Tips for Strategic Project Success

In our video on Strategic Project Success, we outlined the 9 fastest, easiest and most effective steps you can take to obtain success. Here are those 9 items:

1. **Create a detailed Project Description**. Some may call this a Project Charter. There are two parts: The Sponsor's (your) part and the Project Manager's portion. To help you with this, we have provided a custom-made and ready to use Project Description template. In your portion, complete the broad outline of what you have in mind as the strategic initiative, who is involved, and high-level results. You must have a clear vision of your desired outcome you wish to achieve with your project, and what customers the project is targeting as well as who your stakeholders will be. You will use your portion to discuss this project with the assigned Project Manager. Once you have input from the Project Manager, your Description will help you ensure that your staff understands the mission of the project and don't forget to make sure the medical staff understands the project. See the "Project Description Template" attached.

2. **Health Status:** Measuring the Health Status of your patients is crucial. How else will you be able to measure improvements in this area? Health Status must be tracked before, during and after your project. This is important to you as well as your customers. Not only are you making sure your patients' overall wellbeing is *improving*, you are analyzing where to improve *your* operations. Beware, however, of getting caught up in drawn-out, overcomplicated projects to measure health status. Therefore, if you need help thinking about how to do this, or where to even begin, we have attached a "Health Status Cheat Sheet" to go along with this video, free of charge.

3. **Use Facts:** Rely on an important axiom when undertaking your project: *This project will be managed by fact, not intuition.* All too often projects fail because they begin to stray away from the fact. Often the core data that demonstrated why the project was needed in the first place is disregarded and went with their assumptions. To avoid this, all aspects of the project must be measured, and the facts and data must be determined.

4. **Long-term Thinking:** Eliminate short term thinking. Projects must be thought about in a long-term way, else they will be doomed to fail by people sacrificing long-term and long-lasting results for small, short-lived and short-term results. To avoid this, a strong project leader must be assigned along with other project assignees to appropriate roles. Please remember that you must remove some work from those you are counting on to implement this important strategy (even relieving other duties in order to allow project personnel to adequately focus).

5. **Support your PM:** Regarding the Project Manager you select, there are several supports they need in order to achieve success. We will list them below:

   - **Facilitator:** Your project team will need a Facilitator who will help ensure all teams are working together and learning properly (Just-in-time learning on process improvement, LEAN, Statistical Process Controls, & Brainstorming).

- **Representative:** The PM must ensure that the members of the Project Team are drawn from the areas affected by the project and are seen as informal leaders in that area.
- **Time Commitment:** We must recognize each Project Team members has to have time to complete their project work well. We need to recognize that we will need to find ways to lessen normal workloads. Each team member must be recognized for the time they spend on the project.
- **Analytics**: the project team will need to find a person(s) who will be able to determine **how** and **when** project outcomes will be measured, and in defining Key Performance Indicators (KPI). They must look for key performance indicators or lead indicators that will help predict the performance you are looking for.

6. **LEAN:** Ensure that the project manager and project team clearly understand that the goal is **zero defects.** You must have one person available to the team who has implemented LEAN management and can solve problems and designs using these very same LEAN principles. This will allow special *and* usual cases of variations to be identified and dealt with correctly and the goal of eliminating unnecessary processes and steps. The goal of any project is to improve efficiency and effectiveness while removing unnecessary steps. No matter the process in place, "no defects" is the standard of success.

7. **Project Culture:** The Project Manager must set up a culture of clarity and openness. Each project member must have a clear statement of their role. And, each must have a clear understanding of the project and its expectations. The PM must develop a vigorous team philosophy stressing the importance of education and constant self-improvement. You will need to meet with the PM weekly 1on1 focusing on what is planned in the next 2 weeks. Likewise, each project team member needs to understand through standups and routine reporting what is planned to be done in the next 2 weeks and for the remainder of that sprint. Remember that the whole organization will be interested in progress and status reports.

8. **Recognition:** Look for ways to celebrate successes with the team! There will inspire team bonding. Recognize the team for the good work they are doing. By showing the team members the progress and impact they are making, the team will gain satisfaction and motivation.

9. **Trust People:** Put your trust in people. You are working with a team, all focusing on achieving the same goal. At the same time, we are looking to create a culture where creativity and improvement is valued and rewarded, by the team and by leadership. People will surprise you with what they are capable of when you put your trust in them.

These are the important steps senior managers must take to ensure success in strategic projects. This document, and the other two attached documents, are yours to take, use, and to adjust and edit. We have found these elements to be essential. We would like to hear of your successes and suggestions as you use them.