



# **Project Management Pearls: The Impact on Revenue**

June 10<sup>th</sup>, 2020

12:00PM EST



# 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 tasks 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

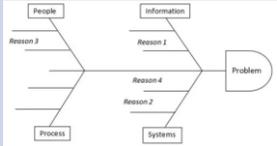
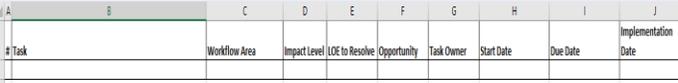
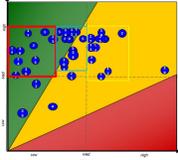
## Prioritize Solutions

- 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<br>(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)<br>(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<br>(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<br>(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<br>(Linenberger, Michael, 2017)                  | Every day! Use to streamline communication in your daily activities, especially with projects  | <ol style="list-style-type: none"> <li>1. Critical Now</li> <li>2. Opportunity Now</li> <li>3. Over the Horizon</li> </ol> |

# 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

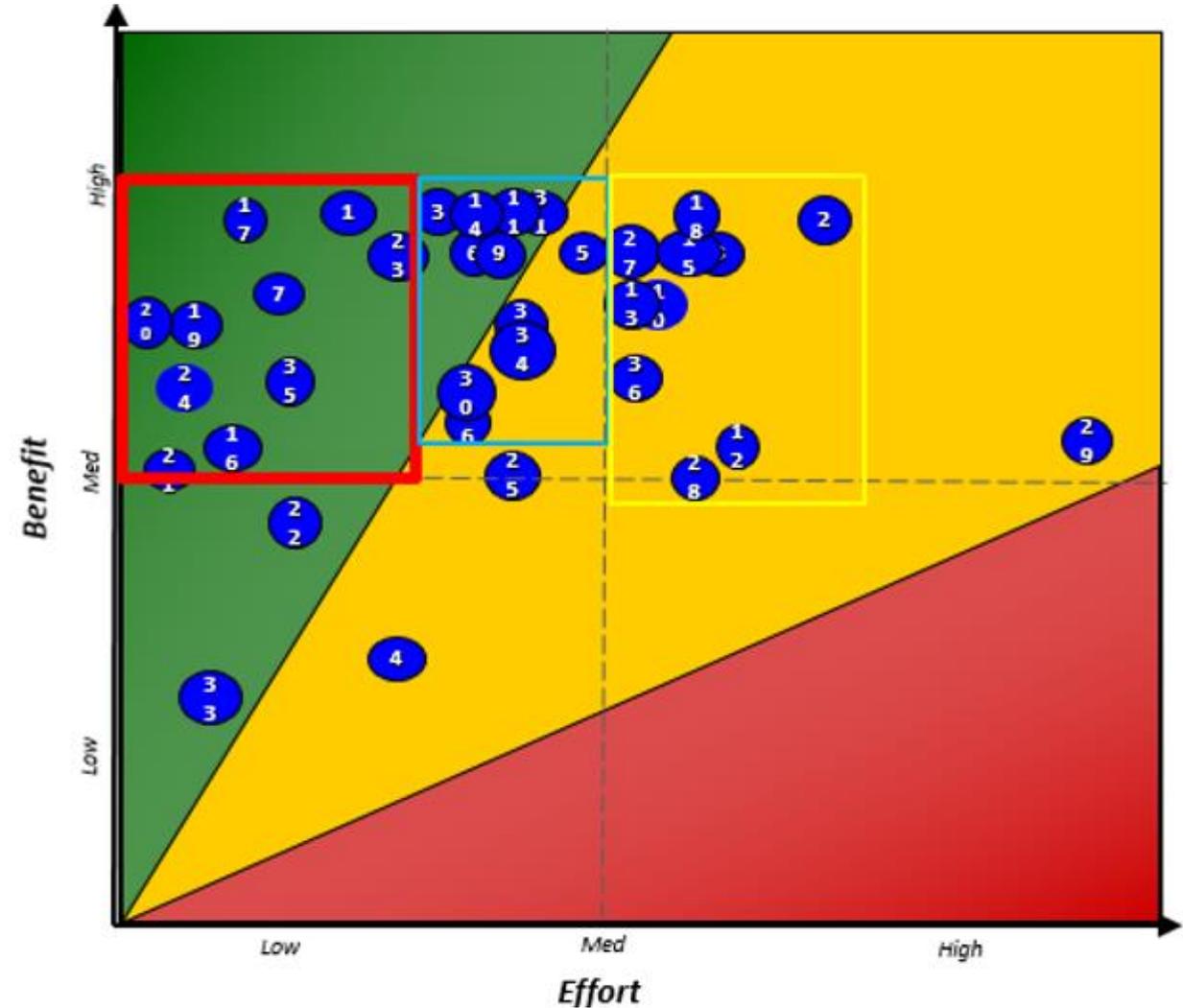
Used 5-Why  
Method for  
Root Cause  
Identification

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

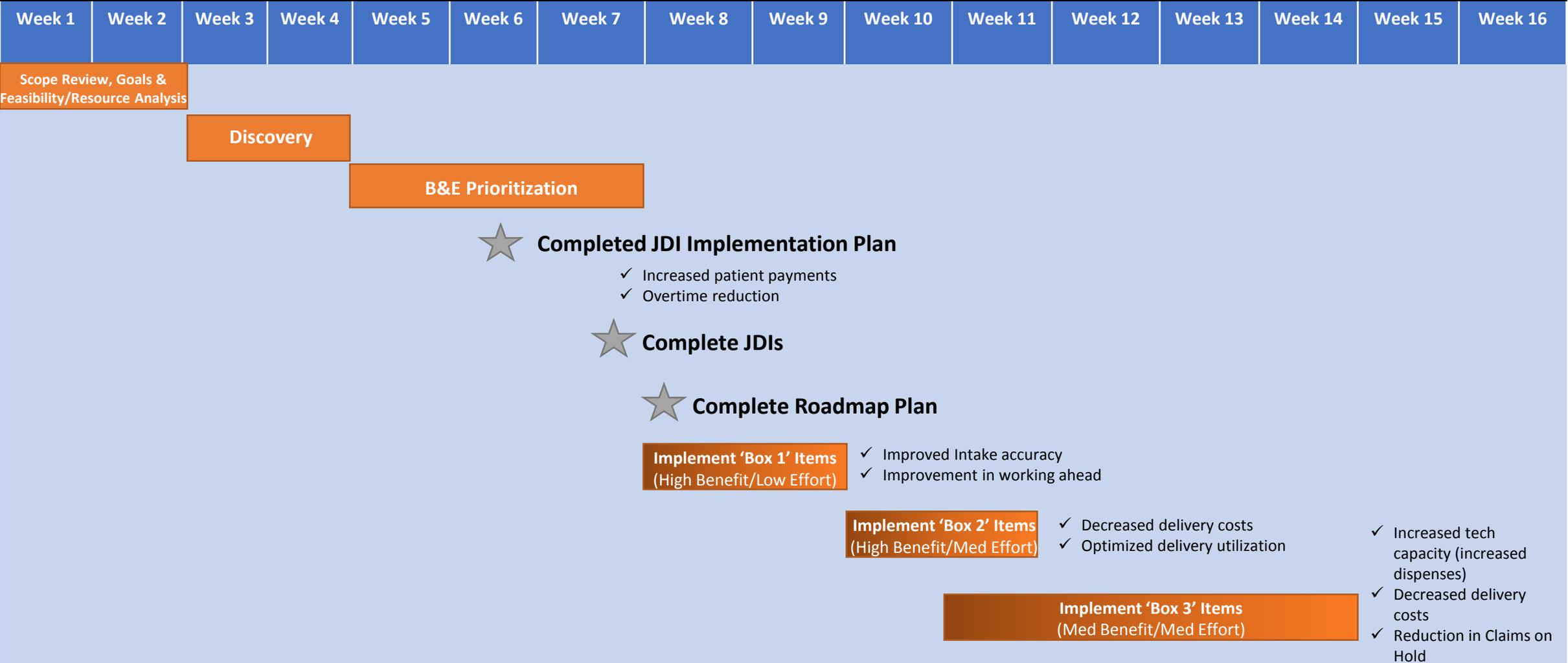
- Monitoring:
  - At time of creating the action plan, obtained baseline values for each metric
  - Used Weekly Status Meetings with project team to retain focus on the project
  - Escalated issues & obstacles to leadership, as needed, for resolution
- Metrics:
  - Thresholds (i.e., what does 'good' 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"><li>• Decreased use of couriers improved overall cost of delivery by 12%</li><li>• Working ahead and mandating cessation of overtime reduced OT costs by 50%</li><li>• Enrollment in a credit card program for patient OOP costs improved by 20%</li><li>• Increased training provided focus on higher priority items for staff and increased accuracy by 6%</li><li>• Reduced email &amp; Skype 'noise' by adopting use of standard communication tool</li></ul> | <ul style="list-style-type: none"><li>• 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</li><li>• Even though there were significant improvements and cost savings in OT, did not meet the OT goal set forth by leadership</li></ul> |

# 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

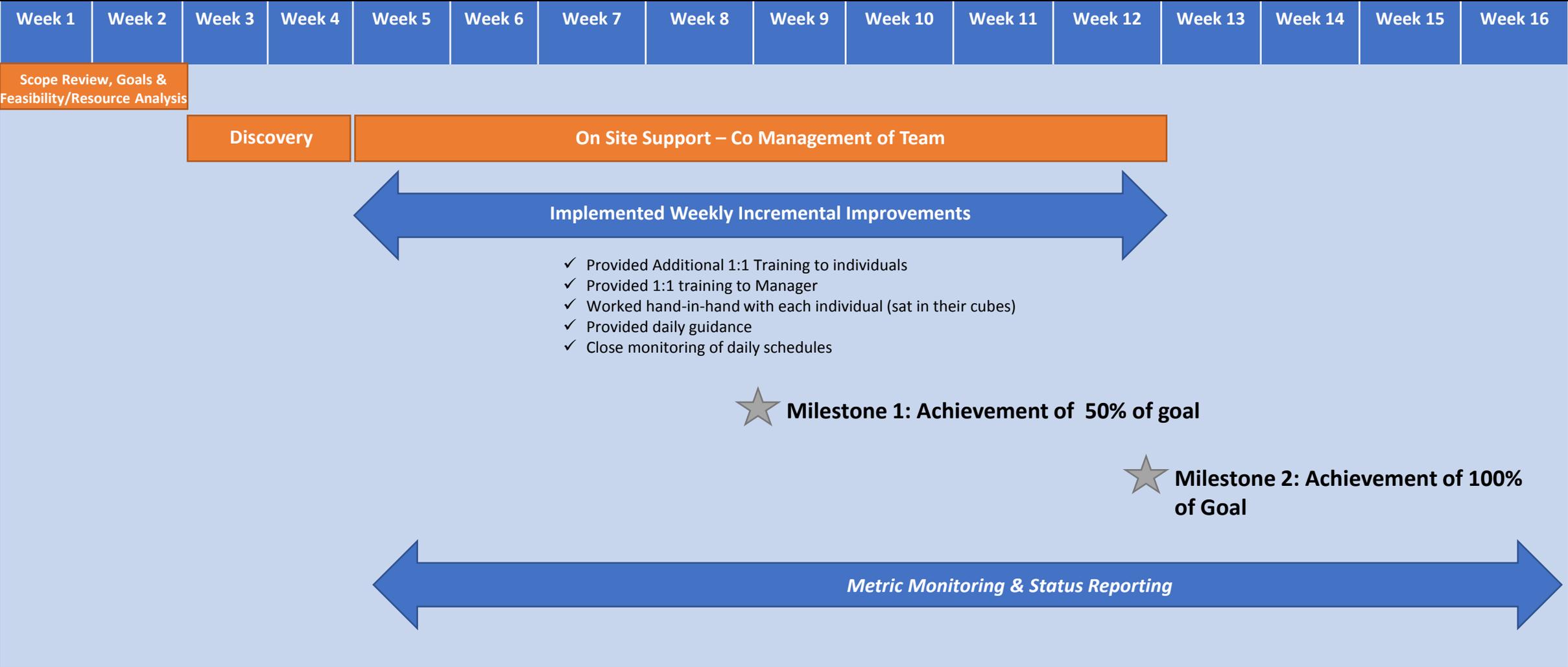
- Monitoring:
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  - Escalated issues & obstacles to leadership, as needed, for resolution
- Metrics:
  - Thresholds (i.e., what does 'good' look like) were established
  - From the metrics identified in the action plan (prior step), metrics were monitored 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

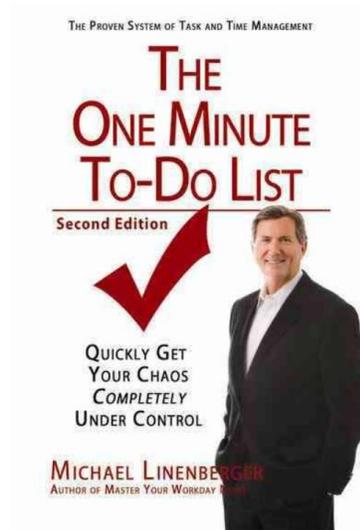
| What Worked for the Location   | What Did Not Work for the Location   |
|--|--|
| <ul style="list-style-type: none"><li>• Identified that several key team members were taking breaks and lunches at the same time, which resulted in sluggish customer turnaround time during high traffic times – rescheduling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

# 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

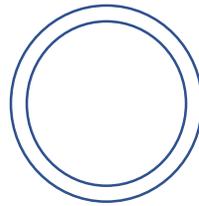
# Urgency Zone: Critical Now List

*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

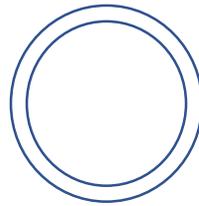
# Urgency Zone: Opportunity Now List

*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

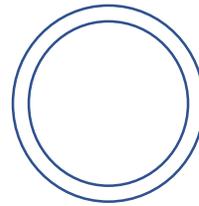
# Urgency Zone: Over-The-Horizon List

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?

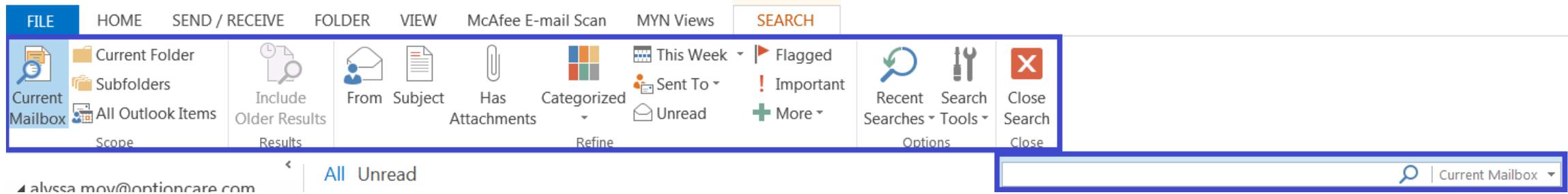


## TIPS

- ❖ 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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