

Value of Project Management Expertise

Save to myBoK

by Gwen Hughes, RHIA

Over the past 25 years, I've had the opportunity to facilitate a number of projects. For the most part, I considered managing them challenging, rewarding, and fun. However, as health enterprises grow more complex, organizations attempt to interface more and more software, and managers are spread increasingly thin, project management—on top of regular workloads—is increasingly difficult.

Because a couple of recent projects I managed were so taxing, I found myself wondering what those with formal training in project management can bring to the table and how I might improve my own project management skills. I did a literature search, visited various project management Web sites, and talked to colleagues who specialize in project management. Here's what I found.

A Project Management Primer

A project, as defined by the Project Management Institute (PMI) is a "temporary endeavor undertaken to create a unique product or service." Projects are initiated by individuals who recognize a problem, identify an opportunity, define what is to be done, and commit to achieving a specific goal.

Project planning is thinking ahead. A project manager, project team, and stakeholders establish a desired outcome. They state exactly what the outcome will be and when it will be done. The project team further identifies measurable steps to accomplish the goal. The team identifies the human, material, space, and monetary resources that will be required to achieve each objective. The team then prepares a written plan to guide execution of the project, measure progress, and serve as a training tool for new team members.

Executing and controlling a project requires assigning various pieces of the project to members of the team; tracking schedules, cost, and progress; detecting variances from the plan; and taking corrective action. Information can be exchanged regularly at status review meetings that might be held weekly among team members and monthly with stakeholders. Information about the extent to which deliverables and quality standards are met, costs incurred or committed, and lessons learned are collected and fed into the performance reporting process weekly.

A **project is complete** when the project objectives or deliverables are satisfied and the work that remains is a functional part of operations. Prior to formally ending a project, the team should meet, address any open issues, and celebrate.

Human Components of Project Management

Much of project management seems like a matter of applying common sense and good management techniques. Yet my search turned up some information on project management that I hadn't considered before. Following are the human resources necessary for project management:

A good **project manager** will establish direction by developing a vision of the future and strategies for producing the changes needed to achieve that vision. He or she will work to align people and communicate the vision to those whose cooperation may be needed. A good project manager will also motivate and inspire by helping people overcome political, bureaucratic, and resource barriers to change. The project manager's first responsibility is to manage the project and the team, then to complete some of the actual tasks. He or she needs to be a great communicator, because poor communication leads to project failure.

Members of the project team should consist of individuals with good communication skills who are committed to the project goal. Members should be flexible, technically competent, task oriented, team players, and have a history of meeting deadlines.

Stakeholders are those individuals and organizations whose interests may be affected as a result of the project. The team must identify the stakeholders, determine what their needs and expectations are, and then manage and influence those expectations to ensure a successful project. Key stakeholders include the project manager, the customer, the enterprise whose employees are most directly involved in the project, and the entity that provides the project's financial resources.

Pieces of a Project Management Plan

There are many ways to organize and present a project plan, but the plan commonly includes:

- the project charter, scope, or deliverables
- a description of the approach
- work breakdown structure
- cost estimates
- start dates
- controls
- performance measurement baselines
- major milestones and target dates
- risks, constraints, assumptions, and responses to each
- open issues
- supporting detail

Work breakdown structures can be used to divide projects into major objectives, partition objectives into activities, and further divide activities into subactivities, creating work packages that must be accomplished to complete the project. Work packages can be assigned to various project team members.

Time and cost estimates must be made for each activity as part of the project plan. Estimates may include a range based on best and worst case scenarios and contain estimates of labor, materials, and direct and indirect costs.

In order to estimate time, activities must be sequenced, as some depend on each other. Gantt and PERT charts (common project scheduling tools) can be used to determine the sequence and the time needed to complete the project. The sequence of activities that makes up the longest path to completion is called the critical path.

As part of the project plan, project team procedures should be developed, including methods for communicating with the project manager, team members, and stakeholders; documenting variances, corrective action, and lessons learned; and authorizing work and making changes.

Work authorization is a process to sanction project work to ensure that it's done at the right time and in the proper sequence. Work authorization might be verbal in small projects or written in large or complex projects.

Formal **change procedures** should define the approval levels necessary for authorizing change and those changes that can be approved without prior review. Procedures should be well defined and agreed on by the stakeholders. Changes should be communicated to the team so that efforts are coordinated.

For the most **effective meetings** during the initial phases of a project, brainstorming, lots of whiteboard, and visuals (such as flow charts or system layouts) help enormously in reaching understanding and agreement and speeding up the overall planning process. Building and agreeing on the project scope should be accomplished first, followed by development of the work plan and schedule. Making sure the plan is complete and without ambiguity is extremely important.

Another Opportunity for Career Development

Project management is about taking the lead in creating a unique product or service. Many of us have led or would like to lead such endeavors in the future. If so, it's time to proactively prepare and improve our skills. Consider reviewing *A Guide to the Project Management Body of Knowledge* (see "Advice from a Project Manager") and other PMI-recommended resources. Or explore options to seek formal training in project management, find a credentialed project manager to serve as a mentor, join a local chapter of the Project Management Institute, and become a certified project manager.

Advice from a Project Manager

I asked Ralph Whiteaker, PMP, (Project Management Professional), a colleague with whom I had the pleasure of working at St. Joseph's Healthcare System in Albuquerque, a few questions about project management. Here's what he had to say:

What does a project manager bring to the table that perhaps an HIM director or IS department member does not?

Whiteaker: Planning, organization, and communication skills are probably the most important and carry the biggest impact. A project manager will first seek to understand the customer's needs and requirements, define the full scope and boundaries, and identify the needed resources (cost, time, staff). He or she will also perform a risk analysis before starting any work. Very often people will start a project without knowing the full scope or implications and consequently either miss the targeted needs, budget, or schedule or have to backtrack to compensate.

Have you identified one set of tools or software that facilitate project team work better than another?

Whiteaker: Scope analysis, followed by a work and deliverable outline, are perhaps the first, most important processes. After that, effective communications with stakeholders and team members is essential for understanding and support. Whether one uses a software package or not is less important than the processes. If software is desired, it should be chosen because it meets the needs of the project.

How should HIM professionals who want to improve their project management skills proceed?

Whiteaker: Training in project management is widely available through seminars, colleges, continuing education, PMI chapters, and independent trainers. Seek out a PMI chapter or member and ask about the opportunities in your area. Focus on processes rather than training in any specific software packages.

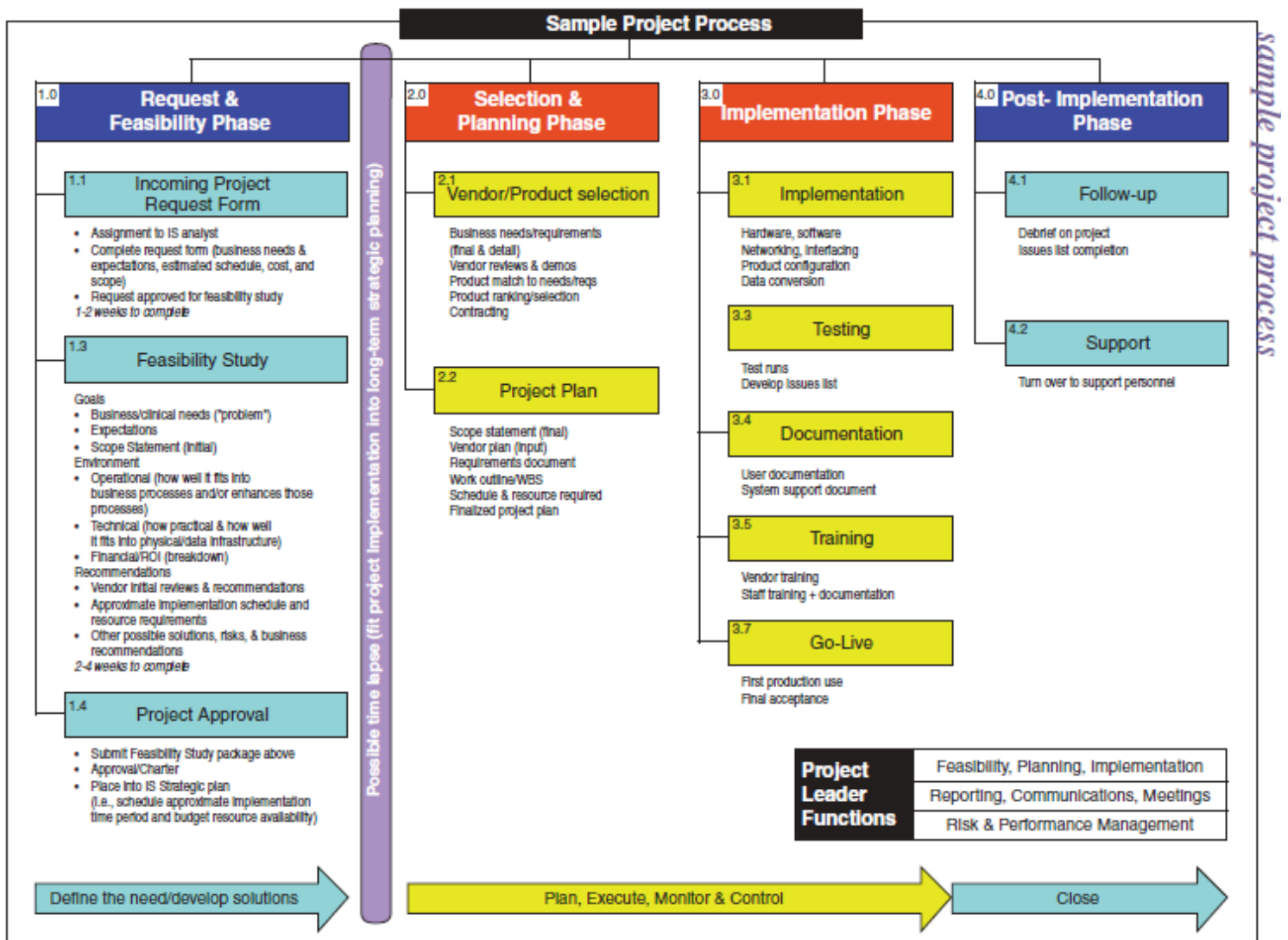
If someone wants to seek the PMI certification as a Project Management Professional, how should they prepare and proceed?

Whiteaker: Start by studying the PMBOK (Guide to the Project Management Body of Knowledge) available through the PMI Web site at www.pmi.org. Follow up with more in-depth study of the individual knowledge areas. Most cities have either a PMI chapter or a college where courses specific to career development or PMI certification are offered.

Why did you decide to become a PMP? How did you develop the expertise needed? What advice would you give to someone who wanted to pursue a similar path?

Whiteaker: I was first exposed through some basic seminars and followed up by seeking more training and then certification. The knowledge and skills are universal because they can be taken and used wherever one goes or in any industry. They can be applied in virtually any situation and allow one to succeed even without advanced technical knowledge in the area where you may be managing projects. Personally, I like challenges and problems to solve, and the project management tools and methods invariably help me with whatever challenges present.

Sample Project Process chart.



Resources

Abdelhak, Mervat et al. *Health Information: Management of a Strategic Resource*. Philadelphia: W. B. Saunders Company, 1996.

Project Management Institute Standards Committee. *A Guide to the Project Management Body of Knowledge*. Newtown Square, PA: Project Management Institute (1996). Available at www.pmi.org.

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