10 Project Chartering Tips

The easiest way to prevent a project meltdown is to prevent that bad project from ever lifting off the ground. Here's how.

By Ericka Chickowski

Most project management experts recommend a project chartering process at the onset of every project. By formalizing the process of initiating a project, organizations will require IT managers, project stakeholders and project managers to more closely analyze project details, set a clear mission statement and pinpoint problems before they ever crop up.

The following project charter tips come by way of Nels Hoenig, co-author of "How to Cheat at IT Project Management" and a PMP-certified software quality assurance analyst for Sterling Commerce, a wholly-owned subsidiary of AT&T, as well as Mike Sisco, president of MDE Enterprises, an IT consultancy and IT management training firm based in Columbia, Tenn., and Steve McConnell, president of the Bellevue, Wash.-based software-development best practices firm Construx Software.

1 Make It a Two-Stage Process
Start with an exploratory that examines whether or not the project is a good idea. This early stage should include a feasibility study and a hard look at ROI.

2 Identify Stakeholders
If the project passes muster during the first stage, it is time to get more people involved. Those who conceived the project now need to identify key stakeholders.

3 Brainstorm Requirements
This is the time to dream up all of those bells and whistles to be included, not five months into development or deployment.

4 Come Up with a Mission Statement
The process of drafting this statement for the charter will make team members and stakeholders clearly tie the project to business objectives and expected ROI.

5 Put Boundaries on Scope
The mission statement will also guide the team to the next step, which is setting boundaries on the scope of the project.

6 Set Change Control Processes
A project plan cannot be completely inflexible. The project charter should have a section on change control. The team needs to determine in advance what the process will be to initiate changes.

7 Create Milestones Based on Tangible Measurables
Come up with measurables that show mission accomplishments. These measurements are the basis for setting project milestones (and checkpoints). The charter should articulate if a project proceeds if milestones are not met.

8 Set Risk Tolerances
Risks not only need be laid out, the level of tolerance for these risks has to be defined. The charter should give PMs guidelines for when to pull the plug.

9 Set a Clear Statement of Ownership
Responsibility for the project needs to be on one person. This avoids project death by committee and prevents the age-old, "I thought you were taking care of that" mentality.

10 Have Templates at the Ready
Businesses should streamline the whole project initiation process by developing project charter templates. This speeds the process and ensures that new PMs include all necessary elements. ■