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**Lessons Learned on the New Direction in Staffing Interface Project**

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| **Project Management Framework**  **Lessons Learned** |

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# Introduction

On completion of the New Direction in Staffing Interface (NDSi) Project, the project management team conducted a lessons learned exercise with members of the project team and project stakeholders. This gave the project management team an opportunity to identify what went well, opportunities for improvement, and recommendations to address these opportunities for improvement in the future. The project officer finalized this document and recorded the project team’s consensus descriptions and recommendations.

## Purpose

The purpose of this report is to formally document the NDSi project’s lessons learned to support a culture of innovation and continuous improvement within the Public Service Commission (PSC). Capturing lessons learned from project stakeholders creates additional value for the management of any future project by identifying the successes, opportunities for improvement, and recommendations.

NDSi involved significant collaboration across multiple teams both within and outside of the PSC, including the involvement of a third party service provider and the direct engagement of several hundred users from the external job seeker, hiring manager, and Human Resources (HR) professional user groups. Due to the high level of collaboration, the need for a clear and well-defined scope, solid governance, and innovative project management methodologies were crucial to the project’s success.

## Project Overview

The NDSi project started on April 26, 2017 and closed on June 29, 2018. The project leveraged the PSC’s New Direction in Staffing (NDS), the new appointment framework and approach to oversight which was implemented in April 2016, to explore improving the interactions between the job seeker, hiring manager, and HR in the staffing process. The overriding objective of NDSi was to define an efficient and meaningful staffing experience based on a foundation of sound evidence and rigorous analysis, designed by the users themselves; job seekers, hiring managers, and HR. This resulted in tested and validated business requirements which will help modernize GC staffing and recruitment.

Prior to the launch of NDSi, the PSC’s User Experience (UX) function had demonstrated success in improving the current GC hiring system based on user research, user testing, and measurable performance results (e.g. the Veteran’s Hiring Act Project, the Student Application Renewal Project).

The Blueprint 2020 Red Tape Report also identified the need to work directly with users to accurately reflect the actual needs of Canadians.

Building upon prior PSC successes and recommendations from the Red Tape Report, the NDSi project undertook a ‘design thinking’ approach to direct user engagement. Successive versions of an iterative prototype (i.e. user interaction (UI) flows, mock-ups, and prototypes) were used to help identify the stakeholder and data requirements necessary to undertake successful hiring. Business processes, concepts, and designs that might better meet these requirements were co-created and refined with the users, focussing on user satisfaction and top task performance.

Consultations with stakeholders and users revealed where the real impacts on people occurred with the changes being explored and potential improvement opportunities were analyzed to determine the greatest return on investment. These improvements were collaboratively identified, designed, and tested with the users themselves via the prototypes. Resulting user feedback and performance analytics provided insights to identify, prioritize, and address high-value opportunities and potential risks leading to products and services that explicitly support NDS objectives.

The NDSi project took a phased approach to the ongoing management of the project. Sound governance, proactive strategic outreach, and internal engagement activities complemented an iterative project management approach to ensure that the project respected or appropriately modified the timelines, scope, and budget approved at each phase of work.

Each of the phases focussed on improvements to the user experiences of the GC staffing processes for all three identified user groups; external job seekers, hiring managers, and HR.

Though each phase focussed on a specific user, it was recognized that a user’s experience with the GC staffing process is not conducted in isolation. Wherever applicable, all user groups were consulted and engaged collectively to inform and improve the end to end GC staffing process.

Each phase concluded with tested interactive mock-ups, user experience test results, a real-time representation of the design (prototype), and an associated information architecture (e.g. what information should be included in the prototype and how it should be structured). The design thinking approach also revealed the potential need to change process in support of an improved user experience.

Additionally, all feedback gathered, regardless of the user group, was documented, categorized, and prioritized using a feedback architecture established for NDSi.

The project achieved its objective of identifying numerous business requirements which will help modernize GC staffing and recruitment. These business requirement can inform transformation initiatives to better address user needs and expectations through improvements to the efficiency, effectiveness, satisfaction, and user experience relating to in-scope aspects of the GC hiring process.

## Sources of Lessons Learned Feedback

The NDSi project team collected lessons learned feedback from the project team via three questions - What worked well? What were the challenges? What would you like the project team to try next time?

The questionnaire focused on the NDSi project sub-working group categories:

1. Project Management and Enabling Support
2. Engagement and Communications
3. Feedback
4. Project Guidance
5. User Experience and Requirements
6. Performance, Data, and Reporting

Sub-working group team leads were solicited for their teams’ aggregated responses which were subsequently centralized, summarized, and categorized to create a draft lessons learned report.

The project sponsor, EMC representative, and steering committee members were provided with this draft report secretarially for their review and consideration, as well as to provide any additional lessons learned feedback based on the same 3 questions and sub-working group categories.

The final lessons learned report is the result of this feedback.

# What Went Well?

| **No.** | **LL Type** | **What Went Well with the Project** | **Recommendations** |
| --- | --- | --- | --- |
| 1 | Project planning | The project charter was drafted collaboratively with, and approved by, the project sponsor and all impacted functional leads. Estimated project resource requirements (types and time allocation) were broken down by functional group and these estimates were embedded in the document. A clear project RASCI (responsible, accountable, supportive, consulted, and informed) matrix was embedded in the document to entrench decision making authority and governance roles and responsibilities from the outset of the project. This helped keep the project on track and within scope. | Draft charters collaboratively with input from all impacted functional leads prior to project kick-off in order to ensure alignment with the project vision and awareness of resourcing requirements.  Entrench decision making authority directly in the charter. |
| 2 | Project Governance | The early establishment of the steering committee with senior management representation from all impacted functional groups built a strong decision-making body that facilitated project direction and implementation. | Attempt to represent all functions with resources dedicated to the project on the steering committee within the PSC to ensure that they are aware of what their employees are doing and so that they can have input on the project’s direction. |
| 3 | Project Governance | Project governance was based on the establishment and use of multidisciplinary sub-working groups comprised of all impacted areas at PSC. These sub-working groups (including a 3rd party service provider) had the expertise and knowledge required to support a major transformation initiative. They provided input, support, guidance, improved alignment within the PSC, and supported the project executive and steering committee in reporting decisions and actions back to their respective units/team to ensure consistent messaging. | On certain (larger) projects, the creation of multi-disciplinary sub-working groups comprised of all impacted areas at PSC to provide input, support, guidance, and to report back to their respective units/team to ensure consistent messaging is recommended.    On smaller projects, the core project team should be comprised of multi-disciplinary members representing all impacted areas at PSC.  Make sure that you have the expertise and knowledge required to successfully undertake your project.  Include policy representatives on the core project team from the outset of the project. |
| 4 | Project Leadership | The project sponsor’s vision was clear and motivated the team to innovate and experiment resulting in a very real drive to positively impact the NDSi project outcomes. | The project sponsor’s vision should be clearly articulated and understood by all stakeholders in order to ensure alignment with project goals and objectives and to increase engagement. |
| 5 | Project Leadership | The project steering committee showed an openness to experimentation that allowed the project team to try many new approaches, processes, and tools which increased project team engagement, increased team member professional development, and improved the final project outputs. | When possible, project governance should be open to trying new approaches, processes, and tools to achieve project objectives. Allowing project teams to fail fast and then forgive them encourages innovation within organizations.  Have the responsible team lead/SME present current outputs to the steering committee to provide governance with real time, relevant updates. |
| 6 | Decision making | The strength of the project executive (product owner) role was demonstrated by the fact that there was (relatively) easy access to rapid decision making and guidance with respect to what was required in order to attain specific goals while meeting project expectations. | Future iterative projects require easy access to a product ‘owner’ or a strong proxy in order to ensure the project vision is being respected and accelerate decision making under tight timelines. |
| 7 | Decision Making | The core project team was comprised of key stakeholders responsible for monitoring the progress of each key deliverable and for making decisions about course corrections that do not require escalation to the project governance. | Leveraging the core project team to monitor the progress of key deliverables and for making decisions about course corrections that do not require escalation to the project governance is highly recommended. |
| 8 | Project Methodology | The creation of a multi-functional core project team comprised of sub-working group team leads serving as the single point of contact with their sub-working groups greatly increased cross-organizational collaboration and fostered representative input from the onset of the project. | The creation of a core project team made up of the sub-working group team leads is highly recommended. These leads should serve as the single point of contact with their sub-working groups and should support the project executive and Steering Committee in sharing decisions and actions.  On smaller projects, the core project team should be comprised of members representing of all impacted areas at PSC.  The inclusion of policy from the outset of any project is strongly recommended. |
| 9 | Project Methodology | Scheduling regular, mandatory stand up meetings with core project team members (and ideally the product owner or a strong proxy) provided a regular connection point for the project team which was very valuable. The team was able to address and discuss issues in a more spontaneous manner than other more formal meetings allowed for. The project moved so quickly and intensely at some points that it was beneficial to have the opportunity to touch base with the team to ensure alignment and integration across sub-working groups. | Schedule regular mandatory stand up meetings to track project progress, team alignment, and identify risks.  The purpose of the daily stand up should be re-iterated regularly to ensure that the objective of the meeting is met in a timely manner.  Attendance at daily stand-ups should be mandatory to all team leads and the product owner or proxy. The audience for daily stand-ups should be limited to the above, unless by invitation to ensure the objective is achieved efficiently and effectively. |
|  | Project Methodology | The use of a standard, repeatable process (sprints) greatly aided the planning of research, design, user engagement, and testing. | Schedule regular meetings (e.g. design sessions, user engagement sessions, analysis sessions, etc.) based on a standard, repeatable cycle.  Make meetings virtual; if an attendee can’t make it in person, perhaps they can still attend remotely to maintain momentum. Having a virtual meeting option for all sessions can also help promote and sustain remote and regional representation and participation.  Establish a back-up plan for technology; if the technology required to make a meeting virtual does not work, the session must go on. Test the technology well in advance of every session, have alternative methods of delivery (i.e. video-conference if WebEx fails), and have electronic versions of documentation available to distribute electronically if all else fails.  Identify proxies for subject matter experts (SMEs) who can fill in for their absent colleagues. |
| 10 | Project Engagement | The project team consulted directly with members of the (external) job seeker community and hiring manager, and HR user groups across the federal public service. Over 120 sessions were held with several hundred users. | Tremendous insights were obtained from direct user engagement. Avoid the use of proxies and deal directly with users whenever possible to ascertain needs, requirements, and to solicit feedback. It is important to get users involved and engaged early and often. |
| 11 | Project Engagement | Several types of awareness and engagement activities were delivered by the NDSi project team (e.g. presentations, demos, elicitation sessions, moderated usability testing, and on-line usability testing) to refine, test, and validate requirements in a variety of ways to ensure an accurate reflection of the user needs. These sessions resulted in valuable user feedback which informed the project’s outputs. | Determine what the project team is trying to elicit from a user group and why prior to planning an engagement session. Also, think carefully about what the project team is going to do with the results and how they are going to use them. |
| 12 | Project Engagement | Mock-ups and prototypes were tested with all job seekers and hiring managers via a moderator to garner additional feedback to refine requirements and influence the project direction. | Don’t just talk about the project’s ideas, concepts, and prototypes; get users to test them to see how they actually work! The use of a moderator allows for insights as to what is working (or not) and why. |
| 13 | Project Engagement | Follow-up questionnaires were sent to test takers and participants to measure perceived improvements of efficiency, effectiveness, and satisfaction. | Performance measurement is an important aspect of demonstrating project progress and success. Determine the elements the project wishes to measure ahead of time and track the results. Use different methods to measure efficiency, effectiveness, and satisfaction. Questionnaires are relatively easy to create and administer. Note: don’t forget about translation! It takes time. |
| 14 | Project Engagement | Interactive prototypes were tested online with all user groups to measure time on task and task completion rates. Questionnaires were embedded in the online testing to measure perceived improvements of efficiency, effectiveness, and satisfaction. | Performance measurement is an important aspect of demonstrating project success. Interactive prototypes can be used to measure actual time on task rather than perceived improvements. They take longer to create, change, and maintain, but they can garner valuable information in the right circumstances. Done right, they can also measure actual and perceived improvements as well (i.e. the inclusion of questionnaires in the prototype itself.) |
| 15 | Project Engagement | The use of a design thinking approach (using images to convey ideas) to engagement sessions guide the exploration and co-creation of refined stakeholder requirements. Design thinking simplified and made ‘real’ the sharing of complex concepts which led to tangible feedback from users. | A picture really IS worth a thousand words; the use of UI flows, wireframes and/or mock-ups, and interactive prototypes greatly improved the communication and understanding of project concepts and ideas that the project team wanted to explore with users. Use images to explore ideas, validate concepts and identify gaps or missing information.  Measure the potential return on investment and value of design-thinking artifacts (wireframes, mock-ups, and prototypes) prior to their use. Wireframes can be created in real time with users using paper and pens or with an online tool such as myBalsamiq for future reference. Wireframes are cheap, interactive, and immediately capture user requirements. Mock-ups are more refined and allow for a more show and tell discussion and feedback elicitation, as well as being a good tool for usability testing in a moderated setting and online. Mock-ups take longer to produce and definitely make users think more of an actual ‘system’ than idea. Interactive prototypes are time-consuming and costly and often do not provide much more value than mock-ups. Interactive prototypes should be used if they introduce value to the project (e.g. measurable performance results, proof of concept validation, etc.) |
| 16 | Project Engagement | The creation of ‘rapid elicitation sessions’ (RES) prior to testing mock-ups yielded tremendous insights and improved the mock-ups that were going to be tested. | Schedule short, focussed engagement sessions with a small number of participants (6-10, ideally 8) to explore ideas and concepts and improve mock-ups prior to undertaking more expensive moderated usability testing. |
| 17 | Business Requirements | Over 1500 items of feedback resulting from the engagement sessions were analyzed, aligned to a feedback architecture, and prioritized. This feedback was used to further refine requirements and design in a rapid manner. | Get feedback directly from users and then take the time required to analyze the feedback. Then make sure the project team uses those results! |

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# Opportunities for improvement

| No. | LL Type | Opportunity for Improvement | Cause | Recommendation (what needs to be done next time) |
| --- | --- | --- | --- | --- |
| 1 | Project Expectation | Ensure understanding of the project’s outputs throughout the project. | NDSi was based on a design thinking approach to requirements definition and validation. This was one of the first times the PSC undertook such an approach. From the onset of the project, an interactive prototype was developed for the purpose of actively exploring the feasibility of NDSi concepts and ideas and to capture performance measurement results. Clarity about its intended end use based on interpretation of project outputs resulted in some temporary confusion and some redirection of focus for a brief period of time. | The project team, including the project executive, would have benefitted from training on the approach and methods that would be used from the outset of the project. Build time to train the team into the project schedule for future similar projects.  The intended use of project outputs should be clearly described and agreed to at the beginning of any project. If disagreement or confusion about the intended use arises, this should be addressed rapidly via established governance.  Project outputs should be aligned with PSC standards to ensure ease of adoption, understanding, and minimize re-work. |
| 2 | Project Methodology | Ensure that the velocity of the sprint cycle is maintainable. | Based on the exploratory nature of this project, an iterative and repeatable process was implemented to ensure that the project team could explore all of the tasks identified as within scope for NDSi in the time allotted and to ensure a high level of consistency throughout the various phases of the project. Direct user engagement resulted in new information entering into the project regularly. This process could have been evaluated with more frequency to ensure scope, as defined by users, was being respected and task completion quality wasn’t being impacted and that time was being allocated accordingly. | Hold retrospectives at the end of each ‘sprint’; honestly evaluate what was learned and what was accomplished in the time allotted and, if required, propose changes to the approved scope and/or sprint cycle via established governance.  Stay consistent with the methodology and avoid reverting back to traditional approaches to project management.  Honour resource commitments; NDSi’s scope (i.e. area of focus) grew based on user feedback, but the project team did not have the resources required to deal with user-identified requirements. |
| 3 | Project Outputs | Establish a clearer understanding of project output ownership, purpose, and the roles and responsibilities of sub-working groups to contribute to their development. | Sustained communication regarding the project outputs would have increased the awareness of project sub-working members. Similarly a more frequent review of the roles and responsibilities of other sub-working groups may have improved inter-working group collaboration. | Future projects should ensure that the project team has a common understanding of the final outputs, the methodology that will lead to their successful completion, and the vocabulary that will be used to describe those outputs. In order to accomplish this, the project team should have an onboarding plan regarding the chosen project methodology and outputs.   * Take the time at the beginning of the project to get the core (and preferably extended) project team together to ensure there is agreement and understanding of what the project outputs are. * Have the subject matter experts or sub-working group leads responsible for their delivery educate the rest of the team about the output. Introduce the artifact, its use, the associated vocabulary, and any other relevant information so that the entire team can start the project in alignment. |
| 4 | Project Outputs | Ensure outputs are aligned with the project’s vision. | Empowered sub-working groups created project outputs independently and often presented them to the core team for review in advanced states. If they were not aligned to the project vision, there was a requirement for re-work. | Present early versions of project outputs to the core project team to ensure alignment with the project vision, identify early course correction, or escalation.  Have the product owner or a strong proxy present at project output research or creation sessions, when feasible, to minimize this issue. |
| 5 | Project Outputs | Document ownership and control. | Many key project outputs were worked on collaboratively by team members. New versions or copies would be created to ensure that work was completed by the required due date. If multiple team members had multiple copies, this could cause confusion about which was the authoritative document and which version was the most up to date.  The technical capacity to amalgamate multiple versions of a document into an authoritative version was beneficial to NDSi. | The creation and maintenance of key project outputs should be limited; single versions should be created with edit access granted to only key personnel in order to reduce errors, improve consistency, and enable the provision of real-time accurate information as required. |
| 6 | Project Methodology | The culture shift required to implement empowered sub-working groups was underestimated and the organization was not sufficiently equipped to support the roles and responsibilities required in this context. | Once the project was underway, certain sub-working groups were not fully resourced and/or did not align with the realities of the project which led to confusion about roles and responsibilities. | Sub-working group lead roles and responsibilities must be clearly articulated and understood at the beginning of the project.  Each sub-working group needs to establish clear directions and objectives at the beginning of the project.  Sub-working groups should be evaluated at regular intervals throughout a project to ensure that they are aligned with the project vision, sufficiently resourced, delivering upon expected outcomes, and non-duplicative.  Project priorities should be respected. Once the charter was signed and resources were officially committed to the project, these resources should have been made available to the sub-working groups. Branch priorities occasionally superseded project priorities and resources were not made available as committed to in the charter. |
| 7 | Feedback | Consistent and thorough documentation of feedback from elicitation sessions. | The NDSi team gathered user feedback from engagement sessions. Rapid note taking led to feedback transcription that was occasionally incomplete which required extra revision. | The use of a dedicated ‘scribe’ at elicitation sessions was incredibly valuable. Ideally, this individual will have a background in UX or business analysis in order to bring an additional element of expertise to the role.  If the project team requires an attendee to elaborate upon their feedback, ask them to elaborate then and there. It’s better to ensure that the user was heard, understood, and recorded accurately than to have incomplete notes that take time and effort to interpret and categorize, yet may not be an accurate reflection of the user’s feedback. |
| 8 | Feedback | Efficient and effective categorization of user feedback. | The NDSi project team experimented with the feedback analysis and prioritization matrix at the outset of the project. It took several iterations of the matrix prior to identifying the version that would be best used to analyse the feedback.  As well, sub-working group ‘ownership’ of the feedback was not clearly established which led to confusion about who was responsible for establishing the analysis process.  Policy advice related to feedback also took longer than expected to obtain. | Establish feedback collection and management guidelines and an associated categorization structure at the beginning of the project that includes identification of roles, responsibilities, the different types of feedback to capture, and their purpose. That said, don’t take too much time establishing this information; your team will not likely start with the right matrix; plan to iterate and evolve your matrix over time – the quality will improve.  Plan for enough time to analyze user feedback.  Analyse the feedback early and often and keep the analysis simple. Aligning the feedback to a simple feedback architecture will ensure that feedback is addressed in a timely manner and that all team members understand the analysis criteria. If the feedback architecture is deemed insufficient as the project progresses, it can be elaborated upon as required and prior feedback can be reviewed.  Determine at the onset of the project who owns the feedback and have the owner(s) of the feedback provide training or information sessions to all members of the team to ensure that there is a common understanding of how the feedback management process will work.  Establish a structure at the outset, within the policy team, the guidance sub-working group and the project team, setting out clear parameters around points such as:   * Management of policy advice – for example, logging of informal and formal advice; * Identification of when formal interpretations are needed; * Formal policy consideration documentation as required.   If further analysis is required, it should be undertaken systematically and result in a formal policy brief or policy recommendation |
| 9 | Project Engagement | Improve administration, communication, and engagement with users. | The creation and maintenance of the user engagement participant list required more time and resources than originally projected. | Ensure that the outreach team is sufficiently equipped to manage the master participants list and schedule the engagement sessions. This should include technology set-up and technology testing.    Leveraging technology to provide ‘stock’ project information to interested participants reduces the associated administrative burden. The NDSi team developed and posted information (including project FAQs) to GCPedia; this efficiently and effectively answered the majority of participants’ questions.  Keep the project’s list of participants informed and updated about the project’s status. These participants are primary spokespeople for the project within their organizations. |
| 10 | Project Engagement | Use ‘good enough’ presentation materials to engage with users. | In some cases, the search for perfection in material development resulted in some inefficient use of time. This was particularly notable during the stages of early engagement with users. | The most important part of this project was engaging with users; the designs and presentation material do not have to be perfect. Get actual users in a room, discuss their needs, show them what the project has, gather feedback, adjust the project’s concepts and the associated designs, and get back in front of them to collect more feedback. |
| 11 | User Engagement | Plan to let users talk about information beyond the planed scope of an engagement session | When users attended NDSi elicitation sessions, they often wanted to explore elements beyond the targeted scope of the session. It was a challenge to achieve the goal of the session in the time period allotted.  The fifth | When engaging directly with users, have a clear goal. Draft an agenda that clearly identifies the goal of the meeting, the expected outputs, and a schedule to accomplish this.  Establish a ‘parking lot’ or other mechanism to capture ideas about items that are out of scope.  Make the sessions longer! Plan for more time than required to discuss ‘out of scope’ issues with participants at the end of the session.  Having the product owner or a strong proxy present at the engagement sessions helped ensure alignment with the project vision. |

# Top 12 Recommendations

The New Direction in Staffing Interface (NDSi) project undertook several new approaches to requirements elicitation, validation, and testing. The project team engaged directly with thousands of users over the course of the project’s time frame. This required new approaches to engagement and outreach. As well, feedback analysis and testing required the creation of new processes and tools. Alternative approaches to internal project governance and project management were also required. Many lessons were learned and associated recommendations were proposed. A dozen of the top recommendations follow:

* Draft the project charter collaboratively with input from the project sponsor and all impacted functional groups within the Public Service Commission (PSC) and, if required, third party service providers and/or external stakeholders. The approved document must clearly identify scope, timelines, leadership roles and responsibilities and resource requirements.
* Ensure that your project team is sufficiently resourced to accomplish the required objectives; if a resource is dedicated in the approved charter, they should be made available to the project team. Dedicated project teams minimize the risk of competing priorities.
* Establish the steering committee early with senior management representation from all impacted functional groups to build a strong decision-making body that facilitates project direction and implementation.
* Iterative projects require easy access to a product ‘owner’ or a strong proxy in order to ensure the project vision is being respected and to accelerate decision making and guidance under tight timelines.
* Establish multi-disciplinary project teams to include expertise and knowledge from various, often disparate viewpoints, to foster a more inclusive project team.
* Empowered project teams are not easy to run. Work together to determine roles and responsibilities, try to reduce overlap, and re-evaluate whether they are working well on a regular basis to see or as required.
* Ensure that the project team understand what the project outputs are and how they are going to be used. As well, make sure there is a clear understanding of who is responsible for the outputs, as well as who is required to support their creation.
* Single official project documents/deliverables with limited edit rights can greatly improve document control.
* A picture really is worth a thousand words; using mock-ups and prototypes, images to convey and explore thoughts and ideas greatly enriched our user elicitation sessions.
* Schedule sessions first and fill them with people who are available; trying to book meetings based on everyone’s availability is very difficult. As well, make all meetings virtual, this increases the likelihood of availability and opens sessions up to regional representation. (Don’t forget to test the required technology well before the meeting’s start time.)
* Take good feedback notes during engagement sessions; don’t be afraid to ask for elaboration to ensure the project team captured the user’s feedback accurately.
* Analyze the feedback as soon after the session as possible. Keep the analysis simple, and make sure everyone understands the associated feedback architecture and how the feedback is going to be used. Establish a structure for the management of related policy advice and considerations as well.