Project Management for the Boss
(Executive Sponsor)

Jonathan A. Gaev, MSE, PMP
Applied Project Management LLC
©2021 Jonathan A. Gaev
13 October 2021
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!

www.powerofprojects.com
The main benefit of project management is happiness!
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.

www.powerofprojects.com
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

www.powerofprojects.com
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)
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.
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.

www.powerofprojects.com
World Record House Construction Habitat for Humanity  3:26

www.powerofprojects.com
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.

www.powerofprojects.com
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
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!

![Cost Increases with Time](#)
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
7. Communications Management
8. Risk Management
9. Procurement Management

www.powerofprojects.com
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 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

www.powerofprojects.com
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)
• 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.

<table>
<thead>
<tr>
<th>Rank</th>
<th>Currency</th>
<th>ISO 4217 code (symbol)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>United States dollar</td>
<td>USD (US$)</td>
</tr>
<tr>
<td>2</td>
<td>Euro</td>
<td>EUR (€)</td>
</tr>
<tr>
<td>3</td>
<td>Japanese yen</td>
<td>JPY (¥)</td>
</tr>
<tr>
<td>4</td>
<td>Pound sterling</td>
<td>GBP (£)</td>
</tr>
<tr>
<td>5</td>
<td>Australian dollar</td>
<td>AUD (A$)</td>
</tr>
</tbody>
</table>
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
2. Scope Statement
3. Schedule
4. Budget/Cost Management
5. Quality Management
6. Staffing Management
7. Communications Management
8. Risk Management
9. Procurement Management
Communication Management from the Project Manager


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!

<table>
<thead>
<tr>
<th>Number of People</th>
<th>Number of Communication Channels</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>4</td>
<td>6</td>
</tr>
<tr>
<td>8</td>
<td>26</td>
</tr>
</tbody>
</table>

# Channels = 0.5 \times (# of people) (\# of people - 1)

4 people = 6 channels

www.powerofprojects.com
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!

SCOPE

TIME

COST
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.

2. Avoid (change the plan).

3. Transfer responsibility (doesn’t eliminate).

4. Mitigate (reduce probability or impact).

1. Eat local food at a local restaurant.

2. Go to McDonald’s.

3. Get recommendation from the hotel.

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 from Green to Red!
Closing the Project

• Don’t let the team run away!

• Be sure you’re done!

• Finalize and store project documents.

• Lessons Learned Review.
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?
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!).

www.powerofprojects.com
References

• Heerkens, Gary R “Project Management” second edition, 2014. (Old and still good!).


Summary: Project Management

Rare/1-time Event
Start
Finish

Plan
Do
Check
Act

Communicate!

Changes:
Scope
Time
Cost

www.powerofprojects.com
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

www.powerofprojects.com
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”.

www.powerofprojects.com
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!

• jgaev@powerofprojects.com

• Send me an e-mail and I’ll send you the template.

www.powerofprojects.com
International Clinical Engineering & Health Technology Management Congress
October 24–26, 2021—Virtual Edition

Keynote Speakers

Adriana Velázquez
World Health Organization, Switzerland

James Wear
Global Clinical Engineering Alliance, USA

Jitendar Sharma
IMI, India

Yadin David
Global Clinical Engineering Alliance, USA

+200 Presentations from over 70 countries

- Health Technology Assessment
- Quality & Safety
- Systems Management
- Clinical Engineering Marketing
- Global Clinical Engineering
- Health Technology Management
- Digital Health
- COVID Case Studies
- Cybersecurity
- Digital Health Case Studies
- Health Technology Policy & Regulation
- Education & Credentialing
- Women in Clinical Engineering
- CE National & Global Impacts
- Innovation / Home Care
- Industry Innovations
- COVID & Health Technologies
- National Clinical Engineering Societies

Register Now!
https://www.globelcea.org/icehtmc
info@cad.tmba.org
Thank you!