

OCTOBER
6:00-7:00 PM UTC

13

WEBINAR

Project Management for the Boss/Executive Sponsor



JONATHAN GAEV

MSE, PMP, Applied Project Management LLC

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Project Management for the Boss (Executive Sponsor)

Jonathan A. Gaev, MSE, PMP
Applied Project Management LLC
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Clinical Engineering is full of projects!

These are “projects” because they start and end and don’t repeat very often.



Polling question: My last project

- Started with a written schedule and budget. Y/N
- Was completed on schedule? Y/N
- Was completed within budget? Y/N

My Project Management Experience

- Over 30 years of project management experience (national and international).
- Formal training as a project manager at RCA corporation in 1980's.
- Certified as a Project Management Professional (PMP) by the Project Management Institute in 2007 (details on next slide).
- Developed project management training courses for small businesses and individuals.
- Focused on smaller projects that took less than a year, cost less than US\$75,000 and had teams smaller than a dozen people.

PMI and PMP

- The Project Management Institute (PMI) is the main/formal authority on project management.
- International organization.
- Project Management Professional (PMP) is a popular certification.

1-2 semesters of study.

Continuous study to maintain the credential.

Definitions

- Project: One-time/rare event. Big or small.
- Executive Sponsor (Boss): Approves resources for the project and assigns the project manager.
- Project Manager: Responsible for getting the job done. Creates the project plan. Manages the project team. Controls the resources.
- Project Management: A specific set of practices and tools used to manage projects.
- Project team: Does the work.

Polling Question:

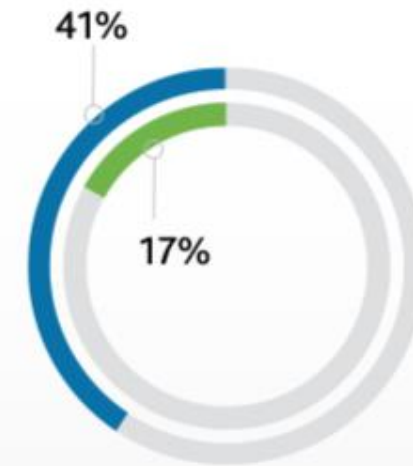
Project management training

- Many managers in my organization are trained in project management Y/N?
- Many staff members in my organization are trained in project management Y/N?

The Boss/Executive Sponsorship Matters!

- One of the main reasons that project fail.
- Training can cut project failures in half!
- Better Boss = More successful projects!

Inadequate Sponsor Support is a Primary Cause of Project Failure



- 41% of **Underperformers** say inadequate sponsor support is a primary cause of their failed projects
- 17% of **Champions** say inadequate sponsor support is a primary cause of their failed projects

The main benefit of project management is happiness!



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My goals for YOU!

1. In Scope:

Understand the roles and responsibilities of the Boss/Executive Sponsor, Project Manager and the Project Team.

Be a better Executive Sponsor.

2. Out of Scope:

This course will not teach you how to be a project manager.

Project selection is not included.

Thoughts for this presentation

- The Boss needs to know:

What a project is.

How a project progresses from start to finish.

What the project manager does.

- We will describe:

The project activities.

The activities of the project manager.

The activities of executive sponsor/Boss.

Project Phases and Roles for the Executive Sponsor

- **PROJECT PHASE**

- **Starting/Initiating**
- **Organizing/Preparing**
- **Executing/Controlling**
- **Finish/Closing**

- **EXECUTIVE SPONSOR'S ROLE**

- Clarify the PROBLEM.
Help obtain resources.
- Approve/Check the project plan.
- Support Project Manager
with conflict resolution and change control.
- Support the Project Manager to properly
close the project.

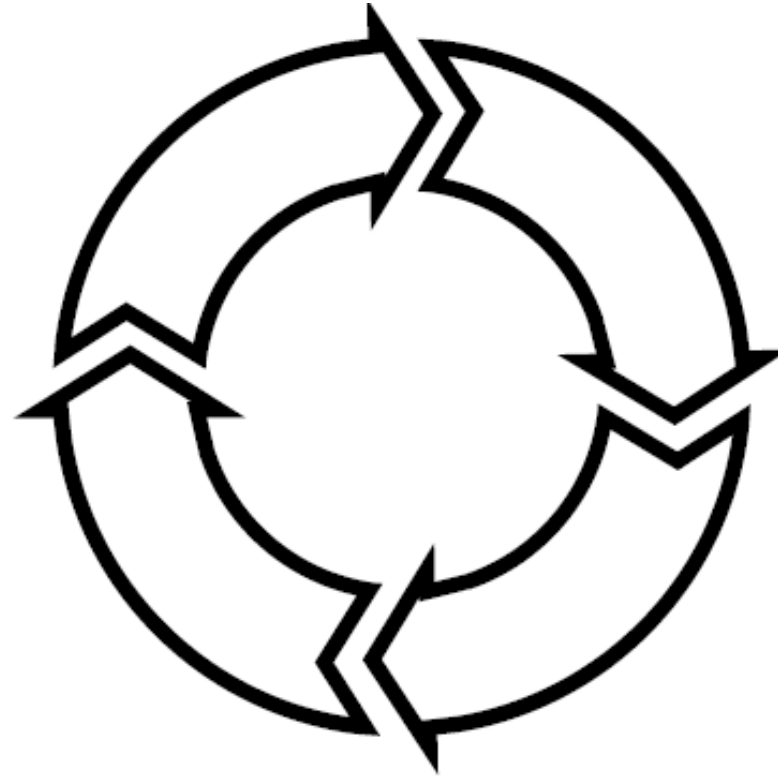
Overview of project management

- **PLAN**

- DO

- CHECK

- ACT



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Project Management PLAN has these elements

Expect to see all of this from your project manager

1. Project Initiation/Documents
2. Scope Statement
3. Schedule
4. Budget/Cost Management
5. Quality Management
6. Staffing Management
7. Communications Management
8. Risk Management
9. Procurement Management

What the mind doesn't know, the eye doesn't see!



O'Thym Restaurant – Montreal (Canada)



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Example of a Plan: Dinner in Montreal!

1. Project Initiation-We love to try local restaurants when we travel.
2. Scope Statement-Dinner at the restaurant including drinks and dessert.
3. Schedule Development-Tomorrow night. 7:00 PM
4. Cost Management-\$100 USD? Check website-change restaurant?
5. Quality Management-Be specific about what we want.
6. Staffing Management-Jonathan is in charge of making arrangements.
7. Communications Management-Decide when to leave. (When to get ready?)
8. Risk Management:
Wine?
French/English?
How to get there on time?
Reservation required/recommended/accepted?
9. Procurement Management: Credit Cards (USA-OK), Cash, Other?

What would happen if I skipped a part of this plan?

Would the issue go away?

Why don't we plan?

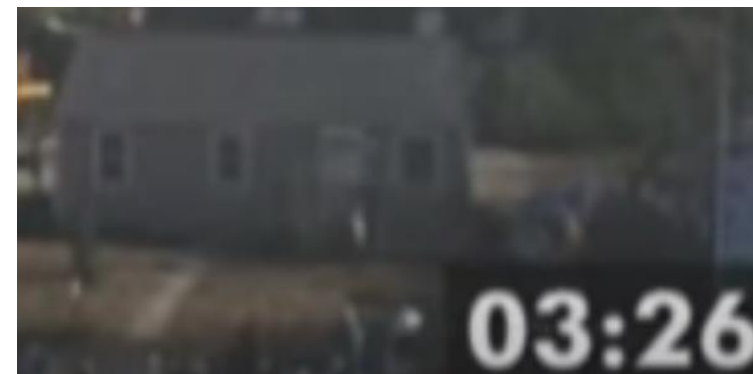
- We think that the sooner we start the sooner we finish.
- We are wrong!
- **The time we invest in planning saves project time.**



World Record House Construction

Habitat for Humanity 3:26

1.28	Roof 1	Assemble Roof Trusses	20 mins
1.31	Roof 1	Install Partial Sheathing	20 mins
1.33	Roof 1	Install Ceiling Insulation	10 mins
1.38	Roof 1	Install Soffits	15 mins
1.39	Roof 1	Finish Ripping	15 mins
1.35	Roof 1	Install Gable Siding	15 mins
1.32	Roof 1	Install Roof on House	15 mins
1.34	Roof 1	Complete Sheathing	5 mins
1.36	Roof 2	Install Metal Roofing	20 mins




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Sponsor should expect a Preliminary then Detailed Plan during the initiation of the project

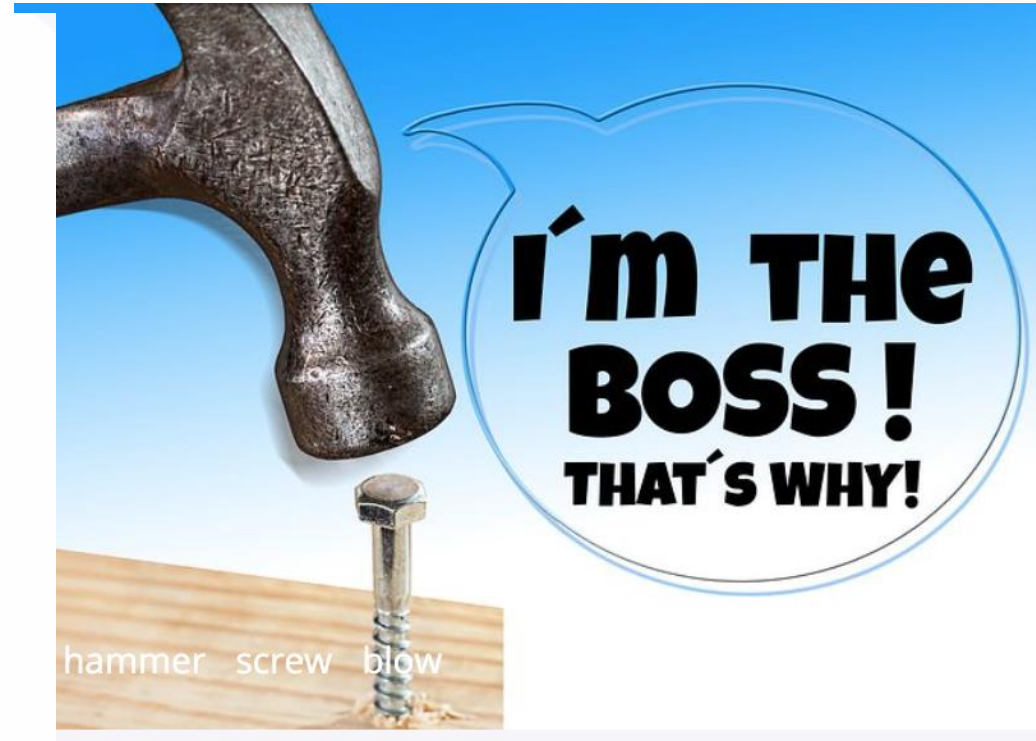
1. **Sponsor**  has a project idea. Problem only and/or Solution.
If the sponsor provides the solution-thinking stops!
2. Project manager develops the preliminary project plan, schedule and budget.
3. **Discussion! Sponsor** provides feedback/reality check.
Approves the development of the detailed project plan.
4. **Sponsor** approves the project plan (notes changes!) or terminates the project.
5. **Sponsor** attends the kick-off meeting to start the project.

Example of Problem vs Solution

- Problem: Surgeons need lasers to perform certain types of surgery.
- Solution #1: Buy new lasers.
- Solution #2: Check current inventory!

Does the hospital already have the laser or have a laser that can be modified to meet needs?

Sponsor expects/leads this conversation: Why are we doing the project?



Project manager and executive sponsor identify all people impacted by the project



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Scope: What's IN and What's OUT

- Adding to scope is the second most common reason for project failure to meet schedule and budget! (called Scope Creep)
- Example: Installing a new physiologic monitoring system.
- In-Scope:

The Clinical Engineering Department will receive the monitors, conduct incoming inspection, mount the monitors on the wall and test the monitor to be sure that it works.
- Out of Scope:

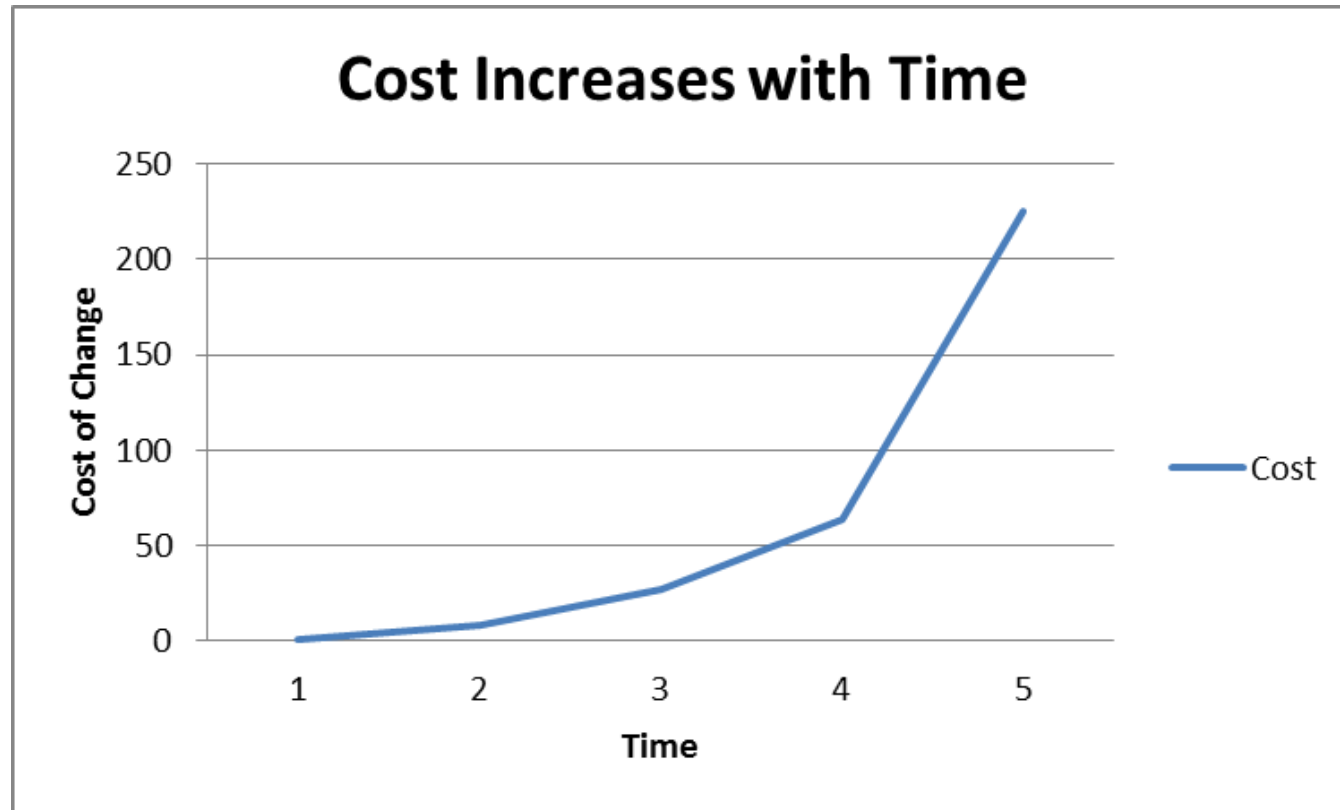
Integration with the electronic medical record (IT/Vendor).
Training the nursing staff on how to use the monitor (Vendor).

Sponsor expects the project manager to develop a preliminary project plan

- Problem statement.
- Business need.
- Reasonable initial solution identified.
- Scope identified.
- Key issues identified (Staffing, Special Resources, Procurement).
- Key risks identified.
- Preliminary budget and schedule.

Project Name with Start and End Dates	Start/Stop dates are estimates in preliminary project plan
Problem Statement	
Solution	May change from preliminary to final project plan
Description/SOW/Acceptance Criteria	
Budget \$, (\$ CASH), Labor Hours	Rough estimate only for preliminary project plan
Project Manager	
Sponsor/Senior Executive	
Stakeholders	
Why Do It? (Mission, Strategic Plan, Problem, Opportunity, Business Need)	
IN Scope	
OUT of Scope	
Major Deliverables	
Assumptions	
Issues (Staffing, Potential Conflicts, Resources)	
Schedule (see attached w/ Cost and Staffing)	Detailed schedule and costs in final project plan
Quality	More detail in final project plan
Staffing	
Communications	Not in preliminary project plan
Risks	Top 3 risks in preliminary project plan
Procurement	

Plan well now because changes always cost more later!



Project Initiation-Summary of Roles

- **Executive Sponsor**

- Defines the problem.
- Gives initial scope.
- Reviews initial plan.
- Approves detailed planning or terminates the project.
- Understands that the project will change after the detailed planning.

- **Project Manager**

- Defines the solution.
- Clarifies scope.
- Develops initial plan and allocates resources.
- Conducts detailed project plan (with project team).
- Presents changes to initial plan.

Project Management PLAN has these elements

1.  Project Initiation/Documents
2.  Scope Statement
3.  Schedule
4. Budget/Cost Management
5. Quality Management
6. Staffing Management
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Let's see how the project manager develops the project schedule

- Starts with the Work Breakdown Structure.
- Budget usually developed together with the schedule.

Work Breakdown Structure-WBS

- Breaks down the work into into smaller pieces that can be estimated and monitored.
- Usually a team exercise, done as part of planning.

WBS: Dinner in Montreal

- First Level-Big Picture

Select
Restaurant

Transportation

Pay Bill

Eat



WBS: Dinner in Montreal

- First Level-Big Picture-> In Order

Select
Restaurant

Get Ready!

1. Shower.
2. Change.
3. Leave Hotel.

Transportation

Eat

Pay Bill

- Note that things change once we get more detail!


(This is why the detailed plan may have a different schedule and budget than the initial plan)

Gantt Chart-Dinner in Montreal

#	Description	5:30	6:00	6:30	7:00	7:30	8:00	8:30	9:00
1	Arrive at Hotel								
2	J gets ready								
3	Wife gets ready								
5	Travel to Restaurant								
6	Eat Dinner								
7	Travel back to Hotel								

- Red = Critical path=total time for the project.
- Total time for project 5:30 PM to 9:00 PM, 3.5 hours
(Eating = 1.5 hours; about 40% of the project time)

Project Management PLAN has these elements

1. ☒ Project Initiation/Documents
2. ☒ Scope Statement
3. ☒ Schedule
4. ☒ Budget,  Cost Management
5. Quality Management
6. Staffing Management
7. Communications Management
8. Risk Management
9. Procurement Management

Cost Management

- Document the method of estimation:
 1. Previous projects (Analogous estimating)
 2. ***Bottom Up**
(Calculate the cost from the WBS activities)
 3. Parametric Estimates (surface area = amount of paint)

- All costs: labor, purchased goods and services.

Rank	Currency	ISO 4217 code (symbol)
1	 United States dollar	USD (US\$)
2	 Euro	EUR (€)
3	 Japanese yen	JPY (¥)
4	 Pound sterling	GBP (£)
5	 Australian dollar	AUD (A\$)

Quality Management


- Sponsor needs to understand what “quality” means for the project.
- Are there specific standards you need to meet?
- **Build quality in to the project activities.**
It costs 10X more to correct problems later.

Staffing-Sponsor pay attention!

- People usually have responsibilities to the project manager and to their “regular manager”.
- You may be called on to help keep people working on the job!
- **This is a major issue on most projects!**



Project Management PLAN has these elements

1.  Project Initiation/Documents
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Communication Management from the Project Manager

1. Performance Measurement and Reporting
Status of schedule and budget.
2. Communication to stakeholders/people involved in the project.

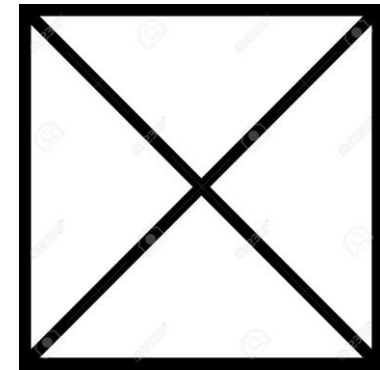
Adjust to meet their needs (frequency and method).

3. **Change management!**

You need a good communication plan because: Communication complexity goes up quickly!

Number of People	Number of Communication Channels
2	1
4	6
8	26

4 people = 6 channels



Channels = $0.5 \times (\# \text{ of people }) (\# \text{ of people} - 1)$

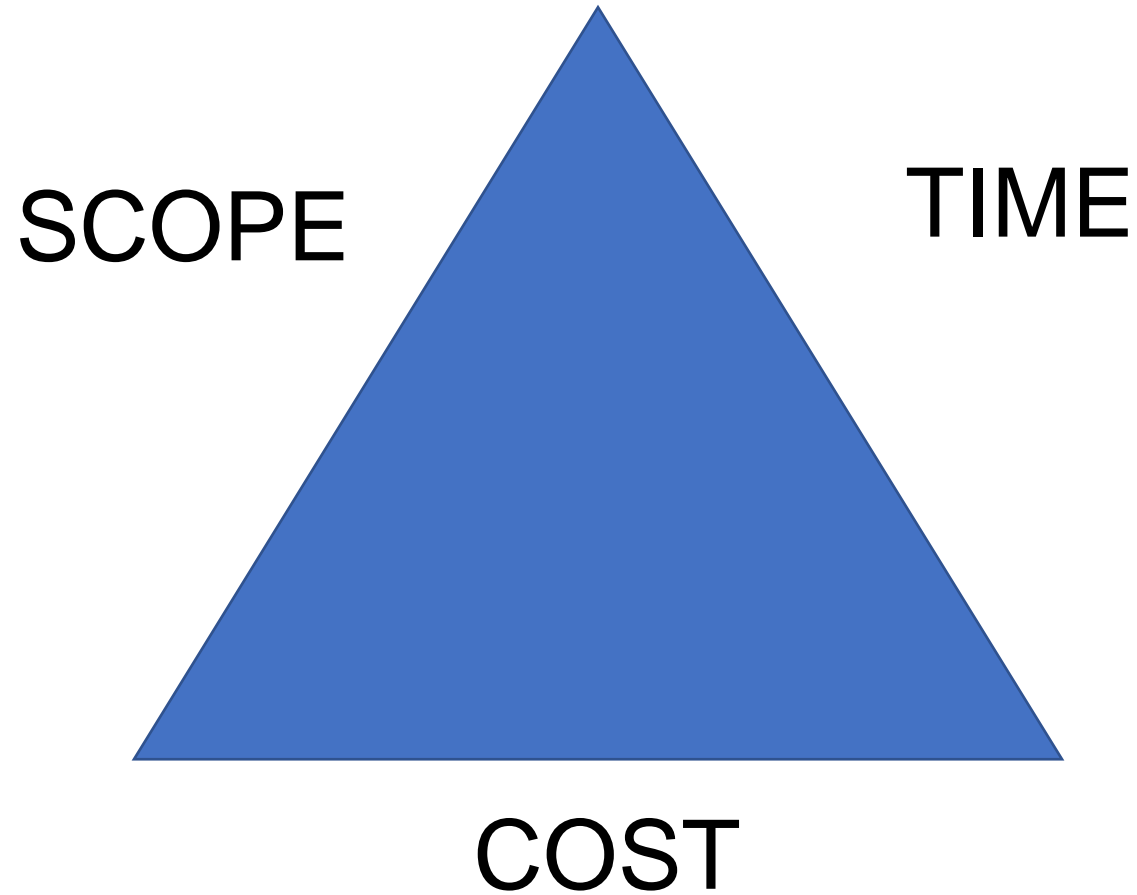


Change Management Plan

- CHANGE REQUESTS ARE ALWAYS WRITTEN!
- Document all changes.
- **Sponsor**-Please decide at the start of the project who can approve changes or you will slow things down!

TRIPLE CONSTRAINT

Think of how changes to one element impact the other elements!



If we buy a bottle of Champagne to celebrate...



Project Management PLAN has these elements

1. ✓ Project Initiation/Documents
2. ✓ Scope Statement
3. ✓ Schedule
4. ✓ Budget/Cost Management
5. ✓ Quality Management
6. ✓ Staffing Management
7. ✓ Communications Management
8. ➡ Risk Management
9. Procurement Management

Risk Management

- | | |
|---|--|
| 1. Accept the risk. | 1. Eat local food at a local restaurant. |
| 2. Avoid (change the plan). | 2. Go to McDonald's. |
| 3. Transfer responsibility (doesn't eliminate). | 3. Get recommendation from the hotel. |
| 4. Mitigate (reduce probability or impact). | 4. Go to an Italian restaurant. |

Procurement Management

- Policies.
- Documentation required.
- Watch for long lead items.

Executive sponsor's role when the Project manager is running the project.

- Pay attention to the status of the project.
Budget, Schedule and Activities
- Ask about changes and risks.
- Look out for people getting pulled off the project.

Project Status Meetings

- Keep the project on track!
- Identify issues and changes. Red, Yellow, Green
- **Well managed projects don't have issues that go from Green to Red!**



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Closing the Project

- Don't let the team run away!



- Be sure you're done!
- Finalize and store project documents.
- Lessons Learned Review.

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Insist on documenting Lessons Learned (Executive sponsor is NOT present)

No Blame!

1. What went right.
2. What went wrong.
3. What would we have done differently?



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Wrapping up

- Introducing project management.
- References.
- Summary.



Introducing Project Management

1. Lessons learned meetings.
2. Use the project planning template.

Project management isn't just for projects!

- You can apply these same techniques to your “regular” work processes.
- Documenting a current work process can be a very helpful project!
- Project management principles creates organization and proactive thinking (always good!).

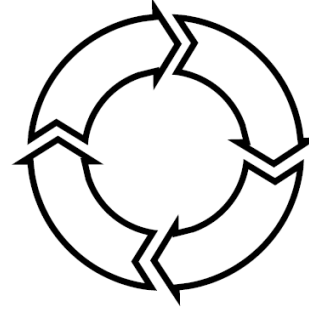
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- Heerkens, Gary R “Project Management” second edition, 2014. (Old and still good!).
- Rowe, Sandra R. “Project Management for Small Projects”, 3rd. Revised Edition, 2020.
- A Guide to the Project Management Body of Knowledge (*PMBOK® Guide*)—*Latest* Edition, PMI.

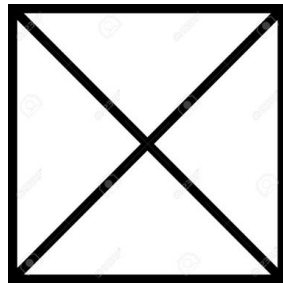
Summary: Project Management



Rare/1-time Event
Start
Finish



Plan
Do
Check
Act



Communicate!



Changes:
Scope
Time
Cost



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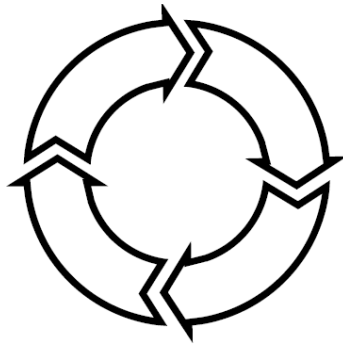
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The Executive Sponsor looks for these skills for their Project Manager

- Organization
- **Communication**
- Negotiation
- Conflict Resolution **(25% to 50% of time)**
Schedules, Priorities, Human Resources, Changes
- Leadership
- Motivation

Summary: Executive Sponsor's Role

- Help the project manager to get off to a good start!
Clearly communicate the business purpose/why.
Clearly communicate the problem to be solved.
Insist on a good plan!
- Understand that project management is an iterative process
and that there will be changes to the plan and the project.



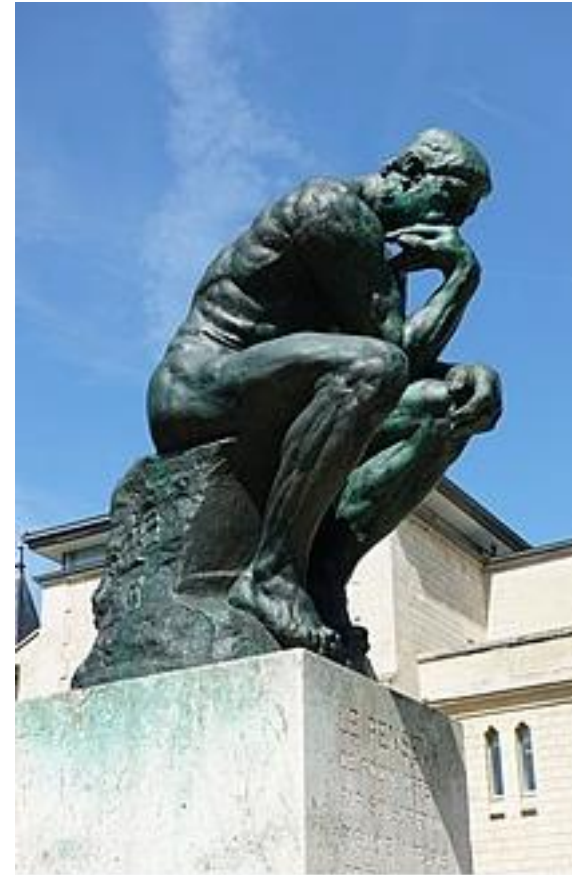
Summary-What to expect from the Project Manager

- A good plan with a realistic schedule and budget!
- Clear, regular and appropriate communication.
- Discussions about changes.
- Requests for help when a team member has conflicting requirements from their “regular boss”.

Project Management: Polling question.

What do you think?

- My team members would benefit from project management training Yes/No.



Thanks for your time!

- Contact me with questions!
- I teach project management in 6 hours!
- igaev@powerofprojects.com
- Send me an e-mail and I'll send you the template.





Q&A

4

International Clinical Engineering
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Congress

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Thank you!