

The DOGBERT principles...
The Basics Every
Healthcare IT Project
Manager Should Know
PM - 101



Project Management 101

The Basics Every
Healthcare IT
Project Manager
Should Know



All You Really Want to Know

Project Management

This presentation is designed to introduce you to basic Project Management (PM) skill sets and fundamental concepts and the basics of how to provide high-quality Project Management in your Healthcare IT Environment.



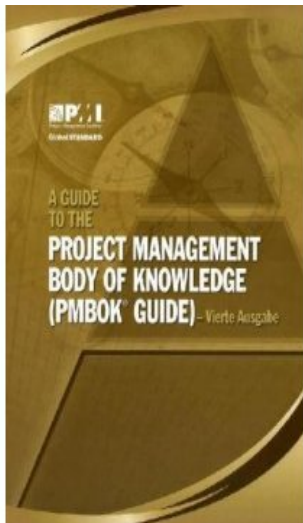
Today's Topics

Project Management Fundamentals:

- What is a Project Manager?
- What does a Project Manager look like?
- What is and isn't a project?
- Matrix versus Line management
- What are some of the challenges of PM?



Today's Topics



Project Management Fundamentals Continued:

- What is a PMI? (pmi.org)
- What is PMBOK? (Project Management Body of Knowledge)
- What is a PMP(certification)
- What is the value of Project Management to me and to my organization?

“PMBOK” is a registered mark of Project Management Institute, Inc.

Today's Topics

Project Management Fundamentals Continued:

- What is in a Project Management Toolkit?
 - Project Charter
 - Project Definition Document
 - Goals/Objectives
 - Scope Statement
 - Project Schedule with milestones defined
 - Status Reports
 - Responsibility Matrix
 - Communication Plan
 - Quality Plan – THE MOST DIFFICULT!
(TESTING)
 - Risk Plan
 - Project Plan



Today's Topics

Project Management – Six Major Principals:



- Defining what is Project Success to Stakeholders
- Involving the right people
- Developing a realistic schedule
- Making accurate time estimates
- Recognizing change is inevitable
- Agree on what constitutes closure and acceptance (JOB WELL DONE)

“Project Based” Management

More and more hospitals, healthcare and IT organizations are choosing to use “project based” management to get **more** accomplished with **fewer** resources.

This means trending away from traditional LINE management styles in your hospital with divisional silos (radiology, lab, nursing) and moving towards MATRIX style (project based TEAM management).

“Project Based” Management

Much of the time project managers in healthcare are pulled from other departmental areas and are being *thrown* into PM without formal Project Management training or certification.

As an example, a Lab manager, Radiology lead, Nursing Director, or Infection Control Director in a facility, may be asked to wear a second hat and manage a large Laboratory System Implementation project or Quality Care System implementation project at the site.

What is a Project Manager?

More than a **manager** of tasks and timelines:

- A coordinator
- A leader (Leadership is “doing the **right** thing”)
- A coach
- A mentor
- A communicator
- A motivator
- A scientist and an artist
- A facilitator (a directed but “objective” facilitator)
- A manager (does things RIGHT)

What is a Project Leader?

ARE YOU A PROJECT LEADER???

“You don’t lead by pointing and telling people some place to go. You lead by going to that place and people follow.”

Ken Kesey

Managers typically say “go”

Leaders say... *“Let’s go there together”*

A leader sets direction, and influences people to go in that direction.

Management is more **tactical** in nature, and often have a more directive and controlling approach.

Project Leadership vs. Management

From the work of Warren Bennis and his book “**On Becoming a Leader**” he describes the differences between leaders and managers as:

- The manager **administers**; the leader **innovates**.
- The manager is a **copy**; the leader is an **original**.
- The manager **maintains**; the leader **develops**.
- The manager focuses on **systems and structure**; the leader focuses on **people**.
- The manager relies on **control**; the leader inspires **trust**.
- The manager accepts **reality**; the leader **investigates** it.
- The manager has a **short-range view**; the leader has a **long-range perspective**.
- The manager asks **how and when**; the leader asks **what and why**.
- The manager has his or her eye always on **the bottom line**; the leader has his or her **eye on the horizon**.

What exactly is a Project?

Definition of project (PMBOK):

“a *temporary* endeavor, to produce a *unique* product or service. A project has a definite *beginning* and *end*, and in one or more ways it is different from anything the organization has produced before”

Examples of projects:

- Building a new hospital
- Adding a maternity wing onto a hospital
- Developing or implementing a new software application for a patient care area (Pharmacy, Radiology, CPOE)
- Implementing a new interface between HIS systems

Why are Healthcare IT projects so challenging?

What typical challenges do Healthcare Project Managers undertake with a project?

- Leading a team that has typically never worked together before (often from different depts.)
- Accomplishing something that has never been done before in a given amount of time
- Almost always with a given and generally **limited** number of resources (\$\$, Time, People)
- Everyone wants high quality, with fast delivery times!
- Healthcare and IT technology are both industries that are changing constantly and rapidly – project goals may change as they are being accomplished

What is NOT a Project?

Operational goals of an hospital or healthcare organization are not projects. They are generally to sustain the organization and are not unique or temporary in nature. Operations generally have a direct line of authority.

- Processing patient registrations
- Performing patient accounts receivable and payable activities
- Working in a production line
- Providing healthcare IT support functions 24/7

Where Did Project Management Begin?

Project management evolved from construction, engineering and defense activities (NOT FROM HEALTHCARE IT!)

The 1950's marked the beginning of the PM era...the CRITICAL PATH METHOD (CPM) was developed by Dupont and Remington Rand for managing plant maintenance projects. And PERT (Program Evaluation and Review) was developed by Booz-Allen & Hamilton as part of the US Navy's Polaris Missile submarine program.

The fundamental Project Management concepts **do not always precisely relate** to the healthcare IT industry – WE ARE SPECIAL!

Globally Recognized PM Organization

In 1969 Project Management Institute (PMI) was formed in the USA , www.pmi.org, is the largest globally recognized standards organization for Project Management.

The PMI bible is the Project Management Body of Knowledge (**PMBOK**) . The PMP (Project Management Professional) is the certification / exam process of PMI for Project Managers.

The PMBOK defines 5 process groups in every project:

- Initiating
- Planning
- Executing
- Controlling/Monitoring
- Closing

Credential Value...value to your career

PMP (Project Management Professional) is a globally recognized and well respected credential – crosses industries- not healthcare specific

Eligibility Requirements:

Secondary diploma (HS diploma/global equivalent); 5 years project management experience with 7,500 hours spent leading and directing project tasks and 35 hours project management education

OR

Four-year degree (bachelors/global equivalent); 3 Years project management experience with 4,500 hours spent leading and directing project tasks 35 hours project management education

Application process + 4 hour, 200 question multiple choice exam

What is the Value of Project Management?

- Allows organizations to accomplish **more** with **less** cost
- Provides greater visibility on each project to enable better management decision making
- Enables better leverage of internal and external expertise
- Maximizes the innovative and *creative* capabilities of the organization by creating teams of focus and open communication (eliminates line reporting in team format)
- Project management provides standards to develop your healthcare organizations methodologies from!

Why are Healthcare IT Projects so Challenging?

- Uncharted Territory: Since each project is **unique**, **the same work** has not been done by this team of people before in this organizational environment
- Multiple stakeholders (docs, nurses, techs, administrators) with **multiple expectations**
 - Each have their own needs of the project
 - Not accustomed to working together
 - Sometimes competing expectations
- Communication boundaries
 - Due to the natural silo structure of large hospital / healthcare organizations
 - *“Those lab people again”*
 - Physicians needs vs. Nursing needs
- Managing Competing demands
 - Time,
 - Scope
 - Cost
 - Resources
 - Changing technology (I need the functionality on my phone now)

Expectations Challenge

What Does Your Stakeholder Want vs. Need?



How the stakeholder described it



How the Project Mgr. Understood it



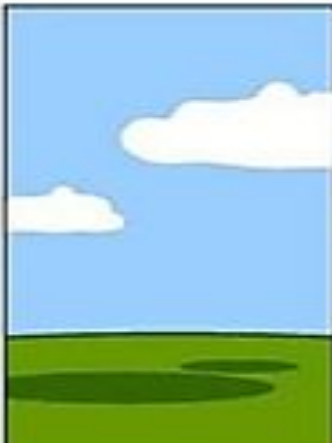
How the analyst designed it



How the programmer wrote it



How the business consultant described it



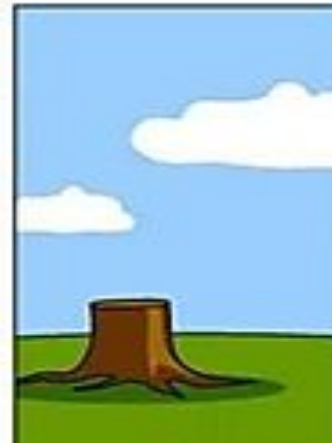
How the project was documented



How Implementations installed it



How the Project Billing occurred



How it was supported



What your Stakeholders (customers) actually needed

Favorite Project Management Rule of Thumb



If the project is a success, the Project Manager has probably broken enough rules and ticked-off enough people that he/she **may not even benefit** from the success.

If the project is a complete failure, the Project Manager usually takes the rap.

So try to remember “what doesn’t kill us makes us stronger” and try not to complain.

Latest Trends in Project Management

- Project managers managing multiple vendors (Physician office Medical Records)
- Agile Project Management – more prototyping
- Using project management TEAMS to facilitate product and vendor selection processes (RFI, RFP and response evaluations)
- Utilize Project teams to identify and manage Risk and provide Risk mitigation strategies organization wide
- Six-Sigma – focus on reducing error; was TQM; Quality of output (Black belt, Green Belt); Quality improvement
- Servant leadership: There is a growing awareness that servant leadership style is paramount for effective project management (*“True project leadership must be about Service”*-Robert Greenleaf)

10 Principles Servant Leadership in Projects

- **Listening** – seek to identify and clarify the team; listen to what is said (and NOT said)
- **Empathy** – assumes good intentions of the team, and not reject them as people (even when forced to reject their behavior based on performance on project)
- **Healing** - learning to heal and connect the project team
- **Awareness** - general and building self awareness and greater project awareness
- **Persuasion** – uses persuasive techniques and seeks to convince others, rather than use positional authority
- **Conceptualization**-thinks BEYOND day to day project (dream great dreams); stretch your thinking
- **Foresight** – understands lessons of past and realities of present (intuition)

10 Principles Servant Leadership - continued

- **Stewardship** – play significant role in holding their project and institution in trust for the greater good of society
- **Committed to Growth of People** – servant leaders believe people have an intrinsic value beyond their tangible contributions to the team as project workers
- **Building Community** – servant leaders seek to build COMMUNITY among those who work within a given organization or project

Servant Leadership is NOT top down hierarchical management style, Servant Leadership emphasizes:

- Collaboration
- Trust
- Empathy
- The **ethical** use of power in project work

Opposite of Servant Leadership is LOW TRUST Project Culture

With a **Low Trust Project** or **Organization** you see:

- High Control in Project Management
- Political posturing in projects – lots of politics and bureaucracy
- Protectionism of ideas and knowledge
- Cynicism about success of the project
- Hidden Agendas (everyone in it for themselves)
- Disempowerment of the project team by administration
- Internal Competition among project team
- Sometimes...Adversarialism and bitterness in the team

Main Purpose of Project Management

Goal: Achieve the **Success Criteria** set forth at the beginning of the project to meet our stakeholders expectations throughout the project lifecycle.

Remember: In order to achieve **success**, the PM should be thinking **end** from the **start and focusing to establish TRUST with the team.**

Always AVOID the SIX Metastasizing PROJECT Cancers:

- **Criticizing**
- **Complaining**
- **Comparing**
- **Competing**
- **Contention**
- **Cynicism**

These are symptoms of low trust project management

Value of TRUST... *Stephen Covey*

As Stephen Covey points out in the “Eighth Habit-effectiveness to greatness”:

*“People make choices about how much they will contribute to your project based on how they are treated. If they are respected, empowered, and trust you, they will engage their heart, mind, body and spirit to share their incredibly valuable knowledge. But, **without trust, there is NO knowledge..***

“why should I share my knowledge if you may lay me off and outsource my job to India?”

TRUST empowers, and is your PROJECT CATALYST!

The Project Management Toolkit



Project Charter: Authorizes project and project manager, and serves as notification to the organization (may list sponsors).
KICK OFF!

- Not necessarily a formal document. It may be an e-mail notification. The charter notifies the organization that the project is official and formalizes the projects existence.
- Constraints: Prevent you from achieving goals
- Assumptions: What we expect to happen

The Project Management Toolkit

Project Definition Document: Living, not static; changes must be approved.

- Reason for project: Why was this project undertaken?
- What are you going to **accomplish? Goals? Objectives?**
- Scope definition: In scope / out of scope
- Success criteria: Critical success factors
- Lists risks, as well as, constraints and assumptions from Charter
- Lists stakeholders (primary): Who is impacted?
- Expected benefits: Value from the project

The Project Management Toolkit

How to Create SMART Project Goals and Objectives?

- **S**pecific Objective
- **M**easurable
- **A**chievable
- **R**ealistic (and rewarding)
- **T**ime-based

“Otherwise you will never be able to determine if your goals are accomplished.”

Goals are generally longer term and broader in intention, objectives are more precise & concrete.

The Project Management Toolkit

Scope Statement: Work that needs to be accomplished to deliver the **product**, service or result with the specific features and functions. Often includes Project Justification (business need).

- Is your project's scope defined clearly enough to show when scope creep is occurring?
- Did you document items that are considered "out of scope?" **LIST PROJECT Exclusions**
- There is a difference between your Scope Statement and Scope of Work (SOW). The SOW is usually more specific because it is more "legalistic" and the **SOW is part of the contractual agreement** and generally a NARRATIVE DESCRIPTION.

The Project Management Toolkit

THE SOW is different than SCOPE....

Statement of Work (typically a governance tool to manage a vendor or contractor) includes:

1. Description of the work, and nature of work
2. Location of work (onsite or remote)
3. Start and Finish dates (period of performance)
4. Deliverables (**due dates** for deliverables, implementation of code, QA testing, User Acceptance Testing)
5. Industry standards or Other standards imposed on the deliverables... HL7 compliant, ISO compliant, HIPAA compliant, FDA , etc.
6. Acceptance Criteria-number of test cases that will be executed
7. Specialized Requirements- special qualification, PM must be certified PMP

The PM Toolkit

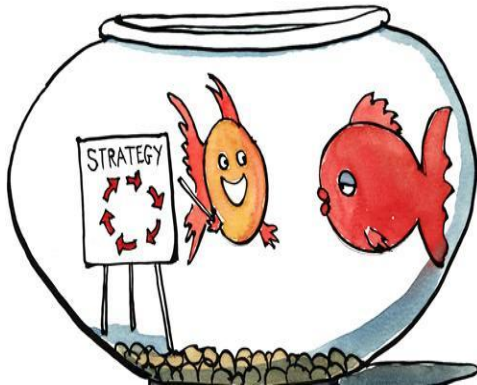
Project Schedule: The difference between Project Schedule, Project Plan and Work Breakdown Structure

- **Project Schedule**: Shows when the work will be done and by whom. Drives the project execution.
- **Project Plan: An all encompassing** planning document used as a basis for execution and control of the project. The Plan is the **strategy** for delivering value from a project. Includes communication document, risk planning, etc.
- **Work Breakdown Structure** (WBS): Defines work at a **task** level, breaking it into discrete work elements.

The PM Toolkit

Famous Planning Quotes:

“Control your plan, don't let your plan control you!”

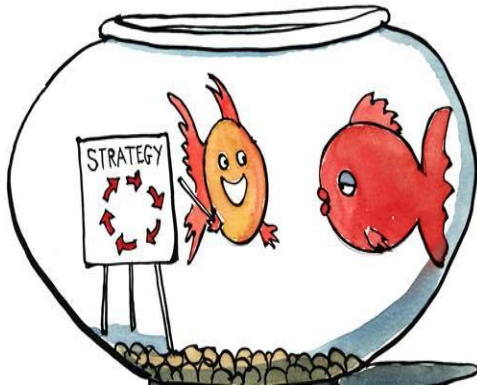


- *“Plans are nothing; planning is everything”* – Dwight D. Eisenhower. This is not an excuse for not planning. The role of planning is **TEAM INVOLVEMENT** and understanding the value of the project. The value is the **PROCESS** of **PLANNING**.
- *“It's easier to use an eraser than a jackhammer!”* – Mike Applegate
- *“Never confuse effort with results.”* If you are measuring your effort as your progress, you're not measuring the right thing. **MEASURE DELIVERABLES!**

The PM Toolkit

More Famous Planning Quotes:

- *“Strategy without tactics is the slowest route to victory. Tactics without strategy is the noise before the defeat.”* – Sun Tzu.
The **Plan is the strategy for delivering value from the project.** You need both the project plan and the project schedule.
- *“Experience is simply the name we give our mistakes.”* – Oscar Wilde

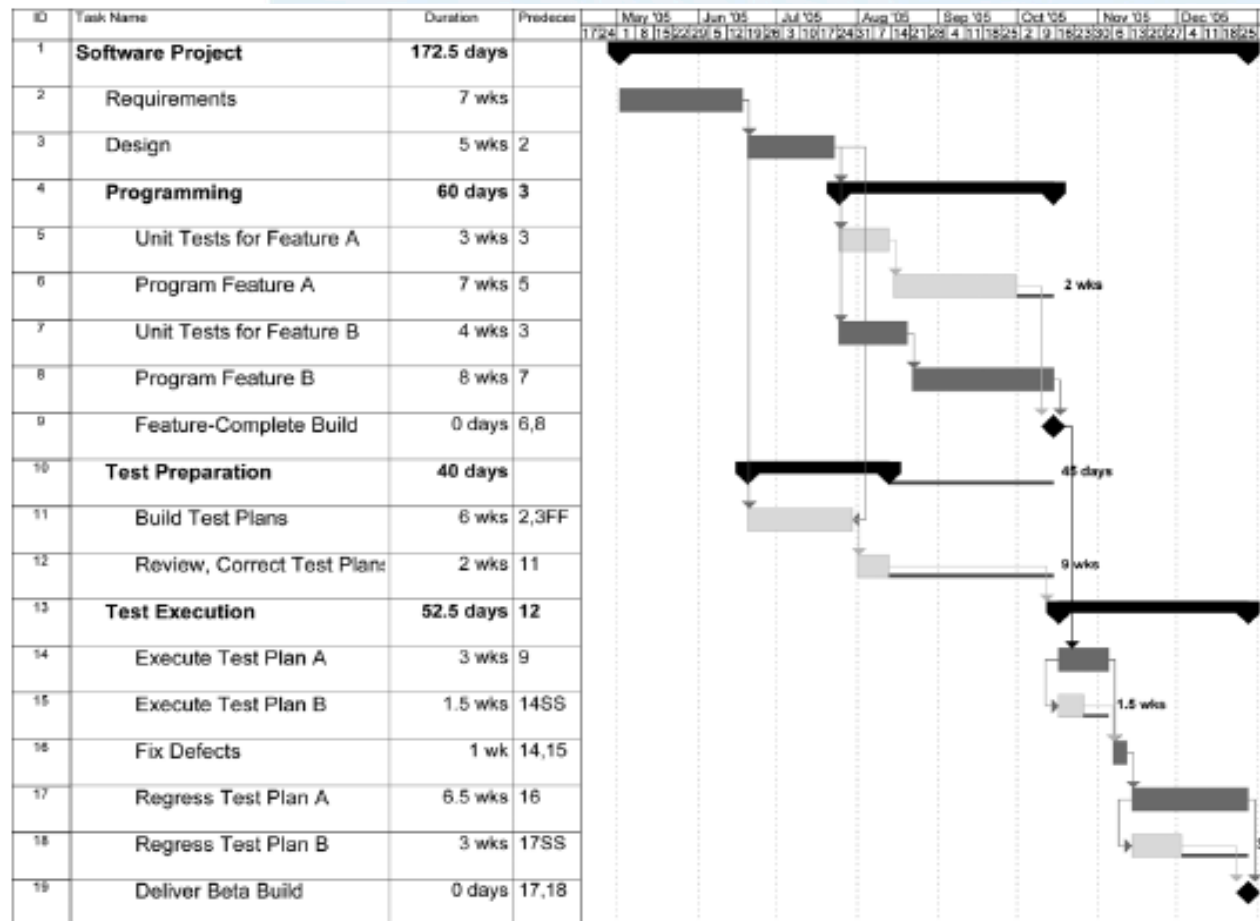


The Project Management Toolkit

Creating the Project Schedule:

- Identify the WBS: work tasks to be performed (smallest)
- Estimate the effort for each task (PMs **don't work alone**)
- Determine task relationships (predecessor and parallel tasks)
- Assign Resources
- Develop a preliminary structure – get team feedback
- Add in contingency buffer (risk contingency-vacation, sick, travel time)
- Finalize the schedule. Incorporate feedback from the stakeholders and get acceptance (sign-off).

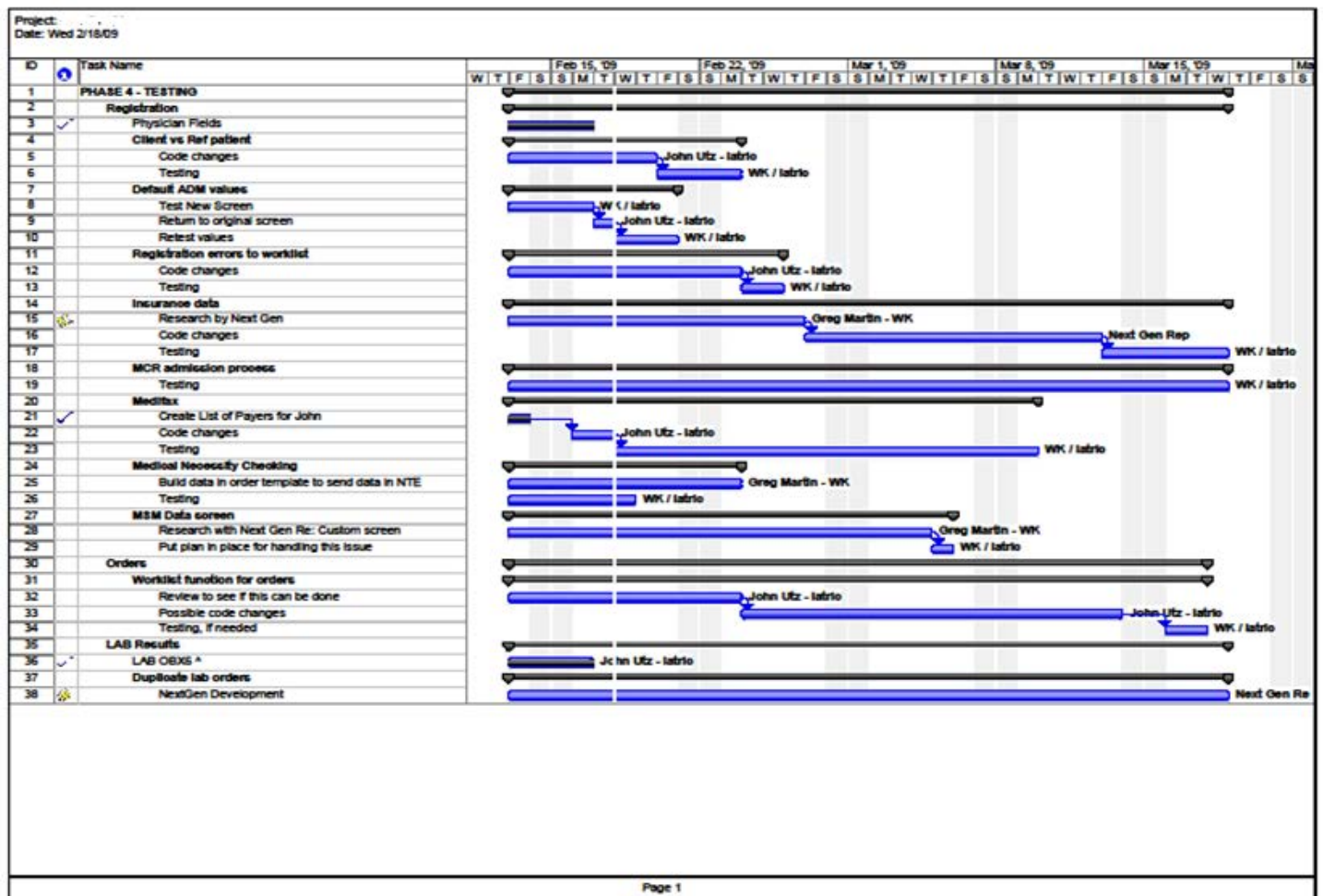
Project Preliminary Schedule - Example



Project Schedule- MS Proj.

Sample: Milestones vs. Deliverables -GANTT

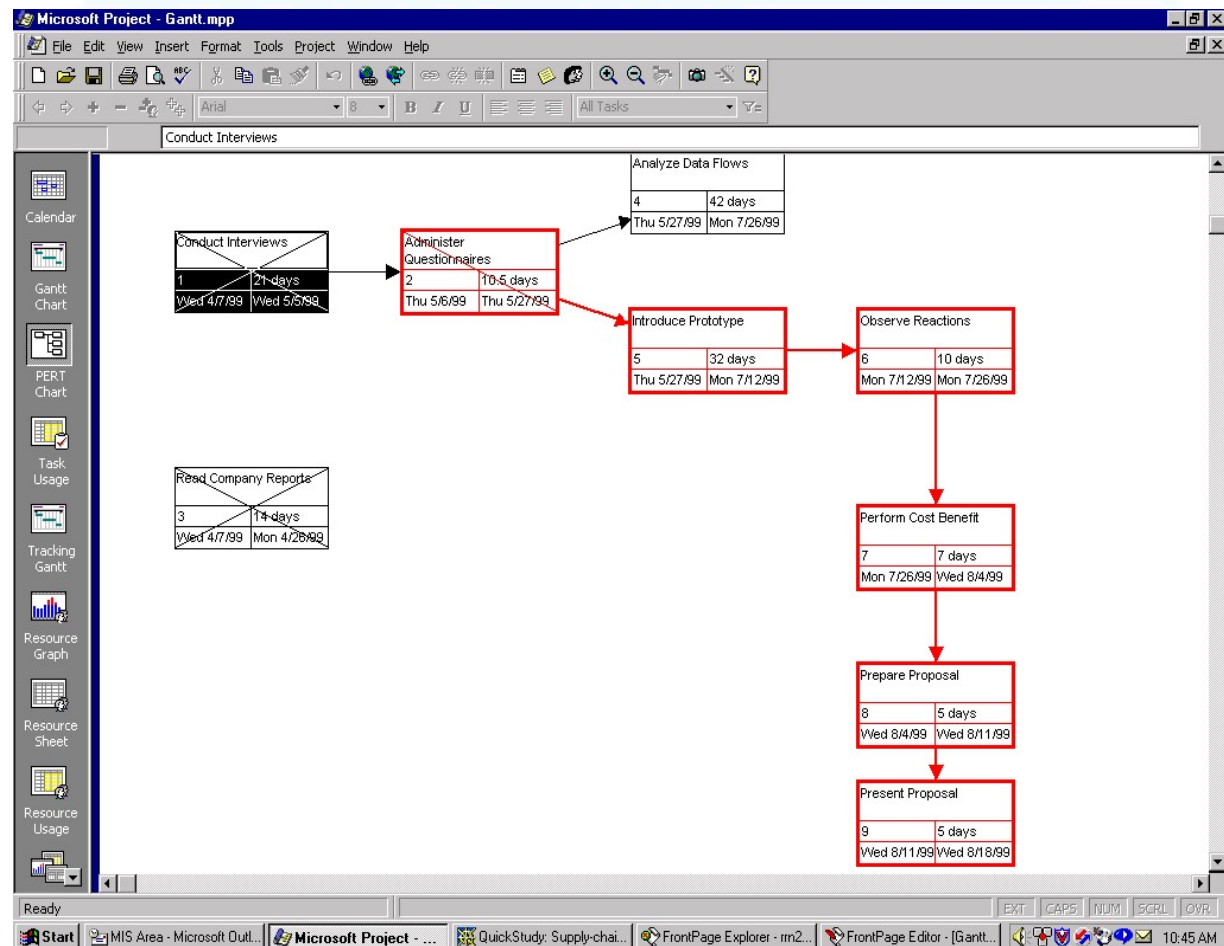
Milestones- flag key event, reach a phase or important decision point, can be SYMBOLIC.



Project Management

PERT CHART – Program Eval and Review Technique

PERT chart (another visualization tool-best show dependencies) developed by NAVY to manage large, **more complex projects**. Critical path shown in RED, crossed out=complete



MILESTONES and DELIVERABLES explained

Milestones- used to flag key event, reach a phase, or important decision point, can be SYMBOLIC, can represent the intangible.



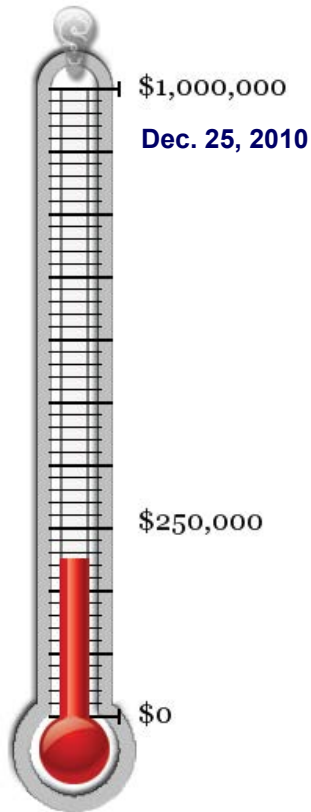
Deliverable- note the word “Deliver”...which implies something is produced and given to someone else.

For example: A PIZZA

When your project produces a Pizza, it is important, but it is typically not a key event.

A deliverable CAN be a milestone, and a milestone CAN be a deliverable...but usually it is NOT.

Project Status



Status Reports: Communication documents that help create clarity with the goals, direction and actual status of the project.

- Think about fundraising thermometers used by organizations like the Red Cross or food drives to track donations. At the top, they list how much money or food they intend to raise and the date the plan to raise it by. This is their *goal*.

Responsibility Matrix

Responsibility Matrix: Outlines what is expected from the various resources allocated to your team. Typically, it is a basic matrix template that defines activities / responsibilities and assigns the responsible resource.

Key Activity	Hospital	iatric	Other Vendor
1. Determine Physician Fields	X-Chad		
2. Document Reports Required		X-Sally	
3. Perform Testing	X-Mary	X-Dawn	
4. Analyze Lab Result Provided	X-Ted		
5. Provide Radiology Exams			X-Samuel/Miles
6. Perform Audit Report		X-Dave	

Communication Plan

Communication Plan: Getting the *right information* to the *right stakeholders* at the *right time*

Some basic rules of communication in Project Management:

- Keep it short
- Keep it relevant
- Keep it fun (add some humor when possible)
- DO IT OFTEN
- Communicate, communicate, communicate

Young Programmer and Project Manager

Communication: How action is sometimes misinterpreted...

A young Programmer and his Project Manager board a train headed through the mountains on its way to Chicago. They can find no place to sit except for two seats right across the aisle from a young woman and her grandmother. After a while, it is obvious that the young woman and the young programmer are interested in each other, because they are giving each other smiles and looks. Soon the train passes into a tunnel and it is pitch black. There is a sound of a kiss followed by the sound of a slap.

Young Programmer and Project Manager

When the train emerges from the tunnel, the four sit there without saying a word.

The **grandmother** is thinking to herself, “It was very brash for that young man to kiss my granddaughter, but I’m glad she slapped him.”

The **Project manager** is sitting there thinking, “I didn’t know the young tech was brave enough to kiss the girl, but I sure wish she hadn’t missed him and she slapped me!”

The **young woman** was sitting and thinking, “I’m glad the guy kissed me, but I wish my grandmother had not slapped him!”

The **young programmer** sat there with a satisfied smile on his face. He thought to himself, **“Life is good. How often does a guy have the chance to kiss a beautiful girl and slap his Project manager all at the same time!”**

Communication Plan

- Assign a communication point person
- Provide agendas and minutes at key team meetings
- Provide schedule and important team documents. Centralize documentation for team use (provide location – SEND THE LINK!!)
- Communicate key milestone dates: Testing, Go Live, Downtime, Downtime procedures and Training
- Provide phone numbers, e-mail and other contact information of key team players / leaders to the entire team for use, problem solving and strategic updates
- Use 5 Cs: Clear, Concise, Courteous, Consistent, Compelling

Project Quality

Quality Plan: PMI defines quality as “conformance to requirements and fitness of use.”

- Basically, does the project produce what it said it would and does the customer feel it produced what satisfies his real need?
- Consider this: 50% of all new products fail to meet their goals because they do not meet the needs of their target customer and are released with unacceptable quality issues.

Project Quality

To focus on quality:

- Be relentlessly obsessed with the customer.
- Include the customer in QUALITY from the start. Don't be too busy to involve the customer. Define the quality process from their perspective.
- Plan quality into your project. Assign tasks to ensure quality (testing).
- Right size your quality initiative. Does it need to pass FDA approval or is it more a “quick and dirty” initiative?
- **Trust but verify.** Assume nothing. Whether it is assigned externally or assigned to a team member, perform some level of verification to ensure the resulting work product meets the targeted criteria.

Risk Management

Risk Planning: The goal of managing risk is to *identify and prepare* for potential threat to the project's critical success factors before it actually occurs.

- Risk Management is the essence of being proactive.
- Every project entails risk. Remember, without risk, there is typically little or no reward.
- A risk response plan means potentially adding time, resources or cost to a project to **mitigate the risk that is identified. (biggest mistake is to identify but not address and provide a mitigation strategy)**

Tips on Managing Deliverables

REMINDER ON DEFINITIONS....

Deliverable: A **tangible, verifiable work product** such as a detail design, a working prototype.

Note the word deliver which implies that something is produced and given to someone else

Milestone: Milestones are **key events** and have a **symbolic purpose**. They are not necessarily tangible but can be. Often, more than one deliverable is completed within a milestone task.

Managing Deliverables

Suggestions for **deliverable** tracking:

Track in a deliverable summary spreadsheet

- Identify: Work product name
- Modification: Is this newly created or updated (document)
- Version: Current version of the work product
- Status of product: In process, completed, approved
- Owner: Person responsible for the product / change
- Target deliverable completion date
- Actual completion date
- Approver: Person approving product / change (customer)
- Approval target date / final approval date

Six Major PM Principles

Remember, the main purpose of project management is to achieve the success criteria set forth at the beginning of the project and meet stakeholder expectations.

1. Always define the project success criteria in detail...in writing. Exactly what must be done? What product is to be delivered? When it is expected to be delivered?

This is scope, requirements (specs), date expectations.

Six Major PM Principles

2. Get the RIGHT people involved and keep them involved. Try to include your customers every step of the way.
 - Roles / responsibilities matrix
 - Get customer approval / sign-off
 - Communicate, communicate, communicate
 - Know all your stakeholders. Yes, even the doctor that is never on call.

Six Major PM Principles

3. Develop the schedule.

Break down the project into tasks. Put these tasks on the schedule and determine milestones, key accomplishments.

Six Major PM Principles

4. Estimate the time.

Estimate each phase. Start by estimating task by task. Determine time involved. Is the customer date expectation reasonable? Sometimes it is better to think backward.

Six Major PM Principles

5. Recognize that change is inevitable and establish a procedure for dealing with change.

Record it. Email the team. Get approval from the customer / programmer. Get a time estimate for the change requested and introduce it into the schedule. Determine how it will impact the delivery date. Determine if it needs to be broken into a separate project phase.

Six Major PM Principles

6. Agree in advance what constitutes **closure** and **acceptance**.

Obtain written acceptance of deliverables throughout your project. Acceptance is an iterative process and typically not a one time event.

Things to Remember

Every project is unique. Every project has a discrete beginning and end. You are producing a one-of-a-kind project every time and it requires using all of your skill sets:

- Business skills
- Technical knowledge / Clinical knowledge
- Leadership skills
- Communication skills
- Project Management fundamentals

Learn from experience (mistakes) and make new and more exciting mistakes the next time!

Some Important facts: IF YOU WANT TO GET YOUR PMP

TO APPLY FOR THE PMP you need to have either:



1. A **four year degree** (bachelors or equivalent) and three years project management experience with **4,500 hours** leading and directing projects and **35 hours** of project management education
2. A **high school diploma** (or equivalent secondary diploma) with at least five years of project management experience, with **7,500 hours** leading and directing projects and **35 hours** of project management education

FIRST THINGS FIRST

Become a member of PMI (Project Management Institute) -OPTIONAL

www.pmi.org



- PMBOK 4th edition (Project Management Body of Knowledge) that you can download
- PMI LOCAL Chapters (and study groups locally – additional fees do apply)
- Access to PMP Credential Handbook
- Leadership and volunteer opportunities
- Access to PM **publications/newsletters/eReads and references**
- Access to PMI Communities of Interest - free

What will it cost to join PMI?

Recommendations continued...

PMI membership (OPTIONAL):

USD \$129 to join

USD \$119 to renew

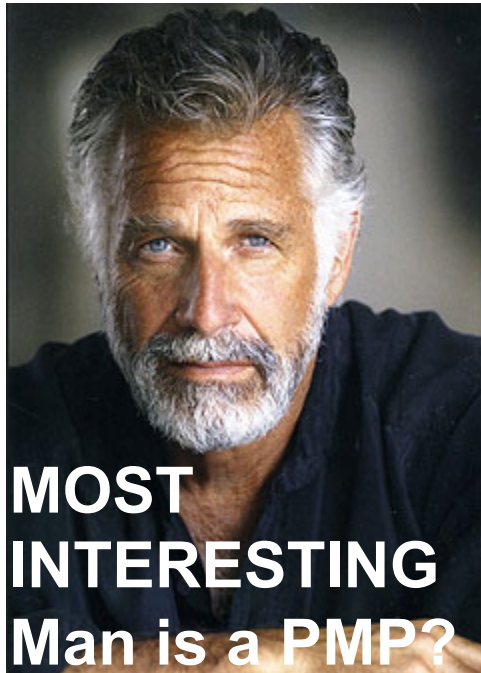
Local Chapter Membership fees vary – usually between \$25.00 to \$35.00 (you don't have to – networking, study groups, local jobs)



Which Certification Credential is for you?

Although earning Project management credentials will not likely make you the most Interesting person in the world... It's an awesome educational goal:

- Certified Associate in Project Management (CAPM)® (HS diploma, 1,500 hours experience **or** 23 hours PM education)
- **Project Management Professional (PMP)**®
- Program Management Professional (PgMP)®
- PMI Risk Management Professional (PMI-RMP)®
- PMI Scheduling Professional (PMI-SP)®
- New — PMI Agile Certified Practitioner (PMI-ACP)SM PILOT
AGILE PROGRAM – agilepilot@pmi.org



Which Certification Credential is for you? PMI CAPM?

The PMP credentialing scheme is accredited by ANSI, against the International Organization for Standardization (ISO) 17024, and registered against the ISO 9001:2000 for quality assurance.

- Certified Associate in Project Management (CAPM)® (HS diploma, 1,500 hours experience on project team **or** 23 hours PM education)
- CAPM is an entry-level certification for Project practitioners with little or NO experience –
Member test is \$225.00 –retest every 5 years
-150 questions, 15 pretest and don't affect score
– 3hrs , questions are primarily from PMBOK)
- The CAPM is great for college grads with the PM educational PDU's but no experience, and want to work on a project team or work towards being a project manager.

Which Certification Credential is for you? PMI PgMP?

Program Management Professional (PgMP)®

PROGRAM Management Professional recognizes the advanced experience and skill of PROGRAM management, demonstrating competency to oversee multiple, related projects. **Four year degree** at least **four years of project management** experience, and **four years of program management** experience OR **Secondary diploma (HS)** with **four years of project management** experience and **SEVEN years of program management**.

UNLIKE other PMI credentials, you must pass a sequence of three evaluations to obtain the PgMP credential:

Evaluation 1 – Application review: the initial evaluation occurs through an extensive application review during which a **panel of credentialed program managers will assess your professional experience** based on your responses to the Program Management Experience Summaries provided on the application.

Evaluation 2 – **170** question **Multiple Choice exam** – to demonstrate your competence in both situational and scenario- based questions.

Evaluation 3 - **Multi-Rater assessment** – Similar to a 360 review process, a team of raters that you select will assess your history of demonstrated performance of tasks that are pertinent to program management

Which Certification Credential is for you? PMI-RMP?

The Risk Management Professional: PMI-RMP
– specializes in Risk management

This Risk certification recognizes unique expertise and competency in assessing and identifying project risks, mitigating threats, and capitalizing on opportunities, while still possessing a baseline knowledge and practical application in all areas of project management.

Requirements: Four year degree with at least 3,000 hours of project risk management and 30 hours of project risk management education OR Secondary (HS) diploma with at least 4,500 hours of project risk management experience and 40 hours of project risk management education.

Continuing Certification Requirements- PMI-RMP ongoing CCR -(on going you will need 30 PDU' s in project risk management per three-year cycle)

Which Certification Credential is for you? PMI-SP?

The Scheduling Professional: PMI-SP – specializes in Project Scheduling (a specialty credential)

The Scheduling Professional credential holder must demonstrate skill and competence in the specialized area of project scheduling—developing and maintaining project schedules:

Requirements: Four year degree with at least 3,500 hours of project scheduling experience and 30 hours of project scheduling specific education OR Secondary (HS) diploma with at least 5,000 hours of project scheduling experience and 40 hours of project scheduling education.

Continuing Certification Requirements- PMI-RMP ongoing CCR -(on going you will need 30 PDU's in project scheduling education per three-year cycle)

Which Certification Credential is for you? PMI-ACP?

The Agile Certified Practitioner: PMI-ACP – designed for practitioners who utilize Agile approaches to project management in their project (this is excellent for those in a development environment)

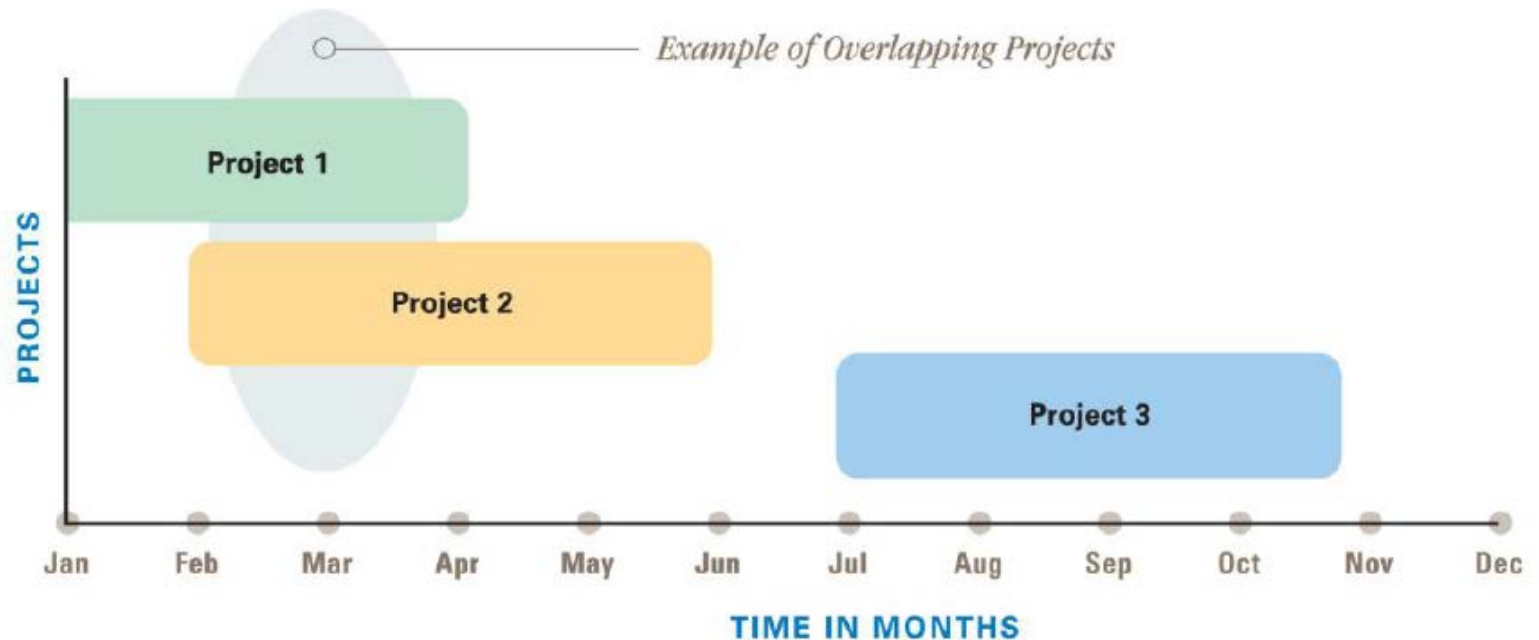
The Agile Practitioner demonstrates skill and competence in the specialized area of project scheduling.

Requirements: Secondary degree (HS diploma or associates degree) plus 2,000 General Project Management experience hours (12 months) working on project teams. PLUS 1,500 hours working on agile project teams (earned within last two years), plus 21 CONTACT hours in Agile management topics and the TEST of AGILE fundamentals.

Recording your Experience for eligibility purposes....

This is important to keep in mind:

BY PMI STANDARDS: Each month that you work on multiple, overlapping projects counts as ONE month toward the total requirements. For example: a project manager works on Project 1 and Project 2 simultaneously from February to April. The total time from February to April counts as THREE not six months toward the total hours to fulfill the project management experience requirements. PMI is looking for **UNIQUE, NON-OVERLAPPING experience**.



Survey says! ...www.cio.com



- 2010 Survey data shows that the longer project management professionals hold PMI's PMP certification, the higher their salaries. (median salary)
- Less than 1 year: \$86,000
1 to 5 years: \$100,000
5 to 10 years: \$108,206
10 to 20 years: \$118,000
- Don't have a PMP certification? Don't worry too much. Project management professionals who lack a PMP still pull a median annual salary of. **\$91,000**

Completing the Application Form and gaining PDU's

If you hold a certification.. .you can report your Continuing Credit Requirements/ PDU (professional development) activities online at:

www.pmi.org/ccrs

You can complete your ONLINE PMP application form by selecting CERTIFICATION tab and select BLUE READY TO APPLY BUTTON.

You can fill out the printable PDU activity reporting form, also available online for printing at (**or printable PMP application**):

<http://www.pmi.org/en/Certification/~media/PDF/Certifications/CCR%20Activity%20Reporting%20Form.ashx>

Project Mgmt. 101 from MUSE is CATEGORY B Educational Activity, Continuing education offered by a University/college or a training organization (MUSE)

Reviewing what to do next

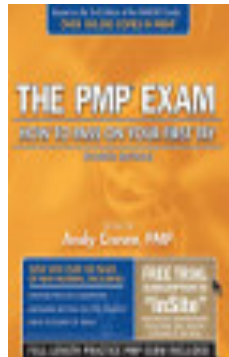
1. Join PMI (and a local chapter- get involved with a local study group) OPTIONAL
2. Print the PMBOK -4th ed.(Project Management Book of Knowledge and begin to read it)
3. Print the PMP Handbook and read it **ENTIRELY**
4. I would recommend printing out the printable application form before moving into the ONLINE CERTIFICATION SYSTEM (so you will not feel rushed)
5. THEN used the Online system to apply, once you start the online application you cannot cancel it. The application remains open for 90 days.

Reviewing what to do next

OPTIONAL: Purchase the book – and take the practice exams

“THE PMP EXAM, How to pass on your first try (Fourth Edition)”

-written by Andy Crowe, PMP



PMP Credential Fees

Exam fees are based on your PMI membership status at the time you submit payment for the credential. If you apply right before you apply for the credential, **make sure you receive confirmation of your membership before you pay. (Optional but saves \$\$)**

Computer Based Test (CBT) for PMI member
\$405.00

Computer Based Test (CBT) for non-member
\$555.00

There are 200 Multiple choice questions, 25 of the 200 are considered pretest questions and do not affect the score (these are placed randomly throughout the exam)

Time for exam = 4 HOURS, no scheduled breaks (but you can break)

Audits? What if my application is audited?

Don't fear an audit... IF your application is "**primarily**" RANDOMLY selected for an audit, just comply with the audit process. (small percentage- the selection for audit is primarily random)

The worst thing that can happen is you don't get past the audit process, and you are refunded the examination fees (less a processing fee of \$100)

In the case of an AUDIT:

You will need to submit PMI **hard copies** of your education (diplomas), training certificates (with contact hours listed), and experience verification (signatures from your manager/supervisor from the projects recorded in your application).

PMI provides you 90 days to submit the documents, the audit processing should take 5 to 7 business days.

Answer all the questions

Answer all 200 questions on the exam, there are 25 pretest questions that are RANDOMLY located. You are not penalized for questions answered incorrectly. Questions left unanswered are “wrong”... so answer them all.

You have exactly 4 hours to complete the exam.

You will receive your results on screen when you finish the CBT. You will also receive a printed copy of your test results, and a second level of results that is provided by domain:

Proficient: Indicates performance above average level of knowledge for the domain

Moderately Proficient: performance that is at the average level of knowledge in this domain

Below Proficient: performance below the average level of knowledge

What is PROMETRIC?

SCHEDULE Your exam through Prometric; the leading global provider of comprehensive testing and assessment services.

Use the Prometric site to find testing centers near you and dates when the exam is available.

<http://www.prometric.com/PMI/default.htm>

Select your location, and on the next screen, select

LOCATE A TEST SITE:

2618: PROMETRIC TESTING CENTER
210 Exchange Place Suite B
Huntsville, AL 35806
Phone 256-430-1945

[Schedule an Exam](#)
[Get Directions](#)

Recommends scheduling...

Prometric & PMI recommend:

Schedule the exam at least **six weeks in advance** of your preferred test date

At least **three months before the expiration** of your eligibility (which is 12 months from your application acceptance by PMI)

For example: IF you received notice Oct. 31st 2011, that your application for PMP was approved, you would want to schedule at Prometric before August 1 of 2012 (because your expiration for eligibility is Oct. 31st of 2012).

Also, if you decided you wanted to take the exam January 9th, 2012 you would want to schedule before Nov. 28th to insure your preferred test date.

New PMP certification exam?

The OLD PMI certification exam **expired August 30, 2011.**

The NEW exam is still based on the 4th edition PMBOK and the biggest change is that the PMI Code of Ethics and Professional Conduct will **now be integrated into the current exam process groups (DOMAINS)** consisting of:

Initiation, Planning, Execution, Monitoring & Control, and Closing

EDUCATION and ELIGIBILITY requirements REMAIN THE SAME!!

The new PMI certification exams have **only changed by 30%**, because the new ROLE DELINEATION STUDY (RDS) has been integrated into the exam.

What is the RDS anyway?

The Role Delineation Study

The **RDS** impacting the 2011 exam began in 2009 to define knowledge and task driven competencies of Project Managers (lead and direct projects).

Included more than 3,000 PMP credential holders from 97 different countries, and a steering committee and a task force of volunteers.

Volunteers included PMP credential holders from every global region, and also demonstrated diversity in industry, job roles and other demographics.

As a result of the RDS, the Professional and Social responsibility content area (Domain 6 previously) will now be tested in every domain (5) rather than as a separate domain on the exam.

RDS revealed that professional and social responsibility was integrated into all the work of Project Management and should be viewed as now integrated into the day-to-day role of the Project Manager.

Exam Content Outline (changes)

Domain	% of Questions on Test
Initiating the Project	13% (was 11%)
Planning the Project	24% (was 23%)
Executing the Project	30% (was 27%)
Monitoring & Controlling	25% (was 21%)
Closing the Project	8% (was 9%)
Professional and Social Responsibility	Integrated into Domain (was 9%)
TOTAL	100%

Total questions scored 175, un-scored (pretest) 25 = 200 total questions

Each Domain contains Tasks and Knowledge and Skills

Each domain contains PM **tasks** that will be measured through the questions in the PMP certification exam, and it is expected that PM's will have the **knowledge and skills** required to perform these tasks. There will also be questions on the cross-cutting knowledge that spreads across all domains.

DOMAINS:

- I. Initiating the Project
- II. Planning the Project
- III. Executing the Project
- IV. Monitoring and controlling the project
- V. Closing the project

Domain I: Initiating the Project (13%)

Task 1 – Perform project assessment based on available information and meetings with the sponsor, other SME's, in order to evaluate the feasibility of new products or services within the given assumptions and/or constraints

Task 2 – Define the high level scope based on the business and compliance requirements to meet the customers expectations

Task 3 – Perform key stakeholder analysis, use brainstorming, interviewing and other data-gathering techniques in order to ensure expectation alignment and gain support for the project

Domain I: Initiating the Project (13%)

Task 4 – Identify and document high level risks, assumptions and constraints based on current environment, historical data or expert judgment

Task 5 – Develop the Project Charter by further gathering and analyzing stakeholder requirements, document project scope, milestones, deliverables.

Task 6 – Obtain approval for the project charter from the sponsor and customer, to formalize authority assigned to PM and gain acceptance of project



Domain I: Initiating the Project – Knowledge/ Skills (13%)

- Cost-benefit analysis
- Business case development
- Project selection criteria (i.e. cost, feasibility, impact)
- Stakeholder identification techniques
- Risk identification techniques
- Elements of a project charter

Domain II: Planning the Project (24%)

Task 1 - assess detailed project requirements, constraints, and assumptions with stakeholders based on project charter, lessons learned, and use of requirement gathering techniques (e.g. planning session, brainstorm, focus groups) to establish project deliverables

Task 2 - Create WBS with the team by deconstructing scope

Task 3 - develop budget plan based on scope using estimating techniques to manage project cost

Domain II: Planning the Project (24%)

Task 4 -develop project schedule based on timeline, scope and resource plan to manage timely project completion

Task 5 – develop a HR management plan by defining the roles and responsibilities of the project team members to create an effective project organization structure

Task 6 – develop a Communication plan based on project organization structure

Domain II: Planning the Project (24%)

Task 7 – Develop a procurement plan based on project scope and schedule in order to ensure required resources available

Task 8 - Develop a quality management plan requirements to prevent occurrence of defects and reduce cost of quality

Task 9 – Develop a change management plan by defining how changes will be handled in order to track and manage change

Domain II: Planning the Project (24%)

Task 10- Develop a risk management plan by identifying, analyzing and prioritizing project risks and define risk response strategies

Task 11- Present the Project plan to the key stakeholders in order to obtain approval to execute project (if required)

Task 12 – Conduct a kick-off meeting with key stakeholders to announce start of project, communicate milestones, share info.

Domain II: Planning - Knowledge and Skills (24%)

- Requirements gathering techniques
- Work breakdown structure (WBS) tools and techniques
- Time, budget and cost estimation techniques
- Scope management techniques
- Resource planning process
- Workflow diagramming techniques
- Types and uses of organizational charts
- Elements, purpose and techniques of:
 - Project planning, communication planning, procurement planning, quality management planning, change management planning, risk management planning.

Domain III: Executing the Project (30%)

Task 1 – Obtain and manage **project resources** including outsourced deliverables by following the procurement plan, in order to ensure successful project execution

Task 2 – **Execute the tasks** as defined in the project plan, in order to achieve the project deliverables within budget and schedule

Task 3 – Implement the **quality management plan** using the appropriate tools and techniques in order to ensure that work is being performed according to required quality standards

Domain III: Executing the Project (30%)

Task 4 – Implement approved **changes** according to the change management plan, in order to meet project requirements

Task 5 – Implement approved actions (workarounds) by following the **risk management** plan to minimize risks

Task 6 - **Maximize team performance** by leading, mentoring, training, motivating team members

Domain III: Executing Knowledge and Skills (30%)

- Project Monitoring tools and techniques
- Elements of a statement of work
- Interaction of WBS structure elements within the project schedule
- Project budgeting tools and techniques
- Quality standard tools
- Continuous improvement processes

Domain IV: Monitoring and Controlling (25%)

Task 1 – Measure **project performance** using appropriate tools and techniques in order to identify and quantify any variances, perform approved corrective actions and communicate with relevant stakeholder

Task 2 – **manage changes** to the project scope, schedule, and costs by updating the project plan and communicating approved changes to the team, to **ensure revised goals met.**

Task 3 – Ensure that project **deliverables conform to the quality standards** established in the quality management plan using appropriate tools and techniques

Task 4 – Update **risk register and risk response plan**, identify new risks, assess old risks, and determine and implement proper response strategies

Domain IV: Monitoring and Controlling (25%)

Task 5 – Assess **corrective actions on the issue register** and determine next steps for unresolved issues by using appropriate tools

Task 6 – Communicate **project status to stakeholders** for their feedback, in order to ensure the project aligns with the business needs.

Domain IV: Monitoring and Controlling (25%)

Knowledge and Skills:

- Performance measurement and tracking techniques (EV (earned value), CPM (critical path), PERT (program evaluation and review technique))
- Risk identification and analysis techniques
- Project control limits (thresholds, tolerance)
- Risk response techniques (transference, mitigate)
- Project performance metrics (costs, efforts, milestones)
- Cost Analysis techniques
- Problem solving techniques and reporting procedures
- Variance and Trend analysis techniques
- Project plan management techniques
- Change management techniques
- Integrated change control processes

Domain V : Closing the Project (8%)

Task 1 – Obtain **final acceptance** of project deliverables by working with the sponsor and/or customer, confirm that the project **scope and deliverables** were met.

Task 2 – Transfer **ownership** of deliverables to the assigned **stakeholders** in accordance with the project plan, in order to facilitate project closure..

Task 3 – Obtain **financial, legal and admin. closure** using generally accepted practices in order to communicate formal project closure and ensure no further liability.

Task 4 – Distribute **final project report**, project closure information, project variances, any issues to provide **final project status**.

Domain V: Closing the Project (8%)

Task 5 – Collate **lessons learned** through comprehensive **project review**, to create/update the organizations knowledge base

Task 6 - **Archive** project **documents** and material in order to retain organizational knowledge, comply with statutory requirements and ensure availability of data for potential use in future projects and internal/external audits

Task 7 – Measure **customer satisfaction** at the end of the project by capturing **customer feedback** in order to assist in project evaluation and enhance customer relationships

Domain V: Closing the Project (8%)

Knowledge and Skills:

- Contract closure requirements
- Basic project accounting principles
- Close-out procedures
- Feedback techniques
- Project review techniques
- Archiving techniques and statuses
- Compliance (statute / organization)
- Transition planning techniques

Cross-Cutting Knowledge and Skills (across all Domains)

Knowledge and Skills:

- Active Listening
- Brainstorming techniques
- Conflict resolution techniques
- Cultural sensitivity and diversity
- Data gathering techniques
- Decision making techniques
- Facilitation
- Information Management tools, techniques and methods
- Leadership tools and techniques

Cross-Cutting Knowledge and Skills (across all Domains)

Knowledge/Skills continued:

- Negotiating
- Oral and written communication techniques
- PMI's code of ethics and professional conduct
- Presentation tools and techniques
- Prioritization and time management
- Problem solving tools and techniques
- Project management software
- Relationship management
- Stakeholder impact analysis
- Targeting communications to intended audiences
- Team motivation methods

What if I fail the examination?

TAKE IT AGAIN, or A THIRD TIME!

You are granted a one-year eligibility period in which to pass the examination. During the eligibility period you may take the exam up to **three times**.

Gauge your time carefully, so you can **retake the exam within your eligibility period if you need to.**

E-reads and references PMI

- **Project Management** by Michel Thiry- Gower Publishing 2010
- **The AMA Handbook of Project Management, 3rd ed.**, by Paul C. Dinsmore and Jeanette Cabanis-Brewin 2011
- **Project Management Circa 2025** by David Cleland and Bopaya Bidanda PMI 2009
- **Things your PMO is doing Wrong** by Michael Hatfield, PMI 2008
- **Q and As for the PMBOK Guide 4th ed.** by Frank Anbari, PMI 2009

Project Management 101

Survey/ Contact Us

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Project Management 101 for Healthcare IT

Thank you for
attending!

