There are good Steering Groups and there are bad Steering Groups. Set up properly, attended by the right people and run well, the Steering Group helps to drive change forward, keeping it in control and on plan to deliver successfully what the business needs.

What’s your own experience?
Do you believe, like we do, that Steering Groups are important, and that they need to be run better than they often are?

Are you seeing great Steering Groups, especially on those large, complex programmes? Are they consistent across programmes so people know what to expect?

Or are you seeing something different? Are people openly criticising the performance of Steering Groups, the time they take or the decisions they don’t take?

You know the type of meeting we’re talking about. The ones with attendees that:

- Take the meeting off track to discuss unimportant topics in mind-numbing detail
- Pretend they have read the briefing papers even though it is clear they have not
- Are distracted (and distracting) by answering phones or rudely tapping on a smart-phone under the desk
- Send uninformed delegates who have no authority to act on their behalf
- Think that turning up and listening is sufficient
- Believe the Steering Group is their opportunity to tear the Programme Manager to shreds.

It doesn’t have to be this way.

Well-governed and well executed, a Steering Group is a valuable mechanism to help you drive a big change through and keep it on track – so it stays in control and true to the original vision, delivering the sustainable change that the business needs.

This guide will help you set up and run an effective Steering Group

We’ve written this guide for leaders of business-critical or complex change programmes:

- Change Sponsors
- Business Leaders
- Programme Directors
- Programme Managers.

Whether you’re new to the role, or jaded or motivated by recent experiences, this guide is for you.

It’s the sum total of our experience on hundreds of change programmes over many years.

Please use, share and feed back any improvements. We’re always learning.
Let’s start by dispelling some crazy myths about Steering Groups

<table>
<thead>
<tr>
<th>The MYTH</th>
<th>The REALITY</th>
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<tbody>
<tr>
<td>A Steering Group is a forum for general communication about the programme</td>
<td>No. A Steering Group is a forum for deciding and acting</td>
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<tr>
<td>A Steering Group is confrontational in nature</td>
<td>No. It must be collaborative. It’s not a trial!</td>
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<tr>
<td>A Steering Group should go in to forensic detail</td>
<td>No. It should only go into enough detail to support the decisions it needs to take</td>
</tr>
<tr>
<td>A Steering Group should be inclusive, with as many as possible attending</td>
<td>No. It should be attended by the minimum number of necessary people</td>
</tr>
<tr>
<td>Steering Groups are monthly events</td>
<td>Not necessarily. They should be at the times and frequencies that the Programme needs them to be.</td>
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A good Steering Group does what it says on the tin. It steers toward an end point, focusing on outcomes

You may call it a Forum, a Project or Programme Board, or a Steerco even. However you term it, this is the leadership mechanism that ensures any large transformation programme has the right support and momentum throughout, so it delivers the real and sustainable change needed.

From our collective experience we’ve uncovered the four main elements that make the difference between Steering Groups that succeed or fail.

1. Absolute clarity of purpose

Often it is wrongly assumed that everyone understands the purpose.

It needs to be clear and understood by all attendees.

The purpose of a good Steering Group is to ensure the business outcomes of the programme are successfully delivered. Its job is to maintain focus on the outcomes throughout the journey by:

- Controlling the programme scope and direction
- Making necessary resources available
- Approving key deliverables
- Making go/no-go decisions
- Resolving major issues, conflicts and risks
- Approving any changes

When you are recruiting and briefing new members or positioning a meeting, make sure everyone knows what they are there for and are clear on the above.

It’s good practice to review and agree the purpose at the first Steering Group meeting.

Many of the attendees may be coming hot-foot from really bad Steering Groups that are unclear on their remit.

Use your first Steering Group meeting to reset expectations and if you feel things slipping, put the remit back on the agenda again, and again.
2. The right people in the room

This is of paramount importance if you want your Steering Group to be effective.

So who should be in the room? And who do you leave out? This needs some careful thinking.

Remember that invitations for your Steering Group should NOT be as wide as possible; they don’t need to go to everyone involved.

Only invite the minimum number of necessary people you need to make the decisions.

Too many people and the group will always find a small anomaly to pick at and get lost in; too few and you don’t have the group needed to make the decision and then stick to it.

If others want to be kept in the loop, then set up communication mechanisms but keep these separate from decision making on the day.

Start with the people shown below.

The Sponsor has to be there; it is their Steering Group. They don’t necessarily need to chair the meeting, but as the leader of the change, they should.

The business leaders need to cover two areas of the business.

1. Firstly, the leaders of those parts of the business where the change is being made. They’re the experts, and their people need the change.
2. Secondly, the leaders of key supporting functions such as Finance, HR or IT. They will probably be providing guidance, resources and often, rules.

The Programme Manager has to be there to report on progress and lead the discussion on the issues and decisions that the Steering Group is focused on.

You may need a representative of the Programme Office, especially when there is a need for detailed discussion on financials or resources.

The Programme Manager should be able to deal with these but it’s often a good idea to let the PMO lead on the data that they are responsible for gathering.

Finally, there may be others such as representatives of key suppliers, or Programme Managers of programmes on which this programme depends.

These are not regular attendees; they only need to be there when they are needed.
### The Sponsor's Role
Be accountable for the overall success of the change
Own and champion the programme and the vision for it
Own the business case
Own the relationships with key stakeholders
Be accountable for the realisation of the benefits
Act to remove barriers to success

### The Chairperson's Role
Get the composition of the Steering Group right
Make sure the right people, with the right authority are there
Make sure everyone is clear why they are there
Align the Steering Group with other, relevant governance
Listen carefully and help to resolve difficult issues
Support the Programme Manager to get the decisions needed
Promote openness, honesty and integrity from everyone
Make sure everyone lives up to the decisions taken

### The role of Business and Functional Leaders
Provide the expertise the programme needs
Review key deliverables
Sign up to the business case elements they own
Ensure the solution is fit for purpose
Manage business impact and benefit delivery
Communicate change and create buy-in
Provides the resources the programme needs, when needed
Fully represent their area in the Steering Group

### The Programme Manager's role
Manage the programme day-to-day
Plan and design the programme
Monitor the programme and report on progress
With the Sponsor, develop and run the governance framework
Be responsible for delivery to time, budget and expectations
Maximise the efficient use of resources
Work effectively with all parties involved in the programme
Communicate approach, plans, budget, issues and risks
3. Careful preparation; no surprises

Preparation is everything if you want the Steering Group to be effective.

The programme needs to prepare the material for the Steering Group to understand, review and approve. The infamous “steering-pack”.

More importantly, time needs to be taken to pre-brief some or all of the attendees. You want to avoid any nasty surprises on the day.

These pre-meetings are essential to agree strategies on how to get key issues surfaced and the right decisions made.

Some steering members will always need a lot more convincing or evidence around decisions than others, so take the time to communicate what you’re looking to decide and address their concerns in advance.

If you are presenting complex matters, get the data approved first.

For example, make sure Finance have produced or signed off any “numbers” being reported (costs and benefits and forecasts to complete), so that valuable time isn’t taken up with arguing whether the numbers are right.

You want to present facts, and with financial statements, they’re only facts if the FD says they are!

What Programme Managers should ensure before the day

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<thead>
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<tr>
<td>You and the Sponsor have a clear agenda, especially around what you want to present and the decisions you want to be taken</td>
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<tr>
<td>Any pre-briefs are complete, with the Steering Pack accurately reflecting the conversations that you’ve had</td>
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<tr>
<td>Any topics that are owned by other stakeholders (such as the CIO presenting a systems update), are well prepared and appropriate pre-briefing has been done</td>
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<tr>
<td>A Steering Pack is produced and distributed to the attendees, when they expect it to be</td>
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<tr>
<td>The Steering Pack tells the story you want to tell, is brief and provides the information needed to support the decisions needed</td>
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<tr>
<td>The Steering Pack presents solutions and not just problems</td>
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<td>You have a script that sets out any important voice-overs that you or the Sponsor need to provide</td>
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<tr>
<td>The Steering Pack couches all options, decisions and recommendations in succinct, clear terms that show their impact</td>
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4. The right agenda, leadership and behaviours on the day

A Steering Group is a forum for ACTION, not a communication vehicle, and it needs to be carefully managed on the day.

When structuring the agenda it’s important to bear this in mind and get the balance right between all the elements you need to cover.

There’s no need to go into forensic detail on every area of the programme. Keep it short – one hour, maximum. You can’t keep people’s full concentration for longer than an hour.

Keep to the agenda and move the meeting at pace.

And ditch the death by PowerPoint. Aim for less than 10 slides in the Steering Pack.

Here is how we’d suggest you balance the agenda:
Strong chairing is essential to keep the meeting on track. The atmosphere must be business-like and collaborative. It should never, ever be combative.

Agree the ground rules in the first Steering Group and enforce these throughout every meeting that takes place.

Stick to the agenda. If the discussion veers off-track, then bring it back. If what is being reported is causing a problem, switch the focus to remediation and away from blame.

The trick is to turn every problem into a group problem and get the group collaborating on resolving it.

During the meeting the Chairperson should:

- Encourage a collaborative engagement on all agenda items
- Keep to the agenda. Park unimportant topics that are getting the meeting bogged down
- Make sure ground rules are being followed - no tapping on an iPhone screen!
- Ensure all attendees are actively engaged—especially those who are influencers, decision-makers or ‘blockers’
- Communicate and summarise clearly, and if in doubt, check for understanding and agreement
- Be polite. Bring in levity as appropriate but use jokes, jibes and anecdotes sparingly!
- Keep the meeting within the timeframe set; manage by exception where this is not possible, but highlight the fact that you are off-schedule to the attendees
- Advertise success and give people a chance to shine
- Be realistic and make sure any expectations set by the meeting are sensible

Some final suggestions

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<tbody>
<tr>
<td>Use simple language, with clear summaries</td>
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<td>State up front, the decisions being asked</td>
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<td>State the facts. If it’s over-budget, say so!</td>
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<td>Back up the request for a decision with the data they need</td>
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<tbody>
<tr>
<td>Leave preparation until the last minute</td>
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<tr>
<td>Include too much detail</td>
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<td>Pretend you know, when you do not</td>
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<tr>
<td>Surprise anyone in the meeting (includes yourself)</td>
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<tr>
<td>Talk over anyone; be rude or arrogant</td>
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