

MOVING THE BIG ROCKS

HOW TO SUCCESSFULLY ACCOMPLISH PROJECTS WITHIN HEALTHCARE ORGANIZATIONS

BY DAVID BAEHR, PMP

JUNE 2014



This white paper presents best practices for creating a project coordination and management structure within your organization. One that will help drive successful outcomes on the right projects at the right time.

You may be an executive leader of a healthcare organization and are finding it hard to move the big rocks. The daily or weekly tasks are scheduled, built into the processes, and they manage to be completed. But what about the big efforts, the one-time projects that require coordination across multiple disciplines? You just can't seem to get the project stuff done. Or maybe you can get them done, but they are often taking too long and costing too much. This seems to be a common problem facing organizations both large and small.

Organizations can be crippled or paralyzed by the lack of a proven methodology for the management of projects. In decades past, project management was seen as an art form and it was expected that a project would take longer than planned, cost more than desired, and perhaps even miss the target. Today project management has matured and the methods for successful project management are understood. Unfortunately, many healthcare organizations have not been exposed to professional project management principles

and they continue to struggle with projects that cost too much and move too slowly.

The consequences of poor project management in the implementation or reimplementing of software systems is too often seen. Many organizations are not realizing the benefits of the best-practices designed into their patient management system. Organizations are often using a small portion of the system because they have chosen to cling to past processes; or they have customized the system to retain their beloved processes and have consequently put themselves on a path toward greater separation from the present and future efficiencies of the system.

Whether discussing a small or large sized organization in industry or healthcare, experience has shown that the adherence to a simple project structure and methodology greatly improves the success. There is a subset of the project management body of knowledge that is critical. When this subset is applied to the projects within an organization the results can be astounding. Projects can be completed on time, on budget, and achieve the desired benefits. The project leaders and team members have a positive experience and are excited to take on the next challenge.

The Panel

Every healthy organization has more project ideas than they have resources to complete them. This ever-changing list of project ideas constitutes the project Portfolio of the organization. With so many ideas, some must wait while others proceed. But who gets to decide which projects will be worked on first and who is charged with keeping track of this list? A cross-discipline Focus Panel is needed to vet and prioritize the ideas in the Portfolio. Which ideas get resourced and in what order must be based on the needs of the business and must support the strategic goals. The Panel should meet on a regular basis to ensure that the

allocated resources are not being wasted and to assess and prioritize new ideas in the Portfolio. This overseeing Panel ensures that the right projects are being worked on at the right time with the right resources. It avoids conflicting projects and promotes complementary projects. There should also be a minimum threshold set for the definition of a project, such as an estimated effort exceeding 40 hours and requiring multiple resources. Ideas that do not meet the minimum requirements of a project should be assigned to an individual and overseen by their management.

Each idea presented to the Panel should have a Sponsor; someone at the executive level of the organization who is willing to place their clout and support behind the effort. It is the responsibility of the Sponsor to see that the cost/benefit analysis is completed and is presented to the Panel. Once the project is initiated, the Sponsor becomes an advocate

for the project team and holds the team responsible for the success of the project.

The Panel leader should periodically report out at executive leadership meetings. Of course, the Panel may not be privy to every piece of information within the organization and therefore can be trumped by executive leadership.

The Program

It is often the case that multiple ideas in the Portfolio can be related. A good example of this is ideas that have to do with improved use of the patient management system. When multiple ideas are related, they should be placed under the concept of a Program. (See Figure 1) The Program allows these inter-related ideas to be viewed as a whole, yet executed by separate project teams. When a Program concept is used the Sponsorship may reside at the Program level rather than at the

PROJECTS CAN BE COMPLETED ON TIME, ON BUDGET, AND ACHIEVE THE DESIRED BENEFITS.

YOU CAN ENSURE THAT THE RIGHT PROJECTS ARE BEING WORKED ON AT THE RIGHT TIME WITH THE RIGHT RESOURCES.

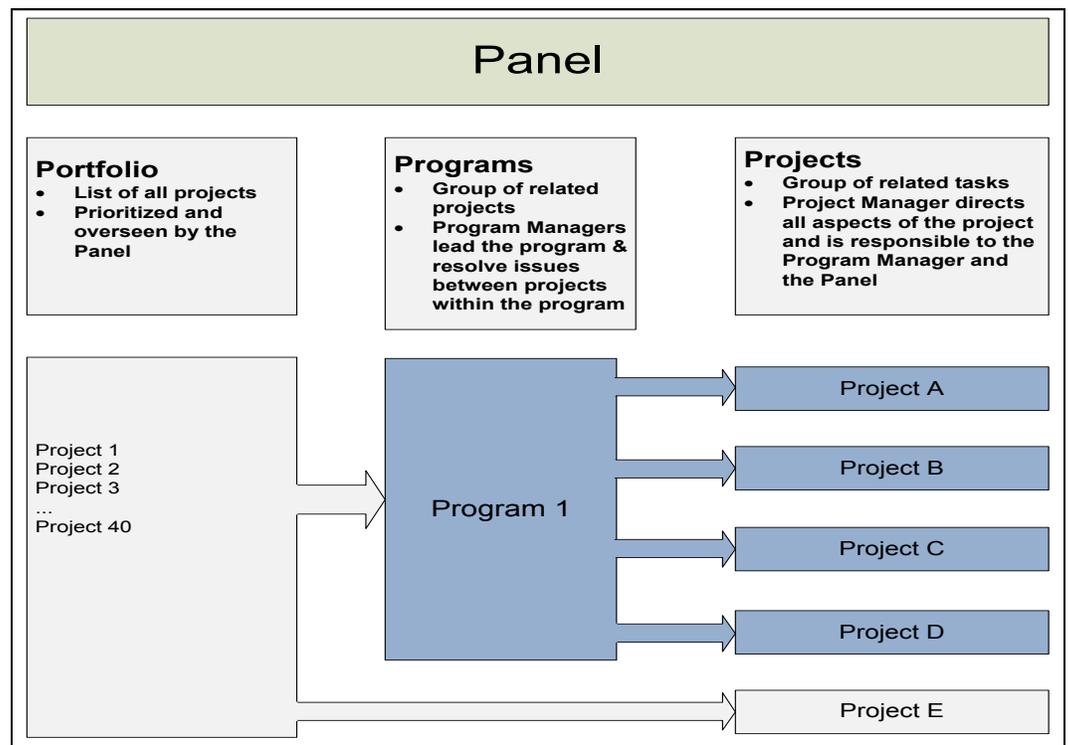


Figure 1

project level. The projects should follow their own execution plan but have an integrated schedule to coordinate the related activities. It is within the role of the Program Manager to maintain the integrated schedule. The Program team can be comprised of the leaders of the projects that are within the Program. The Program team should meet frequently to review the progress of the projects and take corrective action when necessary.

The Charter

At the onset of each project, a Project Charter should be created by the project leader and approved by the Sponsor and the Panel. The Charter defines the project and gives authority to the project team. It makes them responsible for the successful completion of the project. It should include a description of the project, the business need, the objectives to be achieved, the deliverables, the list of team members and customers, success criteria, known major risks, assumptions, scope, and constraints.

The Controls

A successful project must have controls, devices for keeping the project in control. Among the many control devices used in professional project management, the following are most important in the typical small to medium sized project: Schedule, Budget, Communication Plan, Quality Plan, and Risk Management Plan.

The need for a Schedule and Budget is obvious. The Schedule should have at the least four main sections: Initiation, Planning, Execution, and Closing. The Initiation section includes the tasks related to establishing the

project, such as producing the Charter, securing the resources, and having a project kickoff meeting. The Planning section should include the completion of all control documents. Of course, the Execution section is where the meat of the project is. This section contains all the steps that are unique to the specific project. The Closing section is used to ensure all project commitments have been met, the project documents are stored in an organized manner for future reference, and lessons learned have been recorded.

The Communication Plan forces the project team to consider how, how often, and who will communicate to each different stakeholder throughout the life of the project. Once completed, the project leader should periodically ensure that the plan is being followed and that it is meeting the needs of the stakeholders.

The Quality Plan defines the acceptable thresholds for quantifiable levels of performance within the project. If it can be measured and is important to the outcomes, specify the acceptable level in this document and the project strategy for achieving it.

In the Risk Management Plan, list all potential risks to the success of the project. Rate them across two scales: the probability of occurring and the degree of negative impact if they do. The risks which have a high probability of occurring or will have a severe negative impact on the project should be mitigated against. The Risk Management Plan specifies what that mitigation action is. During the life of the project, the project leader ensures that the specified mitigations are effective and reacts swiftly to any of the low probability or low impact risks that may occur.

There is much more that could be discussed in the area of project controls and the management of the project itself, but that is beyond the scope of this paper.

THERE IS A SUBSET
OF THE PROJECT
MANAGEMENT
BODY OF
KNOWLEDGE THAT
IS CRITICAL. WHEN
THIS SUBSET IS
APPLIED TO THE
PROJECTS WITHIN
AN ORGANIZATION
THE RESULTS CAN
BE ASTOUNDING.

Other Success Factors

Organizations new to project management principles require several cycles of learning before they are able to 'go it alone'. Start with project management training for a select group of potential project managers. Then execute a project using these people as the team. This project should be led by an experienced project manager so that the team members can observe the proper leadership of a project. Then choose two of the team members to lead the next project and keep the same team members. It is best to use co-leaders because neither of them will have project management experience and they can help each other to cover all the bases. This also gives project leadership experience to two staff members at a time. Experience has shown this to be very effective in the learning phases.

Be sure to include front line staff on the project team. Their input and support is essential. Front line staff often bring reality to the otherwise uninformed team. But be respect-

ful of their time. Use them very wisely. You may find that you have to lessen their caseload during their project involvement so that they can afford to devote the necessary time to the project.

Every project includes some aspect of change. Acceptance of the change will partially depend on your management of the change process. Just as with projects, there are proven methods for implementing change. Purposely follow a proven Change Management approach.

Celebrate

And don't forget to celebrate! Was the project team successful? Do they deserve to be rewarded for a job well done? Do you want staff to be willing to serve on future project teams? Then allow them the time and money for an appropriately sized celebration.



DAVID BAEHR, PMP

DAVID IS A CERTIFIED PROJECT MANAGEMENT PROFESSIONAL WITH 20 YEARS OF STRATEGIC AND TACTICAL LEADERSHIP EXPERIENCE IN BUSINESS AND TECHNOLOGY FOCUSING ON STRATEGIC PLANNING, OPERATIONAL EXECUTION, TEAM BUILDING, CONTINUOUS IMPROVEMENT, SECURITY COMPLIANCE, AND PROJECT MANAGEMENT.

DAVID'S BACKGROUND INCLUDES COMPUTER SYSTEM SELECTIONS AND IMPLEMENTATIONS, BUSINESS PROCESS REENGINEERING, BUSINESS PROCESS COMPUTERIZATION, TECHNOLOGY IMPLEMENTATION, IT DEPARTMENT OPERATION, AND HIPAA SECURITY IMPLEMENTATION.



1807 Holland Road
Fuquay-Varina, NC 27526

www.rocsinc.com
Phone: 919-886-5521
Fax: 919-287-2473
E-mail: info@rocsinc.com

