HTM Project Management

Project Management, Stakeholder Management, and Working in COVID Circumstances

Agenda

Presenters
- Background
- How We Got Started in Project Management

Basics of Project Management
- Definition and History
- Life Cycle and Knowledge Areas
- Project Management in HTM

Stakeholder Management – They Key to Success
- Formal Understanding
- Practical Understanding
- Communication vs. Engagement
- Must Ask Questions

Stakeholder Management in the COVID World
- Changes in the Landscape
- Responses to Changes

Q&A

Presenters

Tiffany Miller, BSEET
BMET III, HTM
OhioHealth Corporation

Tiffany leads Clinical Engineering's project management efforts and is OhioHealth's subject matter expert on cardiac monitoring. She brings 15 years of experience in medical devices with 5 years as an IS project coordinator with training in ITIL, Agile, and Leadership Coaching. Prior to joining OhioHealth, she held a BMET role at Nationwide Children's Hospital as part of the project design team for their 11-story renovation. Tiffany has a Bachelor's in Electronics Engineering Technology and a Vineyard Leadership Institute Certification. She is inspired by authentically serving others in their healing and is a strong believer in continual education. Tiffany will graduate with a Master's in Organizational Management in July 2021. She currently resides in Westerville, Ohio, where she enjoys bonfires with friends and is a coffee aficionado.
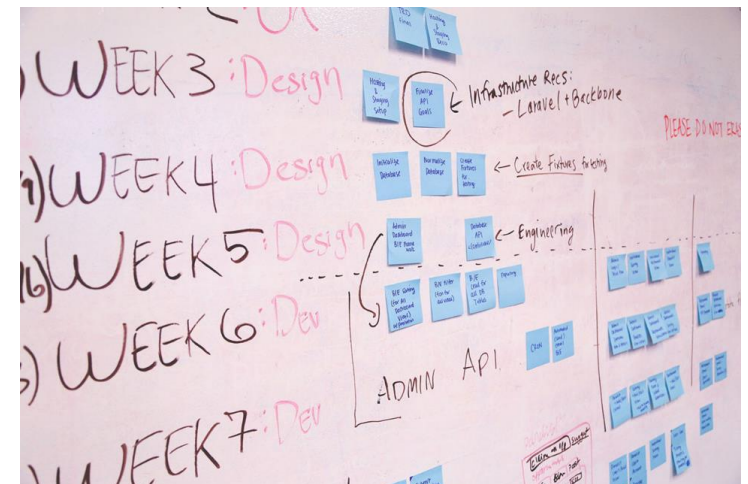
Will Kinsey, MAP, PMP
VP, Partner Success
reLink Medical

Will leads our hospital partnerships and heads up our premier reLink 360 enterprise product. Will brings 15 years of experience in medical devices, healthcare business development, and enterprise product management to our team. Prior to joining reLink Medical, Will held multiple roles at PartsSource where he worked directly with hospital partners to understand their needs and ensure they are set up for long-term success. Will received multiple Bachelor's degrees from Kent State University and holds a Master's of Applied Politics from The University of Akron. Will lives with his wife and three kids in Belmont, North Carolina where they enjoy being outdoors together and dancing like crazy to Alexa's music.

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Basics of Project Management

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What is a Project?

- Is a temporary endeavor undertaken to create a unique product, service or result

- HTM often defines a project as anything other than preventative or corrective assignments.

- A project is temporary in that it has a defined beginning and end in time, and therefore defined scope and resources

- A project is unique in that it is not a routine operation, but a specific set of operations designed to accomplish a singular goal. So a project team often includes people who don't usually work together – sometimes from different organizations and across multiple geographies.

https://www.pmi.org/about/learn-about-pmi/what-is-project-management
https://www.northeastern.edu/graduate/blog/identifying-project-management-strategies/

History of Project Management

- The **Gantt chart**, created by Henry Gantt, was created in 1917
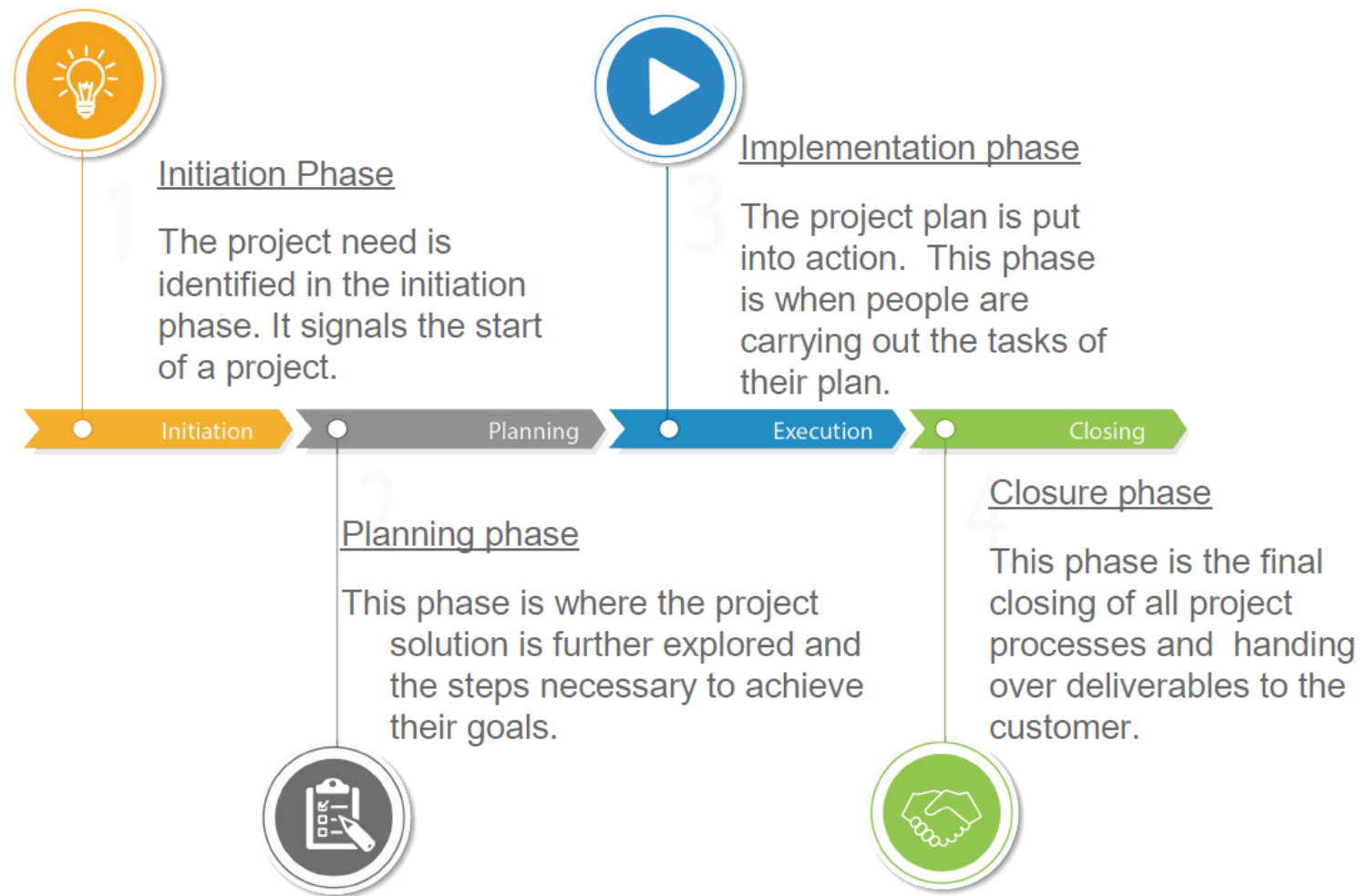
- The **Critical Path** was developed by Dupont in 1957 to help work through the complexities of shuttering chemical plants

- The **PERT analysis** was created by the US DoD in 1958 to identify the time needed to complete a task, which fed into the overall time needed to complete the whole project

- The **Work Breakdown Structure** was also created by the DoD in 1958

- The **PMI** was formed in 1969

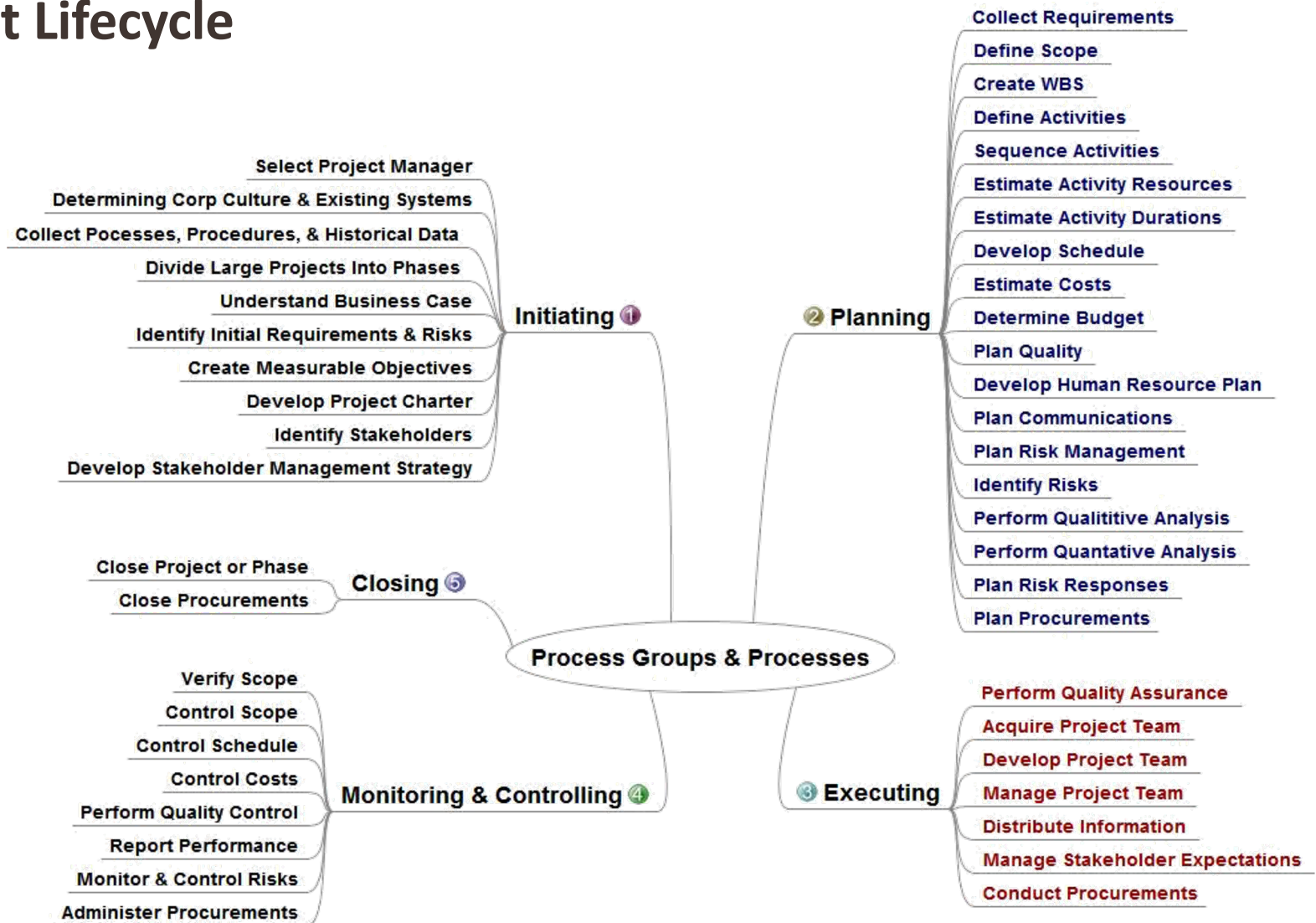- The **Theory of Constraints** was created in 198 by Dr. Eliyahu M. Goldratt

https://www.projectmanager.com/blog/history-project-management

The History of
PROJECT MANAGEMENT

A general overview of the modern development of the field of project management

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1911	The publication of Frederic Taylor's "The Principle of Scientific Management"
1917 Henry Gantt creates the Gantt Chart	
1956	The American Association of Cost Engineers (now AACE International) was founded
1957 The Critical Path technique was developed by Dupont	
1958	United States Department of Defense's US Navy Special Projects Office developed the Program Evaluation Review (PERT) for its Polaris project
1962 The Department of Defense mandated the use of Work Breakdown Structure (WBS) for future projects	
1965	The International Project Management Association (IPMA) was founded
1969 The nonprofit Project Management Institute (PMI) was founded	
1984	The management philosophy Theory of Constraints (TOC) was developed by Dr. Eliyahu M. Goldratt
1986 Scrum was named as a project management style	
1989	Earned Value Management (EVM) came to prominence as a technique in project management
1989 The UK government created Projects In Controlled Environments (PRINCE)	
1997	Eliyahu M. Goldratt developed Critical Chain Project Management (CCPM) based on the methods and algorithms of his Theory of Constraints
2001 Agile as a project style was codified with the creation of the Agile Manifesto or the Software Development Manifesto	
2008	ProjectManager.com is released, bringing project management into the cloud

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Project Lifecycle

Initiation Phase

The project need is identified in the initiation phase. It signals the start of a project.

Implementation phase

The project plan is put into action. This phase is when people are carrying out the tasks of their plan.

Initiation | Planning | Execution | Closing

Planning phase

This phase is where the project solution is further explored and the steps necessary to achieve their goals.

Closure phase

This phase is the final closing of all project processes and handing over deliverables to the customer.

https://www.slideshare.net/JenniferBanzon/project-life-cycle-70247532?from_action=save

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Project Lifecycle

Process Groups & Processes

Initiating ❶

- Select Project Manager
- Determining Corp Culture & Existing Systems
- Collect Pocesses, Procedures, & Historical Data
- Divide Large Projects Into Phases
- Understand Business Case
- Identify Initial Requirements & Risks
- Create Measurable Objectives
- Develop Project Charter
- Identify Stakeholders
- Develop Stakeholder Management Strategy

❷ Planning

- Collect Requirements
- Define Scope
- Create WBS
- Define Activities
- Sequence Activities
- Estimate Activity Resources
- Estimate Activity Durations
- Develop Schedule
- Estimate Costs
- Determine Budget
- Plan Quality
- Develop Human Resource Plan
- Plan Communications
- Plan Risk Management
- Identify Risks
- Perform Qualititive Analysis
- Perform Quantative Analysis
- Plan Risk Responses
- Plan Procurements

Closing ❺

- Close Project or Phase
- Close Procurements

Monitoring & Controlling ❹

- Verify Scope
- Control Scope
- Control Schedule
- Control Costs
- Perform Quality Control
- Report Performance
- Monitor & Control Risks
- Administer Procurements

❸ Executing

- Perform Quality Assurance
- Acquire Project Team
- Develop Project Team
- Manage Project Team
- Distribute Information
- Manage Stakeholder Expectations
- Conduct Procurements

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Project Lifecycle

- Almost everything has a lifecycle; beginning, middle, and end

- The project management lifecycle (PMBOK) is a focus on the lifecycle of a project, which was created to increase the likelihood of project success

- Recognize which lifecycle you are in and plan accordingly

- The Initiation phase is usually skipped and Planning starting right away

- The Closure phase is usually disliked by managers wanting you to move on
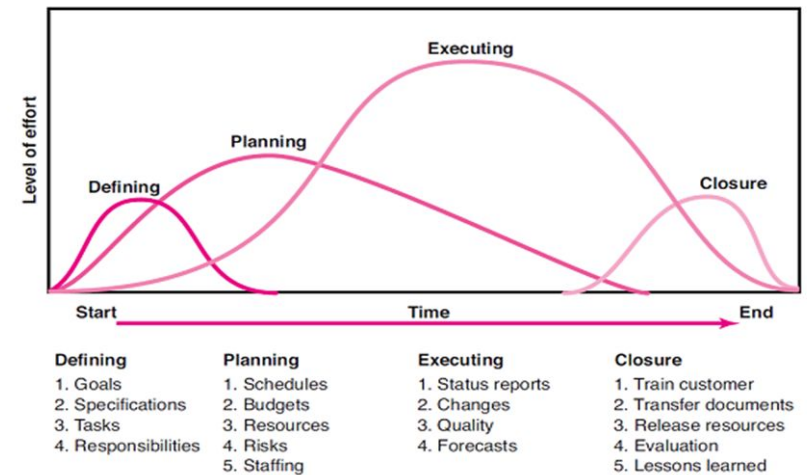
Knowledge Areas of Project Management

Integration	• Coordinate activities across all project management areas and process groups
Scope	• Ensure the project work includes all elements required to complete the work
Schedule	• Ensure the project work is completed in a timely way
Cost	• Plan, estimate, manage and control project finances
Quality	• Ensure the project delivers a quality output that is fit for purpose
Resource	• Secure, manage and monitor use of resources throughout the project
Communications	• Ensure communications on the project are planned and carried out appropriately
Risk	• Identify, assess and manage risk
Procurement	• Carry out purchasing and contracting as required
Stakeholder	• Identify and engage stakeholders throughout the project

https://www.slideshare.net/ElizabethHarrinFAPM/10-project-management-knowledge-areas?qid=035bc7bf-6f15-4c41-8120-e545515c4883&v=&b=&from_search=1

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Project Management in HTM

| Topic	Description
Shift from managing devices to managing people	• Learn the roles of people and what matters to them. • Keeping the ball rolling. • Timeline reporting. • Understanding escalation.
Adapt to preferences in communication	• What options does your organization have available? • What ways do others communicate to you from projects? • Each department or person can be different. • How you say what you say matters.
Focus on building rapport	• Go to meetings 5 minutes early. • Smile, say hello in the hallway. • Answer questions in a timely manner. • Complete timelines given.
Time from bench to meetings, teleconference, email	• As a technical resource these can seem like a waste of time. • Realize these are the tools for HTM project management. • Learn to use them.

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HTM Capital Project – Sample Org Chart
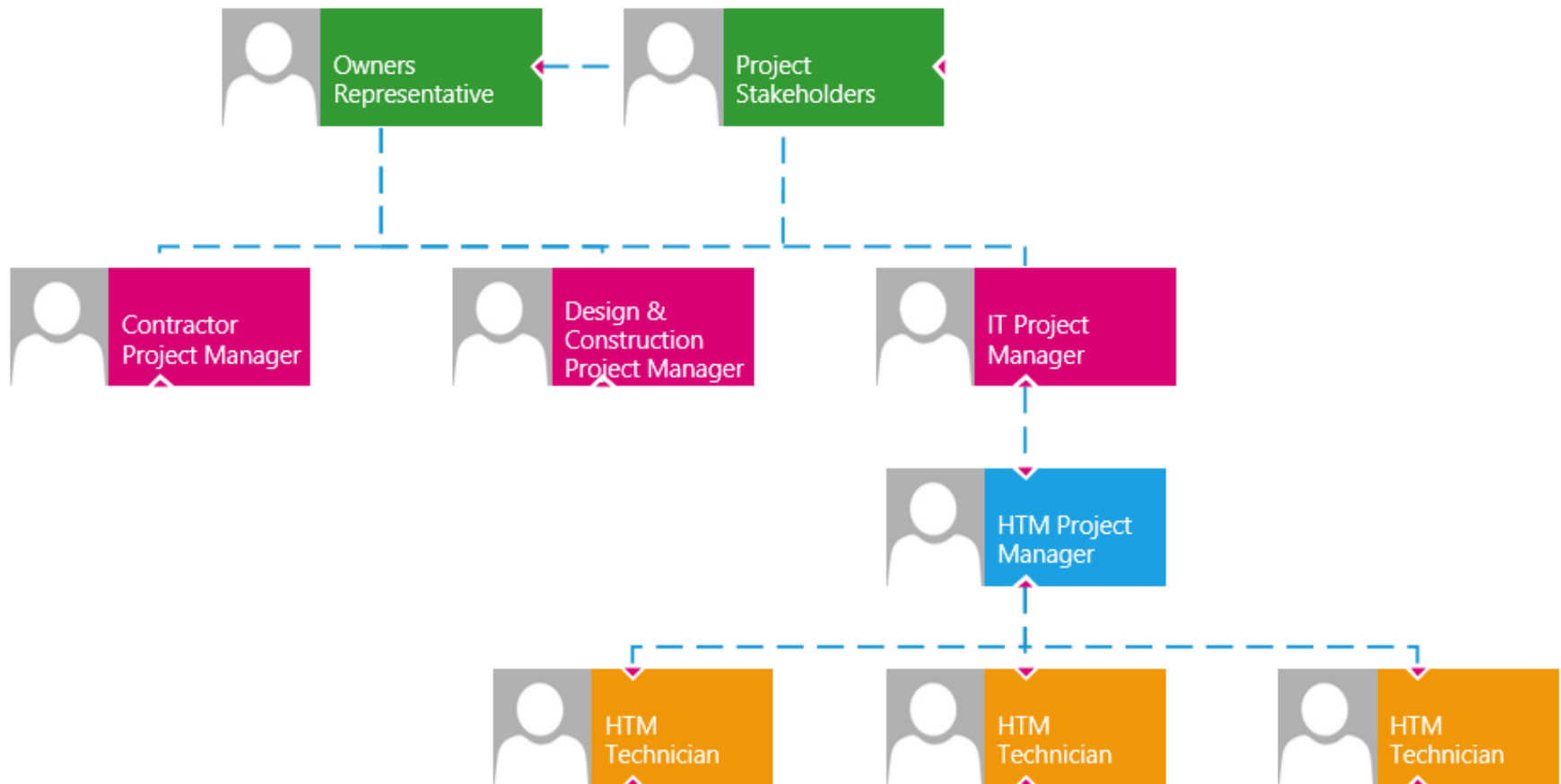
Stakeholder Management – The Key to Success

Stakeholder Management – Formal Understanding

Stakeholder management is the process by which you organize, monitor and improve your relationships with your stakeholders. It involves systematically identifying stakeholder; analyzing their needs and expectations; and planning and implementing various tasks to engage with them*

*https://www.darzin.com/stakeholder-management-ultimate-guide
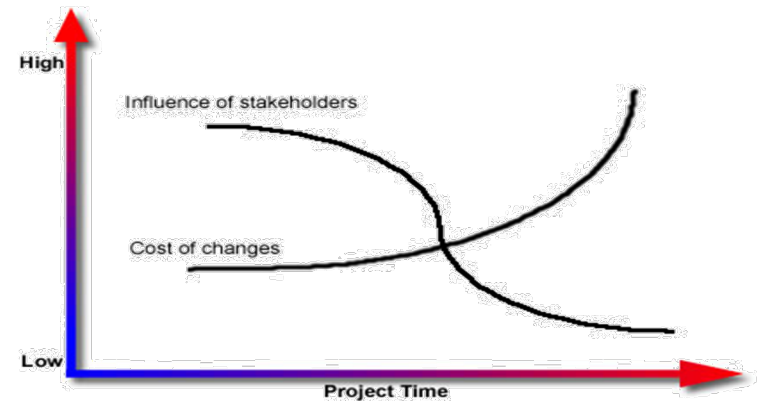
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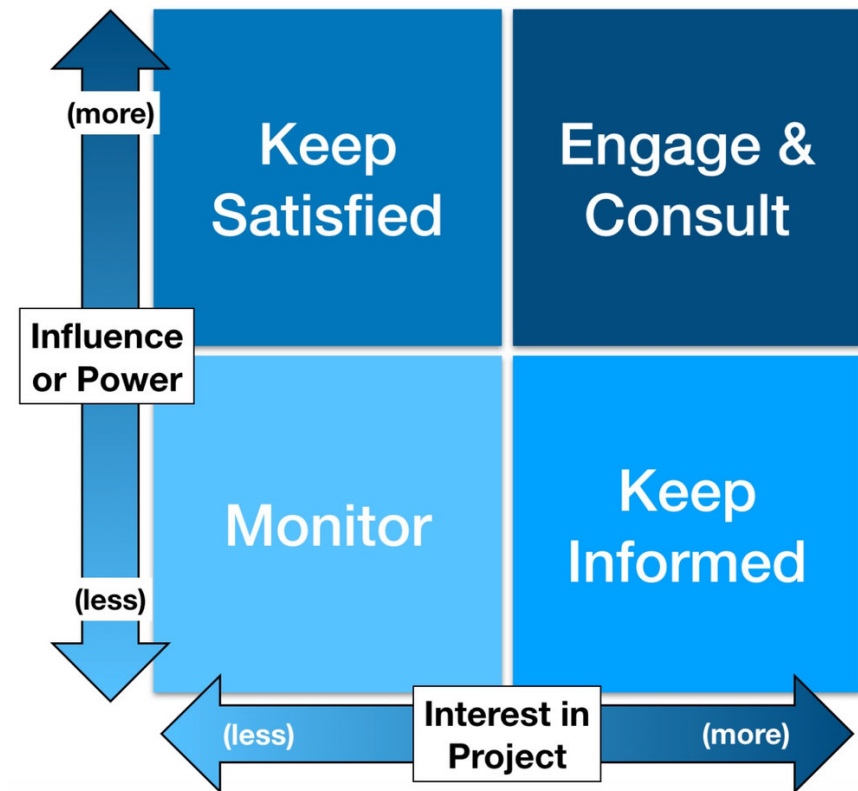
Stakeholder Management – Practical Understanding

- New project managers undervalue the importance of Stakeholder Management

- Sometimes called "people management", this can be both born with and a learned skill

- ANYONE who has interest in a project is a Stakeholder, whether we like it or not

- Direct managers are normally engaged the most while those affected by projects are normally engaged the least

- Relationships are best built before a need has materialized, those relationships must be nurtured

- Point at your stakeholders for every win. Every win

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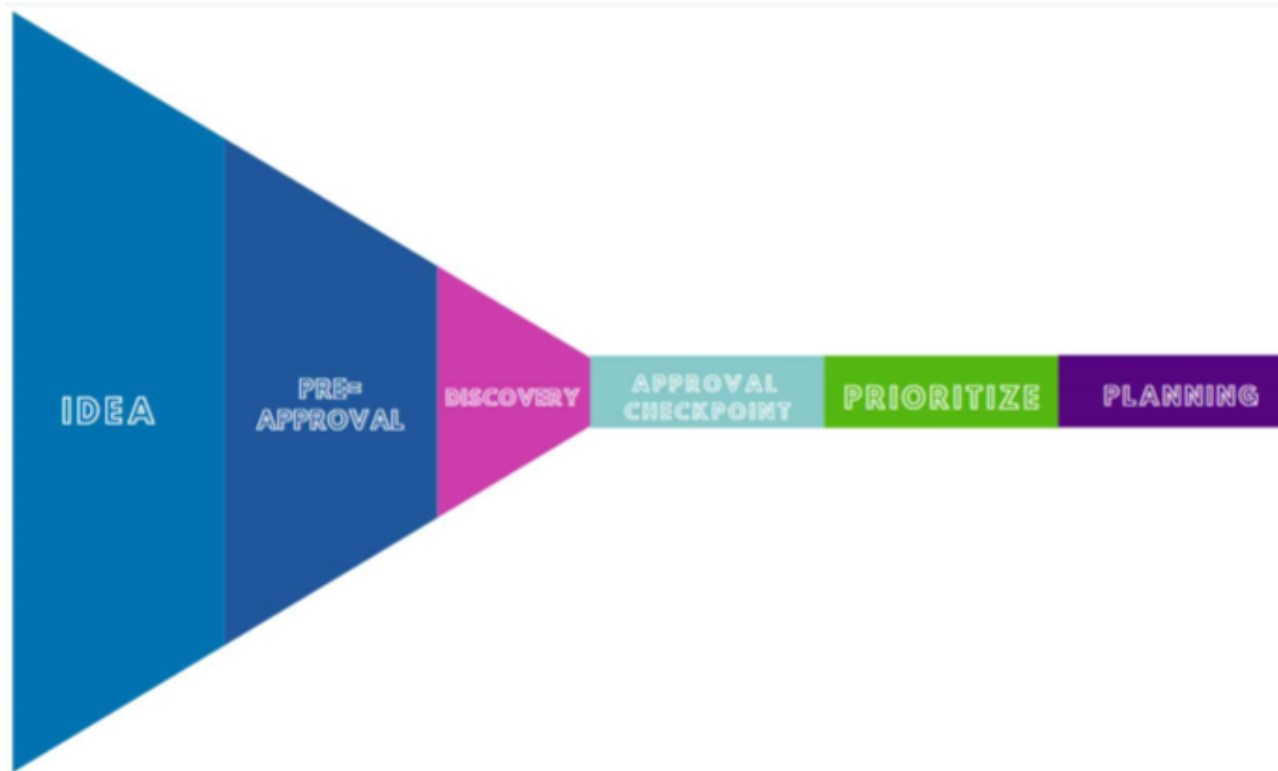MEDICAL

Communications vs. Engagement

- "Engagement implies a two-way relationship with mutual obligations whereas communication is about the transfer of information and ideas, which may or may not be relationship based" – *Dalmau*

- The level to which you engage key stakeholders will be directly proportionate to the level of responsibility you have on the next project

- Easy engagements can be "can I get your thoughts on this", "am I missing anything",

- Be sure to bring stakeholders completed thoughts to engage with and not blank slates. Stakeholders may hold you accountable for early out-of-scope ideas
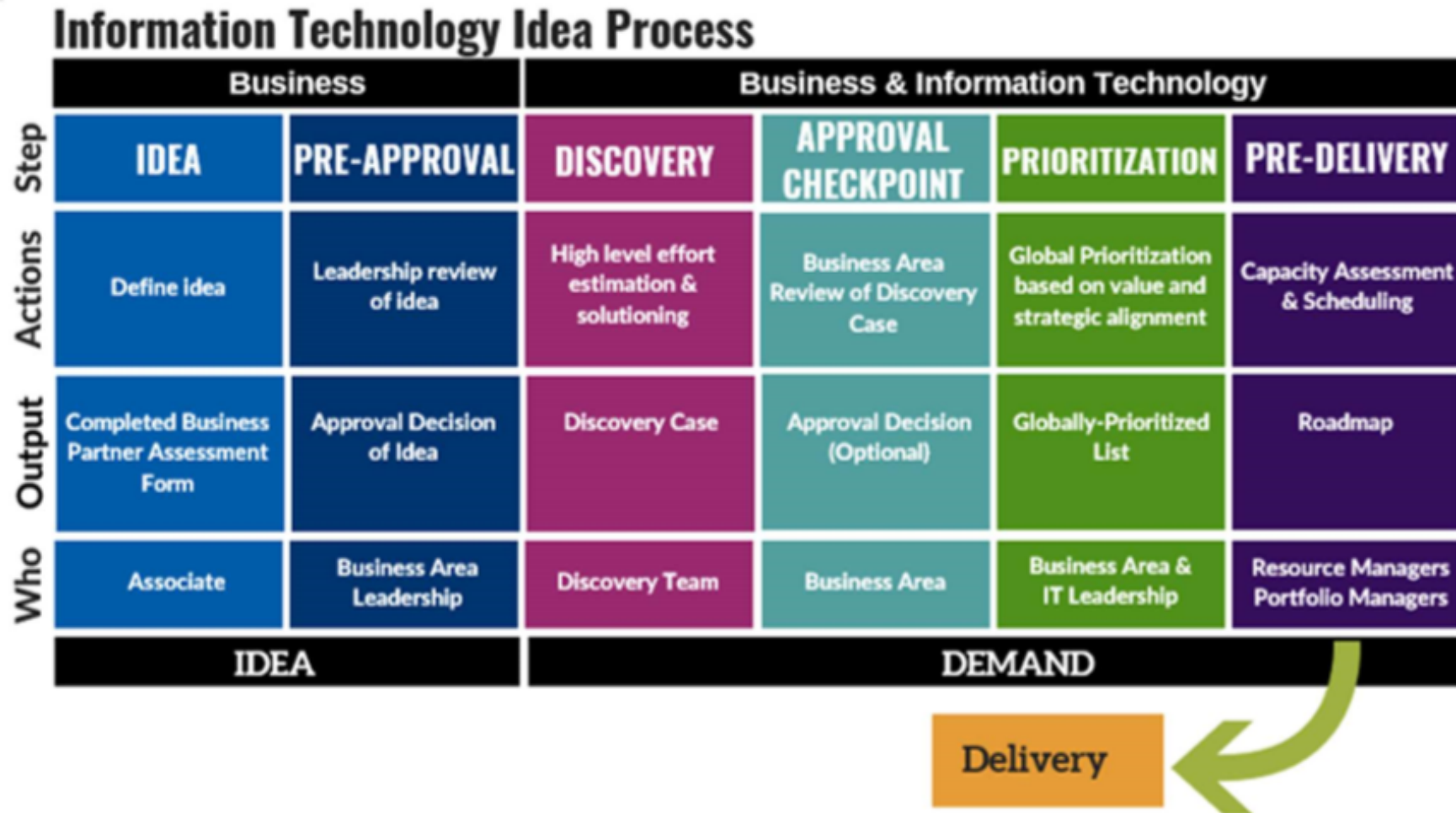
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IDEA Process

Intake and Prioritization funnel

IDEA · PRE-APPROVAL · DISCOVERY · APPROVAL CHECKPOINT · PRIORITIZE · PLANNING

IDEA Process

Information Technology Idea Process

	Business		Business & Information Technology			
Step	**IDEA**	**PRE-APPROVAL**	**DISCOVERY**	**APPROVAL CHECKPOINT**	**PRIORITIZATION**	**PRE-DELIVERY**
Actions	Define idea	Leadership review of idea	High level effort estimation & solutioning	Business Area Review of Discovery Case	Global Prioritization based on value and strategic alignment	Capacity Assessment & Scheduling
Output	Completed Business Partner Assessment Form	Approval Decision of Idea	Discovery Case	Approval Decision (Optional)	Globally-Prioritized List	Roadmap
Who	Associate	Business Area Leadership	Discovery Team	Business Area	Business Area & IT Leadership	Resource Managers Portfolio Managers
	IDEA		**DEMAND**			

Delivery

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Stakeholder Management in the COVID World

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Changes in the Landscape Due to COVID-19

- Access to buildings, stakeholders, and resources has changed dramatically

- Most project managers are working remote currently, away from their stakeholders

- There is a limited ability to informally interact with peers, colleagues, and intra-organization personnel

- Social distancing has suspended conference room meetings for the next 4-6 quarters

- Capital dollars have been frozen, and projects will be reduced in the foreseeable future

Responses to COVID Workplace Changes

- Focus on stakeholder touchpoint frequency

- Balance work-only interactions with some personal or fun communications when possible

- Utilize video whenever possible to communicate with stakeholders. Ask permission prior to starting

- Utilize outdoor meetings done while observing social distancing

- Virtual happy hours for project teams

- Encourage your teammates to accept the new normal of communicating and working

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Questions and Answers

Follow-Up Questions for Tiffany: https://www.linkedin.com/in/tiffanymillerhtm/
Follow-Up Questions for Will: https://www.linkedin.com/in/williamkinsey/

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