WELCOME

GINA GAMBARO

Director, Marketing & Business Development

Asking a question is easy!

➢ <u>About the topic being presented</u> —

  ❖ Click on the **Q&A** icon at the bottom of your screen
  ❖ Type your question & hit Enter
  ❖ Questions will be answered at the program's end, or offline if time runs out

➢ <u>About technical issues or CE credit</u> —

  ❖ Click on the **Chat** icon at the bottom of your screen
  ❖ Type your question & hit Enter
  ❖ Our team will reply to your question right away

Housekeeping notes

▶ This webinar is being recorded for on-demand access later, after the series' conclusion

▶ To earn CE, you must attend the <u>entire</u> session

▶ **For those <u>sharing</u> a computer**

- Complete a manual sign-in sheet before the program ends
- <u>Go to **Chat** to access the link for the sign-in sheet</u>
- Each participant must complete an evaluation to obtain CE credit
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Agenda

BUSINESS LUNCH

Good, Cheap & Fast

Project vs. Operations

Role of the Project Manager

Project Lifecycle

Taking the Lead

Risk and Mitigation Planning

Project Failures

Tips and Tricks

Questions & Answers

About Me

I am passionate about Project Management! I have successfully managed complex IT, Professional Services and Managed Service implementations for a variety of clients, including Express Scripts, BJC Healthcare, Duke University Health Services and UCSF Medical Center. Certifications include: PMP®, ITIL and BPM. Currently, I am the Project Management Team Lead at WheelHouse Solutions, an IT Services company based in St. Louis, MO.

Projects vs. Operations

Organizations perform work that falls into two categories:

PROJECTS

Temporary endeavors (they have a definitive end date), undertaken to create a unique product or service -- no two projects are identical.

- Installing a new medical record or other software

- Installing a new security system in your facility

- Replacing all infusion pumps in a facility

- Construction or remodeling of your facility

OPERATIONS

Encompasses work that is ongoing and repetitive. Does not have an end date, although it may only be performed a few times a year.

- TRAINING TO ENSURE HIPPA COMPLIANCE

- REGULAR, PLANNED MAINTENANCE TO MEDICAL EQUIPMENT, COMPUTERS, FACILITIES, ETC..

- CONTINUING EDUCATION/TRAINING OF YOUR STAFF

Role of the Project Manager

SINGLE POINT OF CONTACT

The individual with authority to assign tasks, monitor progress and oversee that the integrated set of tasks composing the project are completed according to agreed upon specifications. Project Managers are responsible for coordinating and facilitating, however they are not normally the person who caries out the actual project tasks."

WE ARE LOUD

We **Lead** -Motivate and direct resources to task completion. We **Own** – Take control. We **Understand** – Know everything going on. We **Drive** our projects - balancing quality with urgency.
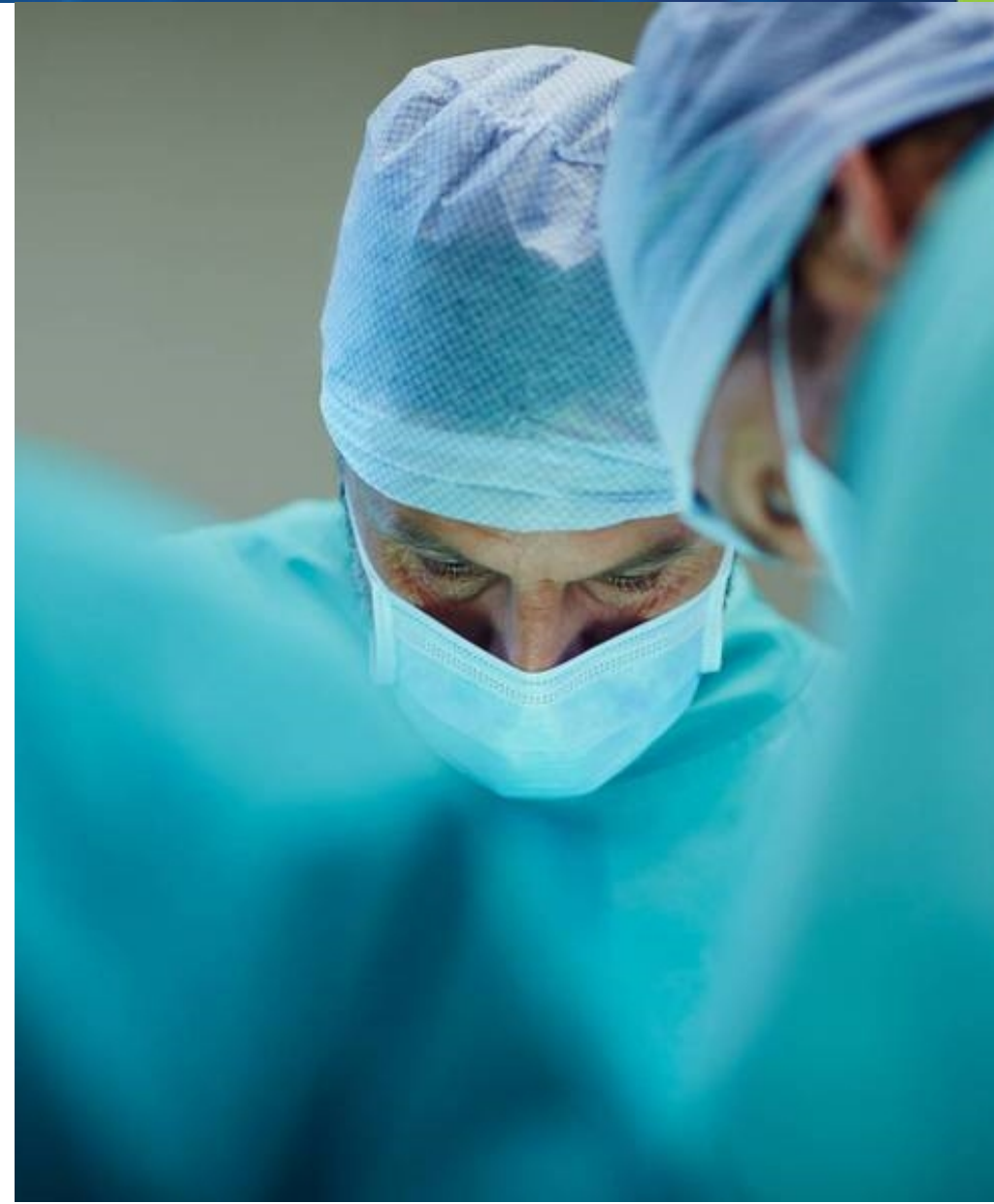
TEMPORARY

We are responsible for completion of a specific Scope of Work. Once complete, we disengage.

TRIPLE CONSTRAINT

- Adhere to Scope
- Complete on Time
- Within Budget

The Project Life Cycle

Initiation 1
- Define project goals
- Create a business case
- Complete the project charter
- Draw up the list of stakeholders

Planning 2
- Define scope
- Create a project plan
- Set a budget baseline
- Define roles and responsibilities

Execution 3
- Allocate project resources
- Manage project resources
- Build the product or process
- Meet often and fix issues as they rise

Monitoring and Control 4
- Track effort and cost
- Monitor project progress
- Ensure adherence to plan
- Prevent any chance for disruptions

Completion 5
- Handover deliverables
- Review project deliverables
- Get project results approved
- Document project learnings

Taking the Lead

So, you are NOT a project manager, but you've been asked to lead a project. What now?

K.I.S.S. Project Management

INITIATION

- Clearly define the goals and requirements
- Identify the stakeholders
- Create a business case (if applicable)

PLANNING

- Clearly define and document the scope
- Create a project plan
- Set a budget (include internal costs)
- Define roles and responsibilities
- Develop a risk plan

EXECUTE

- Assign resources
- Touchbase often with the resources to make sure they are on track
- Review roadblocks
- Communicate with Stakeholders – Escalate!

K.I.S.S. Project Management

MONITOR

- Track task completion and cost
- Meet with core team often
- Engage stakeholders when necessary – Escalate!

HANDOVER

- Facilitate a closure meeting – this will signal to all that the project is done
- Clearly communicate how and who will provide operational support
- Celebrate success

COMMUNICATION

- Communication is important in all phases of a project
- Do not be afraid of overcommunication
- Lives could depend on it!

RISK AND MITIGATION PLANNING

- A Risk is any factor that may potentially interfere with successful completion of the project.
- A Risk is not a problem – a problem has already occurred; a Risk is the recognition that a problem might occur.
- Develop a plan of action for known risks, that way you can easily pivot when problems occur. Common risks include:
  - Illness – know the COVID protocols – use mitigation strategies and cross train
  - Vacation – these are usually planned – assign back up resources
  - Weather – don't laugh! This can be a REAL risk
  - Competing initiatives – your project might not be the priority
  - Supply Chain constraints
  - Budget constraints

Why Projects Fail

- Vague project objectives
  - **Need clear objectives and an end goal or desired end state**
- Overlooking or excluding key audiences
  - **Did you include decision makers? Do you have leadership buy in?**
- Failing to document and review assumptions
  - **You know what they say about assumptions…**
- Not getting commitments in writing
  - **Document action items, who owns it and when it will be done.**
- Failing to keep the plan up to date
  - **Don't forget to include vacations, holidays and freeze periods**
- Not having formal change control
  - **If someone requests a change to an objective or scope, you must get approval, don't just do it or say yes!**
- Not communicating effectively
  - **Push and pull communication**

RESOURCE CONSTRAINTS

- Lack of dedicated project resources
- Operational resources having to double as a project resources
- No dedicated project lead
- Silos

FAILURE TO PLAN

- Without a plan, the project will fail
- Lack of proper risk planning **(critical in healthcare)**
- Not including all departments that are impacted
- Lack of a communication plan

BUDGET

- Underestimating cost
- Not including internal costs when creating a budget (department chargebacks)

SCOPE

- Ambiguous scope
- Scope creep

Project Management Tips and Tricks

- Microsoft Excel has several built-in project plan templates.

- Set up a Microsoft Team for communication. Teams also has a planner feature built in that you can use for a simple project plan and collaboration tool.

- Begin with the end in mind.

If you fail to plan, you

plan to fail.

- Prepare for issues. They will happen!

Recap

UNDERSTAND THE END GOAL AND DEFINE SCOPE

BEGIN WITH THE END IN MIND

BUILD A TEAM THAT INCLUDES STAKEHOLDERS (LEADERSHIP, DECISION MAKERS)

DOCUMENT DELIVERABLES, DUE DATES, ACTION PLANS, RISK AND CHANGE

ESCALATE!

COMMUNICATE OFTEN

Thank you

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Q & A

About CE credit

Administrator credit

This program has been approved for Continuing Education for one total participant hour by NAB/NCERS.

Approval #20230225-1-A81236-DL

Nursing credit

This program has been submitted for Continuing Education for one total participant hour by the Illinois Board of Nursing.

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April 21, 2022

COVID-19 Impacts on Mental Health.

May 19, 2022

Appropriate Use of Psychotropic Drugs in Long-Term & Residential Care.

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6th Annual Live Forum on
Post-Acute, LTC and Assisted Living

June 3, 2022
7 am – 4 pm

DoubleTree Oak Brook, Illinois

THANK YOU!