



Project Managing to Support Change

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Project Managing to Support Change

- Change is a constant in life
- People by nature do not like change
- Whether redesigning processes or implementing systems - projects bring about BIG change
- Project Managers can support organizations to accept or embrace these changes in a better and more graceful fashion

Learning Objectives:

- Review the PMBOK steps for the Planning Phase
- Discuss the role of the Project Manager as a Change Agent
- Review team dynamics and team spirit

Why Us ???

- 40 Years Healthcare experience
- 32 Years Healthcare IT experience
- 20 Years Project Management
- 50+ Projects
- 40+ Different Organizations
- Both are PMP's

Cathryn Stam, PMP

Has worked with three dozen organizations over the last 20 years helping to implement computer systems, her passion for project excellence and creating a team environment comes through in many ways. She is a certified PMP and has been in management roles for most of her career. Having worked in the industry as a consultant, vendor, IT Director, and end user, she has had a chance to see projects from every angle.

Tina Salaris, RN, PMP

Has been in Healthcare for more than 20 years in many different management roles. Over the last 6 years has been working as a project management with a couple of different healthcare vendors managing the implementation of clinical systems and work redesign projects. Prior to project management worked as a Manager of Clinical Informatics, Nurse Manager and Manager of Nursing Operations.

PMI and PMBOK

- PMI is the Project Management Institute
- A Professional Association focused on Project Management
- Established in 1969 it now has over 100,000 members in 125 countries
- PMBOK is the Project Management Body of Knowledge
- A globally recognized standard for managing projects



Process Group Knowledge Area	Initiating	Planning	Executing	Controlling	Closing
4. Integration		4.1 Project plan development	4.2 Project plan execution	4.3 Integrated change control	
5. Scope	5.1 Initiation	5.2 Scope planning 5.3 Scope definition		5.4 Scope verification 5.5 Scope change control	
6. Time		6.1 Activity definition 6.2 Activity sequencing 6.3 Duration estimating 6.4 Schedule development		6.5 Schedule control	
7. Cost		7.1 Resource planning 7.2 Cost estimating 7.3 Cost budgeting		7.4 Cost control	
8. Quality		8.1 Quality planning	8.2 Quality assurance	8.3 Quality control	
9. Human Resource		9.1 Organizational planning 9.2 Staff acquisition	9.3 Team development		
10. Communication		10.1 Communication plan	10.2 Info distribution	10.3 Performance reporting	10.4 Admin closure
11. Risk		11.1 Risk mgt plan 11.2 Risk identification 11.3 Qualitative analysis 11.4 Quantitative analysis 11.5 Response planning		11.6 Risk monitoring	
12. Procurement		12.1 Procurement plan 12.2 Solicitation plan	12.3 Solicitation 12.4 Source selection 12.5 Contract admin		12.6 Contract closeout

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Planning Phase

- Create scope management plan
- Create project team
- Develop WBS
- Finalize the team and create the resource management plan
- Create network diagram
- Estimate duration and schedule development
- Estimate cost and budgeting



Planning Phase

- Determine critical path
- Develop schedule and schedule management plan
- Establish budget
- Establish management plan
- Develop a formal project plan
- Obtain formal approval of project plan
- Hold kick-off meeting



Create Scope Management Plan

- Processes required to ensure that the project includes all the work required, and ONLY the work required to complete the project
- Defining and controlling what is or is not included in the project
- Includes
 - Scope Planning
 - Scope Definition
 - *Scope Verification*
 - *Scope Change Control*



Scope Management

- How do you define what is NOT in scope?
- What level within an organization should see and approve a scope statement?
- If scope changes, how do you handle this?
- How much of an impact will the change have
 - On the team?
 - On the plan?
 - On the schedule?
 - On quality?

Create Project Team

- Team development includes enhancing the ability of stakeholders to contribute as individuals
- Enhancing the ability of the team to function as a team
- Individual development is the foundation necessary to develop the team
- Development as a team is critical to the project's ability to meet its objectives



Create Project Team

- How do you determine if each person is suited to their role?
- Does everyone equal one FTE?
- How do you balance the project resource needs with the team that you have?
- What do you do if there are gaps in your project team?
- How do you communicate this? To whom?

Develop WBS

- WBS (Work Breakdown Structure) is a deliverable-oriented grouping of project components that organizes and defines the total scope of the project
- Decomposition – subdividing the major project deliverables into manageable components
- Provides a level of tasks that can be scheduled and monitored



Develop WBS

- Experience with this?
- Assumes team is on board to do this
- Vendor workplans overshadow this effort
- Good place to be defining all “parts” such as interfaces and data file conversions
- Good time to review end user assumptions

Finalize the Team & Create the Resource Management Plan

Finalize Team

- Team building activities to improve team performance
- Rewards and recognitions systems
- Collocation
 - Same physical location to enhance their ability to perform as a team
- Training – enhance the competencies of the project team



Finalize the Team & Create the Resource Management Plan

Resource Management Plan - Determining what resources (people, equipment, materials) and what quantities of each should be used to perform project activities

- Knowledge of what resources are potentially available is necessary for resource planning
- The policies of the performing organization regarding staffing and the rental or purchase of supplies and equipment must be considered during the resource planning



Finalize the Team

&

Create the Resource Management Plan

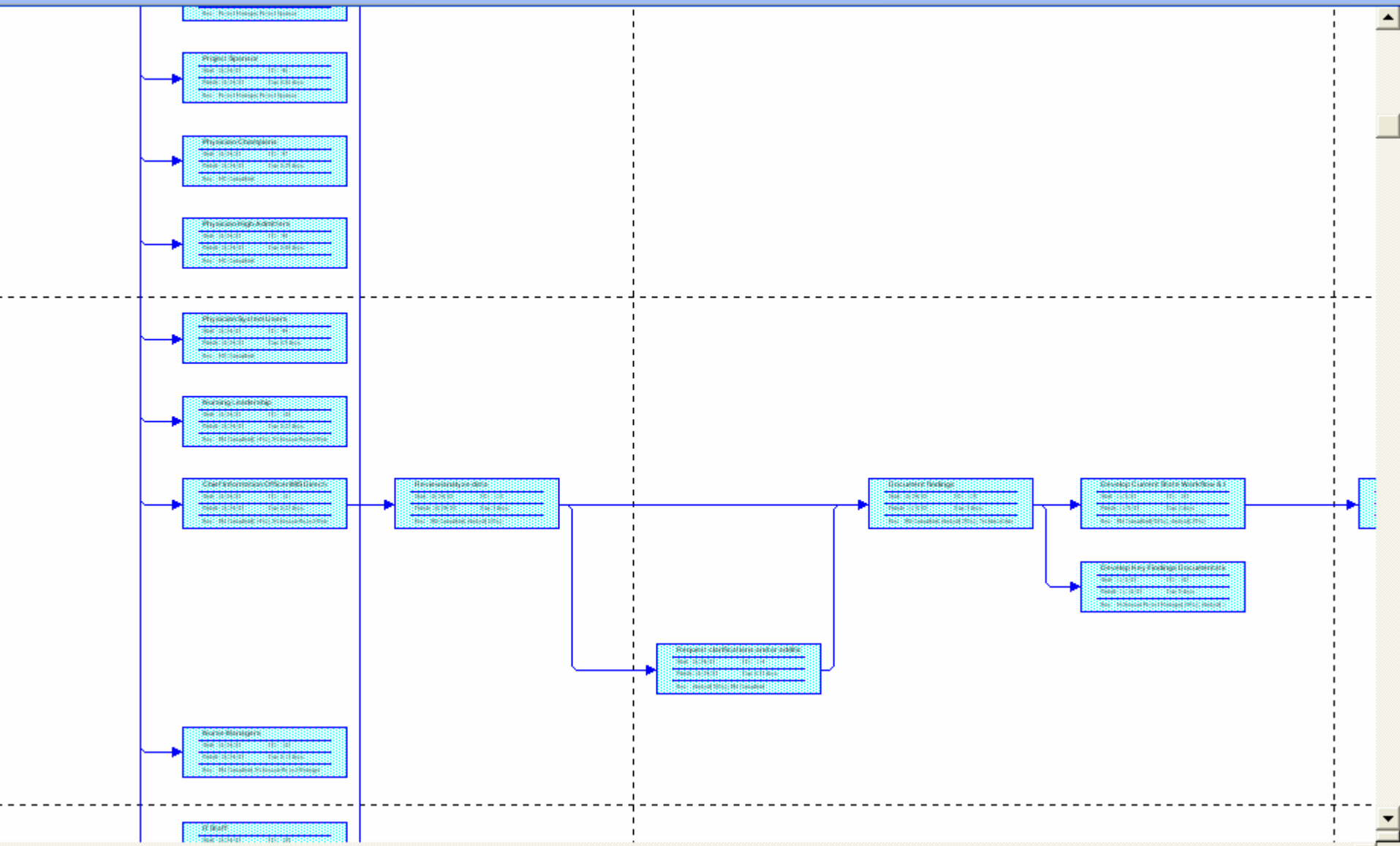
- What training will the team need?
- Will a formal Team Building exercise be done?
- How are people supported on the project?
- Are the team members schedules static or fluid?
- If the schedule is changed or not followed, how does this impact the plan?

Create Network Diagram

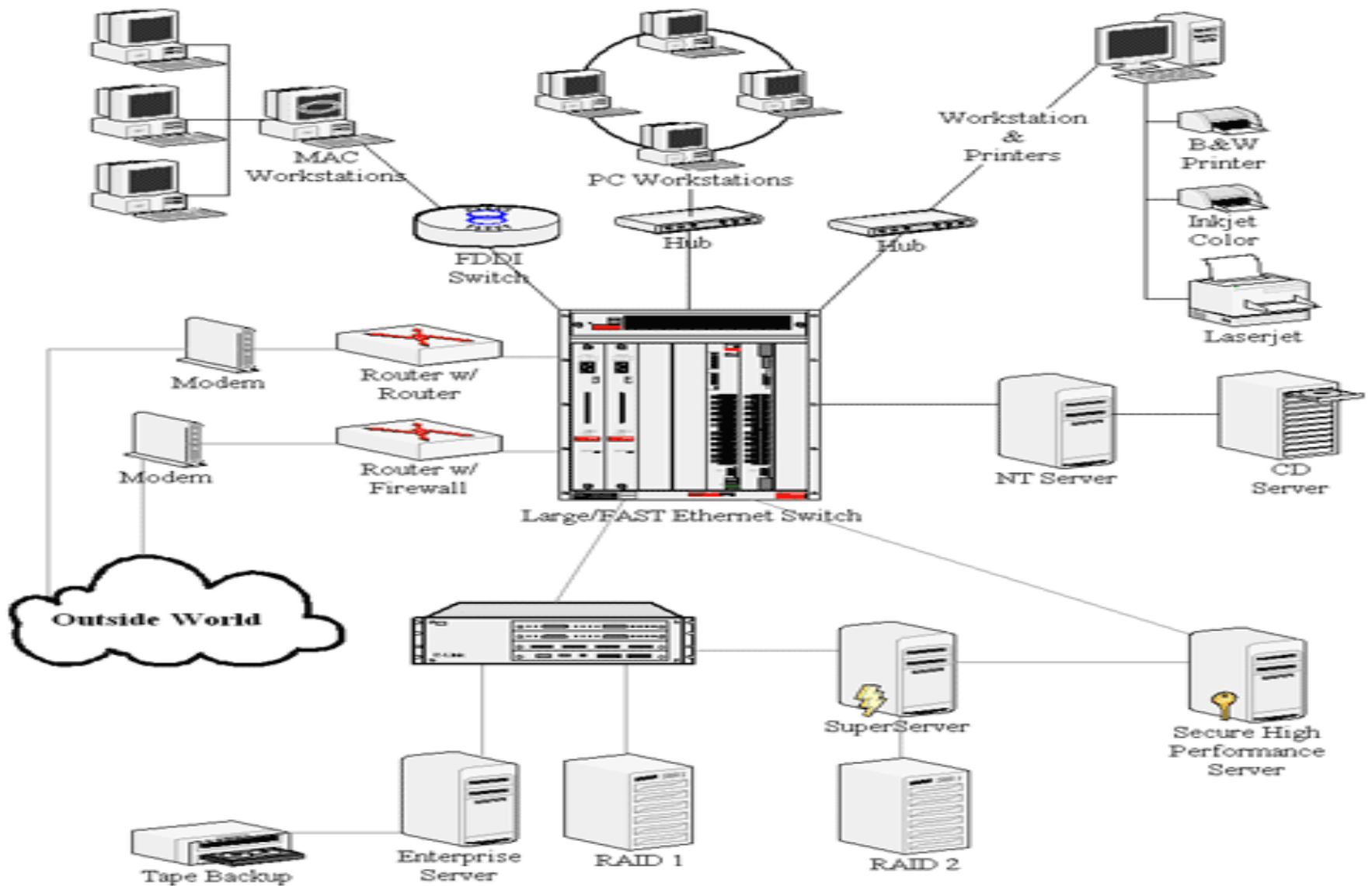
- Schematic display of the project's activities and the logical relationships and dependencies among them
- Also known as a PERT chart
- PERT is Program Evaluation and Review Technique



Agreement signed with client



COMPLEX NETWORK



Create Network Diagram

- Pictures can explain a complex idea well
- Use them!
- PERT chart needs dependencies added to the plan
- Shows critical path very well!

Estimate Duration and Schedule Development

- Processes required to ensure timely completion of the project
- Activity duration estimating is a process of taking information from the project scope and the resources
- Schedule development determining start and finish dates for project activities



Estimate Duration and Schedule Development

- Estimating the number of work packages to complete an activity
 - Expert judgment
 - Top down estimating
 - Quantitatively based durations



Estimate Duration and Schedule Development

- How often is this done?
- Do contracts create artificial deadlines?
- Do vendor workplans reflect a project's reality?
- Can a project manager influence this?

Estimating Cost and Budgeting

- Processes required to ensure that the project is completed within the appropriate budget
- Primary concern is with the cost of resources needed to complete the project activities
- Estimating cost by use of
 - WBS
 - Resource requirements
 - Resource rates
 - Activity duration estimates
 - Historical information
 - Risk



Estimating Cost and Budgeting

- Cost budgeting – allocating the overall cost estimates to individual activities or work packages to establish a cost baseline for measuring project performance
- Reality may dictate that estimates are done after budgetary approval is provided
- Estimates should be done prior to budget request wherever possible



Estimating Cost and Budgeting

- Break down contractual items
- Are there unidentified needs?
- Have all resources been defined?
- Are all other costs identified?
 - Hardware
 - Programming
- Build contingency funds in budget
- Minimize surprises

Determine Critical Path

- A series of activities that determine the duration of a project
- It is the longest path through the project and has the least amount of schedule flexibility



Determine Critical Path

- PERT charts can show this clearly
- This is not a constant – what can change it?
- Do you have a sense of critical path?
- Helps to build focus and heighten response

Establish Management Plan

- Communication Plan – Determine the information and communication needs of the project stakeholders; who needs what information, when they will need it, and how it will be given to them
- Stakeholder Plan – Determine and monitor individuals and organizations that are actively involved in the project, whose interests may be positively or negatively affected as a result of project execution or project completion.
- Risk Plan – Monitoring and control of all identified risks, including description, cause, probability of occurring, impact(s) on objectives, proposed responses, and owners



Establish Management Plan

- Quality Plan – Monitoring specific project results and identifying which quality standards are relevant to the project and determine how to satisfy them
- Procurement Plan - Determine what to purchase and when to purchase it



Establish Management Plan

- These five Plans
 - Communication
 - Stakeholder
 - Risk
 - Quality
 - Procurement
- Are often glossed over, if even given consideration
- If done well they can have a tremendous impact on whether management is proactive or reactive

Develop a Formal Project Plan

- A collection of the formal approved documents used to guide both project execution and project control
- Primary use is to document planning assumptions and decisions, facilitate communication among stakeholders and document approved scope, cost and schedule baseline
- PMI calls Microsoft Project a “Project Schedule” not a “Project Plan”



Develop a Formal Project Plan

- The process of documenting throughout the project
 - Assumptions
 - Decisions
 - Communications
- Gives structure and stability which helps an organization embrace and move forward towards its new state
- This is the foundation of Change Management

Change Management



Change Management

Change

- To become different
- To undergo variation
- To become partially or wholly transformed
- To pass from one phase to another



Change Management

NOT

The process or procedure within a project that regulates and controls what changes or modifications are to be made.

Change Management

- Supporting an organization's group dynamics through the process of change
- Managing the process by which a transition or transformation will occur
- Facilitating alteration or modification in behavior

Change Agent

- Someone who instigates or creates the opportunity for change
- Someone who helps to sustain the momentum towards change
- Someone who supports transition or innovation within an organization

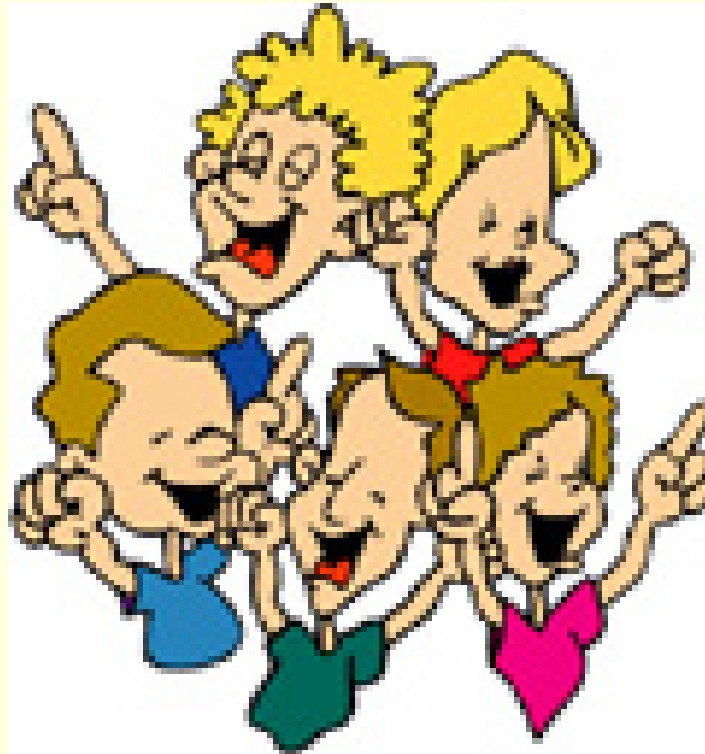
Project Manager as Change Agent

- Acts as a facilitator for the group
- A consistent member of the group who can work with all levels
- Supports communication by team members within the organization
- Temporary or transitory member of an organization
- Can be an objective person who can challenge the status quo

Change

- Change is disruptive by its very nature
- People can be anxious of the process which brings about change
- Change brings people out of their comfort zones
- When people are uncomfortable they will often attack the situation or person bringing about the change
- The Project Manager is free to take on this focus and once the project is done – leave

Team Dynamics



Team Dynamics

- The motivating and controlling forces within a group of people
- How a group of people function and interact together
- Positive team dynamics will help create a more cohesive group which will support each other throughout the project

Team Spirit

- People working together with a spirit of cooperative activity
- Use and reference the tools throughout the project
- Act as if you are a tour guide, the plan is your map
- Communicate to the team and beyond
- Keep track of the Goal – the end point
- It's not about being right

Other Thoughts

- Be consistent
- Listen to what is not being said as well
- Speak the truth, even when it is uncomfortable
- Stay centered
- Don't judge
- Don't match energy
- Don't push the river

Questions?



