



A GUIDE FOR PROJECT TEAMS FROM TORQ

IMPLEMENTING STRATEGIES THAT EMPOWER GOAL-DRIVEN SUCCESS





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INTRODUCTION



Chad Staiger
Practice Lead, Transform

SUCCESSFULLY IMPLEMENT ANY STRATEGY TO ACHIEVE YOUR GOALS

In today's dynamic and fast-paced world, organizations are constantly striving to optimize their operations, drive efficiency, and deliver exceptional results.

However, some common challenges companies face in implementing their vision are having little-to-no structure to maintain alignment across siloed teams, experiencing limited participation from key stakeholders, and leadership being unclear about progress or needs. The implementation proceeds slowly, and the excitement surrounding the vision loses its urgency as it becomes surrounded by confusion and chaos.

The objective of this guide is to provide insight into establishing and operating any initiative by encouraging cross-functional collaboration and transparent communication from beginning to end on your implementation journey.

Every project is different and may require some level of nuance - this guide will provide baseline best practices, which can be customized further for your specific needs.

We hope you find this to be a useful tool that aids in effectively navigating the path toward your goals and transforming your business!



SET THE STRATEGY

THE JOURNEY TO DETERMINE THE RIGHT SOLUTION

IDENTIFY THE PROBLEM OR OPPORTUNITY AND WHAT SUCCESS LOOKS LIKE

Determine if your driver is a problem to solve or an opportunity to exploit. Be able to explain why it is important or urgent. This is the foundation for the story you'll need to tell to gain buy in.

Have clear and measurable objectives to know what success looks when addressed. Consider factors such as revenue growth, cost reduction, customer satisfaction, market expansion, or innovation. Are there critical goals to achieve in the short-term that can be built and expanded upon to meet long-term goals?

UNDERSTAND THE CURRENT STATE AND IDENTIFY FUTURE STATE SOLUTIONS

Thoroughly understand the current state of affairs. Gather relevant information, data, and feedback from stakeholders to gain a comprehensive understanding of the situation at hand. Analyze existing processes, performance metrics, customer feedback, market trends, and any other pertinent factors. From there, identify options to achieve your goals.

DETERMINE YOUR RECOMMENDATION

Assess the feasibility, alignment with organizational goals, potential benefits, and overall strategic fit. Based on the gathered information, analysis, and stakeholder input, make an informed decision on whether the return on investment is worth tackling the problem or pursuing the opportunity.

Be able to speak to the options considered (including do nothing), why the chosen solution is best, any tradeoffs involved, and why the proposed solution achieves the desired results. A helpful way to do this is by creating a matrix to compare the options side by side looking at scope, timeline, budget, resource needs, risks, benefits, etc. of each. You can color code each consideration green, yellow, or red to easily display a heat map of how the options compare.

SOCIALIZE AND ADDRESS MAJOR GAPS

Identify the key leaders or groups who need to be involved. Meet with them to tell the story of what you're trying to accomplish and why. This may involve discussing the current state vs future state and the resulting impacts and benefits at a high level. While this may be important for the company, be able to speak to why the initiative is important to them specifically. Ask what considerations they have or potential gaps they foresee. Incorporate their feedback into your analysis.

MAKE A DECISION

Based on the latest information, determine the correct path forward. Don't be afraid to pivot if needed. If a course correction is needed, it's better to address it now than later. Formalize the decision through the appropriate channels in order to gain funding and resource approval.

DOCUMENT THE STORY

Document your story: a description of what you are delivering, the overarching goal / desired outcome, the business driver(s) and urgency, the proposed solution and alternatives considered, benefits, and strategy alignment considerations. At a high level, also include scope (what is in and out of scope), timeline, cost, and resource needs. You'll need this story to engage others on the journey to implement.



ESTABLISH THE INFRASTRUCTURE

DEFINE HOW THE TEAM WILL OPERATE AND ENGAGE

ASSIGN THE TEAM RESPONSIBLE TO DRIVE PROGRESS

Identify core team members to drive progress and maintain a holistic view of the initiative. This typically includes the business team and program/project manager(s). They should know the driver, goals, solution, importance, and benefits. The team sets the structure, gains buy-in from other leaders, and handles escalations during implementation, acting as the "north star" to ensure alignment and prevent scope creep.

DEFINE HOW THE TEAM WILL OPERATE

Based on your knowledge, create the program/project/workstream structure. Two common approaches are business value-focused or team-based. Determine meeting/reporting cadence and involved stakeholders. This structure should support issue triage and escalation paths.

CREATE A CENTRAL REPOSITORY

Establish a central location for all project-related information. Select members can edit, and all have viewing access. If using different platforms, ensure convenient navigation through links.

IDENTIFY ROLES AND RESPONSIBILITIES OVERALL

Begin a roster for who will be undertaking the work. Start with your leaders and core team. Then identify the owners to oversee each work group. There may be a full team, or multiple teams, behind the work, but there should be one person who is the accountable lead for their delivery. Then get into the details of who is needed to support the leads with the work and their role on the team. From there, begin listing stakeholders who may need to be informed. Then set responsibility expectations for each person. Some teams use a RACI matrix (responsible, accountable, consulted, informed). Defining responsibilities at a higher level can be easier to digest and reference later. When deciding what level of detail is needed, keep cross-team dynamics in mind and if there tends to be friction on ownership.

ENGAGE THE WORK GROUP LEADS

Now that you have identified who is needed, gain buy-in from the accountable leads and ensure they are the right person to lead the group. Understand what resources they need to be successful, help them fill any gaps identified, and note any underlying dynamics or politics that may be subtly mentioned. Ask the leads to help fill out a high-level charter with the scope, timeline, and budget needed for their delivery. This is based on what they know today and will need to be refined, so ask them to include key assumptions and dependencies as well. It is suggested to have a template for the leads to use in order to standardize the information gathered across work groups.

The image shows a template for a high-level charter, organized into seven numbered sections:

- 1 GOALS:** A list of five empty lines for entering goals.
- 2 TEAM:** A list of four empty lines, each preceded by a person icon, for entering team members.
- 3 SCOPE:** Three empty lines for entering the project scope.
- 4 BUDGET:** A section containing a pie chart icon and two empty lines for budget information.
- 5 ASSUMPTIONS:** Two empty lines for entering project assumptions.
- 6 DEPENDENCIES:** Two empty lines for entering project dependencies.
- 7 TIMELINE:** A vertical timeline section on the right side, consisting of a vertical line with a diamond at the bottom and seven horizontal lines for entering dates or milestones.



CREATE UNITY WITH A KICKOFF

ORIENT THE TEAMS & LEADERS TO THE VISION

COORDINATE LOGISTICS

Bring everyone together. Depending on the size of the initiative, schedule 1 – 2 hours for the kickoff ensuring the leads from each work group can attend. Determine who needs to be included, and decide whether it will be in-person, virtual, or hybrid. Coordinate schedules, rooms, and more accordingly. If in-person, providing food and beverage is a nice touch and can be set up pre-meeting for teams to start getting to know each other. If virtual, you may want to plan an icebreaker activity.

SET THE AGENDA

Ask a respected leader to present a 5–10-minute welcome to gain momentum and excitement from the teams involved. Tell the story for your solution and show them the big picture of how everything fits together. Present the high-level plan and how you will bring the team together to maintain alignment. Then allow time for questions and concerns. Having a round table at a team level gives everyone a chance to share as well as forces each group to participate. Document all feedback.

PREPARE AND REPACKAGE CONTENT

You have already documented the story for your solution. Now, repackage it to engage the participants and bring them along your journey to date, where you are going next, and why it matters to them. Think about how you can incorporate visuals and flow charts, not just words. Meet with your core team to understand what information those involved may need. It may be necessary to gather additional details to ensure a productive conversation.

PLANNING WORKSHOP

After the kickoff and once teams have a chance to digest what the initiative is and what is needed, you may need to schedule a half day or full day planning workshop for the primary teams involved. This time would be used to discuss milestones and interdependencies to refine the plan as well as identify new teams who need to be engaged going forward.





COORDINATE HOLISTICALLY

CONSOLIDATE AND MAINTAIN ALIGNMENT IN KEY AREAS

DOCUMENTING THE PLAN

It is critical to document key milestones and deliverables with their timelines and associated dependencies. Where and how this is tracked can vary. For a highly technical project, teams will rely on a platform such as JIRA where all epics and stories are already stored and worked daily. For a more business driven project, it may be better to rely on Microsoft Project Plan, SmartSheets, or something similar.

ROADMAPS

A roadmap is essential for communicating progress without overwhelming stakeholders. It provides a visual, big-picture summary of how key pieces fit together to achieve the goal. Include high-level milestones, start and end dates, and critical dependencies. Color code milestones for quick tracking. Create multiple roadmaps with varying detail levels for different audiences, helping the core team focus on the right areas and providing meaningful updates at a glance.

RISKS, ISSUES AND BLOCKERS

If a risk, issue, or blocker is identified, it should be documented along with the potential or current impact, mitigation plan, owner, and target date. Note priority and escalate to leadership as needed. High priority items should be closely monitored and regularly discussed with the dependent teams and stakeholders.

ASSUMPTIONS

Every initiative has assumptions. Document them and identify how to make the information known instead of assumed. If it is an external or environmental assumption, closely monitor it and ensure it is caveated on status updates or plans when relevant.

DEPENDENCIES

Understand and monitor dependencies as "gives" or "gets." Closely track critical dependencies that could hinder success. Discuss progress in team meetings and react swiftly to understand impacts and contingency plans if timelines are at risk. Consider the chain reaction if changes occur within the initiative. Prioritize and sequence based on what's needed for launch day versus post-launch completion.

DECISIONS

Document decisions to avoid confusion or changing opinions later. Record the question, decision, decision-maker, date, and place of the decision. Ensure proper escalation and authority for decision-making. Communicate key decisions to the team and stakeholders regularly. Urgent decisions require immediate notification. Revisiting and documenting changes to decisions is acceptable.

ACTION ITEMS

Track day-to-day action items based on your team's current landscape. Utilize tools they already use or have access to. Microsoft Teams Tasks by Planner and To-Do is a useful resource for assigning tasks, setting deadlines, and sending automated reminders.

DID YOU KNOW?

+40%

According to PMI, projects with actively engaged and **aligned stakeholders are 40% more likely to achieve their goals** and intended business outcomes.



KEEP EVERYONE UP-TO-DATE

CREATE TRANSPARENT REPORTING AND TIMELY ESCALATION

WORKING TEAM MEETINGS

Hold team meetings for key players involved in achieving milestones or deliverables. Involve individuals from multiple teams to deep dive into work details and needed actions. Collaborate, ask questions, address concerns, problem-solve, and discuss escalations to leadership.

OVERALL PROJECT / PROGRAM MEETING & STATUS REPORTS

It takes a village: as implementation progresses, bring impacted teams together weekly or bi-weekly. Each team provides concise status reports, updates on progress (green, yellow, red) with explanations, accomplishments, upcoming milestones, risks, blockers, decisions made or pending, and dependencies, especially cross-functional ones. Focus on key items for the week. The purpose is to maintain alignment and keep everyone informed. The project manager supports removing obstacles and escalating when necessary.

AD HOC MEETINGS

As teams meet individually or cross-functionally, specific topics may arise not pertinent to the current meeting but need addressing. "Park" such topics and explain scheduling ad hoc meetings later with the appropriate parties. Utilize ad hoc meetings for working sessions, fast-approaching deadlines, or removing impediments.

LEADERSHIP MEETINGS

Depending on the effort's size and complexity, hold separate leadership meetings bi-weekly or as needed. Cover sensitive topics like budget considerations, escalated dependencies, blockers, and decisions requiring input from the leadership team. Core leaders discuss actions enabling team progress.

EXECUTIVE REPORTING

For higher levels of governance or executive leaders, provide a high-level summary easily understood at a glance. Ensure simplicity, avoid acronyms or technical terms. Offer context, current status, and highlight key, high-priority items. Include mitigation plan and target date. Be prepared to discuss details if needed.

ENGAGING STAKEHOLDERS

Tailor stakeholder engagement based on impact. Involve heavily impacted stakeholders in project meetings or demos. Set up specific touchpoints to communicate project direction, gather feedback, and share key decisions. Some stakeholders may only require monthly email updates. Maintain an inventory of stakeholder groups, contacts, and know when and how to involve them.

THE IMPORTANT OF KEEPING EVERYONE "IN THE LOOP"

80%

According to PMI, organizations with **effective communication practices have a project success rate of 80%** vs. 52% for those with poor communication.

71%

PMI's Pulse of the Profession® report states that organizations that **practice transparent reporting and timely escalation have a 71% project success rate**

3x

McKinsey & Company found that projects with informed and engaged stakeholders are **three times less likely to experience cost overruns.**



BE PREPARED TO ADAPT

RESPOND QUICKLY TO THE UNEXPECTED



AUSTYN DWYER
Project Management Consultant

AS ROBERT BURNS ONCE WROTE, “THE BEST LAID PLANS OF MEN ... OFTEN GO AWRY”. THIS IS NEVER MORE TRUE THAN IN THE WORLD OF PROJECT MANAGEMENT – THE BEST PROJECT MANAGERS MUST ALWAYS BE READY EXPECT THE UNEXPECTED AND ROLL WITH THE PUNCHES!

CREATE A CULTURE TO STAY INFORMED AND BE RESILIENT

Encourage a positive and supportive work environment where team members can bounce back from setbacks, learn from failures, and remain focused and motivated during times of change. Actively listen to employee perspectives and address their concerns to foster a sense of ownership and engagement. In standing meetings, regularly communicate about upcoming changes or potential impacts.

RESPOND QUICKLY TO EXTERNAL CHANGES

When there is a major change or disruption to the initiative, immediately notify the critical players and/or experts, and schedule a time to discuss the issue and the expected impact to scope, timeline, and budget. Then develop contingency plans. If necessary, identify 2-3 options with the risks, benefits, and tradeoffs for each.

Quickly notify leaders, provide them with the information learned, and allow them to decide how to proceed. Let them know if there are any consequences if the decision is delayed. Based on the decision, ensure employees are equipped with the necessary tools and resources to navigate the change effectively.

ADAPT YOUR STYLE OR CHANGE THE STRUCTURE IF NEEDED

Don't be afraid to pivot! Every project and team is different so there isn't a one-size-fits-all approach. Sometimes as the project lead, you need to adapt your style in order to support what the team needs to be successful. Ask for feedback about what is working well and what is not. Then be open to receive the feedback without getting defensive.

If they offer a specific approach, ask more about the “why” behind the suggestion. If you pay attention to the root cause, you'll be able to better identify a solution that works for everyone. You may even notice a theme so several concerns can be solved together instead of individually. There should be balance in supporting the team as a whole and individual needs, but you can increase team engagement by implementing changes that better serve their needs or makes compliance more convenient.



CONCLUSION

ESTABLISH AND OPERATE ANY INITIATIVE – TRANSFORM YOUR BUSINESS

In this guide, we explored the essential steps and considerations necessary to successfully implement any strategy to achieve your goals.

This is accomplished by identifying the objectives and solution aligned with the organization's vision, fostering a culture of collaboration, and continuously evaluating and communicating performance. By leveraging these principles and best practices, you can drive your organization towards increased efficiency, excellence, and sustainable growth.

Project management is not a one-time endeavor but a continuous process of improvement. Stay informed, adapt to changes and conditions, and never stop seeking opportunities for growth and innovation. Take the knowledge you have gained and apply it to your unique organizational context by tailoring the insights to meet the specific needs of your company.

You have the power to transform your organization that thrives in an ever-evolving business landscape.

We hope this guide empowers you to take on whatever project management challenges you will face. Embrace the possibilities, overcome the obstacles, and set your sights on achieving excellence through effective project management.

Best of luck!



TORQ – TRANSFORM PRACTICE

TORQ'S TRANSFORM PRACTICE IS EXPERT AT STRATEGY AND IMPLEMENTATION INITIATIVES THAT TRANSFORM OUR CLIENT'S BUSINESSES FOR THE BETTER

STRATEGIC PLANNING

ORGANIZATIONAL REDESIGN

PROCESS IMPROVEMENT

PERFORMANCE MEASUREMENT

INDUSTRY & MARKET ANALYSIS

PROJECT VISION & ALIGNMENT

PROJECT GOVERNANCE

PROJECT ROLES & RESPONSIBILITIES

PROJECT CHARTERS & ROADMAPS

STAKEHOLDER ENGAGEMENT & MANAGEMENT

PROJECT DOCUMENTATION

PROJECT REPORTING AND PRESENTATIONS

RISK & ISSUE MANAGEMENT

