

# Value Analysis & Standardization:

*Systematic steps to support system-wide change*

SEPTEMBER 2007

## PROJECT MANAGEMENT

### Greetings from Carol Stone

This issue of our newsletter focuses on Project Management, something that you as Value Analysis Professionals may have already been confronted with, either in your day-to-day responsibilities or as part of a special task force. It's a role for which you are well-suited as it is based on skills which Value Analysis Professionals possess in abundance: organization and a knack for getting things done.

Assisting us with her expertise is Carolyn Hanson, a Project Management consultant who has worked with a number of Fortune 500 Companies over the past 20 years. We think you'll find her tips and insights useful as you approach your next project, whatever its size or complexity.

In order to continue providing you with "news you can use," we have developed a brief reader survey. We ask that you please take a moment of your time to complete the online survey at <http://www.zoomerang.com/survey.zgi?p=WEB226JD2AV3AS>. And if you know someone else who would like to receive our newsletter, please let us know. Just email me at [carol.stone@crbard.com](mailto:carol.stone@crbard.com) and we'll add them to our mailing list.

Carol Stone  
Vice President, Corporate Marketing  
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# PROJECT MANAGEMENT:

# THEORETICAL PERSPECTIVE

## *Advice from an Expert in Project Management*

**C**arolyn Hanson is a Project Management consultant and President of Watchung Consulting Group, Inc. of Warren, NJ. For the past 20 years, Hanson has assisted organizations and companies implement and adopt project management solutions using popular project management software. Her expertise in project planning, scheduling, tracking, and management has been sought by Fortune 500 Corporations including Chubb Corporation, AT&T, Lucent Technologies, UPS, and USL.

As Shakespeare said of greatness, some are born to project management, some achieve it, and some have it thrust upon them. Project Management Consultant Carolyn Hanson is a little of all three and believes many of us are too. “We’re all sort of project managers by nature,” she says. “If you’ve ever made a list and checked it off, you’re a project manager.”

A project, by definition, is a temporary endeavor undertaken to create a unique product or service, according to the Project Management Institute, which also defines a project manager as the person ultimately responsible for the success or failure of a project. Due to the number of initiatives in a health system, Value Analysis Professionals are often tasked with being a Project Manager on several projects.

“Project Managers are the organizational hub of any project,” says Hanson. “The key is to realize that you don’t need to know all the answers, only how to get to them.”

A Project Manager oversees all elements of a project, leading and motivating a team of workers and coordinating their



efforts, all the while making sure the work flows steadily toward the goal. To the client and upper management, they are the face of the project, responsible for all facets from beginning to end.

On a complex project, such as one involving an entire healthcare system, this can seem overwhelming, especially for a novice. For those, take a page from Hanson’s book. “I see project management as a puzzle,” she says. “Creatively, it’s a challenge to juggle all the pieces, working with the team and the management software to find the quickest way, the shortest path, to the endpoint.”

Acknowledged wisdom divides any project into four phases: initiation, planning, execution and close-out.

**1 Initiation:** This is the time to define the problem — for example, an initiative for improving patient care — by meeting with clients and management to understand their true need, then employing a team of subject matter experts and stakeholders such as representatives from nursing or supply services to define the best project solution. This should include a cost/benefit or financial analysis, a list of task and source requirements, a proposed control schedule, and a project budget. These are all then put into a Project Charter, suitable for presenting to management and useful for

keeping your team on task and focused. For example, you may want to give formal presentations to multiple groups, such as the Nursing Council or Materials Managers.

**2 Planning:** Often begun with a brainstorming session at the project kickoff meeting, project plans consist of three dimensions: cost, time, and scope of work to be done. Scope comes first, in what Hanson calls “peeling the onion,” by identifying all the work to be done, then breaking it down into smaller and smaller pieces until each piece becomes a comfortable size to estimate, execute, and monitor. Next these pieces are put in sequence, with note to costs, resources and responsibilities, dates and times, limitations and constraints, then compared to the estimated budget and end date. Organize by a network of box diagrams, a time-scaled bar (Gantt) chart, or computerized planning software.

**3 Execution:** Here the actual work is performed under the eye of the Project Manager. Note that managing a project does not mean dictating to team members how to perform their tasks. Rather, it focuses on gathering and analyzing information that will optimize decision-making. Open communication is essential, either via meetings, emails, one-on-one, or software templates. Be aware that some members, such as staff nurses, may not have access to email and that you need to consider alternate means of communication.

*“Project managers are the organizational hub of any project,” says Hanson. “The key is to realize that you don’t need to know all the answers, only how to get to them.”*

**4 Close-out:** The final days: As the project nears the end, the Project Manager may create a “punch list” of final activities and use this to organize and motivate team members toward the endpoint. The manager then secures consensus that the project is complete, often meeting to celebrate and discuss lessons learned, ensures that all payments are made, equipment is returned, and files are in order.

Flexibility is key. If the project bogs down, the Project Manager must be

willing to adapt. This might mean presenting to an executive committee to get their support, attending a department meeting for insight into obstructive issues, or considering a phased rollout beginning with the group most receptive to the project.

“The important thing to remember is that you are not called upon to be the subject matter expert,” says Hanson. “You’re the facilitator. Ask ‘why’ and ‘what if.’ Sometimes it’s best to plant the seed and then walk away. Your job is alignment. Your focus is the endpoint. You’re the manager.” ❖

## FOOD FOR THOUGHT

*By Ryann Murray, Student Intern*

An easy way to picture the process of Project Management is to imagine the organizational steps required to build a house.

### *Meeting*

In building a house, this begins with a meeting between the builder, contractor, realtor, and potential buyer to discuss the project, the process, and the participants as well as the deadline or move-in date.

### *Attention to Dependencies*

Team member roles are organized with special attention to dependencies and simultaneous actions. For example, in building a house, the painter is dependent on the plasterers who are dependent on the framing carpenters and so on. However some, like the electrician or plumber, can do their jobs simultaneously, without dependency or interference with each other.

### *Contingency Planning*

Scheduling includes project milestones such as the addition of the second floor or the completion of roofing. Contingency planning is essential: A good builder anticipates problems and poses alternatives whether they’re the result of illness, bad weather, or a preferred carpet style being out of stock.

### *Seeking Input*

Construction (the project itself) begins when the official timeline is complete. During this time, it may be helpful to reference other persons, in the form of advice or tips, who have completed a similar project. For example: seeking input from friends who have recently experienced home construction.

### *Communication*

Finally, the entire home building team must maintain communication throughout the entire process. This is especially important for the home owner and the home builder, who should be constantly updating one another on their preferences and progress.

*In the end, a project, much like a house, requires adequate research, a well thought-out design (or blue print), a detailed schedule, appropriate resources, and continuous communication to reach its designated goal.*

## Project Management in a Nutshell

- Determine the framework
- Get management /stakeholder buy-in
- Select a team
- Build a Project Charter
- Define the workload
- Calculate estimates
- Develop a schedule
- Strategize risks
- Match resources to work
- Establish a control process
- Implement the plan
- Track and report progress
- Lead /Motivate /Communicate
- Manage project closure

## What’s Your Reality?

*Continued from outside.*

► **Honesty and integrity:** *traits most admired or desired in leaders. To be known as doing what you say you will and following your principles, even in the face of adversity.*

In addition to the official duties, a Project Manager is often called upon to be a babysitter, salesperson, politician, teacher, and friend. In practice, says Heerkens, this means that a Project Manager should care about everything and dwell on nothing, be proactive and not wait to be told to do something, develop a keen understanding of human nature, learn the who/when/how of relying on others, make decisions based on technology, people and business, learn to make decisions based on ambiguous information, never stop developing social skills, and always appreciate the value of being politically savvy. For the Value Analysis Professional, much of this means knowing your team and your stakeholders; for example, knowing which physicians can be used as support for your project and which need to be won over — and what it will take to win them. ❖

# PROJECT MANAGEMENT:

# PRACTICAL PERSPECTIVE

By Ryann Murray, Student Intern

*Computer software such as Microsoft Excel and Microsoft Project can be powerful Project Management Tools for the Value Analysis Professional*

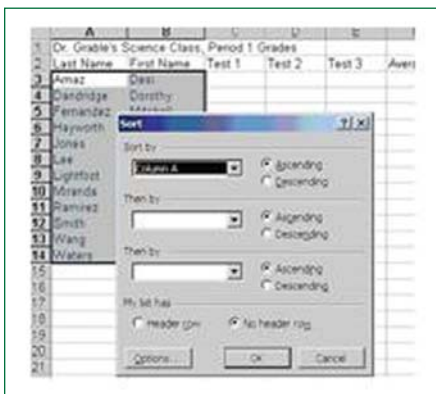
A key step in project management is the creation of a schedule or work item list. Two common and effective computer resources for accomplishing such tasks are Microsoft Excel and Microsoft Project. While similarities exist throughout both programs, there are individual differences and benefits that make each more desirable under specific circumstances.

## Microsoft Excel

Microsoft Excel uses a spreadsheet of cells for the classification of data. A project manager can use this program to list and share specific information about the team project, such as the necessary tasks, resources, time allotted, and members available. Simply put, it is an electronic version of a pen and paper list, one that can be manipulated and shared among team members for efficient scheduling.

## Filtering and Sorting

Excel offers two features that are particularly important for project managing: filtering and sorting. Filtering is the ability to filter out specific columns of data so that undesirable information is

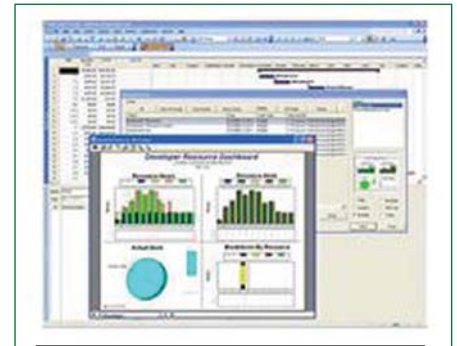


This shows a detailed view of the Sort Function in action and allows you to see how you can highlight a specific region, and then sort it accordingly.

not presented. Sorting is a way to better visualize and organize data by allowing a user to sort columns of data alphabetically, numerically, or chronologically. One drawback in Excel stems from the program's lack of interactive options and automatic updating. This means that the project manager must be extremely familiar with the task because schedules and lists in Excel are only self-maintained. A team would want to use Excel for reasons such as its simplicity, organization, low cost, wide availability, and success at being an overall managing tool rather than focusing on extensive details and change.

## Microsoft Project

Microsoft Project is a more sophisticated tool for project managing. This software takes the basic concepts of lists and schedules, first implemented in Excel, and advances them to provide a more intricate, flexible, and interactive way of analyzing the team's assignment. Microsoft Project allows more than the addition of tasks, resources, time, and members; it also provides finances, personal schedules, risks and, most importantly, dependencies. All of these features can be integrated into a timeline for simultaneous tracking. The dependencies feature allows the program manager to specifically view what tasks can begin only after a separate task has been completed. Microsoft Project also contains the feature referred to as "what-if" scenarios, which allows the project manager to view the hypothetical effects of data manipulation on the potential final outcomes. Moreover, Project is a very useful resource for those managers who are unfamiliar with the task, thanks to its automatic adjusting of data with change.



This is a sample of a project in Microsoft Project that is using charts and graphs to visualize the amount of time, resources, and people used and still left.

## Best Uses

One concern over Microsoft Project results from issues regarding complexity. Simple projects, which require little information or dependencies, can be overcomplicated by Project. While its many capabilities may appear overwhelming to a first-time user, its organizational power can be harnessed with little practice. In conclusion, Microsoft Project is the ultimate tool for managers with little knowledge of the task, projects that require increased specificity, or other complex assignments. ❖

## Building a Project Charter

*Often required by company policy, a Project Charter is a useful document for any Value Analysis Professional charged with managing a project.*

*It describes the project and its objectives, the proposed team, the level of authority granted to the project manager, the project management philosophy, a statement of scope, methodologies to be used, customers/stakeholders, principal interfaces, anticipated outcomes, and preliminary planning information or a brief project management plan. It also may include a page for management signatures to indicate they have reviewed and agreed to the charter.*

# SHARE *Your* VIEW

Lorna M. is a Value Analysis Professional who has been in her job for three years. During this time she has handled several standardization projects but now she is faced with one that involves her entire healthcare system. From the beginning, she knew it would be a complex management task that would require bringing together a team from disparate locations, departments, and functions. Now, as she feared, the project has bogged down because her team just doesn't seem to be responding.

## What should Lorna do to get her project back on track?

**SCENARIO 1** Lorna should hold a motivational meeting to inspire her team to pull together.

**SCENARIO 2** Lorna should pinpoint the team members who seem to be having the most trouble meeting their project responsibilities, and then meet with them individually to find out the problem.

**SCENARIO 3** Lorna might go back to her own sponsor or supervisor for coaching or insights into issues beyond her scope.

*Email your thoughts on this case to wendy.lemke@crbard.com. A sample of responses will be published in the next issue.*

## What's Your Reality?

Suggestions for dealing with daily issues...

In addition to an ingrained commitment to organization — which Value Analysis Professionals tend to possess in abundance — good Project Management requires good leadership. “PMs [project managers] must be able to judge when leadership is needed from them and when it is more appropriate to be a team player,” writes Caitlin Kneram for salary.com. “They must learn to adapt their style to meet the needs of the team at each stage in the lifecycle of a project and to fit different individuals needs within the team as well.”

As most Value Analysis Professionals have found, facilitating cross-functional communication across teams can be one of the biggest challenges in managing a project, writes Kneram. This is especially true for hospital systems with multiple locations. However, as they also know, good communications throughout the project can ensure the respect of the team.

Project managers need to be able to direct teams toward a goal. This means they must be assertive enough to set clear goals, but approachable enough for others to alert them to problems as they occur. The ability to delegate is essential.

**In his book, *Project Management*, Gary Heerkens lists four personal traits that he deems critical for a successful manager:**

➤ **Thinks like a generalist:** ability to reference in terms of the big picture, attentive to everyone and everything.

➤ **High tolerance for ambiguity:** ability to process mixed signals or contradictory data by developing processes for finding truth and narrowing down inputs without getting frustrated.

➤ **High tolerance for uncertainty:** ability to make many decisions without precise or sufficient data, decisions that are “only” acceptable and not perfect.

*Continued on inside.*

## Resources for the Value Analysis Professional

### Free Project Management Software

- [www.openworkbench.org](http://www.openworkbench.org)
- [www.projectkickstart.com/products/project\\_kickstart4.cfm](http://www.projectkickstart.com/products/project_kickstart4.cfm)
- [www.office.microsoft.com/en-us/project/default.aspx](http://www.office.microsoft.com/en-us/project/default.aspx)

### Books

- *Absolute Beginner's Guide to Project Management* by Greg Horine
- *Project Management For Dummies (Business & Personal Finance)* by Stanley E. Portny

### Courses

- American Management Association [www.amatraining.org](http://www.amatraining.org)
- The Learning Tree [www.learningtree.com](http://www.learningtree.com)
- Project Management Institute [www.pmi.org](http://www.pmi.org)

## TIPS for Project Managers:

- ◆ Be organized
- ◆ Write it down
- ◆ Know your team and your stakeholders
- ◆ Name a sponsor
- ◆ Communicate dependencies
- ◆ Be proactive; have a Plan B
- ◆ Focus on the big picture
- ◆ Consider phased-rollout for large projects
- ◆ Use humor
- ◆ Avoid threats
- ◆ Stick to facts, avoid emotions
- ◆ Hold meetings to a minimum
- ◆ Keep reports and tools simple
- ◆ Give time and cost estimates in a range (example: 20-30 rather than 25)

## SHARE YOUR VIEW...

Last issue we met Mary R., an RN and five-year Value Analysis Professional whose new boss thinks that Mary's presentations are "weighted in detail and lack punch." Mary is mystified: she's always prepared and prides herself on knowing her subject as well as the needs of her stakeholders.

**What should Mary do to improve her presentation skills so that her supervisor can see her for the qualified professional that she is?**

### SCENARIO 1

Mary should look for a course on presentation skills such as those offered at a community college or professional organization.

*"This is great if the budget permits but don't forget to look closer to home. Sometimes your own organization offers courses such as these. She should check with her boss or the HR department."*

### SCENARIO 2

Mary should approach a friend who has attended one of her recent presentations and ask how it could have been better.

*"Another set of eyes (and ears) is always helpful. If possible, she should try to get someone who is acknowledged (especially by her new boss) to be good at presentations and is willing to offer tips as well as feedback."*

### SCENARIO 3

Mary should go the do-it-yourself route by reading books on making effective presentations, then implementing her learnings at the next opportunity.

*"Books are a good resource but Mary needs to combine her readings with practice. Our CEO presents to his kids. He calls them an ideal test audience because they don't know the subject and are brutal with their comments. Videotaping is also an option as long as she can remain objective about her own performance." ❖*

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