Project Management 101

The Basics Every Project Manager Should Know

IATRIC systems

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.

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? What is PMBOK?
- What is the value of Project Management?

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
  - Risk Plan

Today's Topics

Project Management – Six Major Principals:

- Defining what is Project Success
- 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 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 with divisional silos 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 training or certifications.

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

What is a Project Manager?

More than a manager of tasks:

- A coordinator
- A leader
- A coach
- A mentor
- A communicator
- A scientist and an artist
- A facilitator

What is a Project?

Definition of project:

"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 a new software application for a patient care area (Pharmacy, Radiology)
- Implementing a new interface between systems

Challenges

What typical challenges do Project Managers undertake with a project?

- Leading a team that has typically never worked together before
- 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

What is NOT a Project?

Operational goals of an 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 customer orders
- Performing accounts receivable and payable activities
- Working in a production line
- Providing customer support functions 24/7

Where Did PM Begin?

Project management evolved from the construction industry and the fundamental Project Management concepts do not always precisely relate to the healthcare IT industry.

Globally Recognized PM Organization

Project Management Institute (PMI) , www.pmi.org, is the globally recognized standards organization for PM. The PMI bible is the Project Management Body of Knowledge (PMBOK) . The PMP (Project Management Professional) is the testing/certification process of PMI.

The PMBOK defines 5 process groups in every project. They are: Initiating, Planning, Executing, Controlling and Closing.

What is the Value of PM?

- 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)

Why are 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 with multiple expectations: Each have their own needs of the project, not accustomed to working together.
- Communication boundaries: Due to the natural silo'd structure of large hospital / healthcare organizations.
- Managing Competing demands: Time, Scope, Cost, Resources.

Expectations Challenge

What Does the Customer Need?

Favorite PM 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 PM

- Vendors managing projects
- Managing multiple vendors
- Using project management TEAMS to facilitate product and vendor selection processes
- Project teams to identify and manage risk and provide risk mitigation strategies
- Servant leadership: There is a growing awareness that servant leadership style is paramount for effective project management.

Main Purpose of PM

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*.

The PM Toolkit

Project Charter: Authorizes project and project manager. Serves as notification to the organization (may list sponsors).

- 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 PM 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 PM Toolkit

SMART Project Goals and Objectives.

- Specific
- Measurable
- Achievable
- Realistic (rewarding)
- Time-based

The PM Toolkit

Scope Statement: Work that needs to be accomplished to deliver the product, service or result with the specific features and functions. Often called Project Justification.

- 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?" 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.

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.

Famous Planning Quotes:

- *"Plans are nothing; planning is everything"* – Dwight D. Eisenhower. This is not an excuse for not planning. The role of planning is understanding the value of the project.
- *"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.

The PM Toolkit

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 PM Toolkit

Creating the Project Schedule:

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

Project Preliminary Schedule

Sample

ID	Task Name	Duration	Predeces
1	**Software Project**	**172.5 days**	
2	Requirements	7 wks	
3	Design	5 wks	2
4	**Programming**	**60 days**	**3**
5	Unit Tests for Feature A	3 wks	3
6	Program Feature A	7 wks	5
7	Unit Tests for Feature B	4 wks	3
8	Program Feature B	8 wks	7
9	Feature-Complete Build	0 days	6,8
10	**Test Preparation**	**40 days**	
11	Build Test Plans	6 wks	2,3FF
12	Review, Correct Test Plans	2 wks	11
13	**Test Execution**	**52.5 days**	**12**
14	Execute Test Plan A	3 wks	9
15	Execute Test Plan B	1.5 wks	14SS
16	Fix Defects	1 wk	14,15
17	Regress Test Plan A	6.5 wks	16
18	Regress Test Plan B	3 wks	17SS
19	Deliver Beta Build	0 days	17,18

Project Schedule

Sample: Milestones Explained

Project:
Date: Wed 2/18/09

ID	Task Name
1	PHASE 4 - TESTING
2	Registration
3	Physician Fields
4	Client vs Ref patient
5	Code changes
6	Testing
7	Default ADM values
8	Test New Screen
9	Return to original screen
10	Retest values
11	Registration errors to worklist
12	Code changes
13	Testing
14	Insurance data
15	Research by Next Gen
16	Code changes
17	Testing
18	MCR admission process
19	Testing
20	Meditax
21	Create List of Payers for John
22	Code changes
23	Testing
24	Medical Necessity Checking
25	Build data in order template to send data in NTE
26	Testing
27	MSM Data screen
28	Research with Next Gen Re: Custom screen
29	Put plan in place for handling this issue
30	Orders
31	Worklist function for orders
32	Review to see if this can be done
33	Possible code changes
34	Testing, if needed
35	LAB Results
36	LAB OBXS ^
37	Duplicate lab orders
38	NextGen Development

Page 1

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. 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 responsible resources.

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 is PM:

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

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)
- 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 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 verity. 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.

Managing Deliverables

Work Products

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 (like delivering pizza). Deliverables are the little pizzas your project gives to you, your team and your customer.

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:

- 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 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 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 Principles

3. Develop the schedule.

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

Six Major 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 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 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.

Final Thoughts

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!

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