The assignment workshop

Clarifying the assignment together in the initiation phase: explanation and agenda

In the initiation phase of a project, a sponsor is responsible for delivering a sharply formulated project assignment or starting memo that has broad support. This is often not an easy task, especially if the project concerns complex subject matter in which several players are involved. The sponsor must therefore be able to instruct a project team as well as possible about WHAT is expected of them. The better the WHAT is put into words, the better the team can come up with proposals about the HOW.

The assignment workshop can help with this. It is an interactive workshop in which a group of people involved help the sponsor and the project team to define the project as well as possible. With a half-day meeting, and a feedback session a week later, you make a realistic investment when it comes to a complex project of a year or more.

PURPOSE	Gathering the input with which the sponsor, with or without the help of the intended project manager, can formulate a project assignment that has broad support. All 9 components of the project definition are worked out in it from the sponsor's perspective.
WHEN	In the initiation phase, prior to the Project Startup, when the task is still very unclear. If it is clear from the start that the main focus is getting the assignment clear, call the meeting an assignment workshop rather than a Project Startup. This prevents the term Project Startup from losing its meaning.
WITH WHOM	A group of no more than 12 people involved and possibly a process facilitator (see Participants).
HOW LONG	Half a day, with a feedback session a week later.
WHAT YOU NEED	Flip charts for the work in subgroups.

PARTICIPANTS

To keep the meeting workable, it is advisable to invite a group of no more than 12 participants. If you want to work with a larger group, you will need to choose other exercises, for example a world café. Possible participants are:

- The sponsor
- Intended members of the steering committee
- Representatives of the user group (“What we really need is…” “What we really don't need is…”)
- Key specialists who can formulate constraints, for example when it comes to the quality of the end result (“What it has to comply with is…” “What you need to watch out for is…”)
- Representatives of supplying business units (“Take into account these other projects, programmes and activities…” “Be aware that our schedule for the coming period looks like this…”)
- The intended project manager (handy, of course, with a view to the handover)
- A process facilitator (can be useful, especially if there are conflicting interests)

HOW TO GO ABOUT IT

The workshop: an agenda for half a day

The agenda could look like this – assuming half a day with 12 people and a process facilitator.

1. **Welcome and objective** of the workshop by the sponsor. Explanation of the programme by the process facilitator.
2. **Check-in:** in which roles are you here, when is this workshop a success for you and what do you need to take part in it?
3. **The task** – for example with the exercise 'the TV report':

   In two years' time, a camera crew will visit us to make a TV report about the result of our project. They have heard that an outstanding achievement has been delivered here. In the report, we may show 5 unique parts of the result. Split up into 3 mixed groups of 4 and come up with a proposal for the 5 scenes you want to show. In other words: what will we have achieved when the project is finished, and what are its most essential elements?

   Each group gives a short presentation.
4. **Elaboration in subgroups:** making proposals on flip charts for objectives and the main results as well as the scope demarcation. This eventually leads to a specification of the 'must haves', 'need to haves' and 'nice to haves'. Put these side by side in plenary, discuss the main differences and make a decision.
5. **Constraints conversation:** with the intended result in view, it is good to have a conversation about the constraints. What else would those present like to pass on to the sponsor when it comes to the constraints and the process of the project? What does the sponsor need to take into account? What is minimally necessary, who needs to be involved?
6. **Closing and check-out.**

A week later: the feedback session

1. **Work out the session.** The intended project manager works out the session in a draft project assignment.
2. **Discuss the draft with the group.** After a week, the group meets again to discuss it and add to it. In this session you can address matters such as:
   - Additional input or afterthoughts
   - Force field analysis and/or risk analysis
   - Information about next steps, including schedule and communication (initiation phase, transition to the definition phase and Project Startup, expected start of the execution phase and so on).

NOTES