# Intro to Project Management and The Story of Floyd Medical

Heather Casey, PMP, PgMP, PfMP

Heidi Cook, PMP, PgMP, PMI-SP

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# About the Presenters
# Heather Casey



- Berry College Graduate, Decision Science

- Started career at Macy's Systems and Technology – 11 years

- Came to Floyd in 2007 as Cerner EMR Project Manager

- Started PMO in February 2011, currently in role of Director of Projects

- Certified in Project, Program and Portfolio management through PMI

- Currently pursuing Masters in Psychology of Leadership at work with Penn State University.

- Passionate about leadership and project management

# About the Presenters
# Heidi Cook

- Virginia Tech Graduate, Business Information Technology & Marketing Management

- Started career at AT&T in Telecommunications – 10 years

- Came to Floyd in 2013 as a Project Manager and currently working as the PMO's Team Lead

- Certified in Project and Program management, as well as Scheduling, through PMI

- Certified in ITIL, CompTIA Healthcare IT, and Knowledge Management

- Continuous focus on leadership and project management

# Intro to Project Management

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# What is a Project?

- A *temporary* endeavor with a clearly defined beginning and end
- Undertaken to create a *unique* project or service
- Tactical efforts to deliver strategy

# Examples of Projects

- Implementation of PCMH

- Implementation of Meaningful Use

- Startup of an ACO

- Office 365

- Business Intelligence

- Disaster Recovery

- Redesign of ICU

- Projects that impact enterprise strategy
- Construction
- Quality/Regulatory required projects
- Clinical System Enhancements/Upgrades/New Implementations
- Business System Enhancements/Upgrades/New Implementations
- Infrastructure Projects

# What is Project Management?

- A business discipline for achieving project objectives through activities that:

  - Start and end at certain times

  - Produce quantifiable and qualifiable deliverables

- *Science*:  The processes necessary to successfully complete a project

- *Art*:  Leadership Skills (Trust, Team Building, Communication (90%!), Integrity, Problem Solving)

# The Secret of Getting Ahead

- The secret of getting ahead is getting started.  The secret of getting started is breaking your complex, overwhelming tasks into small, manageable tasks, and then starting with the first one."

        -     *Mark Twain*

# Why Project Management?

- Proven methodology for successful outcomes

- Better decision making at senior levels

- Increased productivity, reduced costs, increased profitability

- Improved communications across stakeholder groups

- Better resource usage

- Achievement of strategic goals and vision
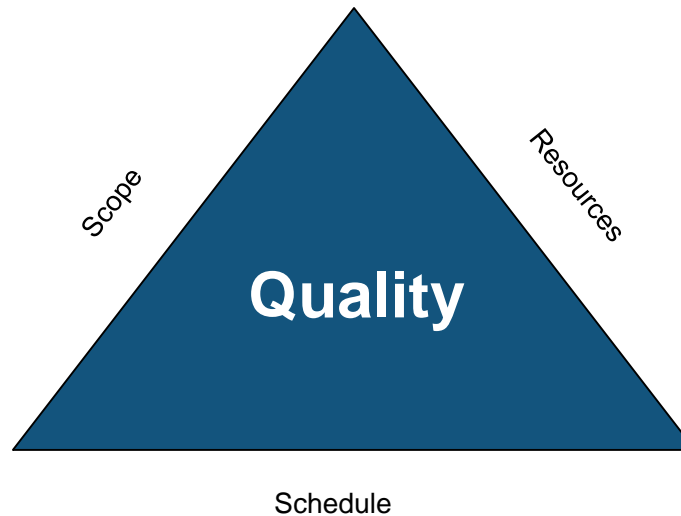
*A goal without a plan is just a wish….*

# Project Managers Conundrum -Choices, Choices, Choices!

Triple Constraint
➢ Schedule
➢ Resources
➢ Scope



Scope

Resources

**Quality**

Schedule

# What happens when you increase scope?
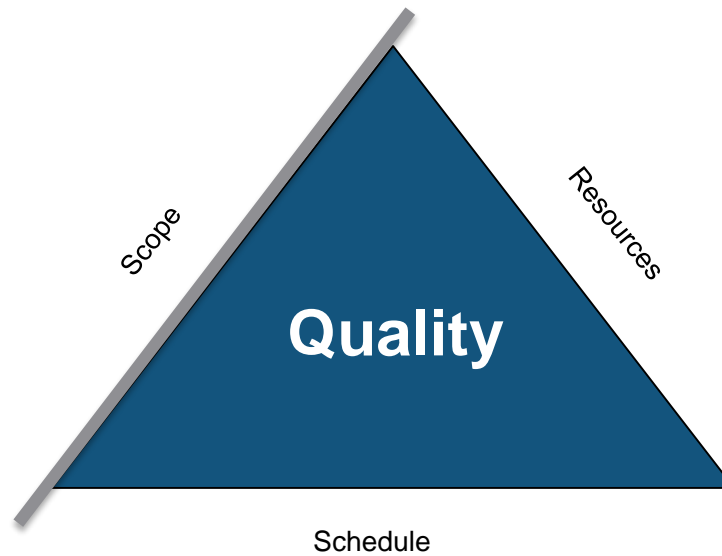
# Things Project Managers Think About

- Integration
- Cost
- Human Resources
- Stakeholder Management
- Scope
- Quality
- Communications
- Time
- Procurement
- Risk Management

Improving Success Rates!

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# The reality of the situation is...

The characteristics of the project <span style="color:red">are not going to change</span> whether you use a formal project management process or not. <span style="color:red">What changes</span> is how the events are dealt with when the project is in progress.

Are they dealt with haphazardly and reactively?

Or proactively with a smoothly running process?

**Initiating > Planning > Executing > Monitoring & Controlling > Closing**

# IT Project Management – The Story of Floyd Medical

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# How do I start a PMO?

- PMI offers methodology around over 30 processes
- Very few projects I have ever worked on use ALL of these
- Review processes and determine where your major issues with existing projects occur
- Choose 3-5 key processes to begin with

**Initiating > Planning > Executing > Monitoring & Controlling > Closing**

# Where did Floyd start?

• Over 5 years ago when we focused effort on starting the PMO we had….

- – 15% coverage of project managers within the portfolio
- – 3 project managers
- – Very few consistent processes defined
- – 1 Template (for status reporting)

# Where did Floyd start?

- We selected the key areas to focus on as:
  - Status Reporting
  - Charter
  - Project Workbook
    - Issues
    - Risks
    - Actions
- Another idea is to select 1 or 2 key processes in each process area (Initiation, Planning, Executing, M&C and Closing)

# Where did Floyd start?

- Choose areas of focus

- Select/Create Templates

- Implement processes

- Refrain from adding more process until existing ones are repeatable

- Be in continuous feedback and improvement loop

- Once first set of processes are stable, look at next holes which might include:

  - Change management, decision management, closeout/turnover, project schedules, budgeting, resource management

# Project Workbook

## Issues & Action Items

**Template Guidance (Delete Lines 3-9 before printing)**

| | |
|---|---|
| 1 | This spreadsheet uses formulas in each row to make calculations. These cells are shaded in light blue. **Do not delete or manually enter data in the blue cells.** |
| 2 | The first 150 rows have been pre-populated with formulas. |
| 3 | To add more rows, use Copy and Paste to duplicate the formulas and formatting. |
| 4 | Columns N through Y are hidden and contain formulas required by the header data. **Do not delete or overwrite columns N-Y.** |
| 5 | Use Page Preview to select the Print Area. **(File Menu - View - Page Break Preview)** |

**Project Name:** Insert Project Name Here   **Total Entries:** 1   **Current Date:** 3/18/2016

| Action Item Totals | Action Items Totals by Priority (Open or In-progress) | Issue Totals | Issue Totals by Priority (Open or In-progress) |
|---|---|---|---|
| Open = 0 | High = 0 | Open = 0 | High = 0 |
| In Progress = 0 | Medium = 0 | In Progress = 0 | Medium = 0 |
| Closed = 0 | Low = 0 | Closed = 0 | Low = 0 |

| ID # | A/I | Status | Project Name | Priority | Impact Level | Description | Events Log | Assigned To | Sched. Status | Date Opened | Current Target Date | Target Date (Revision History) | Date Closed | Reported By |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1 | A | In Progress | Wireless Refresh | High | Project | Greenway Phase 1 Refresh | Brandon to perform Greenway Phase 1 | Brandon Roberson | | | | | | H Cook |
| | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | |

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# Project Workbook

**Risk Action Log**

**Project Name:** Insert Project Name Here

| Risk Categories | Risk Summary Counts | | Probability | Impact Ratings | |
|---|---|---|---|---|---|
| B = Business | High | 0 | 10% Remote | 1 - Negligible Impact | $ |
| C = Cost | Medium | 1 | 25% Unlikely | 2 - Minor Impact | $$ |
| E = External | Low | 0 | 50% 50/50 Chance | 3 - Significant Impact | $$$ |
| Q = Quality | Open | 1 | 75% Highly Likely | 4 - Major Impact | $$$$ |
| R = Resources | Closed | 0 | 99% Almost Certain | 5 - Catastrophic | $$$$$ |
| S = Schedule | Total | 1 | | | |
| T = Technical | | | | | |

| Risk ID | Risk Cat.* | Status | Date Opened | Date Closed | Project Name (Use if Risk Log is at the Program level) | Description | Response Strategy | Mitigation Strategy & Event Triggers* | Probability | Impact | | | Risk Exposure (1-99) | Impact Level | Assigned To |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1 | S | Open | 41430 | | | Numerous access point's are less than version 7, which is out of date for support. Anything less than the Cisco 3600/2600/1600 is also not compatitble with the monitoring software required to be able to monitor signal coverage throughout the facilities. | Mitigate | Replacing all of the AP's with 3600's, 2600's, or 1600's will resolve this risk. | 0.75 | x | 3 | x 20 = | 45 | Project | Brian Smith |

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# Project Workbook

## PM Workbook  Change Management Log

**Project Name:** | Insert Project Name Here | | Research Results

| PCR # | Type of Change | Status | Date Submitted | Requested By | Short Description | Priority | Cross Dept Impact | Impact Level | Cost of Change | TrackIt WO Number | Scheduled Date | Project Team Consensus | Change Advisory Board | Final Dispositi... |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1 | CAB | Approved | 11/13/2013 | Daniel Wilson | (Project) Replace all the access point on the 2nd Floor | High | High | Project | | WO 369930 | 11/19/2013 | Approved | Approved | Approved |
| | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | |

## Decision Log

**Project Name:** Microsoft Systems Center

| # | Topic/Question/Issue | Status | Date Resolved | Decision | Justification of Decision | Made By |
|---|---|---|---|---|---|---|
| 1 | Which AP(s) to use - 3600 VS 2600 VS 1600 | Closed | 4/22/2013 | 3600's in the main hospital & 2600's in the other locations. 1600's are not to be used. | The 3600 series offers more options with radios, is a high density client, offers HD Video/VDI, and has the ability to add security modules, off channel scanning, and proactive intelligent channel switching. While the 2600 is $200 per unit cheaper, it is not as robust as the 3600 as it does not support optional modules, or the above mentioned off channel scanning or proactive intelligent channel switching. The 1600 does not have true CleanAir capability (it uses CleanAir Express) so is not going to be considered. | Brian Smith Heidi Cook Stacey Cline Heather Casey Charles Howell Grant Carmichael Jeff Buda Brandon Roberson |

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# Project Workbook

**Lessons Learned Log**

| Category (Select from Dropdown) | Issue | Problem/Success | Impact | Recommendation |
|---|---|---|---|---|
| Communication Management | After charter was sent to the group, one stakeholder (Stacey Cline) volunteered new information regarding access points. | Problem was that not all of the stakeholders felt comfortable with the scope. | Delay to the acceptance of the charter. | Need to make sure all requirements are listed and documented, as well as make sure all stakeholders are happy with the scope before sending out the charter. |
|  |  |  |  |  |

**Stakeholder Register**

| Directly Involved with Project (Internal) | | | | | |
|---|---|---|---|---|---|
| Name | Title | Phone | Mobile | Email | Notes |
| Sonny Rigas | Executive Sponsor / Chief Operating Officer | 706-509-6900 | | SRigas@floyd.org | |
| Brian Smith | Network Manager | 706-509-5733 | | Bsmith@floyd.org | |
| Grant Carmichael | Security Analyst | 706-509-6793 | | Gcarmichael@Floyd.org | |
| Jeff Buda | Chief Information Officer, IT | 706-509-5738 | | Jbuda@floyd.org | |
| Charles Howell | Director, IT Operations | 706-509-5736 | | Chowell@floyd.org | |
| Heather Casey | Director, IT Projects | 706-509-6667 | | Hcasey@floyd.org | |
| Heidi Cook | IT Project Manager | 706-509-5758 | 678-492-0440 | hcook@floyd.org | |
| Stacey Cline | Technical Architect | 706-509-5734 | | Scline@floyd.org | |
| E J Hunt | Server Manager | 706 509 4338 | | Ehunt@floyd.org | |

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# Project Workbook

**RACI**

| Wireless Refresh | Note: Those that do the work are (R)esponsible and those that approve are (A)ccountable. | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Title | Name | Project Mgt Plan | Schedule | Budget | Requirements | Use Case | High Level Solution Design | Technical Specs | Testing | Installation of AP's | Maintenance of AP's | Installation of Cisco Prime | Maintenance of Cisco Prime | Monitoring of Data on Cisco Prime |
| Project Manager | Heidi Cook | R | A | I | R | I | I | I | I | I | I | I | I | I |
| Director, IT Projects | Heather Casey | A | I | R | C | C | I | I | I | I | I | I | I | I |
| Technical Architect | Stacey Cline | C | I | I | C | R | R | R | C | C | C | C | C | C |
| Server Manager | EJ Hunt | C | C | C | C | C | C | C | C | C | C | C | C | C |
| Server Team | Multiple | I | I | I | I | I | I | I | I | I | I | R | R | I |
| Network Manager | Brian Smith | C | R | C | A | A | A | A | A | A | A | A | A | A |
| Network Team | Multiple | C | C | I | C | C | C | C | R | R | R | R | R | R |
| Service Desk Manager | Rollie Winget | C | C | I | C | C | C | C | C | C | C | C | C | C |
| Service Desk Team | Multiple | I | I | I | I | I | I | I | I | I | I | I | I | I |
| Release & Deploy Mgr | Jason Miller | C | C | C | C | C | C | C | C | C | C | C | C | C |
| Release & Deploy Team | Multiple | I | I | I | I | I | I | I | I | I | I | I | I | I |
| Director, IT Operations | Charles Howell | C | I | R | C | C | C | C | C | C | C | C | C | C |
| CIO | Jeff Buda | C | C | A | C | C | C | C | C | C | C | C | C | C |
| Security Analyst | Grant Carmichael | C | C | I | C | C | C | C | C | C | I | I | I | I |

# Project Workbook

**Project Checklist**

| | Phase | Deliverable/Task | Completed By | Complete On | Notes |
|---|---|---|---|---|---|
| | | **Project Name:** | | | |
| Required | 1. Initiation | Project Checklist | | | |
| Signoff | 1. Initiation | Project Charter | | | |
| Required | 1. Initiation | Other Setup Tasks | | | |
| Signoff | 2. Planning | Communication Plan | | | |
| Required | 2. Planning | Identify/Analyze Project Risks | | | |
| Signoff | 2. Planning | Scope/Requirements Document | | | |
| Signoff | 2. Planning | Design your product | | | |
| Required | 2. Planning | Resource Plan | | | |
| Required | 2. Planning | Create Budget Baseline | | | |
| Required | 2. Planning | Project Schedule | | | |
| Required | 2. Planning | Procurement Plan | | | |
| Required | 2. Planning | Other Planning Tasks | | | |
| | | Continue Startup Questions | | | |
| | | Setup/Facilitate Security Assessment - This is a revisit with Grant in order to ensure what we have planned is solid in design | | | |
| | | Research and Design Solution - please note this could take a LARGE amount of time based on how complex solution could be | | | |
| | | Define Technical Requirements | | | |

# Where are we now?

- PMO now consists of 18 staff members, 14 project managers, 1 business analyst, 1 technical architect, PMO lead, PMO director

- Knowledge base of templates and examples of most PMI process areas

- Formal project management system (PPM)

- 100% coverage of IT projects and construction projects

- Branching into enterprise strategic efforts

# What type of skills should I look for in a PM?

- In Rome, the experienced project manager resource pool is slim
- Successful project managers typically have these skills:
  - General leadership skills
  - Ability to build healthy relationships
  - Communication – both written and verbal
  - Detail and process oriented
  - Critical thinking/problem solving skills
- PMI or other methodology can be taught to those who have the above talent.
- Project Managers bring order to chaos!

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# How to sell project management

- Value – create, demonstrate and show consistent value!
- Value statement
  - Floyd Example:
  - Leading projects to create opportunities for healthcare excellence
- Business Case – project failures?  Successes?  Industry statistics
- Treat implementing project management as a project!
- Marketing
- Be a SERVICE and not an obstacle
- Pick a project and use as an example applying focus on doing it "right"