

## **An Introduction to Project Management**

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With Y2K well behind us, health information management (HIM) professionals are busy updating their encoding and/or abstracting systems, implementing physician office management systems, long-term care systems and imaging systems just to name a few. Implementing information technology (IT) requires project management skills, regardless of whether you are leading the efforts, participating in defining the plan or assisting in implementation tasks. Every member of an IT implementation team plays a role in dealing with obstacles and meeting agreed upon outcomes, timelines and budget.

Successful project management is a lot more than creating and tracking tasks. Project management is hard work. It requires a vision as well as attention to detail. It requires empathy but a fairly strict enforcement of the project plan. Successful project managers have the ability to motivate their team as well as deal with the administrative minutiae necessary to keep the project moving forward.

### **Project Management Basics**

Project management begins with planning, which includes getting the definition of success from key stakeholders (CEO, your boss etc.) before the project starts. The project manager needs to understand the desired results in order to develop the project budget, define project deliverables and communicate what success will look like for the people who will be doing the work.

With these basic planning thoughts in mind, let's take a look at the components of project management.

#### **1. Leadership**

The first step in undertaking a project is establishing project sponsorship, management and reporting relationships. The sponsor is an executive who will be responsible for championing the project with other executives. Without an executive sponsor, the project is guaranteed to fail. Once sponsorship is obtained, the project manager needs to be identified.

#### **2. Project Charter**

The project manager should draft a charter and make sure that the project sponsor agrees. The charter however cannot be considered final until the project team has had a chance to review and challenge it. The charter should include at least a statement summarizing what the project will accomplish; expected duration of the project; the business purpose for the project and what factors led to the development of the project. The charter also includes a list and descriptions of all expected project deliverables; project team roles (physician, nurse, HIM professional, etc.) and the project teams' decision authority and reporting structure.

#### **3. Team Selection**

The team members should be selected based on the roles identified in the charter. Consider also including an outside perspective. In many instances, teams will need to invite subject matter experts (SMEs) to meetings to share their knowledge and judgment and act as advisors to the team.

#### 4. Project Launch

The first meeting of the project team should include the Sponsor. It's important for the entire team to hear the Sponsor express his expectations. The purpose of the kick off meeting is for the team to finalize the charter by refining the project deliverables, identifying any missing roles, defining the project's risks and identifying the work breakdown structure. To get a real grasp of a project, you have to think about it in pieces. Work breakdown structure simply means breaking down the project into manageable activities/desired results. The tendency for novice project managers is to develop a laundry list of tasks. The better goal, however, is to organize the work into measurable desired results and key milestones and then make assignments.

#### 5. Ongoing Project Management

Interacting with project team members (not project management software) is the key to keeping the project on track. The project manager conducts several tasks while managing a project:

- **Hold Weekly Status Meetings:** Meeting weekly is critical because it is the primary method used by project managers to keep all team members focused on the project goal as well as their individual responsibilities. A fixed agenda for every meeting keeps meetings productive. Keep the meeting focused on desired results and critical milestones. Most people who are held accountable for clearly defined outcomes will get their tasks completed. If projects are aimed at measurable outcomes and not long lists of tasks, the desired end result is more likely to be achieved. Leave detailed task discussions to those involved in accomplishing the tasks.
- **Walk Around:** Walking around and visiting team members gives you a feel for the mood of the team. Join task meetings from time to time but be sure to set the expectation early so that the task team doesn't see your presence as an intrusion. Also, listen and facilitate only when necessary by asking questions or drawing comments out of others.
- **Work the Detailed Plan:** The project team needs an easy reference that describes what key milestones they should be working on the status of desired results. A number of project management software products are on the market. The best tool for the job is one that takes no more than one hour a week to maintain. The plan needs to include: desired results, key milestones, planned start and completion date, actual start and completion date if appropriate, the team members assigned to the desired results, and the status. Use an issues-tracking database to track and resolve issues as they arise. Alternatively, issues and desired results can be tracked in one database. Try to avoid micromanaging tasks. It only creates a dependency between team members and the project manager. Micromanaging tasks is appropriate when tasks are clearly not getting done. Never get more than a month behind on any key milestone unless there is an appropriate reason for doing so.
- **Communicate the Plan:** It's important for the entire team to be able to communicate the purpose and status of the project to all stakeholders and interested parties. Sometimes teams get so bogged down that they lose track of the intended goal. One way to facilitate keeping the project goal in front of the team is to develop "key messages" for your projects. This means to brainstorm key messages that project members share with colleagues throughout the facility. The goal is to be sure that everyone is on the same page and is communicating the same message about the status of the project at any point. The team should refine key messages as the project progresses.
- **Prevent Scope Creep:** It's easy for a team to accept requests to add additional edits, for example, or customize a few screens here and there. But these requests add up, and before you know it the team is the victim of scope creep. The project manager needs to use good judgment determining when to

add that small enhancement or when it might be better to wait for the next version release. If the scope changes, the project manager needs to reforecast the project (budget, timelines etc.) and formally review suggested revisions with the project sponsor.

- **Complete the Project:** The goal of course is to complete the project, and it's the project manager's job to see that the team finishes the project on or close to schedule and within budget. Once the project is complete, it's time to celebrate!

### **Developing Project Management Skills**

Even if you are not leading a project, understanding the components of good project management will help you be a good team member and to recognize why projects might be floundering and to offer suggestions to get the team back on track. Project management can also be applied to your daily work to facilitate reaching your goals and objectives. The range of project management methods varies greatly. To gain more exposure to project management methods, consider the following professional development activities:

1. Attend project management seminars and workshops. Many good training and consulting companies provide one-day to weeklong programs. If you are really interested in project management, check out the Project Management Institute at [www.pmi.org](http://www.pmi.org), the professional association for project management professionals.
2. Search the Web for articles on project management.
3. Evaluate the projects you are involved in against the project management basics identified in the article.
4. Implement project management techniques to manage all your IT projects, no matter how small they may seem.
5. Apply project management techniques to accomplish your professional goals.

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