



## 5 PROJECT MANAGEMENT TECHNIQUES TO TRANSFORM YOUR LEADERSHIP PERFORMANCE

Kristina Krail, MPH, RN, NEA-BC, FACHE, PMP  
November 8, 2016  
2:30 PM – 3:30 PM  
Session 132

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### Learning Objectives

- 1 • To recognize the uniform framework and process steps of managing a successful project
- 2 • To describe 5 selected PM processes and associated tools
- 3 • To apply Project Management knowledge to current nursing management role requirements

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# THANK YOU!

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Who manages projects?

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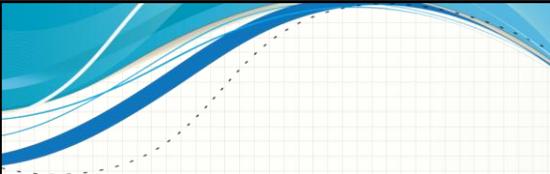
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**THE NURSING PROCESS AND PROJECT MANAGEMENT**

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# What is the definition of a project?

- A temporary endeavor undertaken to create a unique product, service, or result
- Different from ongoing operations – projects have a beginning, an end, and a limited duration
- Critical to the organizations' business strategy - for strategy is implemented through projects
- Unique: one or more elements that have never been done before

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## Project Management Processes (Map)

- Interrelated actions and activities performed to achieve project objectives
- Each process has inputs, applicable tools + techniques, and resulting outputs
- Time/Budget/Scope

Knowledge Area	Project Management Process Groups				
	Initiating Process Group	Planning Process Group	Executing Process Group	Monitoring & Controlling Process Group	Closing Process Group
4. Project Integration Management	4.1 Develop Project Charter	4.2 Develop Project Management Plan	4.3 Direct and Manage Project Execution	4.4 Monitor and Control Project Work 4.5 Perform Integrated Change Control	4.6 Close Project or Phase
5. Project Scope Management	5.1 Collect Requirements 5.2 Define Scope 5.3 Create WBS			5.4 Verify Scope 5.5 Control Scope	
6. Project Time Management	6.1 Define Activities 6.2 Sequence Activities 6.3 Estimate Activity Resources 6.4 Develop Schedule 6.5 Monitor Schedule			6.6 Control Schedule	
7. Project Cost Management	7.1 Estimate Costs 7.2 Determine Budget			7.3 Control Costs	
8. Project Quality Management	8.1 Plan Quality	8.2 Perform Quality Assurance	8.3 Perform Quality Control		
9. Project Human Resource Management	9.1 Develop Human Resource Plan	9.2 Acquire Project Team 9.3 Develop Project Team 9.4 Manage Project Team			
10. Project Communications Management	10.1 Identify Stakeholders 10.2 Plan Communications	10.3 Distribute Information 10.4 Manage Stakeholder Expectations	10.5 Report Performance		
11. Project Risk Management	11.1 Plan Risk Management 11.2 Identify Risks 11.3 Perform Qualitative Risk Analysis 11.4 Perform Quantitative Risk Analysis 11.5 Plan Risk Responses		11.6 Monitor and Control Risks		
12. Project Procurement Management	12.1 Plan Procurements	12.2 Conduct Procurements	12.3 Administer Procurements	12.4 Close Procurements	

PMBOK Guide 4th Ed.

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Project Time Management		• Define Activities • Sequence Activities • Estimate Activity Resources • Estimate Activity Duration • Develop Schedule		• Control Schedule	
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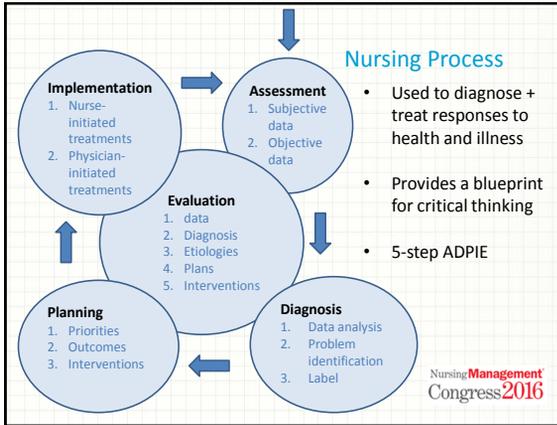
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### NSG PROCESS + PROJECT MGMT

	NURSING PROCESS		PROJECT MANAGEMENT PROCESS
🔍	ASSESSMENT DIAGNOSIS	➔	INITIATING
📄	PLANNING		PLANNING
🔧	IMPLEMENTATION		EXECUTING
📊	EVALUATION	➔	MONITORING + CONTROLLING
✅			CLOSING

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### Nursing Project Examples

- Establish a new service-line
- Create a staff development offering
- Implement a new process (like huddle or rounding)
- Open a unit
- Expand a program
- Submit a grant



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## Nursing Project Examples

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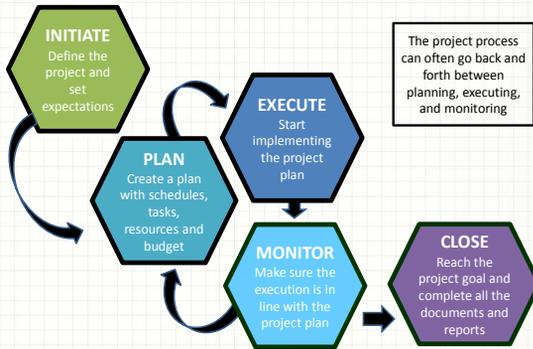
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## The Project Management Life-Cycle



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## SOME TOOLS & TECHNIQUES

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# Initiating Process Group



*"The processes and activities needed to identify, define, combine, unify and coordinate the various processes and activities within the Project Management Process Groups" PMBOK 4<sup>th</sup> ed.*

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# What is a Project Charter?



A document that formally authorizes a project or a phase and identifies initial requirements that satisfy the project sponsor's needs and expectations

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# Project Charter



1. Project title and description
2. Project manager assigned and authority level
3. Business case
4. Resources preassigned
5. Stakeholders
6. Outcome description and deliverables
7. Measurable project objectives
8. Project approval requirements
9. High-level project risks
10. Project sponsor authorizing this project

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## Project Charter Example



1. Project title and description	New Unit General Orientation
2. Project manager / authority level	Nurse Manager? Unit-based Educator
3. Business case	Competency, safety, reg. requirement
4. Resources preassigned	Educator hours, staff ed. hours, space
5. Stakeholders	Med. Staff, HR, unit staff, admin.
6. Outcome description + deliverables	Program completed /replicable
7. Measurable project objectives	# staff trained, skills check list, unit open!
8. Project approval requirements	Plan approval, program content approval
9. High-level project risks	Const. schedule, staff can't be released
10. Project sponsor	DON? Unit Chief? Dir. Staff Devo?

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## Planning Process Group



*"Planning processes defines how the project is executed, monitored and controlled and closed"* PMBOK 4<sup>th</sup> ed.

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## Required Plans



- Integration plan
- Scope plan
- Time management plan
- Cost plan (budget)
- Quality plan
- Human Resource plan
- Communications plan
- Risk management plan
- Procurement plan

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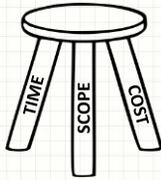
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## Project Scope / Cost / Time



How long it will take to deliver the scope



How much it will cost to deliver the scope

The work that must be done to complete the project

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## Scope Management



- Create a detailed project scope statement based on information from the charter
- List deliverables – where, when, to whom
- Create a “WBS” **W**ork **B**reakdown **S**tructure
  - Hierarchical decomposition of the scope
  - Descending levels represent more detailed elements
  - Relates the elements to each other and the end product

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## How do you create a WBS?



- Meet with project personnel
- Brainstorm phases and work areas
- Consider how to accomplish each phase
- Break down each phase into smaller units until you can estimate a resource (\$\$ or hours) for each task
- Each task should be able to be completed without seeking additional information
- Each task should have a start and a finish

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## WBS Example



- Determine student body
- Determine overall learning objectives
- Identify offering format, logistics, length, schedule
- Determine location, equipment, AV, and IT requirements
- Communicate above requirements to related departments
- Identify subject matter expert
- Identify graphics that can enhance program
- Review content received back from SME
- Create program sign-in procedure and sheet
- Create program evaluation
- Assign program evaluation tabulation and report-out
- Confirm program schedule
- Determine procedure for staff on LOA, non-compliant, etc.
- Monitor attendance, faculty performance and program realization

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## Time Management



- Includes processes for managing the work of the project so that the project may complete on time
- A schedule can be created with knowing:
  - Duration = how long
  - Sequence = in what order of execution
  - Estimates resources = by who and how much

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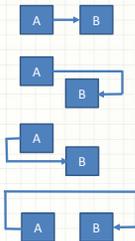
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## Time Management



- Dependency Relationships
  - FS When A finishes B can start
  - FF When A finishes, B may finish
  - SS When A starts, B may start
  - SF When A starts, B may finish



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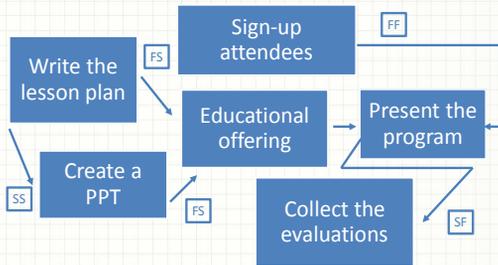
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## Dependency Example




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## Time Management



- Scheduling Dependencies Reasons
  - Mandatory (must be completed in a certain order)
  - Discretionary (preferable to be accomplished in a certain order)
  - External has to be completed in a certain order because of requirements outside of the project
  - Resource constraints

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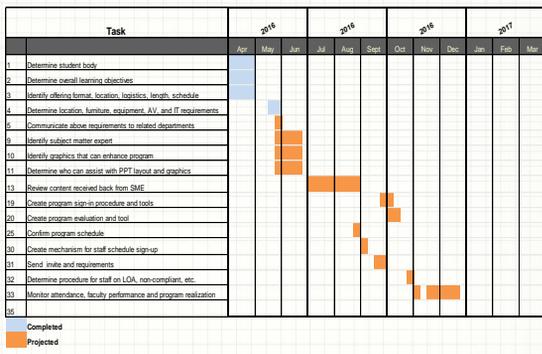
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## Schedule Example




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# Executing Process Group

*"The processes associated with the work defined in the project plans to achieve the project's objectives"*  
 PMBOK 4<sup>th</sup> ed.

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# Stakeholder Management

Stakeholders are any people or organizations whose interests may be positively or negatively impacted by the project or its outcome



- Stakeholder analysis
- Stakeholder register
- Stakeholder management strategy

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Stakeholder Description	Options for Managing the stakeholder
High interest in the project, low influence, knowledgeable expert on high risk areas	Invite the stakeholder to participate in the risk management process
Low interest, the source of major requirements on the project (high influence) not easy to work with	Make sure the requirements are clear Send reports
High interest, high influence, not a supporter of the project	Find out why the stakeholder is not a supporter, and base your management plan on that
High interest, high influence, a supporter of the project	Involve the stakeholder in team meetings, include the information requested
Moderate interest, high influence,, completing many activities on the project, a project supporter	Invite the stakeholder to officially join the project management team
Moderate interest, high influence because s/he has identified many potential risks for the project, a supporter of the project	Plan to meet with the stakeholder periodically throughout the project to see if s/he has identified any more risks
Moderate interest, nervous about completing his or her assigned activities	Plan to forward relevant literature to help the stakeholder, arrange for training if necessary

Rita Mulrany's PMP Exam Prep 7<sup>th</sup> Edition 2011

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## Stakeholder Example

- Nursing employees
- Administration
- Medical staff
- Quality Assurance department
- Facilities or material management
- CFO
- Others

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## Monitoring + Controlling Process Group



*"Processes associated with tracking, reviewing, and regulating the progress to meet the performance objectives defined in the project plans" PMBOK 4<sup>th</sup> ed.*

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## Monitoring + Controlling Principles

- Risk: An uncertain event or condition that if it occurs has a positive or negative effect on a project's objectives (may happen)
- Issue: A point or matter in question that is not settled (has happened)
- Identification vs. mitigation plan vs monitoring
- What would be risks associated with putting on an educational offering?

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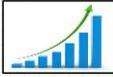
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# Risk Control Example



## Failure Mode Effects Analysis

FMEA is a risk analysis tool/exercise that can be used to analyze and prioritize key process outputs and associated potential failures; identify the effects of those failures on the process and develop contingencies or interventions to detect and prevent the failures

- Structured approach to identify:
  - ways process might fail (failure modes)
  - effects or results of failures (failure effects)
  - possible causes of failures
- Eliminates the risk associated with specific causes
- Prioritizes actions that should be taken to prevent or reduce the risk
- Prioritizes actions that should be taken to prevent or minimize the consequence of failure

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# FMEA Example



Process Step	Potential Failure Modes	Potential Failure Effects	S Severity	O Occurrence Probability	D Current Controls	D S x O x D Risk Priority Number RPN	Recommended Intervention	Assigned Person	Date
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1. Conduct a multidisciplinary team
2. Consider the numerous process steps
3. Brainstorm the probable/possible associated failure modes
4. List the related effect – in other words, if the failure actually occurs, what would it mean to the staff + patients
5. Rate the severity of the effect (see slide on RPM- agree on 1- 5 ranking scale definitions)
6. Identify the causes of the failure mode and effect
7. Rate how likely this cause will occur and illustrate as occurrence probability
8. Identify the controls in place to detect the issue
9. Rank its effectiveness in the detection column (1 means excellent controls and 5 means no controls)
10. Multiply severity, occurrence and detection number to determine RPN – Risk Priority Number (1-125)
11. Identify most critical issues and decide where to focus first
12. Assign specific interventional actions with responsible persons and deadlines

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# Risk Control Story




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# Closing Process Group



“The processes of finalizing all activities across all of the project management process groups to formally complete the project or phase”  
PMBOK 4<sup>th</sup> ed.

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# Project Closing Examples



- Turn over deliverables
- Archive project documents
- Policies, procedures, position descriptions
- Thank the project participants
- Complete financials
- Release the resources
- Stakeholder survey
- Seek commendation or references
- Debrief and “lessons learned”
- Issue final report

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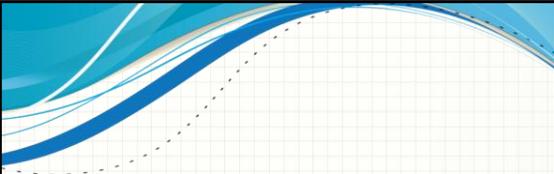
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# SUMMARY AND REVIEW

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## NSG PROCESS + PROJECT MGMT

	NURSING PROCESS	PROJECT MANAGEMENT PROCESS
	ASSESSMENT	INITIATING
	DIAGNOSIS	
	PLANNING	PLANNING
	IMPLEMENTATION	EXECUTING
	EVALUATION	MONITORING + CONTROLLING
		CLOSING

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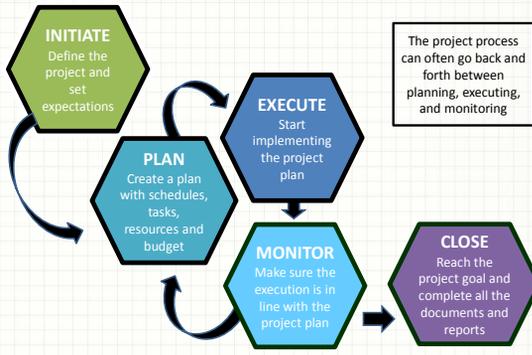
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## The Project Management Life-Cycle




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## PM Areas of Knowledge

- Integration Management
- Scope Management
- Time Management
- Cost Management
- Quality Management
- Human Resource Management
- Communications Management
- Risk Management
- Procurement Management




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## Resources

- *A Guide to the Project Management Body of Knowledge (PMBOK® Guide)* – Fifth Edition. Project Management Institute, Inc. 2013.
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your Leadership performance  
November 8, 2016  
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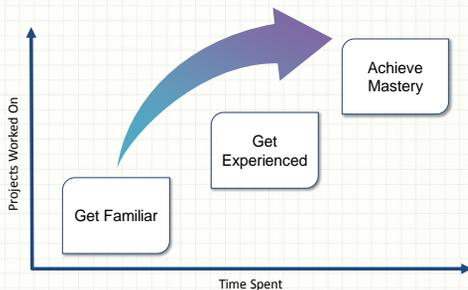
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## Working Toward Mastery



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