

Establish the Project Team

At this point, it will be useful to form a project team. The team members can be an invaluable asset to you. They will act as a liaison between the project and the rest of your client’s organization.

“Job Description” for the Project Team

The “job description” for the team might be to work with you to:

1. **Customize plans and activities during upcoming phases in the consulting cycle.**
Team members could give you feedback to ensure that project activities suit the nature and needs of your client’s organization. Team members often know more about the organization’s culture and how to work within that culture.
2. **Review various drafted results from the consulting process.**
For example, team members can help develop and review plans for data collection, collect and analyze that data, generate preliminary recommendations and conduct presentations.
3. **Monitor progress of the project.**
Team members should know the project plans and be aware of the implementation status. Members can help, for example, by modifying plans and/or activities to get back on schedule or by changing schedules.
4. **Sustain momentum throughout the planning process.**
Team members can show enthusiasm and support for the project. Other members of your client’s organization can be inspired if they see team members really believing in the project.
5. **Answer various questions from you during the project.**
There will be times when you do not understand various terms and practices within the client organization. Team members can explain what is happening, any effects on the project, and suggest how the project might be modified.

Who Should Be on the Project Team?

The team should include five to eight highly committed individuals. That size often seems to provide the most appropriate range of energy, participation and decision-making ability. Membership on the team depends on the desired project outcomes and the scope of activities. If the number of employees in the organization is 10 or less, you might include all employees on the team. It often helps if the team is comprised of a cross-section of the employees, including executives, middle managers and entry-level employees. A cross-functional team can help to ensure that all levels of the organization have a chance to provide input to the development and implementation of the action plans for change, thereby increasing the ownership and participation. Also, a cross-functional team can bring a rich diversity of ideas often useful in generating diverse perspectives and opinions during the project.

You should seek to include the people who can make decisions about the project, can ensure that the project is fully resourced to achieve its desired results and are affected by the project. Ideally, the Team can include members from outside the organization, such as investors and specialists in the areas of products and services. The following guidelines will be helpful.

1. **The Chief Executive Officer (CEO) should be on the team.**
The CEO provides ongoing visible legitimacy, along with the ability to make decisions and provide historical information about the organization. If there is a likelihood that the CEO will not be on the team, members of the Board and the CEO should have clear and credible reasons for excluding the CEO.
2. **Include the person responsible to ensure the project is finished.**
Usually that person is the CEO. If someone else has primary responsibility, find out who that person is as soon as possible – that person is critical to the success of your project.
3. **Encourage the Board Chair to be on the team.**
Especially if your project involves significant change in your client’s organization, the Board should consistently be aware of, and approve of, project activities. One of the best ways to ensure that kind of awareness is to include a key member of the Board on the team.
4. **Include a “champion.”**
The champion helps to maintain enthusiasm during the project. Different people might fill the role of champion at different times, but you should always know who the current champion is.
5. **Include someone to help administer the project.**
For example, this person would ensure that materials and facilities are provided for meetings and that meeting results are well documented. This person can also take notes during meetings and distribute them to key personnel.
6. **Consider having the leader of each major product or service on the team.**
It is extremely important that the project retains or enhances the performance of your client’s services to its own customers during the project. One of the best ways to ensure that quality of performance is to involve personnel who provide products and services.
7. **Consider including members from outside the organization.**
Examples of external members include investors and specialists in the areas of the products and services. These members can provide extremely valuable insight as to how planned changes will be perceived and can affect external stakeholders. Inclusion of investors on the team can provide significant credibility for the client to the investors, as well.

Train Team Members About the Nature of Organizational Change

Despite the popularity of the term “change” today, it is surprising how little people really know about the principles and activities required for successful change in organizations. Even highly experienced leaders and managers often do not realize what brought about successful change in their organizations – they often conclude that things just seemed to work out well somehow.

Team members can be much more valuable to your project if they have at least some basic understanding of the nature of planned change in organizations. Often, they can quickly gain that understanding by reading and discussing basic principles of successful change, key roles during change and the numerous ways in which successful change is brought about in organizations.