

The 3P Academy – Getting Busy People Fixing Tough Problems

Project Leaders' Guide to Developing Your 1-Page Project Charter

Have you ever found yourself thinking that everyone's aligned on something, but when you delve further, it turns out that you're all wanting slightly different things? It's a challenge which many improvement teams face when trying to meet the needs of different stakeholders. Left unaddressed, it can lead to scope creep, moving goal posts, impossibly competing priorities, and a whole bunch of frustration and wasted effort.

So investing a little extra rigour at the beginning of a step-change – getting clear agreement on what's wanted and why it matters - can pay back many times over once your project gets underway. And it's all distilled into a single page Project Charter or Scope, making it easy to keep everyone aligned, and to allocate scarce resources to the areas of greatest business benefit.

This Guide is designed to walk you and your team through getting it right, setting you up for success.

Can it Really all Fit on a Page?

Definitely. Because typically, we're talking about projects which deliver anything from £20K to £500K of annual business value within a few months, on a budget of less than £500. The investment is people's time rather than financial resources, so it needs much less documentation than projects with longer timelines and bigger budgets.



If it's proving a struggle to distil to a single page, it's usually because

- You're trying to do too much at once – seeking to improve multiple different processes or metrics, when success could be achieved faster by splitting them into separate, smaller projects
- Or more commonly when people are first learning the ropes of delivering successful step-change... If they don't really understand exactly what's being asked of them, they fluff it out with extra words and ambiguity, rather than investing the effort in getting clarity. The clarity which is vital to delivering what's actually needed.

There's no single industry-standard template for your 1-page, but I do recommend that across the business, you set a standard. It makes it far easier to compare different projects side-by-side for allocating key resources, and also makes it easier for teams to use, once they're familiar with it.

So let's walk through each of the sections

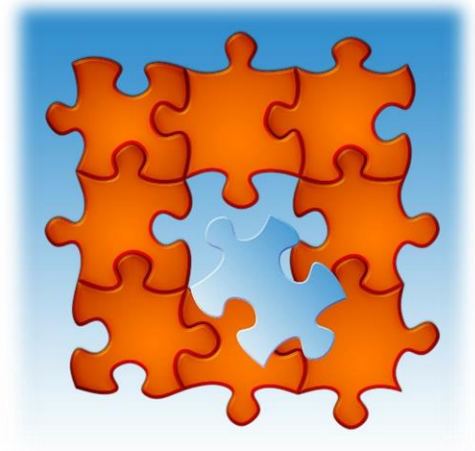
Problem Statement

This is where we set out, in a single sentence, what's falling short of required.

Although it's called problem, it could also be an opportunity, if performance is acceptable, but still falling short of what's possible. Either way, there's a gap between the current and desired future states, and here's where we specify what that is.

The most important thing is to make sure it's the issue we're defining, not someone's idea of how best to solve it.

"We haven't got a widget that does xxx" is not a problem statement – it's a solution idea. And if we lock on to a specific solution too soon, there's a high risk it won't be the best one. So what issue might the widget be helping us overcome?



There are two broad types of problem statement, which can usually be expressed as a single sentence

1. Metric-based problem

e.g. "In the six months to July 2024, customer complaints averaged 6.8%"

We state what metric, it's current value, and what time period that data's from.

2. Non-metric problem

e.g. "We currently have no way to demonstrate training compliance to external auditors"

Business Case

In this section we answer a Project Charter's most important question. **So what?** Why does that gap matter, and why should we invest time and effort in trying to close it?



We outline the ripple effects of the problem as a series of short bullet points, helping to make really clear why addressing this gap matters, and set its place in the over all business priorities.

Some of the bullet points may be measurable, in which case include data. If your main metric isn't financial, try to include at least one bullet point which is, making it much easier to compare and prioritise different step-changes.

There may be some ripple effects which you can't directly prove – it's OK to describe un-proven effects as long as they're clearly worded. For example 'Could be contributing to low staff morale and high employee turnover', if these are a significant issues within the business.

So for our problem statement "In the six months to July 2024, customer complaints averaged 6.8%", our business case bullets may include

- Reviewing and responding to a complaint takes an average of 45min. Based on current complaint volumes and pay rates, this represents an annual capacity cost of £52K
- Compensation paid in relation to complaints is currently averaging £42K per year
- Poor customer experience is known to contribute to loss of repeat business
- And poor publicly-visible reviews may negatively impact our ability to win new business
- High rates of customer dis-satisfaction may be contributing to low staff morale and staff turnover / churn, which is running 3 percentage-points above industry average

Most projects will have between 5 and 10 bullet points, each of which is also an anticipated positive side-effect of the project's main goal, but for which the project team aren't being held directly accountable.

Goal

The goal is the project's end-point, so it's really important to make sure it's worded very clearly.

How you express your goal will depend on which type of problem statement you started with.

You're probably familiar with the acronym SMART to describe goal-setting. So let's quickly recap it...




Specific – Exactly what will the project deliver?

Masurable – A metric is already a measure. For a non-metric problem, the measure's likely to be that we now have what's currently missing e.g. for the problem "We currently have no way to demonstrate training compliance to external auditors", our goal could be "An operational system for demonstrating training compliance, to meet the documented needs of our external auditors"

Achievable – we'll come back to this one...

Relevant – It meets a specific customer (internal or external) or business need

Timebound – By when will we deliver? If you're working on a metric problem, timebound also needs a second element. For how long will you demonstrate the new level of performance for your stakeholders to have confidence that it's sustainable?



For example, the goal might be “Reduce customer complaints to 2.5% throughout November 2024”. The expectation is that new level of performance will be maintained permanently, but there needs to be a point at which we’re confident that it’s been achieved, and the project can be closed. There’s no right and wrong about how long this monitoring period should be – go for the minimum your stakeholders are willing to sign off.

Setting your Target

Coming back to Achievable... Over the years, I’ve experienced two broad methods of setting improvement targets, which are often determined by the prevailing culture of the organisation. Let’s say your Goal is a 20% step-change. Performance is stable at 17%, and you can prove why the remaining 3% isn’t worth the effort it requires. Would the project be signed off as a success?

If yes, then you’re more likely to be comfortable with accepting a stretch target. If not, then what commonly happens is people guess what they’ll change, and what impact it’ll have... “Well, we know we could get a bit of a gain from training – that’ll give us about 2%. And we could probably get another 1.5% for sorting out that IT issue (*and so forth...*). So let’s set the target at 5%.”

Rather than setting a stretch target and using a good, structured improvement methodology to get performance as good as you possibly can, it gets played safe. Which is a massive missed opportunity to deliver breakthrough results. In nearly 30 years of leading these type of projects, I’ve never had a target which I knew at the beginning how to meet. And I’ve never had a project fail. A few have come in slightly below target, but always having delivered way more than people believed was achievable at the outset.

So when setting your improvement target, be brave (and forgiving)...

Other Sections

Depending on the project and their relevance, you could also include

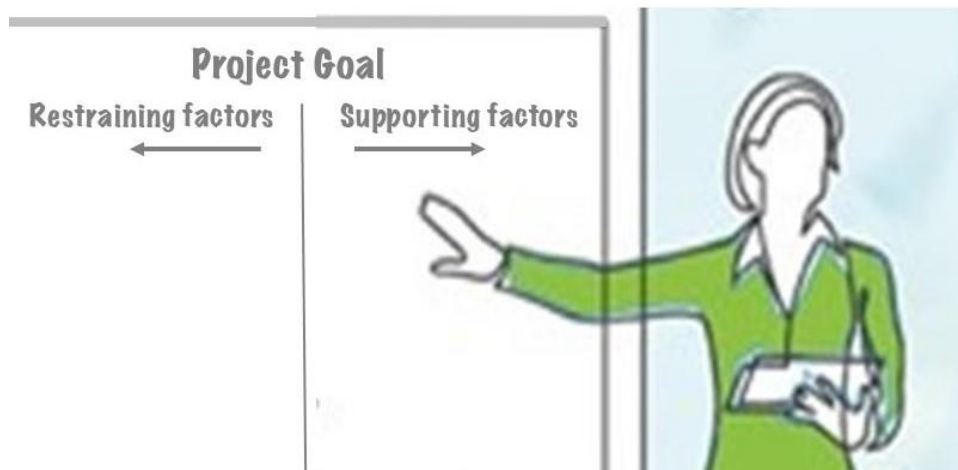
- **Key deliverables** – This is generally used to record anything where there’s split ownership, e.g. the project team may develop all training documentation, but out of scope is delivering that training to everyone affected.
- **Out of scope** – Anything which certain stakeholders may be expecting, for which the project team aren’t accountable. For example, if they’re working only in one service area, other areas may be specified as out of scope
- **Other Resource Requirements** – could include things like a travel or overtime budget to enable the team to get together, or access to key systems for testing. Anything which might be critical to the team’s ability to deliver
- **Risks and Constraints** if any are relevant to the project team’s ability to deliver

Forcefield Analysis

The Charter may go through several edits as your stakeholder discussions progress. Forcefield analysis, originally developed by Kurt Lewin, is a useful tool to check before the Charter's final edit that you've included everything you need, and help you firm up plans for delivering your performance step-change.

Just as valuable as its input to your Charter, are the session's contribution to building the shared language and understanding within the project team. I've led many change teams who felt overwhelmed by what we were being asked to deliver, but weren't really speaking up until this session. The structured process of sharing their concerns, discovering what's already in place to help drive the change, and starting to plan for what might go wrong can be powerful.

It can also help you to clarify the synergies and priorities with the organisation's other key activities, and to set up 'tripwires' – early warning indicators with escalations which you've agreed in advance, so that if the project did start to go adrift you can take early action to bring it back on track.



This session may unearth some controversial opinions or observations, which your project team need to feel comfortable to share. As you go, you're looking to capture actions to help you better leverage the supporting factors, and remove or reduce the effects of the restraints. But do manage expectations – they may well identify many which you can't do anything about. Record them anyway.

Set up your flipchart (physical or virtual) as shown, and invite your participants to share their ideas, writing them up as you go. Try to keep it brief and legible, but record enough detail so that anyone reading the flipchart would know what was discussed, even if they weren't in the session.



No Evaluation is the general rule of brainstorming – saying whether an idea is good or bad is off limits. But it's fine to test understanding and check for fit, and you should include this in your session introduction. So for example, anyone in the room can ask for clarification or examples. It should be an open discussion.

As with all brainstorming formats, good facilitation is absolutely key to a successful session. Ideally your facilitator should have experience of running these kinds of sessions, and shouldn't take part in the session itself (i.e. shouldn't be contributing their own ideas) – though it's worth having a few ideas in your back pocket to throw into the mix if the flow from the group starts to dry up. If you want to take part in the session and contribute all your ideas, bring in someone else to facilitate.

The Facilitator's Role

- Ensure that everyone's staying engaged, having equal say, and feeling that their input's valued. Avoid the session from being dominated by one or two people.
- Accurately summarise and record each point – take care to OK your para-phrasing of each item as you write it up, so that participants don't feel their meaning's being changed.
- Keep the group on track. As actions are suggested, record the headline and move on – don't let the group get sucked into discussing the detail just yet. Review the actions list at the end of the session to allocate an action owner and deliver-by date for anything which needs to happen in the near future. Remaining action ideas can be re-visited later.
- Keep the flow of ideas going. You may find the session dries up quite quickly – never close it down when people first run out of steam. The later-emerging ideas are often the best ones.
- Ensure a balance between the two sides of the flipchart – there's a tendency for the 'restraining' side to fill up much more quickly. Ask lots of open questions to get people thinking more widely.
- Ensure that a balance of topics have been considered and captured, including but not limited to budget, leadership support, engagement, logistics (like arranging training sessions), strategic fit, synergies with other important activities, prevailing mindsets and opinions....
- Keep the session to time. 90 minutes should be plenty to capture everything you need.



At the end of the session, recap the main session content and capture any further actions which are suggested, thank the participants, and recap on the next steps of programme design activity.

How Long Does it Take to Complete a Typical Charter?

Using the Lean-Sigma methodology for delivering step-change, the project charter is a key output from the Define phase. This typically takes the first 3 weeks of a 4-6 month project (though it's common for other activities to be happening in parallel too). A thorough Define phase and Charter will draw from completing the process metric baseline or industry best-practice analysis, mapping both customer needs and the current process, stakeholder interviews, and forcefield analysis to assess potential drivers and barriers to success.

Here's a worked example from our Change Leader training programme (the xx's would be quantified in a real project)

Delivery Performance Improvement Project

Project Leader: Adam Grant

Project Sponsor: Susie Smith, Customer Service Director

Problem statement

In the six months to Jun 2024, our on-time delivery performance has reduced from 95% to 78%.

Business case

- Customer complaints related to product delivery (late and / or wrong delivery) have almost doubled. 15% of deliveries are currently generating customer complaints.
- On average over the last 3 months, the direct financial impact of delivery problems has been £xx per month in additional deliveries and replacement product, and £xx per month in customer concessions and credit notes
- An average delivery complaint takes 40 minutes to process. This is equivalent to a monthly direct labour cost of £xx to handle current volumes of delivery-related complaints. This is also reducing the time which customer service staff have available for winning new business
- As well as damaging our reputation with existing customers, a wider reputation for poor delivery performance may impact our ability to win new business in our existing sectors
- The financial, capacity and reputational impact of poor delivery performance may also impact our ability to further grow the business, by expanding into gluten free or supermarket supply

Goal and Key Deliverables

Improve on-time delivery performance to 95%, to be demonstrated throughout Oct-Dec 2024.

Update all operational and training documents, and train a champion from each process area

Outside scope

Reducing product quality related complaints (including products being delivered damaged) – this is being dealt with by a parallel project

Training all personnel in new ways of working

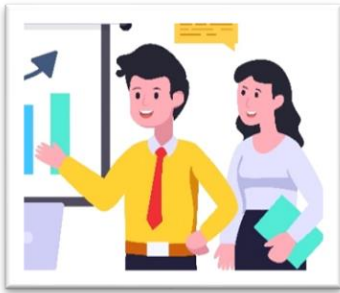
Other resource requirements

Overtime budget to enable delivery drivers to take part in improvement activities, without further impacting day-to-day delivery performance

Introducing the 3P Academy - Getting Busy People Fixing Tough Problems

Delivering exceptional performance isn't easy, especially when everyone's busy. Even the most compelling vision and solid business case aren't always enough to deliver sustainable change, and the performance you know is possible.

The 3P Academy is dedicated to helping businesses like yours to develop a culture of world class continuous improvement, and the breakthrough KPI performance which it enables. Our support follows two parallel paths...



Performance through People

Your people are amazing – one of your biggest business assets. Some of the time...

Because no matter how talented, dedicated or experienced they are, every one of your people deals with stress and uncertainty every day: Competing priorities, difficult customers, tight deadlines...

They'll take most of those challenges in their stride. But the more they build up, the more they impact performance, which can easily snowball. So we embed the resilience, communication and influence skills to keep your people performing at their collective best, even under pressure.

Performance through Process

Process isn't usually a word to quicken the pulse with excitement. Yet there's a process for everything your business does, from welcoming new customers to creating your annual reports.

When they're working they get little attention, but when processes aren't at their best, the mistakes and work-arounds become a silent capacity thief – leaving less time for what everyone's really meant to be doing. And your KPIs get harder to maintain, let alone improve.

We're experts at getting operational teams delivering breakthrough process improvements, to enhance productivity, capacity and on-time delivery, reduce quality issues and complaints, and improve customer experience - leading to less stress, and a healthier bottom line.



Some of Our Key Numbers



People We've Trained

Over 1,000



Processes they've Improved

More than 5,000



Resulting annual value

Around £75million, and counting...

What We Do

3P Academy Transformational Programmes

There's nothing we love more than working with you to embed the shared skills, systems and language of performance throughout your business. This is typically a 12 month programme, and suits a six-plus-figure business employing 50 or more people.

Every programme's designed bespoke, tailored to your specific needs, and is delivered bite-sized to fit into busy schedules. Workshop sessions are hands-on, so participants apply their new skills to deliver improvements as they learn – projects typically deliver between £15K and £250K of business value within the first few months.

A Guided Project or Process Improvement

For smaller businesses or those who want to focus on a specific improvement, we facilitate strategic projects and deliver the first significant step-change within a selected process area. Using our unique blend of continuous improvement and the latest behavioural science, this can also include Lean Six Sigma Yellow or Green Belt certification for your improvement champions.

Masterclasses and Keynote Presentations – developing Resourceful Thinking

Our interactive sessions are designed to equip your people to perform at their best, even under pressure. There are 12 topics, which can be delivered stand-alone for a conference or away-day, or as a series, including How to Keep Stress Useful, How to Deal with Uncertainty and Change, Handling Difficult Conversations and Effective Decision-Making.

Described as 'a vitamin boost for the emotional immune system', the most common outcomes include improved sleep quality, resolving repetitive worrying, improved motivation and problem-solving, and reduced friction in important relationships.

Developing Your Leaders

These half-day interactive Masterclasses equip your leaders to navigate the complexity of competing priorities, internal politics and challenging personalities, putting them at the heart of your developing improvement culture. Topics include how to influence and lead change, communicate more effectively, and deliver exceptional performance (even when everyone's busy).

Coaching and Consultancy

We also work one-to-one with individuals, and with leadership and change teams for personally tailored skills development. Designed to help you cut through the complexity to fast-track your improvements, overcome the blind spots, and deliver performance improvements more swiftly and smoothly.

Introducing Sue Evans, 3P Academy Director



My whole career's been about creating effective, lasting change. I spent the first half of it embedding Continuous improvement within international organisations including Danone, Corning and Lloyds Banking Group. Highlights include two programmes which more than doubled site productivity, and delivering £1.9M waste reduction in under 5 months.

Hands-on experience at both ends of the World Class spectrum has given me a unique perspective for nurturing an improvement culture from any starting point.

Gaining my first Six Sigma Black Belt qualification over 25 years ago, I was part of a world-class business. Our strategy, systems and culture made breakthrough change straightforward. At the time I thought that was normal... On moving to my next role, I quickly discovered that it wasn't.

I moved to a business with no strategy, few systems, and none of the culture and infrastructure which I'd come to take for granted. So I set about creating it. I presented a no-spend, £1million saving initiative, only to be told "Don't worry about it". It was the first time I'd encountered a solid business case and plan getting no support. And it floored me.

But bit-by-bit, I found ways round the complacency and objections, engaging the operational teams to more than double productivity and halve process scrap, in less than 8 months. After delivering further £multi-million breakthroughs in a second from-scratch organisation, I established what's now evolved into the 3P Academy. Our programmes are carefully crafted from a signature blend of Continuous Improvement and Behavioural Science.

Across 10 years of delivering to around 25,000 people from hundreds of organisations, I've maintained an average feedback score of 9.2 out of 10. As well as supporting leadership teams to embed an improvement culture, I've mentored a diverse portfolio of projects, ranging from £15K to over £600K annual business value.

I'm a Master Practitioner and Trainer of NLP (neuro-linguistic programming), and an Approved Havening® Practitioner, trained in each by the original creators. I have a Diploma in CBT (cognitive behavioural therapy), a combined Diploma in Hypnotherapy, Coaching and NLP; and Institute of Leadership and Management certification as a Mentor and Coach. I'm also a Fellow of the Professional Speaking Association – one of less than 70 across the whole of the UK and Ireland.

It's my mission to get people fixing the problems which no one else has been brave enough to tackle. Because in many businesses, the answers to unlocking ground-breaking improvements are hiding right there, in plain sight. I believe in every individual's right to a challenging and fulfilling working life, and in every organisation's right to reap the rewards of building and supporting a capable and motivated workforce. That might sound idealistic, but the right know-how can make it your reality.