Project Guidelines

Getting Started

At the beginning of every project, you must take a group of diverse individuals and begin to mold them into a cohesive team. You want to build synergy within the team. But how do you take dozens of people, sometimes hundreds, and get them working together toward a unified goal. The answer is rather simple and you probably learned it in fourth grade math……..lowest common denominator!

In any project, you want to educate on the most common factors that are mutual to all teams in the project. This will help define the culture, behavior and goals of any project.

Where to Begin

What I like to do is first sit down with a pen and paper and write down the things at the end of the project that I want people to come away with. How should people treat each other? What are the ways I want people to collaborate and interact with other teams and people? Once I get a bigger picture of the project, I can then focus on the details that will steer people to these ideas. Here are my top five that I like to include:

- Professional Behavior
- Collective Ideas and Solutions
- Inter-departmental Groups/Teams
- Focus and Goals
- Issue Management

The Mechanics of the Project

Let me state now that you are trying to create a document that will be share with the project team members. They are your focus and you want a document that they can refer to when they have questions in their team. With this in mind, you want to include topics such as:

- Project Government
- Project Organization Charts
- Timelines
- Modules/Applications included in the project
- Communication Structure

- If multiple phases, what is include in each phase
- Project Job Titles and Responsibilities
- Challenges and Constraints
- Status Reports

A couple of years ago, I was leading a very large project in an organization that was implementing a full HIS System. They were going from many disparate systems to a fully integration HIS. They had not done a large project like this in 25 years, so the concept was new to many of the people. Due to a timing issue with the delivery of the software, it was delivered two months early. Most of my time for project planning had just been taken away. I choose not to do the Project Guidelines. It was a decision that I regret the entire project. Even though I covered most of the information in meetings and had PowerPoint slides, 80% of the project team members could never remember the basics of the project. I was constantly reminding them of the same information. I had learned a very valuable lesson.

Let Everyone Know

You want to communicate this information to everyone that is a part of the project and in some cases to the entire organization. I have seen some people want to skip this information or not to hand it out. They feel that maybe people will use it against them. If you are working in this type of environment, then you definitely want to create the document and hand it out. Think of it this way, instead of people using it against you, it can be a communication vehicle to help defend you if needed. I give it to Senior Leadership, Middle Management, Information Services, Project Members, Physicians, Project Advisory Committee, and the Board of Directors.

Make sure you have paper copies, or an electronic copy store where it is available to everyone. You can email it. You can hand it out at meetings.

What if the Document Changes?

I will go ahead and just state it. Yes, the document is going to change, so be prepared. Make sure you put a date/time stamp or a version number on it. You could even put a revision log in the very front. Look at it this way; you have a method of which to communicate any changes.

Testing Phases

I also like to include testing phases in the document especially integration testing. If your organization is like some that I have worked with, the teams like to work in silos. I have found if I include the testing phases and make sure I communicate that all teams will participate in Integration Testing, there are no surprises later for the team members. I have also learned that this helps to spawn inter-team collaboration throughout the project.

Putting It All Together: Example Table of Content

Here is a sample Table of Contents.