



White Paper 2017-13

Why Holding Workshops is Key to Accelerating Project Start-up

Project start-up is a particularly hurried phase and we often hear project managers and other project team members state that they are too busy to have time for workshops. However, properly conducted workshops will significantly accelerate setup and project preparation compared to traditional work approaches. In this White Paper we examine why it is the case, which workshops are particularly important to hold and what are the required features of productive workshops.

The case for workshops

Properly prepared and facilitated, workshops are efficient ways to co-create shared understanding and plans. The reasons are fourfold:

- Bringing together different and varied points of views and experience to enrich the discussion,
- A dedicated span of time without interruptions to consider key issues,
- Confronting points of view thus enabling the emergence of new approaches, and the shared realization of challenges and opportunities,
- Reaching a shared vision of reality that will allow and intrinsic alignment of the team during execution.

In addition, during the project start-up phase, as team members have been gathered to execute the project, workshops serve as an excellent occasion for teambuilding.

Properly conducted, workshops are a way to reach these objectives in a much accelerated manner compared to normal meetings or office operation. We estimate from experience that a single workshop can often gain as much as weeks of 'normal' office-type collaboration.

Key workshops for the project start-up phase

At Project Management Team level (project manager and direct reports) the following workshops are required as a minimum during the start-up phase:

- Project execution plan and high level schedule/convergence plan,
- Contract and scope review,
- Work Breakdown Structure and Cost Breakdown Structure, plus responsibility allocation for each package at the lowest breakdown level,
- Organization of project team (including RACI matrix), which can be complemented with the production of a Project charter,
- Risk and opportunity brainstorming and rating workshop, plus mitigation/enhancement action allocation.

Additional workshops may be recommended in particular if the project needs to address particular challenges, for example related to local conditions, the need to involve important stakeholders, etc.

In addition, workshops can also be held at the discipline level to resolve specific complexities, like for example at

the engineering level to coordinate the work of several engineering offices and contractors.

How to conduct productive workshops

The resistance of many people to the workshops concept might be due to past negative experiences where "workshops" were conducted which were simple meetings without proper framing, resulting in poor productivity and feel of loss of time.

Real workshops need to be properly prepared and facilitated to be effective. From our experience facilitating many such workshops, some key success factors emerge:

- An experienced facilitator needs to be mobilized. Ideally he would not be part of the team so as to retain independence and neutrality. His role is to make the session as effective as possible to reach the workshops objectives,
- Preparation should not be underestimated. Even for experienced facilitators count at least one day of preparation for one day of workshops, plus gathering of all relevant information,
- The objective of facilitation is effectiveness. The tactics deployed will vary depending on the matter to be discussed, and generally involve participative methods such as using post-its, producing charts together etc.,
- Workshop objectives should be clear and achievable, and include specific deliverables. Do not try to cram too much in a workshop program, in particular to allow important discussions to happen if needed,
- Even with the best preparation, workshops almost never unfold as expected. It is normal and this is actually a sign of success, and shows that issues or difficulties have been uncovered that were not known before,
- The facilitator while not being an expert in the technical matter should be able to challenge the team in terms of process to reach the objectives assigned, sometimes not hesitating to push subjects which seem unclear or which people hesitate to discuss because it is complex.

A large part of workshops success lies in the experience of the facilitator as well as in the willingness of participants to use the opportunity to discuss full the issues at stake in a fully collaborative manner.

Holding effective workshops is the most efficient way of supporting project start-up.

Sometimes people fear to hold workshops because they fear to lose control over the discussion. But it is actually by allowing tough conversations to happen that issues will be uncovered and resolved. In a project, there is almost no subject that should be kept confidential to the team. The participation of the entire team on discussions even on specific subjects is often worthwhile even from the simple team alignment perspective.

Specific recommendations for project start-up workshops

Some specific recommendations apply in addition to project start-up workshops:

- Half-day workshops are best during the start-up phase so as not to overwhelm the workload of the team, even if that means splitting workshops. This also allows to structure the data recovered and be more effective in a subsequent meeting,
- Workshops are best held in neutral ground outside the office – this also prevents the temptation of running to one’s desk during the break – but close enough to allow people to go back to office after the workshop, or if it ends early,
- Project start-up workshops need to be held with the full project management team. Even if the assignment of some team members has not formally started it would be good to have them participate to the workshops, otherwise the effectiveness of team alignment will be much lower. Typically this issue often arises for construction and commissioning managers, or representatives of the future operator of the facility, which are too often not mobilized from the start of the project.

Real workshops need to be properly prepared and facilitated to be effective.

Conclusion

Holding effective workshops is the most efficient way of supporting project start-up. This is not understood by many project teams, possibly because of the lack of properly facilitated workshop experience and the lack of experienced facilitators.

Our experience is that properly effective workshops can save weeks of conventional office collaboration and accelerate dramatically the project start-up while producing high quality deliverables that will allow the project to start on the right foot with a realistic execution plan and an effective organization.

Useful additional references from our library

White Paper [2012-23 ‘The Urgency of Project Startup: How to Ensure Success of your Project by Creating the Space to Lead’](#)

White Paper [2013-12 ‘Actual Project Leadership is About Organizing Effective Conversations – not to Run Properly Complicated Tools’](#)

White Paper [2016-13 ‘Project Startup Essentials’](#)

White Paper [2016-15 ‘How to Properly Setup Project Control on a Large, Complex Project’](#)



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