

Successfully Shifting a Health Care Project Team to Operations



While common for enterprise health care project teams to shift into more operational roles toward the end of their projects, unless the new operational roles and responsibilities are well-defined, team members risk getting lost in the transition and failing to provide their organizations with proper and needed levels of support.

In this article, we share our recommendations for best practices when transitioning project teams into operational roles, based in part on a transition success we observed first-hand within a major national health plan. The health plan sought to shift a 200+ member project team to a new operational model to support a key line of business affecting its plan participants. But first, the health plan and its transitioning team needed to factor in the critical differences that existed between its project and operational work.

Project and Operation Differences

Organizational projects and operations are often intertwined, but someone's accomplishments on the project side don't automatically equate to operational success, and vice-versa. Bear in mind that projects and operations have key fundamental differences: Projects have definitive beginnings and endings, while operations are continuous. Projects are typically specific to a defined task and often have never been attempted before, whereas operational tasks are frequently repetitive and cyclical.

The differences in projects and operations also play out in their managers. Project managers typically have

discretionary accountability and authority over their projects, and are more focused on completing their projects than on what occurs afterward. They're concerned about the deliverables. Operational managers must operate within a hierarchical structure and are most significantly involved with maintaining continuity and consistency. Their greatest interests are service excellence and reliability.

It would be a mistake for organizations – in health care and otherwise – to assume that successful project managers could automatically be slotted into operational roles without helping these individuals achieve a successful transition. Not only could such a move jeopardize the likelihood of operational success, it could also significantly reduce the desire of the transitioning project managers to remain with their employers. With a projected U.S. shortage of 1.5 million college-educated employees by 2020 (per McKinsey) – especially in technology, finance and accounting – employers that fail to retain high-quality talent do so at their own long-term peril.

A Successful Formula

To the national health plan's credit, rather than assuming project team members would automatically thrive in their new operational roles, the organization instead wanted to ensure that new operational team members had clearly defined functional roles and responsibilities, and would succeed in their new efforts.

Given the scope, scale and importance of the health plan's operational transition, this would be a challenging task. Processes transitioning between individuals and potentially to different teams require careful planning, coordination, and communication between affected groups and individuals (including partners and affiliates outside the enterprise) to ensure successful completion. Without doing so, there was a risk of ambiguity with accountability that could impact the timeliness and accuracy of the health plan's operations, which primarily involved critical administrative processing for plan participants.

Thus, to create a new organizational structure with clearly defined functional team roles and responsibilities, the health plan determined the following goals:

1. Understand current state and future-state operational requirements to develop an organizational model that would meet both steady-state operational needs and support a high level of ongoing change
2. Define core team functions, roles and responsibilities, and staffing levels required to support the new organizational model
3. Identify opportunities to gain efficiencies, such as through reducing duplicative activities across functional teams
4. Execute the transition from the current, program-supported structure to the new operational model

Best Practices

Each of the 200+ project team members needed to transition from their current, project-based organizational responsibilities to their new/modified operational scope and responsibilities, as defined in a future-state organization model. The project team also included both individual contractors and consultants who needed to document and manage their transition plans. The health plan provided both team and individual transition plan templates to be used by each team leader.

Due to the scope and scale of the transition, the health plan's leaders required strategic and tactical assistance throughout the effort. This work included directing and overseeing day-to-day transition activities, assisting key leaders in transitioning to the new organizational model, and supporting leaders in completing such key tactics as defining team roles/responsibilities, organization charts, staffing plans, transition plans, and team charters.

Sequentially, the health plan's tactical best practices included:

1. **Developing a master work plan/timeline/RACI** – These included documents to identify milestones/deliverables for the transition to operations, a RACI for each deliverable, and the status in order to manage the work stream and provide communication throughout the client organization
2. **Creating an organization structure** – Diagrams containing the planned organization structure within the new operational group, both at the overall organization level as well as with individual teams and personnel
3. **Defining team functions and transition planning documentation** – Summary of each team's future state mission, core functions, changes occurring in the transition, decisions, and assumptions
4. **Optimizing initiatives** – Documentation on proposed initiatives that would ease transition to operations under the future state model and streamline activities going forward
5. **Developing team staffing worksheets** – Individual worksheets for each team to map functions and volume to estimated staffing requirements through year-end
6. **Organizing quarterly staff planning models** – Used to identify resources required for ongoing stabilization efforts and the associated costs bucketed by employees, contractors, and consultants
7. **Setting goals metrics** – Worksheet containing goals metrics, their value history, and progress toward goal, as well as a process document for maintaining them
8. **Developing organization and team charters** – A draft of the new operational charter and templates for each involved team to develop its own charter

Positive Results

Through its transition planning efforts, the health plan not only successfully shifted its 200+ member project team to a vital operational team, but also gained key new background and knowledge on organizational work streams and documentation. The latter will be invaluable to the organization's ongoing management of the operational team.

Additionally, the client created a new SharePoint site, containing a catalog and inventory of all of the documents needed to support the transition effort. This will be useful for future, similar project-to-operations transitions within the organization.