

NEWEST TRG LEADERSHIP TOOL

"Practical Means for Dealing with Difficult Times"

This section of our site features business tools and planning considerations designed to assist leaders for whom "just keeping up" is not good enough. These notes focus on sequences of thought and action intended to enhance the positioning of your group, both on a long and short-term basis.

Each week additional sets of Tools on a wide array of business subjects will appear. Your input is requested as to which Tools might be of interest to you. Requests will NOT create any form of obligation on the Reader who makes the suggestion, but will help us understand which subjects are of general interest.

Please check back weekly to review the next tool. Visit our [LEADERSHIP TOOLS ARCHIVE](#) for previous tools.

THE "SINGLE DOCUMENT" AND "THE BOOK" PART I

NOTE: These notes are directed to a project manager or executive in charge of the strategic development of a complex group.

BACKGROUND

The act of capturing and refining all the issues, points, and concepts that have been discussed, alluded to, or thought about by multiple parties regarding an issue or project, will help to clarify the intentions of the parties both in your own mind and among all others who are either involved with or affected by a potential mutual development effort. The existence of the "SINGLE DOCUMENT" may help assure that everyone permitted to read (or asked to help write) the resulting document will be talking about the same issues, outcomes, or conditions in the same way, using the same terminology, and referring to the same data.

The specifics of the issues and the scale of the intended outcome will drive the scope of the appropriate documentation. If little or no documentation is needed beyond existing works, then the task becomes the compilation and appropriate communication of that which already exists, and the Single Document should be little more than an index. There is a trap in this approach in that the eventual existence of difficult, unresolved issues in a project is often linked to inadequate or inappropriate documentation at the start.

Because there are so many possible ways in which the written piece-parts of a project can be cobbled together, it is often useful to create one central document to capture the critical concepts of the project. Each of us begins with different ideas in our heads at the start of a project and most (if not all) participants start out saying words that mean something beyond the definition of their counterparts. If those ideas can be captured on paper in the form of questions and options, most people will be inclined to cooperate as you "fix" the document as a way of clarifying the project. (If they won't help, that issue in

THE "SINGLE DOCUMENT" AND "THE BOOK" PART I 10/05/11

itself is often a flag of deeper problems)

BUILDING THE SINGLE DOCUMENT

Start the SINGLE DOCUMENT with an outline of all the parts of the project that you believe to be true. Under each subject area of the outline list all of the related questions, flagging those that are either contentious or around which there is general confusion.

A good SINGLE DOCUMENT begins with a series of high-end questions that, while seeming to be basic to all projects, are actually specific to the project under consideration. As each question is answered, the document should be modified and re-circulated, locking in the points already created in simple language. If there is a disagreement between the parties as to the appropriate answer, write down the options, then work to resolve the differences between the parties point by point, and end to end.

At the start, enunciate an understanding that there are likely to be misinterpretations at first, BUT that the act of reviewing the written word will catch and correct outstanding errors with the successive drafts of the document.

Revise the text as questions are answered, issues are closed, or new questions arise.

When there is consensus on any given point, replace the question about that point with the answer in an affirmative statement. Each time there is a disagreement between the parties as to an answer, list each option and if necessary each of the new questions that will help clarify the issues of that disagreement.

Once there is a single answer from all parties for each of the defining questions, the relationship of the parties will have been functionally clarified as well, and, as a result, there is a distinct prospect of prompt closure.

Over time the Single Document should move (through subsequent drafts) from asking questions, to capturing the steps of the resulting negotiation or internal development, to defining a working project or project as it emerges, to laying out the working activities that start the resulting project, program or project going.

The document is "single" because it replaces and/or incorporates, as an appendix, the piece-parts of writing that generally surround the growing life of any project or major project. In this way a SINGLE DOCUMENT is more than just a piece of paper with a description of what has been said and meant by one of the parties. Through the act of development, a well constructed and managed SINGLE DOCUMENT becomes a vehicle to bring the parties not only to closure but beyond to become a living map of an ongoing interaction.

If you cannot answer any question . . . KEEP ASKING.

THE "SINGLE DOCUMENT" AND "THE BOOK" PART I 10/05/11

OPENING THE BOOK

To start the sequence of discussion correctly, be certain of your basic information by securing (if possible), and putting in an electronic file or binder ("The BOOK") copies of existing:

- Summaries of the project as it exists at that moment (this may be no more than a paragraph or may include a specification sheet, prospectus or other defining document at whatever stage of development it may exist)
- Histories of the project and of any similar projects
- Resumes of the principals (both people and organizations)
- Past documentation including:
 - Pertinent correspondence (letters, memos, e-mails) used to initiate or define the project
 - Contracts or BoD minutes (if they exist), both in full and abstracts
 - Related financial sheets (budgets, statements, cost sheets, estimates)
 - Organizational charts and flow diagrams, etc.

BUILDING THE INDEX

List the documents that you have (or that are missing). This list will eventually become the index of a compilation of documents related to the project, and found in The BOOK.

The BOOK should be more than conceptual, although even if it starts out as a concept only (as in "Our Book of Business is well understood."), it should be turned into a tangible form promptly.

NOTE: BOOKS do not have to be voluminous. At the start a simple Book can be a one page project description, followed by a page of Background information, and perhaps a two page working agreement, license or memo of understanding. While some BOOKS may fill multiple electronic folders or several 3" Ring-binders and ultimately include copies of signed operating agreements, BoD minutes or copies of applicable regulations, together with anything that could be useful for someone who must either move around inside a resulting project, other BOOKS are never more than a few simple sheets. In rare instances, when the project is of enormous consequence with large numbers of stakeholders and extensive regulatory requirements, a BOOK can become an entire library of documents. More likely the BOOK will be a handful of related documents, and will cease to have little more than reference value.

NEXT WEEK: The "Single Document" and "The Book Part" II

For additional information regarding THE "SINGLE DOCUMENT" AND "THE BOOK" PART I, please visit our [Contact Page](#) and send us an Email or simply call us directly during East Coast business hours on our toll free number 1.800.97-REGIS (1.800.977.3447).