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An introduction to project management

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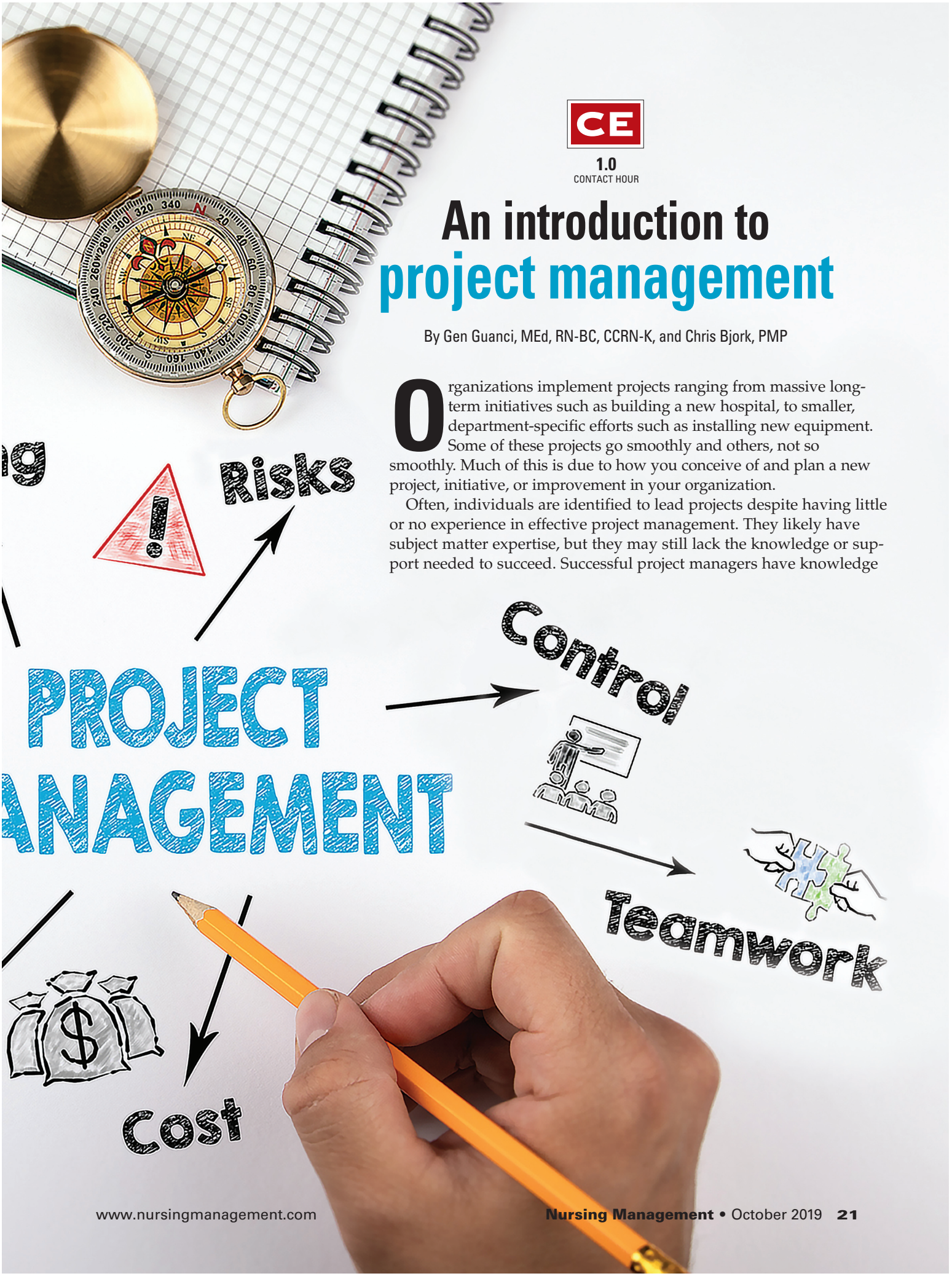
Organizations implement projects ranging from massive long-term initiatives such as building a new hospital, to smaller, department-specific efforts such as installing new equipment. Some of these projects go smoothly and others, not so smoothly. Much of this is due to how you conceive of and plan a new project, initiative, or improvement in your organization.

Often, individuals are identified to lead projects despite having little or no experience in effective project management. They likely have subject matter expertise, but they may still lack the knowledge or support needed to succeed. Successful project managers have knowledge



of project management concepts, tools, and techniques; the skills needed to lead teams, remove barriers, and communicate with stakeholders; and the ability to develop detailed plans, accurate budgets, and project work schedules.[1] Project managers must also be authentic leaders with a positive attitude and excellent communication skills. Keep in mind that successful project managers may or may not be formal leaders.

In this article, we provide an overview of the formal project management process, with tips you can apply to the next project you manage.

Moving pieces

You've just been assigned to lead an initiative in your organization. Would you sit down with a small group of people and discuss where you are currently, where you want to go, and how you want to get there? Would you talk about complexity or who should have a say in what this initiative will look like when it's done? Would you discuss who has responsibilities, authority, and accountabilities within the project? If you're asking yourself questions like these, you've already been engaging in the formal phases of project management.

What grew out of scientific management theory in the early 20th century and began to be formalized in the 1950s by DuPont and the US Department of Defense has evolved into the current project management body of knowledge (PMBOK). The Project Management Institute (PMI) defines project management as "a temporary endeavor undertaken to create a unique product, service, or result."[1] Simply put, project management is a series of principles, tools, and techniques that takes valuable inputs (time, talent, resources) and creates valuable outputs (increased quality, safety, satisfaction, and so on).

A Guide to the Project Management Body of Knowledge (PMBOK Guide) introduces the formal process groups of project management: initiating, planning, executing (the authors have replaced this term with "implementing" to avoid language that may condone violence), monitoring/controlling, and closing.[1] *Table 1* provides a brief outline of the common phases found in many successful projects.

There are many things and people to keep track of in project management, but you'll be happy to see that all the phases and their related processes are inherently practical and easy to understand. Although formal project management has largely been found in industrial, construction, and high-tech sectors, the principles and practices work in healthcare settings and are becoming standard for large-scale projects.

Healthcare project management

Let's look at an example of implementing organization-wide shared governance using the formal phases of project management. First, we need to define the project by deciding what key outputs we want. Do we want organization-wide interprofessional shared governance or nursing department shared governance? Do we want only unit-specific shared governance or perhaps a mix of options? Whichever type of shared governance we pick becomes the project's output. For example, if we choose for the organization to implement the councilor model of shared governance, our desired output may be to successfully implement this model in a certain number of departments by a certain date.

Initiating

Once we've selected our output(s), a project charter/scope document can be drafted. This document is typically created through the collaboration of the project manager and the executive sponsor. The project's charter/scope document contains every high-level aspect of the project, such as how the work will get done, how much time it will take, how much it will cost, and who will be impacted by the results of the project (key stakeholders).

The charter/scope document also identifies the key performance indicators of the project.[2] Another important part of the project charter/scope document is a complete understanding of the current state. This requires gathering existing data and collecting new data that are salient to successful implementation. Does shared governance exist already in the organization in some form? Do some units or departments already demonstrate the characteristics of good shared governance? If so, you'll have a source for project team members. Assembling a project team is critical for the next project phase.

Planning

A project is usually led by an individual who's accountable for its overall success or failure. The project plan is the key

Table 1: The project management process[1]

Initiating

- Project charter is developed (scope, budget, timeline)
- Key stakeholders are documented
- Project requirements are gathered
- Deliverable: Project charter/scope document is signed by executive sponsor
- KEY QUESTIONS: What will this look and feel like when it's done? Who will have a say in what this should be? Who will approve the project and who will lead it?

Planning

- Project manager creates the plan
- Project team is created and resources (people) are assigned
- Schedule, communication plan, and change management process are created
- Project team meets to break down a comprehensive task into manageable chunks
- Deliverable: Project plan
- KEY QUESTIONS: Who will be on the project team? How fast and cheaply can we get it done? How will we communicate, how often, and with whom? What tools will we use to complete the work and what training will be required for the team?

Implementing

- Project work is completed by the team within the parameters of scope, budget, and timeline
- Achievements and milestones are celebrated
- KEY QUESTIONS: How will we invest in the team? What obstacles can we remove? Can we improve our processes and capture our lessons along the way?

Monitoring/controlling

- Communicate, communicate, communicate
- Change requests are received and either excepted or rejected
- Risks are monitored and mitigation strategies are deployed
- Deliverable: All tasks are completed within scope, budget, and timeline
- KEY QUESTIONS: Where are we, where should we be, and how do we get back on track?

Closing

- All resources are released
- Project deliverables are confirmed and accepted
- Lessons learned are documented and incorporated into future iterations and new initiatives
- Success is celebrated
- KEY QUESTIONS: Is the executive sponsor satisfied with the outputs or deliverables from the project? Did the lessons learned and process improvement get captured so the next project team will be even more successful?

deliverable from the planning process. Ample time should always be taken in the planning process to ensure that all aspects of project implementation are considered. The project plan contains everything that's known about the scope, budget, and schedule. It also contains a description of all the work of the project, broken down by the project team into manageable chunks or work efforts. This breakdown becomes the task list for the project team, and it's used to build the schedule.[2] Remember, if you want to go deep with sustainment, such as with shared governance, you should go slow with the implementation. In addition, it's vital to include representation from end-user groups in the formation of the project plan.

Scheduling in project management accounts for assigned tasks and resources. There's a specific focus on work efforts that can be completed concurrently and those that are dependent on each other. It's important for the project manager to see scheduled workflows throughout the project. The project timeline is often displayed as a Gantt chart that shows dependences across a horizontal axis. *Table 2* is an example of a project timeline for the first 5 months of a shared governance implementation.

Monitoring/controlling

Communication is one of the project manager's greatest roles. How will we communicate with all stakeholders and how often? Who needs to have what information to be able to do their job and keep up with progress and challenges? At this stage, developing and sharing a communication plan is crucial for project success.

Risk is a formal concept in project management that's often ignored. It can have both positive or negative impacts on the project scope, budget, and timeline. The key is to be able to assess risk potential and create proactive responses to avoid, mitigate, and/or accept the impacts of risk. In our example of shared governance implementation, some identified risks may be past negative experience with shared governance, lack of leadership knowledge related to leading in a shared governance culture, and lack of staff buy-in.

Because we know change is constant in healthcare, project plans need to anticipate change and develop a process for formal change requests. The goal in change management is to control what's often referred to as "scope creep." This is the tendency of key stakeholders to change the intended output—usually by adding features—after the project scope has been developed and planned. One of the biggest threats that unmanaged change presents is a change in project scope (the outputs). Scope changes that aren't managed can cause the project to be delayed or go over budget. In the worst-case scenario, the project fails and all our efforts are for nothing.

An example of scope creep can be seen in the organization that decides to implement organization-wide shared governance in a phased approach, identifying implementation in the nursing department as phase one. Then, 1 month into the implementation, a new decision is made to roll out shared governance to all the departments in the organization at

Table 2: Shared governance implementation Gantt chart

Shared governance implementation plan	Month 1					Month 2				Month 3					Month 4				Month 5				
Week	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23
Project charter developed (scope, budget, timeline)																							
Key stakeholders documented																							
Project requirements gathered																							
Deliverable: Project charter/scope document signed by executive sponsor (milestone)						X																	
Project manager creates the plan																							
Project team created and resources (people) assigned																							
Schedule, communication plan, change management process created																							
Project team meets to break down a comprehensive task into manageable chunks																							
Deliverable: Project plan (milestone)																		X					
Project work completed by team within parameters of scope, budget, and timeline																							
Key achievements and milestones celebrated																							
	= Initiating																						
	= Planning																						
	= Implementing																						

the same time. It would be far better to decide on the large scope of implementation at the outset rather than charting a course for a narrower output. This decision has significant impact on resources and requires changes to the project management plan. A formal change management process that's developed during the planning phase will help protect project scope, costs, and schedules, as well as mitigate scope creep.

Implementing

Now that the intense work is done, the project plan is typically presented to the broad project team and executive sponsor during a kickoff meeting, which signals the beginning of the implementation phase. During this phase, the project team is busy completing tasks and getting the work done while, at the same time, the project manager is keeping an eye on progress and monitoring for risk.

During the implementation phase, the project manager monitors and controls all aspects of the project. It's here that communication systems are activated and key performance indicators are monitored. This is also when contingency plans (risk management, change controls) developed during the planning phase kick into high gear. Contingency plans are used during implementation to keep the project on track, specifically as it pertains to what's often called the "triple constraint" of time (schedule), cost (budget), and scope (project goals).[1] When any one of these constraints is exceeded, it causes problems with the other two. If a project goes off track, such as an unplanned change in scope, costs will rise and the final project deliverables will be delayed. However, if unplanned scope changes were anticipated, there will be sufficient budget and schedule reserves to accommodate the changes.

Anyone who's participated in projects of any size knows that despite the best planning, work can become messy and unclear. The project manager's hardest job is trying to respond to these challenges and adhere to the goals of the project charter/scope document. Change management and communication are the essential tools that the project manager and all team members use to keep things on track. Built in the planning phase, a formal system to submit, review, and approve or deny changes is invaluable. The communication plan, also created in the planning phase, is in frequent use during the implementation phase. One of the best parts of the communication plan is when and how to celebrate the achievement of milestones and other important work. How will you uplift your project team for the excellent work they do? In our example, shared governance milestones may include the recruitment of new council members, development of specific data-driven shared governance goals, and achievement of those goals. Just as we plan for changes, it's important to plan for the celebration of major achievements and the project's completion.

Closing

Successful projects have a definitive beginning and end, so the closing phase of project management is just as significant as the initiating phase. It's in the closing phase that we formally sign off on the objectives (outputs) in the project charter/scope document. The executive sponsor accepts the deliverables and signs the project deliverables over to ongoing operations. The final closing task is to document lessons learned and save these for the next iteration or project on the horizon.

In our example, it may seem like the project would never close because a shared governance culture can only thrive if it's continuously nurtured, monitored, tweaked, and celebrated. However, it's imperative that you close the project of implementing shared governance once your goal of successfully implementing the chosen model in a certain number

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of departments by a certain date is met rather than letting the project go on indefinitely. After closing the current project, you would begin a new project for the ongoing nurturing, monitoring, tweaking, and celebrating of your shared governance structure.

Moving forward with confidence

No matter what sort of project you find yourself managing, there are resources that can help. The *PMBOK Guide* is the authoritative project management resource that presents a detailed how-to on all aspects of project management philosophy and practice.[1] Curtis Cook's *Just Enough Project Management: The Indispensable Four-step Process for Managing Any Project Better, Faster, Cheaper* offers a lean process for project managers, executive sponsors, and project team members.[2] The nonprofit professional membership association for the project, program, and portfolio management profession, PMI maintains the global standards for project management, developing process standards for "agile methods" and business analysis and certifying project, program, and portfolio managers, as well as business analysts. Its website, ProjectManagement.com, provides resources for project managers and leaders from white papers and webinars to project templates.[3]

There are also many software platforms that can aid in planning, tracking, and communicating about projects. The goal is to use just the right amount of structure without adding unnecessary complexity. If a platform is too complex, people will resist using it. Many of these platforms exist only in the cloud, and your organization may or may not allow access. It's a good idea to consult with your information technology department before deciding on a platform. Also, keep in mind that more than one platform may be necessary.

Organizational success

As you move into your next project, we hope you'll feel a little more prepared. The satisfaction that comes with a project well managed can't be overstated. The work we do matters and the more efficiently every project goes, the better off everyone in our organizations—and by extension, our patients and families—will be. NM

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