

## **Project Management Basics: Have You Mastered These Six Fundamentals?**



**No matter your type of health care organization, your project management fundamentals should be defined by the terms why, what, when, who, where, and how.**

As seen in [Healthcare Business Today](#).

At times undervalued, project management is the glue that holds projects together and propels them to success. Done well, project management mitigates project risks, cuts costs and improves success rates. Conversely, poor project management can cause projects to fall apart, wasting time and resources.

Based on my more than 25 years of project/program experience in health care, I have assembled the following six fundamentals for project management success. By coupling these with a committed sponsor, dedicated team and realistic budget and schedule, you should be on your way to project management success!

### **The Six Fundamentals**

No matter your type of health care organization, your project management fundamentals should be defined by the terms why, what, when, who, where, and how.

#### **1) Set a project goal: Why are we doing this project?**

In my experience, nearly 90 percent of projects launch and complete without a clear understanding of why the project is important to the organization. It's virtually impossible to define a project's goals — and keep team

members on track — when you have no idea how to measure or identify success.

Here are ways to clarify the expected project goals and outcomes:

- **Create a business outcomes summary** – This should be approved by project stakeholders, posted in the project room, and constantly referenced as the project scope is defined, refined, and managed.
- **Review goals and expected outcomes** – Every team member should understand why the project is important and what success looks like.
- **Review the summary** – Make sure everything you do is in-line with your goals. This is especially important when making a “go live” decision.

## 2) Describe your project: What are we doing here?

Clearly defining and managing project scope is challenging. At a high level, this is understanding what you are creating, building, or developing. While you may have a clear project objective, you may also have no sense of how detailed a project like this will be. Without clearly understanding all of the moving parts, how can you properly resource or schedule the project?

To properly outline and define your projects’ scope:

- **Create a project scope statement** – This should document both in-scope and out-scope items.
- **Ensure you have a clear project sponsor** – This person, group or department should confirm and approve project scope and issue final approval on detailed requirements.
- **Baseline the project scope** – Establish the project’s parameters.
- **Become outcomes-focused** – Ensure your scope and requirements support the desired outcomes, by vetting them against the business outcomes summary.
- **Create a clear change-control process** – Rigorously enforce change control to control scope creep.

## 3) Set a firm project deadline: When does your project need to be completed?

Every project has a timeline and due date. To maximize success, clearly define how much time it will take to complete the project and communicate this to your entire team.

- **Understand the rationale for project deadline(s)** – Know whether you will have latitude for moving any deadline date(s).
- **Create a concise project schedule** – Keep it simple and current to get the job done. I’ve seen many situations where a project schedule is developed at the start, but put aside and never used again.
- **Adopt the right monitoring tool** – Pick an appropriate tool to monitor and maintain your project schedule, and keep it current. Don’t get hung up on the tool used – simply pick one that works well.

#### 4) Define project roles: Who and what are my project resources?

From my project management experience, I learned that a lack of clarity around roles and responsibilities often causes work to not get done or fall through the cracks – everyone thought someone else was doing the work! To manage resources effectively:

- **Document roles and responsibilities** – All team members, sponsors, and stakeholders should have clear and unambiguous accountability for specific tasks. A roles & responsibilities matrix can suffice, although it may be even better with a RACI matrix.
- **Create a project organization chart** – This ensures clarity of project leadership and an understanding of the escalation path.
- **Create and maintain a project budget** – Define the budget at the resource level so that the cost of each item is clear. Track resource time against the budget to avoid overruns.

#### 5) Determine your project location: Where is the project taking place?

Do not overlook location when considering project fundamentals. The logistics of where your work will be completed is important and can directly impact resource management.

- **Determine project logistics** – Ensure that project sponsors and stakeholders agree on the approach taken, given the potential impact on schedule, cost, and resource assignments. Projects involving teams spread across a large geography may require extra project management and funds to cover travel time and costs.
- **Document and share project logistics** – Engage team members to manage expectations.
- **Update the project schedule** – As necessary, add updates to reflect impacts due to project logistics.

#### 6) Determine your project approach: How will the project be completed?

It is critical that the project team and stakeholders understand how the project will be tracked and managed, as well as how project progress and issues will be communicated. Your project management plan should:

- **Outline project manager communications** – State how the project manager will communicate with team members, report progress, manage the work, control quality, and track and manage issues and risks.
- **Specify the procedures, templates, and tools** – Limit to what is needed to manage the project.
- **Clarify project manager expectations** – Clearly present these at the project kick-off meeting.
- **Secure sponsor approval** – Align plans with the project's business outcomes and framework.

#### Toward Successful Project Outcomes

No matter your staff's attributes and the worthiness of your project, if project management fundamentals are not

effectively employed, projects can fail to meet their deadlines and/or desired business outcomes. By adhering to the six project management fundamentals above and clearly communicating measurable business outcomes with your sponsors, you can achieve greater health care project management success.