

Project Team Handbook

Objective: To provide a concise, comprehensive, and thorough resource for all project team members detailing the information about the project team, tools, resources, and protocols.

Project Team Members:

Name	Role	Email	Phone

- Capture the project team member information in a grid format as provided above. This will provide easy access to the team members if they need to reach someone. This information can be particularly important if some of the team members are consultants, remote or offshore. Adjust the grid accordingly to meet the needs of the team. You may need to capture working hours for anyone who may be located in an off-shore location.

Project Methodology and Protocols:

- Capture the methodology that will be used for the project activities. Provide documentation for any team members who may not be familiar with the methodology or approach for the project activities.
 - For example – Methodology:
 - Methodology: Agile/Scrum; Proposed: 5 sprints
 - Methodology: Waterfall; Proposed: 6-month duration
- Note the systems that will be required for the team members to work on this project effort.
 - For example – which applications, systems and network folders will the team members need access to? Does the team member need to submit a Help Desk request for access to those systems to be productive? If so, list those applications, systems, and sites:
 - Team members will require the following systems and applications for this project. Don't forget to provide a link to the internal learning management system so that your team members can learn how to effectively use the tools.
 - Project folders on network drive:
 - Document repository
 - Help desk tools.
 - Product software
 - Project management tools – Asana, JIRA, MS Project, Trello, Google Hangouts, video conferencing etc.
 - Computer or laptop needs.

- Also note any team protocols that will be discussed as a framework for the project effort, including but not limited to the following.
 - For example – Communication protocols:
 - Daily stand-up – mandatory
 - Weekly retrospective/lessons learned – mandatory.
 - Status reporting outside of the above protocols will be discussed with the team.
 - Monthly dashboard report will be compiled for the leadership team.
 - For example – Team protocols
 - Although the hours may be somewhat flexible, we will be working on the project Monday – Friday from 8:00-5:00 EST.
 - Remote working is available for those project team members that can adequately support a remote environment while continuing to work effectively and productively from a remote location.
 - All team members will need to have access to some form of communication device - cell phone, office phone, computer.
 - Vacation schedules and back-up plans will be reviewed as a team.

Team Collaboration Tools:

- What tools will the team be using to collaborate?
 - List the tools that will be used while working on the project, the organization user id’s and passwords, as necessary. Whatever information is needed for the team members to schedule, and participate, in the meetings. Don’t forget to provide a link to a video on how to use the various tools for those team members that don’t have experience with these tools.

Use	Tool	User ID	Password
Video			
Teleconferencing			
Chat			

- AnyMeeting: <https://www.intermedia.com/products/anymeeting-video-conferencing>
- FaceTime: <https://support.apple.com/en-us/HT204380>
- Google Hangouts: <https://hangouts.google.com/>
- GoToMeeting: <https://www.goto.com/meeting>
- Skype: <https://support.skype.com/en/faq/FA34850/getting-to-know-skype>
- WebEx: <https://www.webex.com/>
- WhatsApp: <https://faq.whatsapp.com/en/web/26000012/>
- Zoom: <https://support.zoom.us/hc/en-us/articles/206618765-Zoom-Video-Tutorials>

Project Documentation:

- Provide the path(s) on the network drive of all locations where project documentation will be stored for easy access by all project team members.
- Provide the path(s) to the organizational process map which will provide the visual representation of the project methodology selected, a glossary that provides definitions for common organization and project related terms and acronyms, and other organizational

related project documents. Confirm that the consultants and remote team members will have access to this path for the project documentation.

Team Principles:

- Respect the expertise, ideas, questions and comments from teammates and stakeholders alike. Project work provides an excellent learning environment, take advantage of that experience!
- Collaborate with team members and colleagues on various needs, ideas, or challenges.
- Share your thoughts, ideas, questions, lessons learned and funny stories!
- Listen to your teammates. Listen to the stakeholders. Listen to yourself!
- Ask questions if you don't understand a concept, idea, or task. Don't struggle. Just ask.

Use this as a framework for your Project Team Handbook. Include this into your onboarding package for new team members. By keeping this handbook simple, yet meaningful, you will be providing your team in the information they need to be effective and productive from Day 1.

Additional insights can be found in these articles:

<https://www.mbiconsults.com/blog/welcome-to-the-team>

<https://aspetraining.com/resources/blog/project-team-onboarding>