Project Management 101 Session II

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Webinar Instructions

To avoid echoes and feedback, we request that you use the telephone audio instead of your computer audio for listening and speaking during the webinar.

Figure 1

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Meeting options

🔗 Copy event link

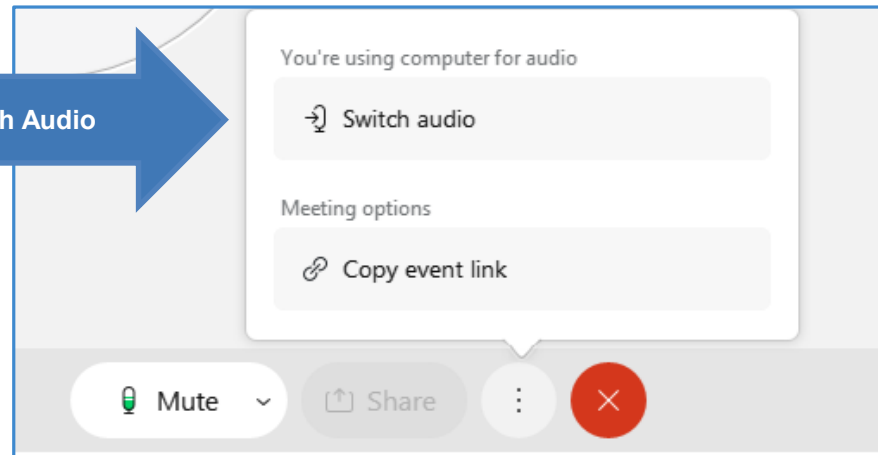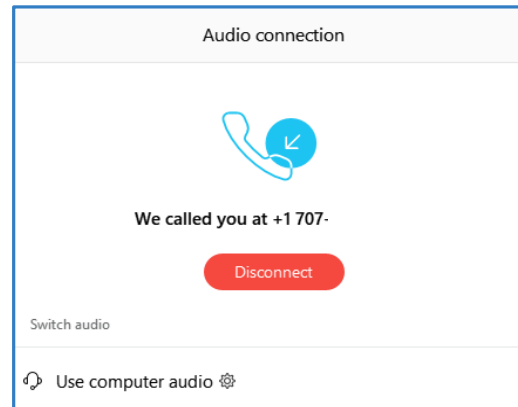You can switch your audio connection by clicking on the three dot ellipsis icon found at the bottom of your screen.

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Figure 2

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Webinar Instructions

Figure 1

- All attendees have been muted to eliminate any possible noise/interference/distraction.

- Please take a moment and open your chat box by clicking the chat icon found at the bottom right-hand corner of your screen and as shown in **Figure 1**.

- If you have any questions, please type your questions into the chat box, and they will be answered throughout the presentation.

- Be sure to select **"Everyone"** when sending a message.
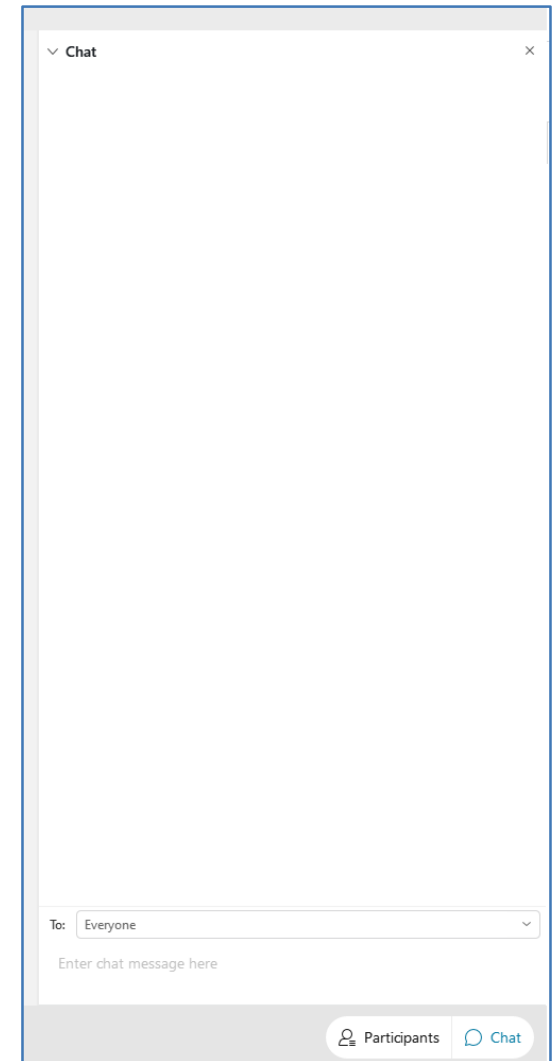
Chat ⌄   ✕

To: Everyone   ⌄

Enter chat message here

Participants   Chat

Project Management 101 Session II

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Learning Objectives

1 Review concepts from session

2 Learn the key points in executing/ monitoring projects

3 Understand how to successfully close/transition projects

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Session 1:
Review & Apply

Project Management Phases and Key Activities

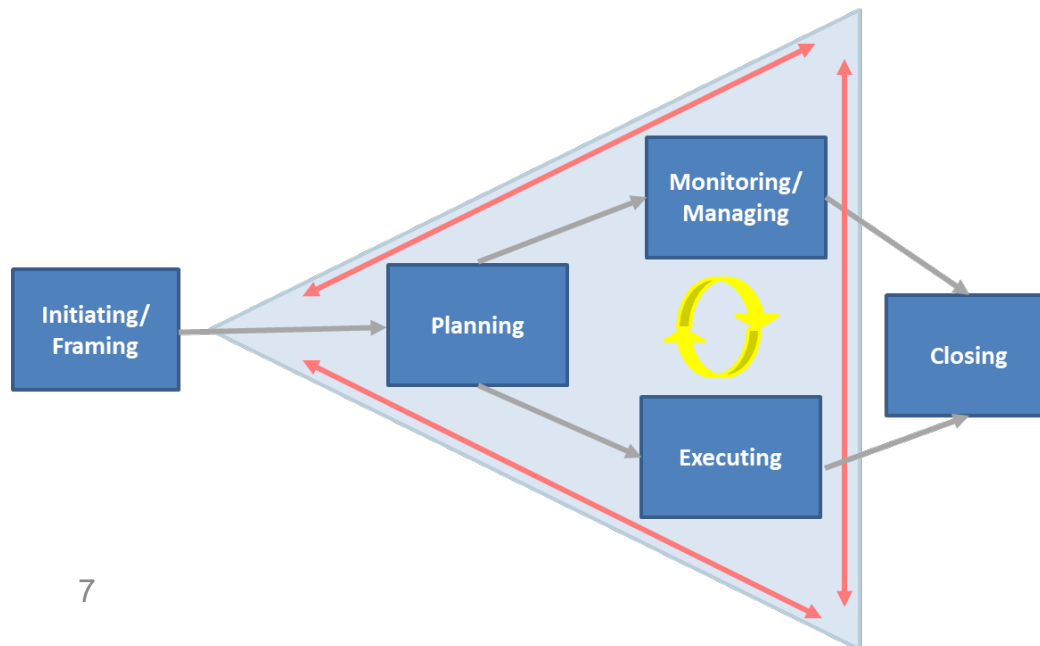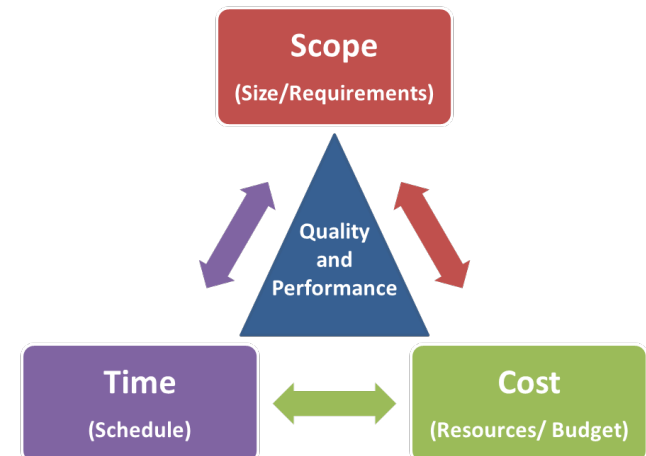| Initiating/ Framing	Planning	Executing/ Monitoring	Closing/ Transitioning
• Gather Information • Meet with Sponsor • Conduct Stakeholder Analysis • Launch/Kick-off • Develop Project Charter	• Identify Project Plan Elements • Create Work Breakdown Structure • Document Communication Strategies	• Manage/Control Project • Facilitate Project Meetings • Track Action Items	• Develop Transition Plan • Create Closure Summary • Prepare Project Review and Celebration

Initiating/ Framing → Planning → Monitoring/ Managing → Executing → Closing

The Triple Constraint

Scope (Size/Requirements)

Quality and Performance

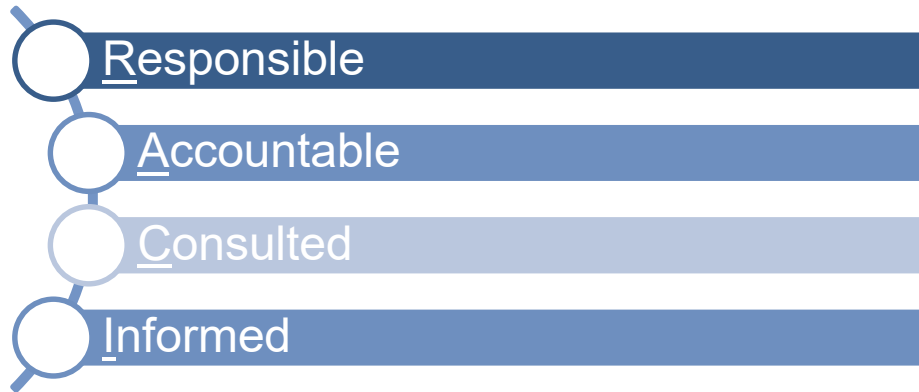Time (Schedule)

Cost (Resources/ Budget)

Activity - Apply Learnings

- Scenario: You have been tasked to lead a project to implement drive-thru flu shot clinics each Saturday from October 2 - November 13, 2021

  - Exercise I: Conduct a stakeholder analysis using a RACI Chart (new tool)

  - Exercise II: Create a WBS

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Introduction to RACI

- RACI Stands for:

  - **Responsible**
  - **Accountable**
  - **Consulted**
  - **Informed**

- RACI Chart is used to describe the general roles for all project stakeholders
- RACI Charts are known by several names including: Responsibility Assignment Matrix (RAM) and RACI Matrix

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RACI Definitions

Responsible: Those doing the work

Accountable: Those who are ultimately responsible for ensuring tasks are completed correctly and on-time
Note: Only 1 person should be identified as "accountable" for any given task or deliverable

Consulted: Two-way communication with subject matter experts and impacted area stakeholders

Informed: One-way communication with wider-population stakeholders

Exercise I: Stakeholder Analysis with RACI

Identify Stakeholders:

- Who is affected/impacted?

- Who is concerned?

- Who may have influential or different views?

- Who are the opinion leaders/influencers?

- Who might serve as a "champion"?

- Who can contribute to project success?

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Exercise II: WBS

- Work Breakdown Structure: A visual depiction of the project that organizes and defines the scope of the project into manageable tasks:
  - Define milestones, deliverables, and tasks
  - Sequence and identify dependencies and risks
  - Assign owners and estimate duration

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Work Breakdown Structure Sample

Milestone/Deliverable/Task	Start Date	Due Date	Responsible
1.0.0 Organize and Scope Quality Improvement Project			
1.1.0 Gather Information			
1.1.1 Surf internet for information regarding change packages			
1.1.2 Obtain information regarding efforts already attempted			
1.1.3 Obtain baseline data			
1.1.4 Identify any regulatory information impacting initiative			
1.2.0 Meet with Sponsor			
1.2.1 Discuss information already gathered			
1.2.2 Identify possible team members and roles/responsibilities			
1.2.3 Clarify negotiate roles and responsibilities of PM			
1.2.4 Establish accountability for project oversight			
1.3.0 Conduct Stakeholder Analysis			
1.3.1 Identify stakeholders			
1.3.2 Develop a survey to distribute to stakeholders re. Needs/wants/feelings			
1.3.3 Compile stakeholder analysis results and identify communication needs			
1.3.4 Develop feedback loop for stakeholders			
1.4.0 Launch/Kick-off			
1.4.1 Prepare meeting agenda and secure space			
1.4.2 Invite team members			
1.4.3			
1.4.4			
1.4.5			

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Well Done!

Phase 3: Executing/Managing

Execute/Manage Phase: Key Activities

Initiate/Frame → Plan → Executing/Monitoring → Closing/Transitioning

- Facilitate Project Meetings
- Track Action Items
- Manage/Control Project Plan

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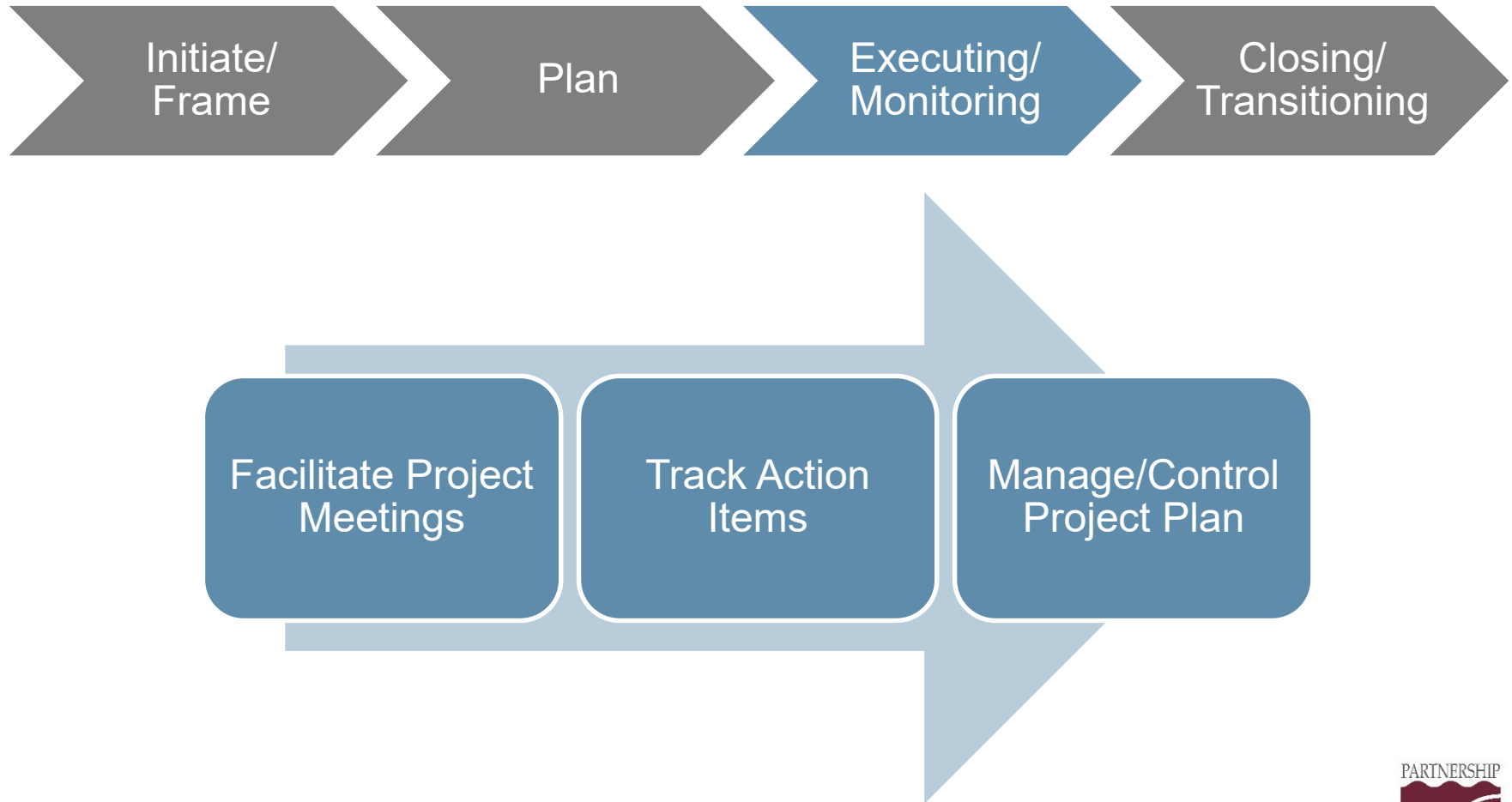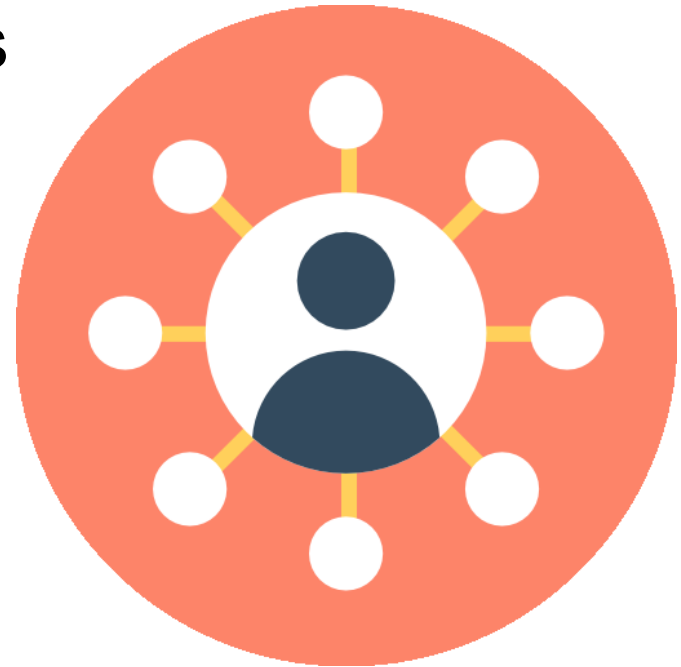
- Focus on
  - Work Progress
  - Issue Resolution
  - Actions
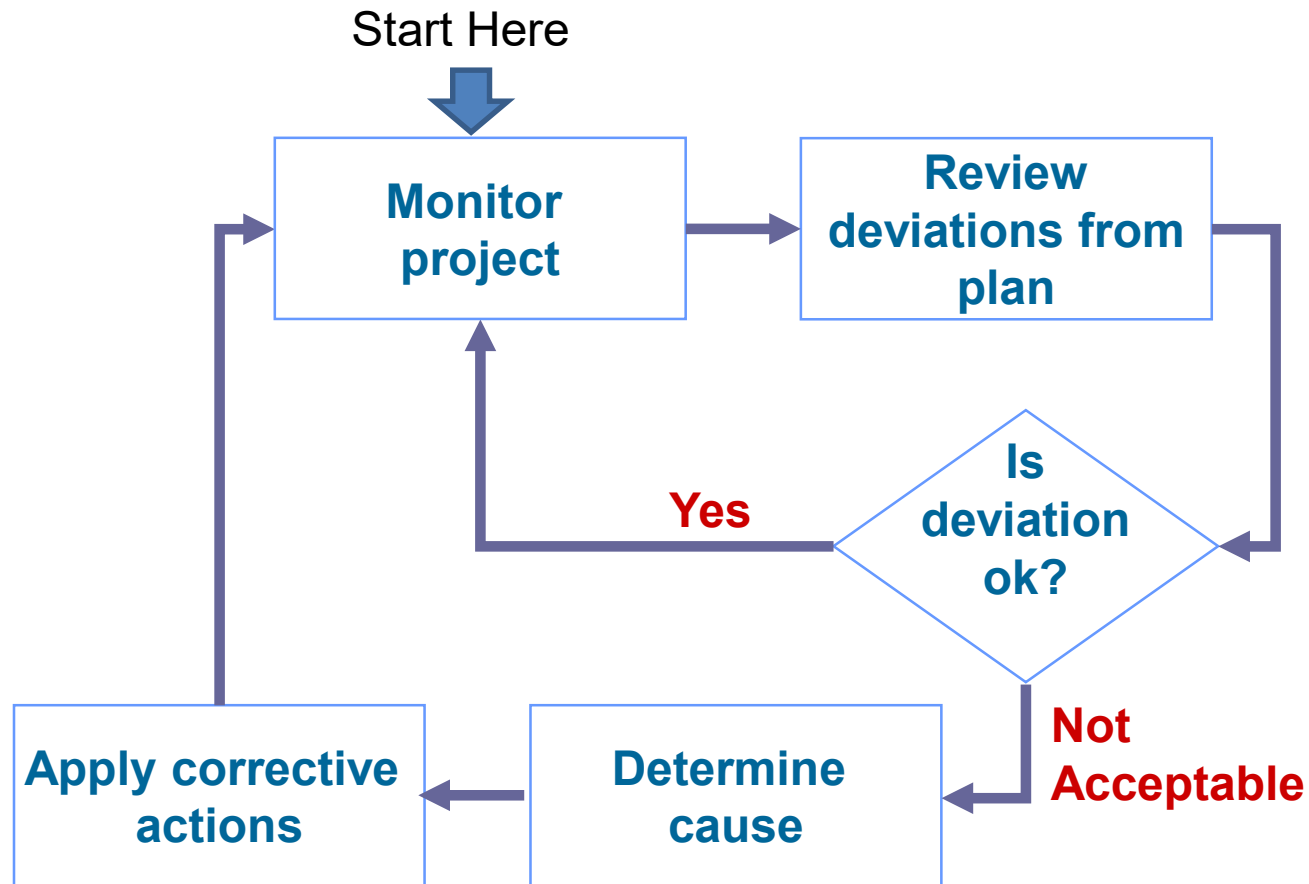- Ensure alignment with the goals and plan
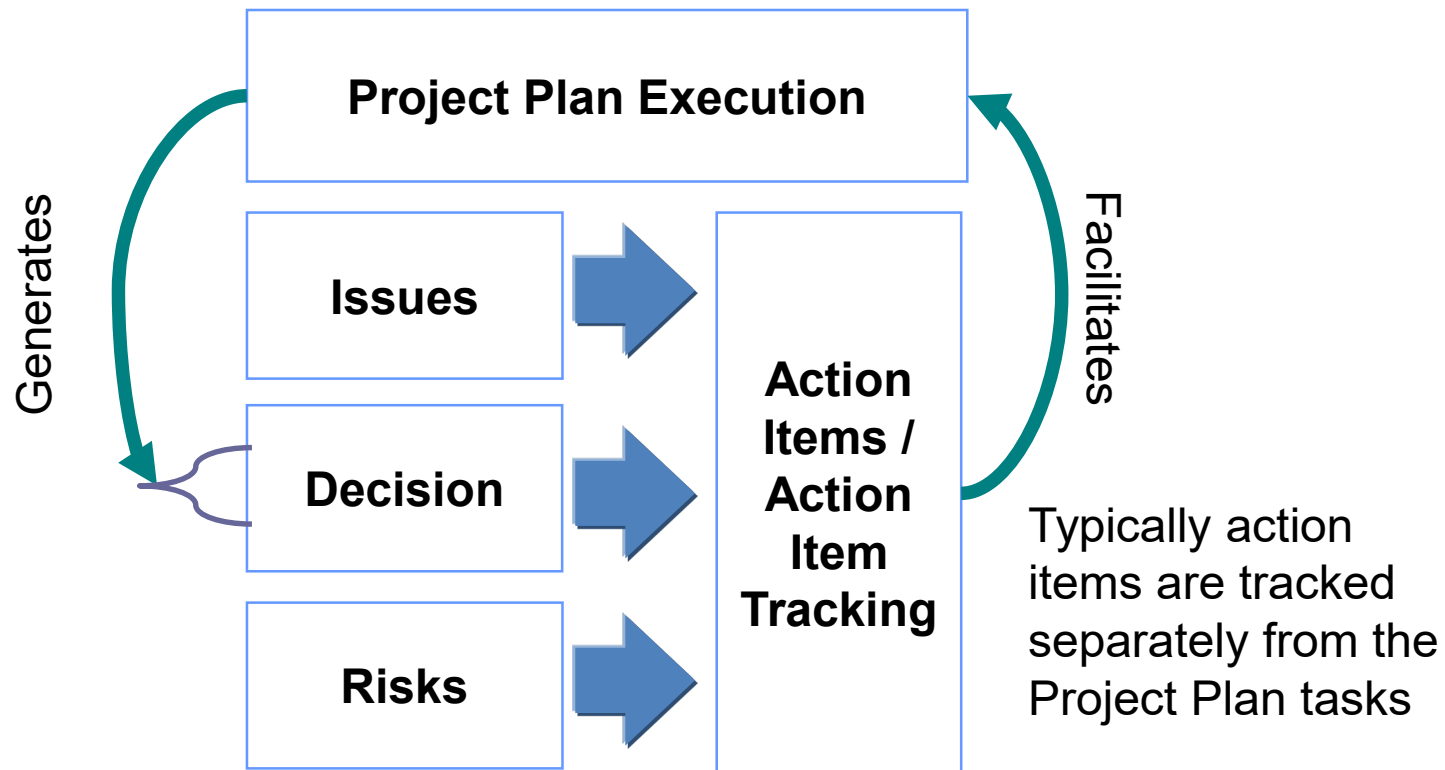
Ongoing PM Control Areas

- Goal/scope changes

- Issues and issue resolutions

- Quality of deliverables

- Change management
  - Project team dynamics
  - Stakeholder buy-in

- Costs/budget

- Risks/assumptions

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Project Control Process

Action Items, Issues, Decisions, and Risks

Generates

Project Plan Execution

Facilitates

Issues

Decision

Risks

Action Items / Action Item Tracking

Typically action items are tracked separately from the Project Plan tasks

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Project Action Item Logs

#	Date	Type	Description	Due Date	Owner	Status	
1	5/1	Action	Create list of stakeholders.	5/3	Mary	Closed	
2	5/2	Issue	May be resistance among stakeholders to new process.	5/4	Tim	Investigating	
3	5/2	Decision	Scope is limited to Process A at Facility B?	5/4	ponsor	Closed	

If this investigation was confirmed, you might move this item to a risk log to be actively managed or determine immediate actions to start addressing this
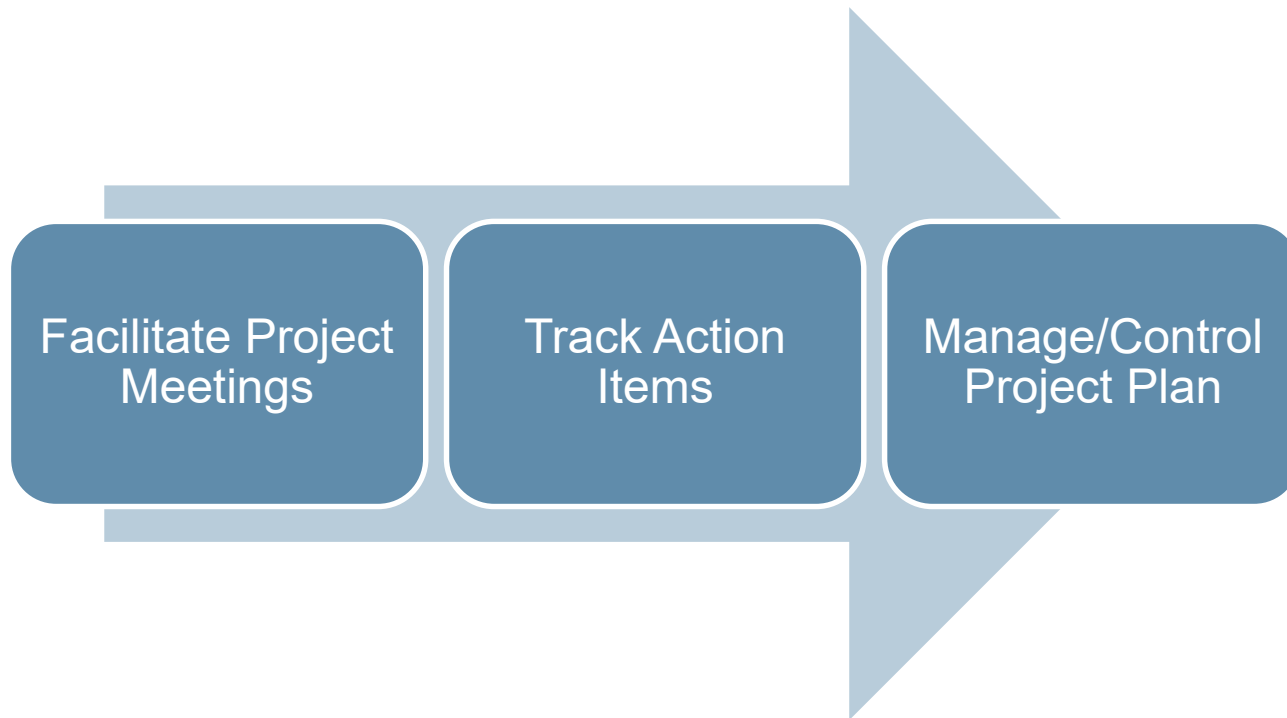
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Execute/Manage Phase: Recap

Initiate/Frame → Plan → **Executing/Monitoring** → Closing/Transitioning

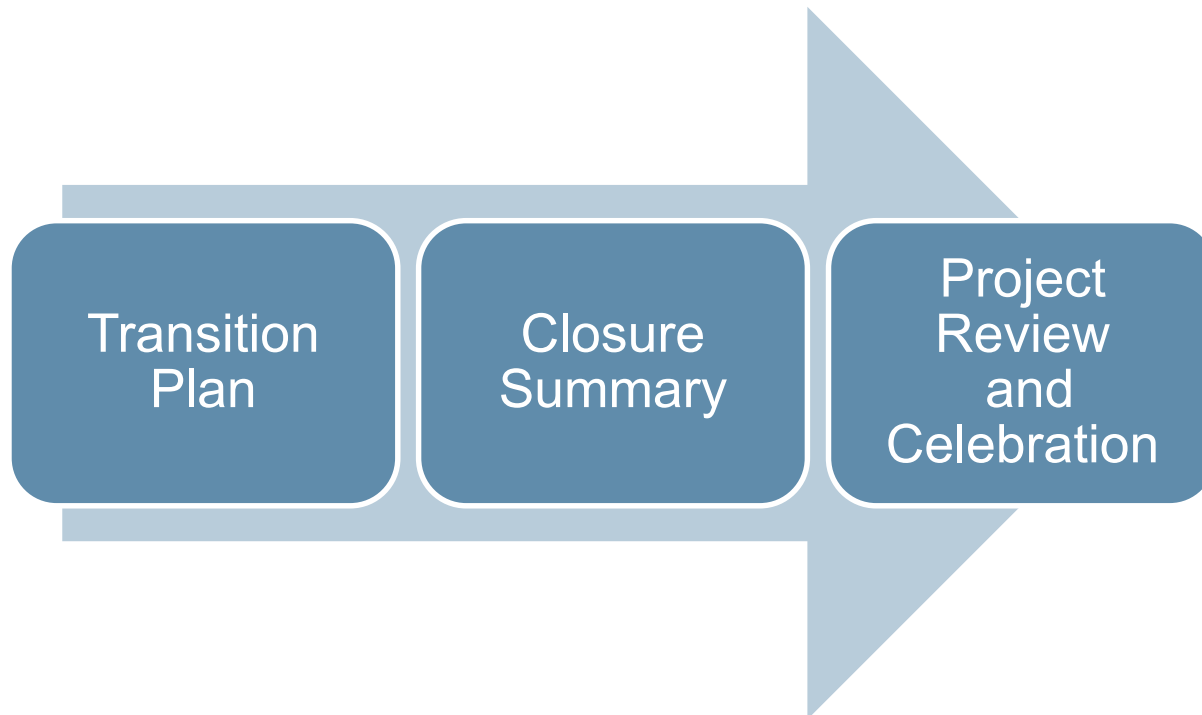**Facilitate Project Meetings** | **Track Action Items** | **Manage/Control Project Plan**

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22
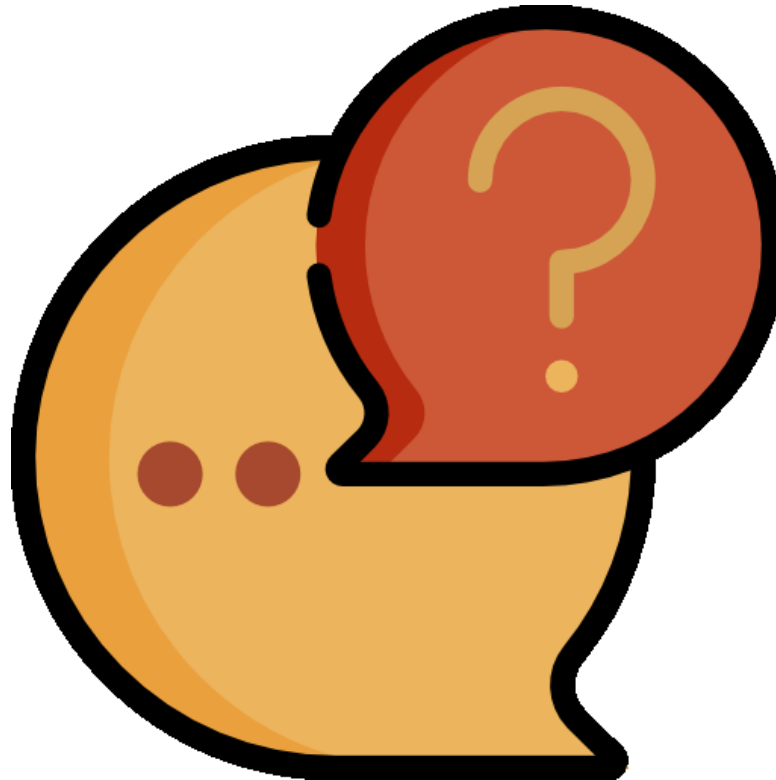
Phase 4: Closing/Transitioning

Closing/Transition Phase: Key Activities

Initiating/Framing → Planning → Executing/Monitoring → Closing/Transitioning

Transition Plan — Closure Summary — Project Review and Celebration

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Closing/Transition Plan

- Aligns responsible individuals to effectively move project into operations
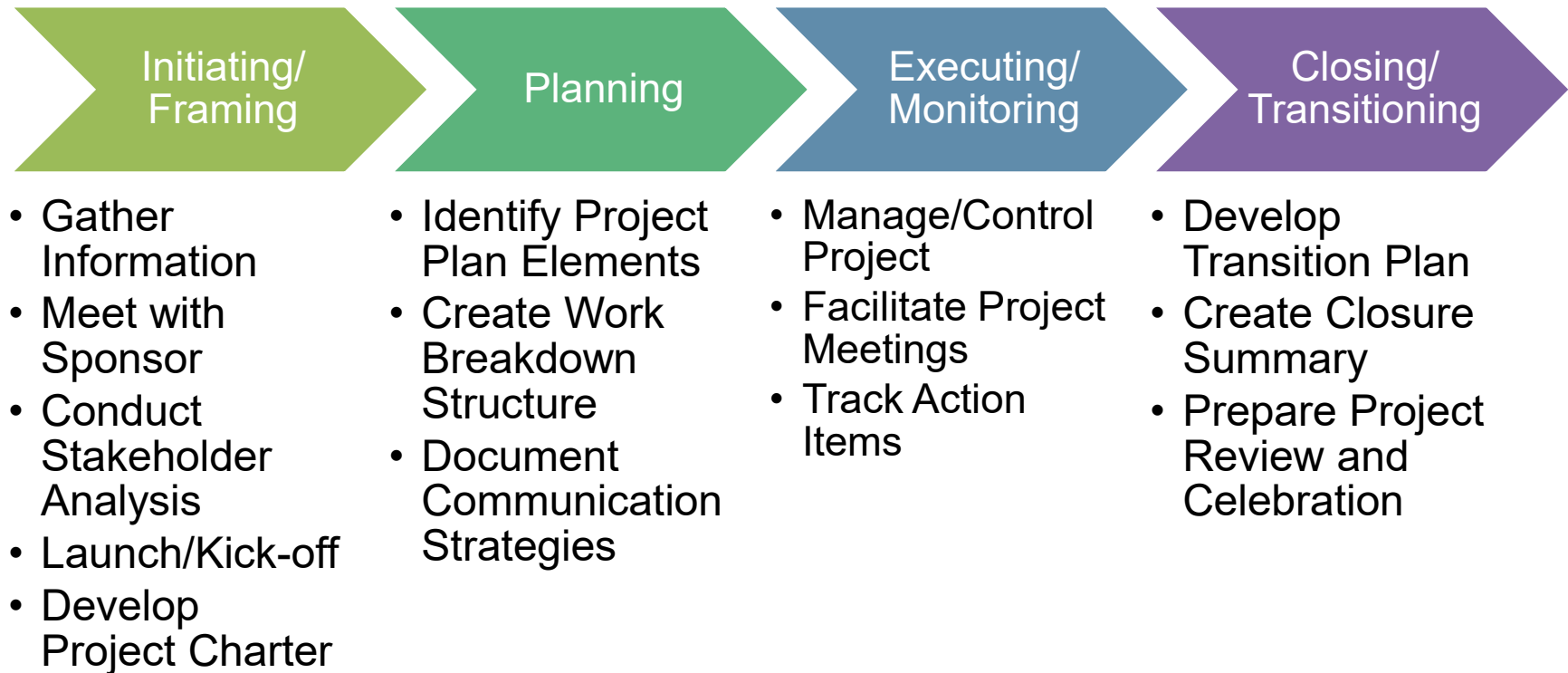- Engages individuals who will be operationalizing the work

Close-Out Activities

- ## Close-Out Project Documentation
  - Complete all final updates to project documentation (i.e. WBS, reporting, project action item log)
- ## Team Close-Out Activities:
  - Develop Transition Plan: Confirmation of transition operational ownership, meeting schedule, and timeline
  - Wrap Up: Highlights and Learnings
  - Contingency Planning
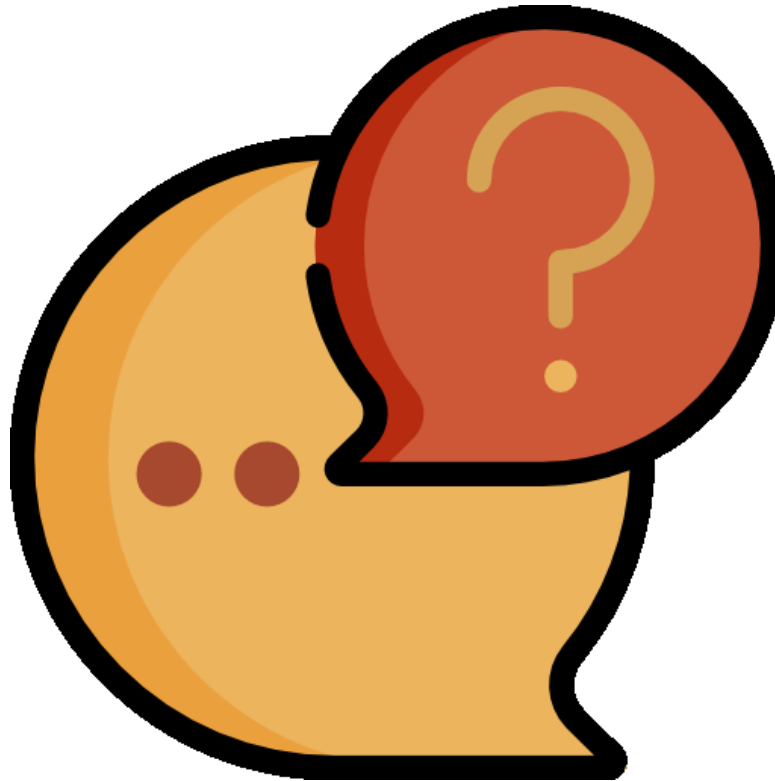 - Final Project Presentation
  - Celebrate

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Final Deliverables

- ## Close-Out Deliverables to Complete and File:
  - Transition Plan
  - Training Package (identification of who needs training, who will conduct training, creation of materials for training)
  - Plan for Monitoring (ensure success in the long term)
  - Comprehensive documentation of solution implemented, including roles and responsibilities
  - Final Project Summary

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Project Management Summary

Initiating/Framing → **Planning** → **Executing/Monitoring** → **Closing/Transitioning**

Initiating/Framing
- Gather Information
- Meet with Sponsor
- Conduct Stakeholder Analysis
- Launch/Kick-off
- Develop Project Charter

Planning
- Identify Project Plan Elements
- Create Work Breakdown Structure
- Document Communication Strategies

Executing/Monitoring
- Manage/Control Project
- Facilitate Project Meetings
- Track Action Items

Closing/Transitioning
- Develop Transition Plan
- Create Closure Summary
- Prepare Project Review and Celebration

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Questions/Comments

More Project Management

- ## Project Management Training
  - On-line & In-person

- ## Certified Project Management Professional (PMP)®
  - Requirement: 36–60 months of experience leading projects plus 35 hours of project management training

- ## Resources
  - PMBok Guide
  - PMP Exam Prep by Rita Mulcahy

PMI Website
https://www.pmi.org/certifications/project-management-pmp

Upcoming Webinars

e-Reports Relaunch
    March 3, 2021, noon - 1 p.m.

Member Benefit Delivery System for PCPs
    March 17, 2021, noon - 1 p.m.

Involving Patients in Quality Improvement
    March 30, 2021, noon - 1:15 p.m.

ABCs of Quality Improvement - 5 Sessions
    Every Wednesday in June, noon - 1 p.m.

http://www.partnershiphp.org/Providers/Quality/Pages/Quality_Events.aspx

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Quality Improvement On-Demand Courses

ABCs of Quality Improvement – an introduction to the basic principles of quality improvement. Five one-hour sessions.

Accelerated Learning Education Program – these learning sessions will provide you an overview of clinical measures including: measure specification/definitions, recommendations to maximize measure adherence, promising practices and improvement strategies and tools.

2019 PCP QIP High Performers – How'd They Do That?
In this webinar, two high performers in each category share their secrets to achieving high results in the PCP QIP program.

Additional Learning Opportunities

• Advanced Access – 5 part webinar series to improve access

• Tools for Prioritizing Quality Measures

• Change Management/Change Fatigue and QI

Link to all Recordings:
http://www.partnershiphp.org/Providers/Quality/Pages/PIATopicWebinarsToolkits.aspx

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Please complete your evaluation.

Your feedback is important to us!

Thank You!

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