



Project Management Pearls: The Impact on Revenue

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What's the Problem?

- Do you ever start a task and can't seem to see it to completion?
- Do you ever get distracted by *new* problems and let *old* problems go by the wayside that end up costing you later?

With only 2.5% of companies successfully completing 100% of their projects, lack of good project management can **cost you** in your everyday operations (Gallup, 2012).

Don't be Intimidated by Project Management!

- Project Management is simply a set of methodologies that enable you to ***get things done*** on time and on budget
- The benefits of using project management methodologies include:
 - Improves the chances of achieving your desired result
 - Improves the productivity and quality of work
 - Provides structure and breaks down a large problem in smaller, achievable task to reach the overall goal
- Every company and every team has problems, so, how do you get started?

**YOU CAN'T
MANAGE WHAT YOU
DON'T MEASURE**

PETER DRUCKER

The Game Plan

Assess the Situation

- Identify the **symptoms**

Determine Resources

- Use a RACI chart to define responsibilities
- Identify skills needed for the problem

Document Your Goals

- What do you want to achieve?
- What do you want to achieve?

Perform a Discovery

- Identify where the symptoms lie in the process

Identify Root Causes

- Use a Fishbone Diagram to identify why issues are occurring

Assign Solutions

- Use an Action Plan to identify and assign a solution to each root cause

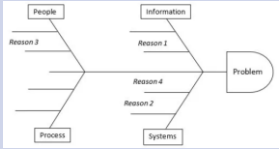
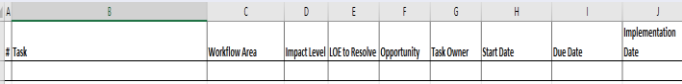
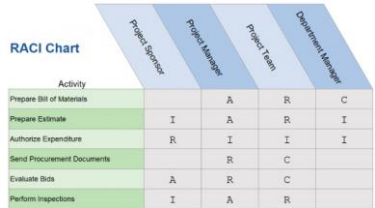
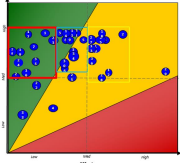
Prioritize Solutions

- Use a Benefit vs Effort model to prioritize the solutions

Lead the Project

- Assign a resource to lead the project

Toolkit in Review Today

Tool	When to Use the Tool	What it Looks Like
Fishbone Diagram (Fishbone Diagram Maker, 2020)	When there are symptoms of a problem but you don't know what the root cause is	
Action Plan (Work Breakdown Structure) (Action Plan Template, 2020)	When you have a project or large task that spans a length of time that can be broken down in smaller units of work	
RACI Chart (RACI Matrix Template, 2020)	When a team is created to define who is Responsible, Accountable, Consulted, or Informed for certain tasks – can be used for projects or operational	
Benefit vs Effort Model (Action Priority Matrix Worksheet, 2020)	When there are too many solutions to address and you need to identify which items to address with the highest ROI (Return on Investment)	
1 Minute To Do Method (Linenberger, Michael, 2017)	Every day! Use to streamline communication in your daily activities, especially with projects	<ol style="list-style-type: none"> 1. Critical Now 2. Opportunity Now 3. Over the Horizon

Case Study 1: The Struggling Pharmacy – Scale Stunts Efficiency

Size of Project: Large-Scale (1 location, entire workflow affected)

Duration: 3 – 6 months

The Problem: One location of 50+ employees was bleeding overtime hours but lacked the same production output as comparative sites and encountered a greater number of customer service complaints. New staffing requisitions were denied until the root cause(s) were uncovered and addressed.

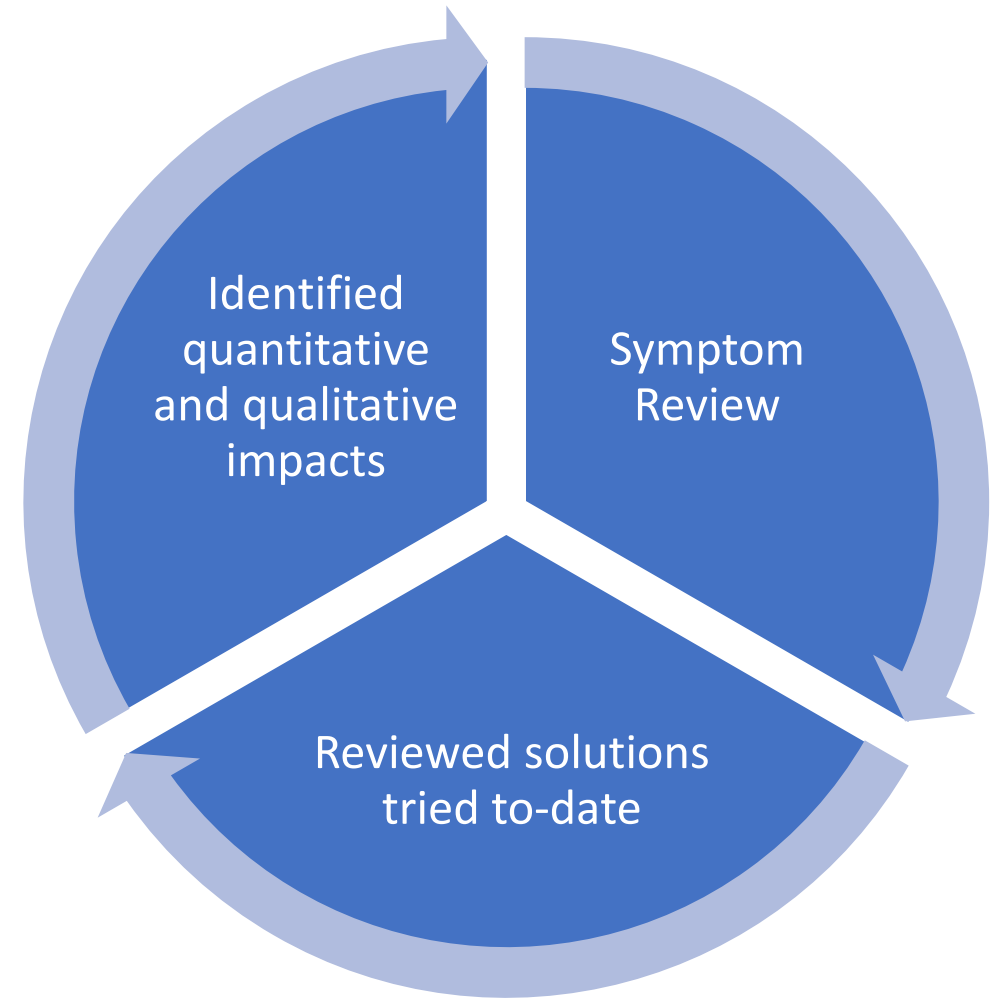
The Result: Reduction of OT by 50% in 3 months and reduced Cost of Delivery by 12% to meet budgeted goal.

Case Study 1: Methodology Used

- Scope Review of Pain Points
- Goal Definition
- Feasibility Review & Resource Identification
- Discovery
- Benefit vs Effort Analysis
- Action Plan Creation
- Monitoring, Metrics and Redirection
- Value Realization

Case Study 1: Scope Review of Pain Points

- **Symptom Review:** The lagging indicators included increased OT, increased delivery costs and reduction in referrals
- **Solution Review:** Reviewed failed solutions implemented with local leadership
- **Qualitative/Quantitative Impact Identification:** The symptoms impacted the bottom line for the location in terms of direct and indirect costs to the company



Case Study 1: Goal Definition

- Alignment: Once local leadership agreed on the impacts from the problems, the goals of the project became clear
- Memorialization of the Goals:
 - The team documented the 10 goals and included the goal list in every status update and team meeting
 - The goals were used to later define how each goal will be measured to track progress of the project

Case Study 1: Feasibility Review & Resource Identification

- Once scope was known, reviewed the effort in totality with leadership
- Determined team member skills needed to accomplish the project
 - Strong organization skills
 - Ability to ask direct questions
 - Strong understanding of the operational workflow
 - Experience with implementing change
- Created RACI chart for clarity on roles & responsibilities
- Assigned team members to on-site discovery schedules

Case Study 1: Discovery (Kick-Off)

Completed
On Site
Observations

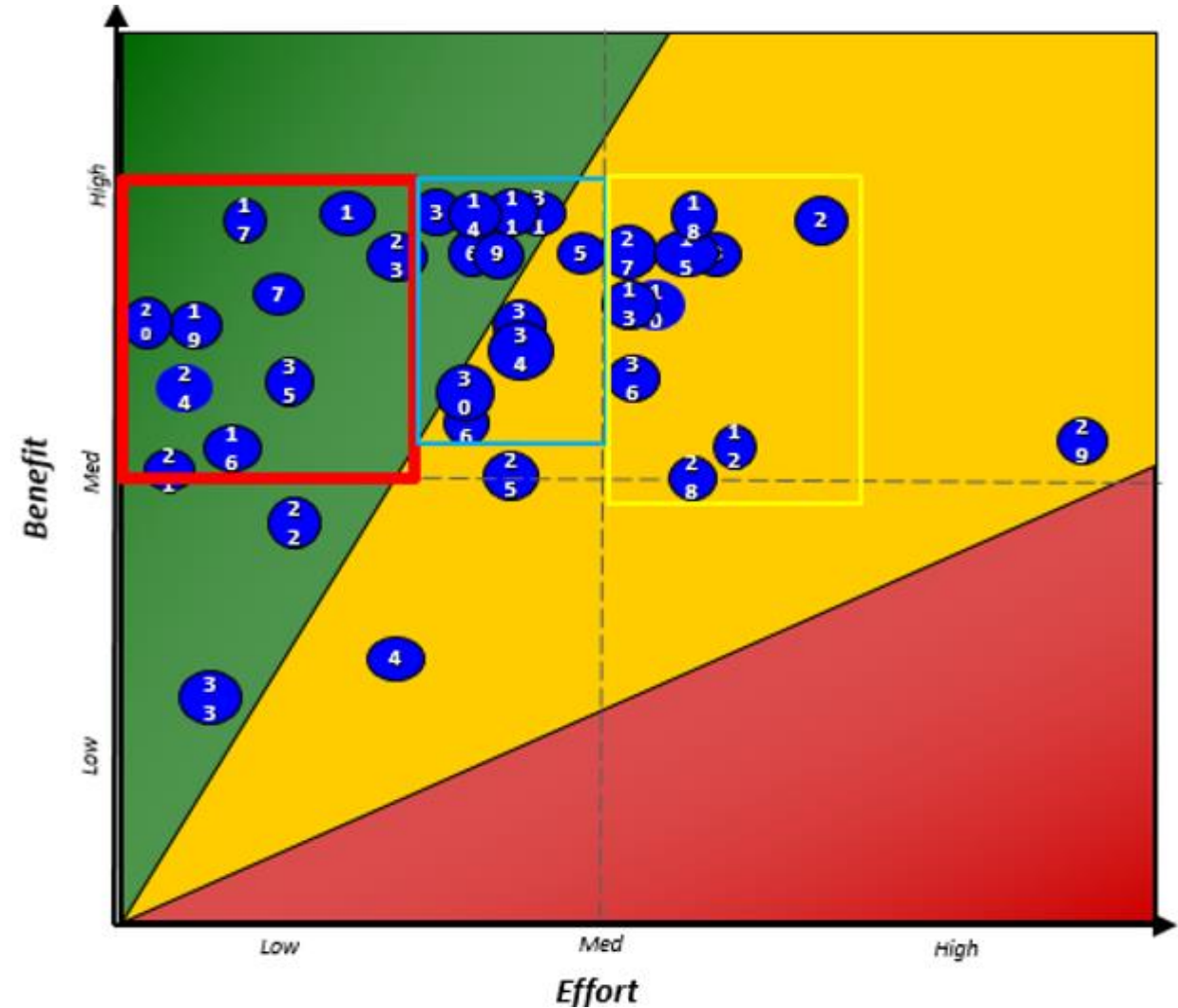
Used 5-Why
Method for
Root Cause
Identification

Completed
Daily Debrief
Meetings

Aggregated
Results

Case Study 1: Benefit vs Effort Analysis

- Leveraged results from the Discovery process and assigned a number to each potential solution to address
- Each member of the project team completed the B&E analysis individually and assigned values to the following elements that resulted in a final calculated value:
 - Importance to Customer
 - Cost to Implement
 - Likelihood of Success
 - Cost Reduction
 - Positive Impact on Other Processes
- All results were averaged to create a finalized prioritized list
- Results were summarized into the following buckets for implementation:
 - JDI's (Just Do It): High Benefit, No Effort
 - Box 1: High Benefit, Low Effort
 - Box 2: High Benefit, Medium Effort
 - Box 3: Medium Benefit, Medium Effort



Case Study 1: Action Plan Creation

- Used results from the B&E analysis and implementation buckets to assign the following elements on an Excel spreadsheet:
 - **Task:** Description of the task
 - **Solution Number** (aligns back to B&E #): Aligns back to higher level solution as there may be multiple tasks needed to complete a solution
 - **Task Owner:** Name of an individual who is responsible to complete the task
 - **Start Date:** Date the task begins
 - **End Date:** Date the task is due
 - **Implementation Date:** Date the task will be implemented that impacts operations
 - **Measure to Monitor Process:** Describe the method that will be used to measure progress towards the particular task (i.e., report, audits, metrics, etc)

Case Study 1: Monitoring, Metrics & Redirection

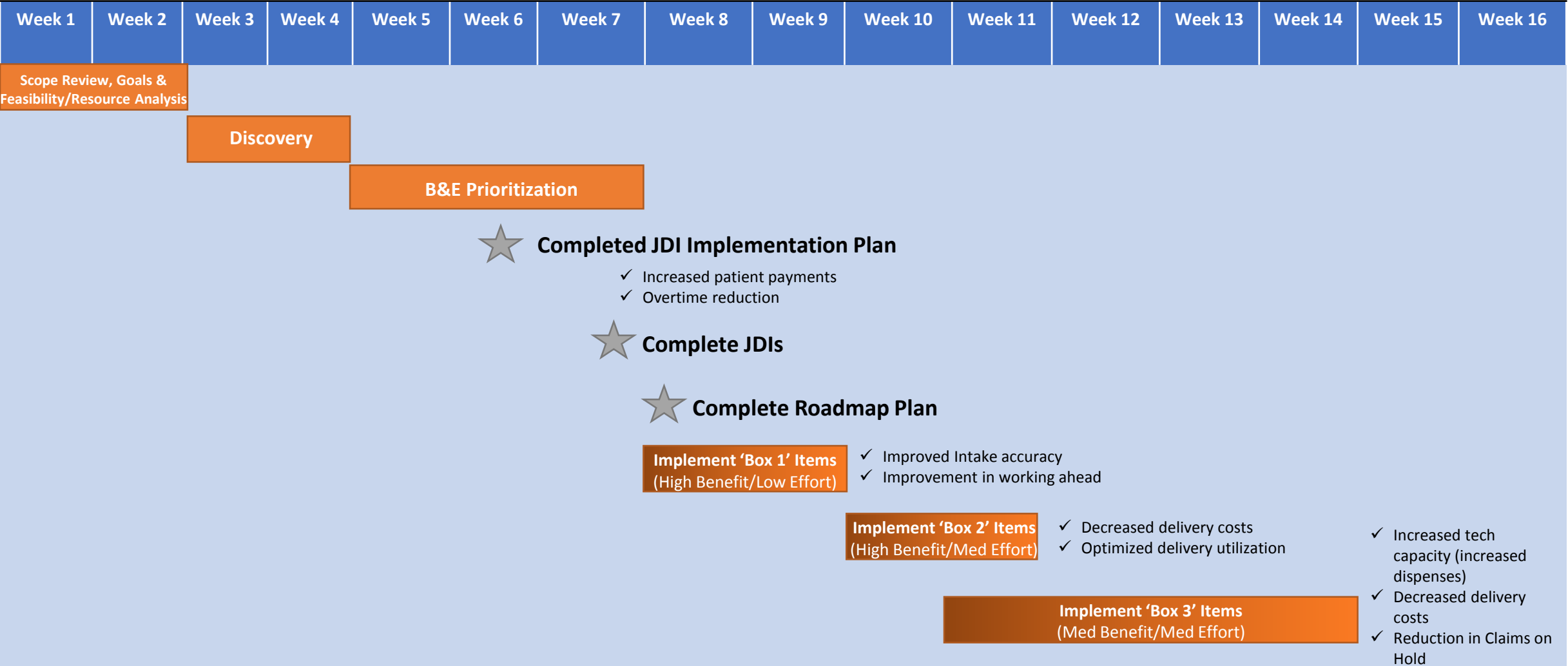
- Monitoring:
 - At time of creating the action plan, obtained baseline values for each metric
 - Used Weekly Status Meetings with project team to retain focus on the project
 - Escalated issues & obstacles to leadership, as needed, for resolution
- Metrics:
 - Thresholds (i.e., what does 'good' look like) were established
 - From the metrics identified in the action plan (prior step), metrics were monitored by the task owner and reported to the project lead
 - Trending was tracked to show progress over time (week to week)
- Redirection:
 - Several solutions did not realize benefit – decision made to stop efforts on the solution or try a different solution
 - Example: Efforts to try to increase capacity in a particular resource did not work due to learning obstacles that required additional accommodations

Case Study 1: Value Realization

- Metric monitoring provided clear results in what worked to meet goal, what showed progress and what did not work

What Worked for the Location	What Did Not Work for the Location
<ul style="list-style-type: none">• Decreased use of couriers improved overall cost of delivery by 12%• Working ahead and mandating cessation of overtime reduced OT costs by 50%• Enrollment in a credit card program for patient OOP costs improved by 20%• Increased training provided focus on higher priority items for staff and increased accuracy by 6%• Reduced email & Skype 'noise' by adopting use of standard communication tool	<ul style="list-style-type: none">• Moving Pharmacy staff off of a paper based refill log to an automated refill log helped with standardization but did not see a bump in productivity• Even though there were significant improvements and cost savings in OT, did not meet the OT goal set forth by leadership

Case Study 1: Schedule Summary



Case Study 2: Sluggish Intake Turnaround Time

Size of Project: Small-Scale (1 location, 1 area)

Duration: 1 – 3 months

The Problem: Location had multiple complaints from customers on slow response time which cost the location a major customer for a period of time. Something needed to be done to accelerate the team's response time.

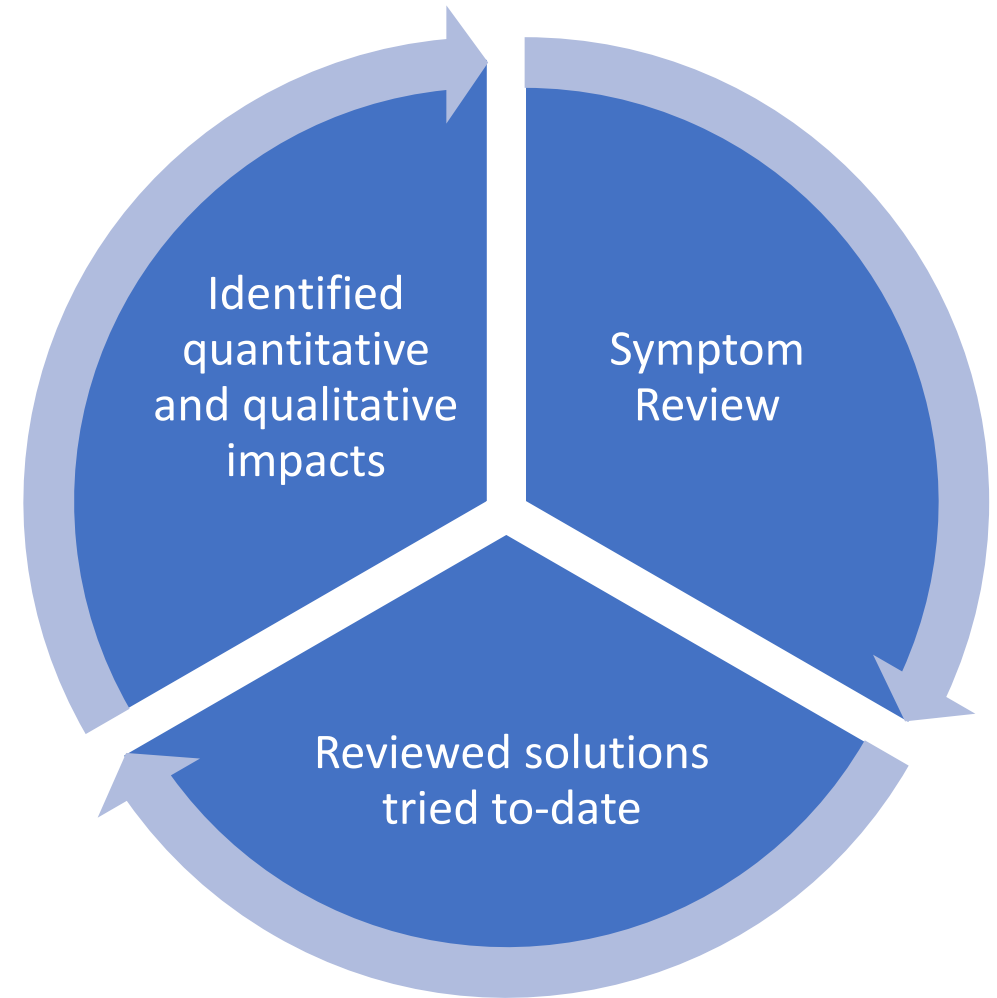
The Result: Improved acceleration by 80% in 2 months and met goal within 4 months.

Case Study 2: Methodology Used

- Scope Review of Pain Points
- Goal Definition
- Feasibility Review & Resource Identification
- Discovery
- Action Plan Creation
- Monitoring, Metrics and Redirection
- Value Realization

Case Study 2: Scope Review of Pain Points

- **Symptom Review:** Reports of slow response time from several sources that caused irritation with a major customer
- **Solution Review:** Reviewed failed solutions implemented with local leadership (turnover of a key manager, recent new hires)
- **Qualitative/Quantitative Impact Identification:** Slow turnaround time impacted customer satisfaction and reduced growth for a period of time



Case Study 2: Goal Definition

- **Alignment:** Leadership was immediately aligned on the goals of increasing turnaround time and improving customer satisfaction.
- **Memorialization of the Goals:**
 - The team documented 2 goals (Reduction in Turnaround Time by 90% & Improved Accuracy Rate by 9%) and included the goals in every status update and team meeting
 - The goals were used to later define how each goal will be measured to track progress of the project

Case Study 2: Feasibility Review & Resource Identification

- Once scope was known, reviewed the effort in totality with leadership
- Determined team member skills needed to accomplish the project
 - Strong understanding of the Intake process
 - Prior Intake management experience
 - Prior experience turning around performance of teams
- Assigned team members to on-site discovery schedules
- Assigned team members to remain on site for a period of 2 months to co-manage the team

Case Study 2: Discovery (Kick-Off)

Completed On Site Observations
– Remained on Site for 2 Months

Observed and worked hand-in-hand with staff on the floor

Completed Weekly Debrief Meetings

Implemented incremental solutions each week

Case Study 2: Action Plan Creation

- Used results from the on site discovery process to assign the following elements on an Excel spreadsheet:
 - **Task:** Description of the task
 - **Task Owner:** Name of an individual who is responsible to complete the task
 - **Start Date:** Date the task begins
 - **End Date:** Date the task is due
 - **Implementation Date:** Date the task will be implemented that impacts operations
 - **Measure to Monitor Process:** Describe the method that will be used to measure progress towards the particular task (i.e., report, audits, metrics, etc)

Case Study 2: Monitoring, Metrics & Redirection

- Monitoring:
 - At time of creating the action plan, obtained baseline values for each metric
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 - Escalated issues & obstacles to leadership, as needed, for resolution
- Metrics:
 - Thresholds (i.e., what does 'good' look like) were established
 - From the metrics identified in the action plan (prior step), metrics were monitored by the task owner and reported to local leadership
 - Trending was tracked to show progress over time (week to week)
- Redirection:
 - Several efforts to train a manager did not result in value and eventually was replaced
 - Utilizing an 'alpha' methodology to assign work within Intake was unsuccessful to the size of the location and ended up utilizing a 'round robin' approach to balance the workload

Case Study 2: Value Realization

- Metric monitoring provided clear results in what worked to meet goal, what showed progress and what did not work

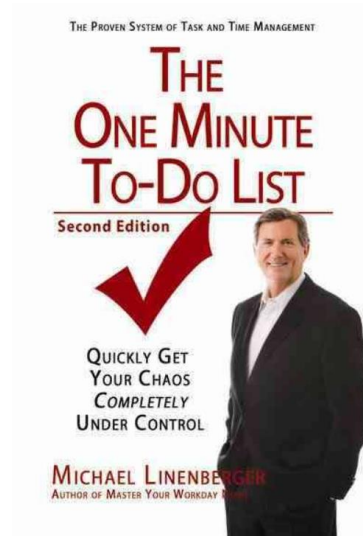
What Worked for the Location	What Did Not Work for the Location
<ul style="list-style-type: none">• Identified that several key team members were taking breaks and lunches at the same time, which resulted in sluggish customer turnaround time during high traffic times – rescheduling breaks/lunches provided more balanced coverage• Shared weekly Turnaround Time metrics with the team by individual which triggered competition to ‘be the best’• Pulled ahead key customer-specific tasks to increase turnaround time by 90% within 4 months	<ul style="list-style-type: none">• Following a process in sequence – determined sequential order elongated Turnaround Time and instead pulled key tasks to the front of the workflow• Realized Accuracy metric needed tweaking to exclude non-realistic scenarios• Ensuring completeness of data elements from referral sources

Case Study 2: Schedule Summary



The 1 Minute To Do List (1MTD)!

How to improve personal productivity and focus time on the most valuable tasks



What Makes 1MTD Work?

Why Paper To Do Lists Don't Work

- Too many tasks – impossible to keep up
- Most treat tasks as 'first in, first out'
- Focuses on importance, not *urgency*
- Importance' is arbitrarily assigned

Why 1MTD Lists Work

- ✓ Focuses on urgency over importance
- ✓ Work is organized into 'Urgency Zones'
- ✓ Most urgent tasks stay on the forefront
- ✓ Reduces personal stress and disorganization

What Do I Need to use 1MTD?

- Microsoft Outlook
- Outlook Task Manager
- (Optional) TaskTask Smartphone app

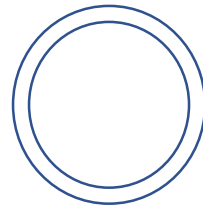
Urgency Zone: Critical Now List

*Review **hourly**, takes 20 seconds*

List items that are absolutely due today

When listing items, ask yourself the following:

- What's making me nervous today?
- What would impact me negatively if not completed today?
- Perform the 'Going Home' test – would I be willing to not go home but instead work late tonight to get this item completed?



TIPS

- ❖ It's ok if this list is empty!
- ❖ List no more than 5 items in the Critical Now zone
- ❖ Enter a start date of today for Critical Now items as Outlook tasks

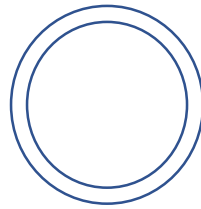
Urgency Zone: Opportunity Now List

*Review **daily**, takes 20 seconds*

List items that could be due tomorrow, up until 10 days from now

When listing items, ask yourself the following:

- What would I work on if I had the opportunity?
- What tasks would I work on after my Critical Now tasks are complete?
- What would I do now if the right person walked by my desk that would move a task forward?
- What items could suddenly 'mushroom' in urgency or may become due tomorrow?



TIPS

- ❖ Review daily, move items to Critical Now or to Over-The-Horizon if urgency changes
- ❖ List no more than 20 items in the Opportunity Now Zone
- ❖ Add a due date at the start of the task name
- ❖ Use start dates in Outlook tasks to further prioritize

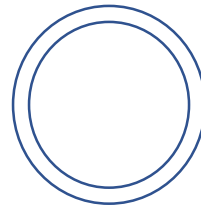
Urgency Zone: Over-The-Horizon List

Review **weekly**, takes 20 seconds

List items that can wait 10 days or more

When listing items, ask yourself the following:

- What's not troubling me right now – what doesn't feel urgent?
- What do I not want to lose sight of that may become urgent later?

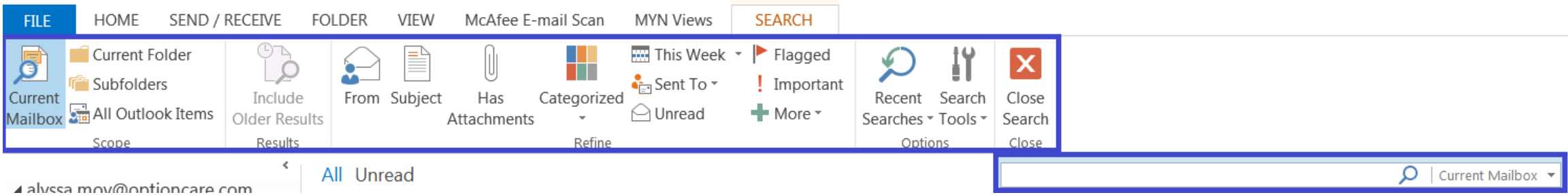


TIPS

- ❖ Use a start date on the Outlook task in the future - select a date of when you want to review it
- ❖ Select the date as a Monday so that you will see it in your list at the start of your weekly review

1MTD Outlook Tips & Tricks

The powerful Microsoft search functionality...and why you don't need folders anymore!



- Search by Sender
- Search by Category
- Embedded search criteria
- Search in all folders or specific folders
- Advanced search (under Search Tools)

1MTD Outlook Tips & Tricks

Organization Tips

Use of Appointments for reminders

- **Benefit:** Pushes information to you for items that have a hard due date and time

Assigning emails as Tasks for reminders

- **Benefit:**
 - Easy way to add tasks to your 1MTD list that link to the original email
 - Allows you to easily respond once the task is complete and ensures those on the email will stay in the loop

1MTD Demo

1MTD Demo – Seeing it in Action

Summary

By the end of this presentation you should now know:

- ✓ How to uncover the root cause of an issue
- ✓ How to create and use an Action Plan to organize and manage work tasks that support a larger goal
- ✓ How to use Project Management methodology and tools to solve real world problems that result in real value
- ✓ How to improve your own personal organization and productivity through use of Urgency Zones

References



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Worksheet

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