

**Project Management: What Every HIM Professional Needs to Know
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LESLIE: Juggling multiple priorities and doing more with fewer resources is one of today's key workplace challenges. I think that having a solid project management foundation can help HIM practitioners keep their sanity, avoid feeling overwhelmed and achieve positive outcomes.

PATTY: Sounds like you think we should talk about project management this month!

LESLIE: I think we need to don't you? The number of change projects are endless - Recovery audit contractors, ICD-10 readiness, privacy regulations, EHR's, documentation improvement etc. Even if you aren't involved in these projects directly, project management skills are still needed to organize and manage our work priorities.

PATTY: That's a good point Leslie. Let's bring Nancy Coffman-Kadish, MS, RHIA, CAPM, Care Communications Inc's manager of project management into this discussion. She has first hand knowledge of the importance of project management skills. She also just finished preparing her presentation on this topic for AHIMA's 81st National Convention and Exhibit.

LESLIE: Nancy, please share with our readers your thinking on what HIM professionals need to know about project management.

NANCY: I think the key to project management is understanding that successful projects just don't happen. I know that seems obvious but if managing projects were easy there would be more success stories to tell. The literature is full of failed projects, particularly information systems projects.

PATTY: To what do you attribute the high failure rate Nancy?

NANCY: I think it is often a result of lack of planning. Projects are made to happen through planning. Planning is all too often ignored in favor of getting on with the task of doing the work.

LESLIE: That sounds like fire, aim, ready to me!

NANCY: Yes, something along those lines. Time spent up-front identifying requirements and the structure for organizing and managing a project will save many hours of confusion and rework later on.

PATTY: I can relate to that--having been on the receiving end of projects that did not include a complete planning process and learning through my own mistakes in taking planning shortcuts.

NANCY: You took planning shortcuts! I am surprised to hear that given how much you value project management.

PATTY: I think when we are learning and subsequently practicing project management techniques, we try things and learn what works and what doesn't. I learned through trial and error. This is why I have come to value the discipline of project management, especially the importance of the planning phase. In addition to organizing a project, to me the planning process starts the process of getting buy-in to the plan and creating some urgency around the project.

LESLIE: I like the planning phase because it's so collaborative. It's not something that can happen in a silo.

NANCY: That's a great point Leslie. The project management planning process may require a number of plans depending on the level of complexity. That alone requires diverse input to be as complete as possible. Project plans include at minimum:

- Project scope
- Project plan (tasks, responsibilities and schedules) including budget
- Communications plan

More complex plans include subsidiary plans such as:

- Quality management plan for ensuring quality throughout the project
- Issues management plan
- Risk management plan

PATTY: Nancy, I often hear you say, "plan the work and work the plan." I think it's a great reminder of a project management fundamental.

NANCY: I guess you could say that is a project manager's mantra.

LESLIE: I also have often heard you say that projects should not be confused with operations. What does that mean?

NANCY: Operations typically includes any work that is ongoing and repetitive. It's basically the work necessary to maintain an infrastructure and the business of the organization. There is no set end point when it comes to operations. Different kinds of tools and resources are needed to run day-to-day operations. Projects are temporary in nature and are undertaken to produce a unique product or result. Specific tools have been created to manage projects. And projects have an end date and often require special staffing from cross functional areas of a department or an organization.

PATTY: I hadn't thought about the difference. Why is this important Nancy?

NANCY: To be clear, project management can be applied to daily work to facilitate organizing and reaching goals and objectives but you can't lead or participate in a project using day to day operational management skills and resources and expect to be successful.

Making the transition from HIM manager to project manager can be difficult, as the approach to a situation is different from one role to the other. Many of us become "accidental project managers" where project management is a secondary responsibility and one is expected to manage the project in addition to their "real work."

LESLIE: That is so interesting Nancy. Can you provide examples on how the HIM manager role is different from the project manager role? Also, I am not sure I understand what you mean by the term HIM manager.

NANCY: I am using the term HIM manager but it could be any title that would portray an HIM practitioner who is hierarchically responsible for a function such as a coding supervisor, release of information manager or a practitioner assuming a front line supervisor or team leader role. HIM practitioners in supervisory roles often lead projects using their operational skills sets. It's a subtle but different set of behaviors and skills from project management. For example, supervisors tend to seek the best possible solution to an operational challenge while project managers will seek practical solutions that might have required compromise to meet the scope of a project. Some additional examples are included in this table.

HIM Manager

- * Seeks optimal solutions
- * Strives for accuracy
- * Focuses on processes
- * Works with absolute rules
- * Specializes to improve
- * Succeeds individually
- * Uses operational policies and procedures

Project Manager

- * Seeks pragmatic solutions
- * Strives for workability
- * Focuses on results
- * Works with situational rules
- * Generalizes to improve
- * Succeeds through others
- * Uses project management tools and resources

PATTY: I think the HIM skill set lends itself to successful project management, but having more knowledge and more tools at hand can only improve what we already know and do.

NANCY: I think that is accurate Patty. The discipline of project management has been defined by the Project Management Institute. It is a defined body of knowledge and includes nine domains or project knowledge areas and five project management process groups. The more HIM practitioners understand the project management body of knowledge (PMBOK), the better equipped they will be to participate in or lead a project.

LESLIE: What are the project management process groups?

NANCY: We have already touched upon planning. The other process groups are:

Process Group

Definition

Initiating

Defining and authorizing the project or a project phase.

Planning

Defining and refining objectives and scope, and planning the course of action to meet the project's objectives.

Executing

Coordinating people and other resources to carry out the project management plan.

Monitoring and Controlling

Ensuring that project objectives are met by:

1. Measuring and monitoring progress regularly,
2. Identifying variances from the project management plan, and
3. Implementing necessary corrective actions.

Closing

Formalizes acceptance and brings the project or a project phase to an orderly end.

LESLIE: In today's health care environment, much of the HIM professional's job is either being a member of a project team or managing a project. With this level of involvement, HIM professionals need to learn project management skills, or sharpen the tools they already possess, in order to participate in their organization's projects, either as a project manager or a member of a project team.

PATTY: Nancy, what else do you think every HIM practitioner needs to know about project management?

NANCY: Many project managers did not begin their careers with formalized project management training. Many are called upon to lead a project or participate as a project team member with little idea of what they are supposed to do. Fortunately, the organizational skills that HIM professionals possess are a good place to start, with some key project management principles added. Here are my top five areas to focus additional skill development:

1. Learn to manage multiple priorities: A project manager must be able to juggle multiple priorities, and often times those priorities are also competing. To do this, a project manager must be organized, thorough, meticulous, and a pretty good juggler.
2. Become an expert on communication: Communication is critical to project management and a skill any successful project manager has mastered. There cannot be too much communication; only not enough. Communication doesn't mean "talking" or "presenting," but rather the transfer of knowledge, sharing ideas,

solving problems and providing new or updated information.

3. Seek to understand and to be understood: A project manager should be able to effectively communicate in written form and know which medium is the best forum for communication, be it e-mail, telephone, face to face. The best communicators seek to understand and then to be understood, not just heard.

4. Keep an eye on the big picture: The big picture in this case is the deliverables. Successful project managers can keep their eye on the big picture while also working on the small picture (details and specifics). This will allow the project manager to be prepared when problems arise because he is knows what is happening today, is aware of what should or could happen tomorrow, and has planned for the final outcome. It should also provide some flexibility in solving problems as they arise.

5. Learn how to use project management tools: The PMBOK includes many tools and ideas to help manage projects and lead people through them. To use the tools you need some basic knowledge of the nine domains and five process groups. There are numerous articles and books that can break these concepts down. It's a matter of taking the time to learn them and apply. There is also formal training in project management offered by a variety of companies.

LESLIE: Where do leadership skills fit in Nancy?

NANCY: Leadership skills are at the core of successful project management. Building relationships, building trust and helping people through change, is perhaps the hardest part of any project.

LESLIE: That is good to hear. Sometimes we get so focused on the mechanics of our projects that we don't pay enough attention to the "people issues" that are always under the surface of any project. It's important to build relationships with each project team member and to be able to create a project environment that is collaborative and productive. The key to effective collaboration is to encourage every team member to put out their own best thinking on the challenges that confront the project team.

PATTY: Thank you Nancy for sharing your insights with us today. I think you have given us some new ways to think about project management and the skills required when assuming project management roles.

LESLIE: I would like to wish our readers great success as they work on projects within their workplace. There are certainly plenty of opportunities to incorporate project management into the workplace.

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