



# THE CONCISE *HEALTHCARE* PROJECT MANAGER'S GUIDEBOOK

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Be the change you  
wish to see in this world.

-Mahatma Gandhi

# FROM *CLINICIAN* TO PROJECT MANAGER

*They Why behind my decision*

I was a practicing physical therapist (PT) for 15 years and truly enjoyed my job, working with patients and other healthcare team members, and solving problems. As I looked for professional growth opportunities, I started branching out into different roles, like precepting, onboarding, mergers & acquisitions, informatics, and electronic medical record (EMR) implementation.

Although navigating those other roles required tools that I had in my PT bag there were many other skills required to be successful that I didn't have on hand. As problem-solving is a passion of mine, I went straight to work reading up on and learning about leadership, management techniques, and business.

Don't get me wrong, all of those topics were very helpful, but there was still a gap that needed to be filled. I sat in on countless leadership meetings learning about organization visions only to see a completely different end product in the field. There was a major gap between the vision and the final outcome - and not in a good way.



**"I make it my mission to spread the project management word to clinicians tasked with leading projects."**

Initiatives that were intended to make me and my teammates' work lives easier, only made them more challenging. Tools implemented to streamline our days only made them more cumbersome.

No matter what I learned or studied about leadership and business, it still wasn't closing the gap. But then one day during an internet search, I found my key search term: Project Management (PM).

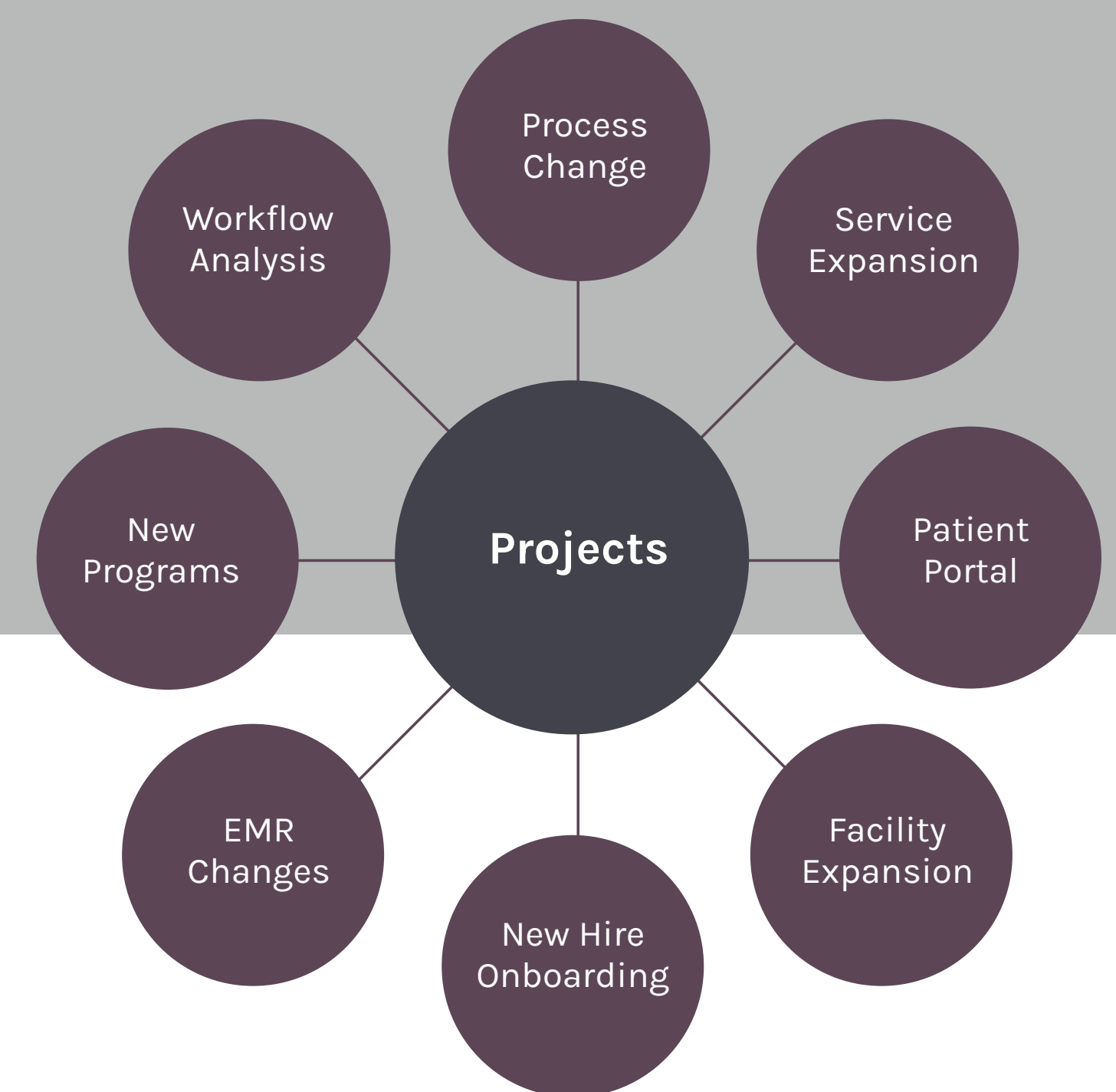
Project management? I didn't even know what it was, but I was intrigued. Initially I thought, 'Ummm, isn't leading a project the same things as managing it?' The answer is an emphatic - No!

Just as there were skills I needed to learn to be successful at physical therapy, there are skills required to be successful at managing projects. Now I make it my mission to spread the PM word to others out there like me - Clinicians tasked as project leaders without having the knowledge of project management basics. And that is why I created this guidebook...



# Why Healthcare?

*How the healthcare industry can benefit from formal project management*



Healthcare is a massive industry that spans across multiple areas, such as care delivery, technology, insurance, marketing, and pharmaceuticals. The Healthcare Services Market was valued at USD 10.30 Trillion in 2021 and is projected to reach USD 21.06 Trillion by 2030.<sup>1</sup>

This growth can be attributed to a number of factors, such as:

- technological advancements
- increased number of elderly people
- lifestyle changes

With a growing number of baby boomers aiming to age in place, industry segments like home health agencies and organizations offering telehealth will need to be prepared to take on this extra load. But are we ready?

Processes will need to be in place, fully implemented, and, most importantly, consistently adopted. New technologies will need to be designed, built, and consistently adopted. Whether you're talking about implementing a new Falls Program, a new electronic medical record (EMR), or a process for telehealth, they are all healthcare projects and will require close management to succeed.

So how are we currently doing?

Research in the US shows a resounding - Not so good. In a 2022 study at the University of Chicago, 56% of respondents thought healthcare in general was handled 'not too/not at all well'.<sup>2</sup>

So why is that?

Many projects fail for a number of reasons, but some common ones are:

- lack of clearly defined and/or achievable milestones and objectives to measure progress
- poor communication
- lack of communication by senior management
- employee resistance<sup>3</sup>

All of the above can be positively impacted by an organization that embraces project management. By that, I don't mean, an organization that has project managers, but an organization that truly embraces a project management mindset.

***The secret of change is to focus all of your energy, not on fighting the old, but on building the new.***

- Socrates

1-Healthcare Services Market Size, Share, Opportunities & Forecast (verifiedmarketresearch.com)

2-US Healthcare Industry 2023: Sectors, Trends & Statistics (insiderintelligence.com)

3-[https://www.pmi.org/-/media/pmi/documents/public/pdf/learning/thought-leadership/pulse/pulse-of-the-profession-2017.pdf?sc\\_lang=temp=en](https://www.pmi.org/-/media/pmi/documents/public/pdf/learning/thought-leadership/pulse/pulse-of-the-profession-2017.pdf?sc_lang=temp=en)



# KEY *TAKEAWAYS* FROM THIS SECTION

*Discovering your Why?*

It's valuable to think about why you gravitated toward this guidebook. What piqued your interest about healthcare project management?

**01 *Why healthcare?***

What about healthcare interests you? Are you currently working in healthcare? Are you interested in pursuing a job in healthcare? Do you like helping others? Do you enjoy being part of a team?

**02 *Why project management?***

What is it about project management that interests you? Are you currently a project manager? Are you interested in changing careers and moving into the project management field? If so, why?

**03 *What are your strengths?***

Not thinking about any specific profession, what are your strengths? What areas do you excel in? What do people most often compliment you on?

**04 *What areas would you like to grow in?***

Not thinking about any specific profession, what are you passionate about? What would you like to learn more about? What biases do you have? What biases would you like to overcome?

***Putting it into  
practice.***

***Take a minute to write  
down your why? - at a  
personal level and/or a  
professional level***

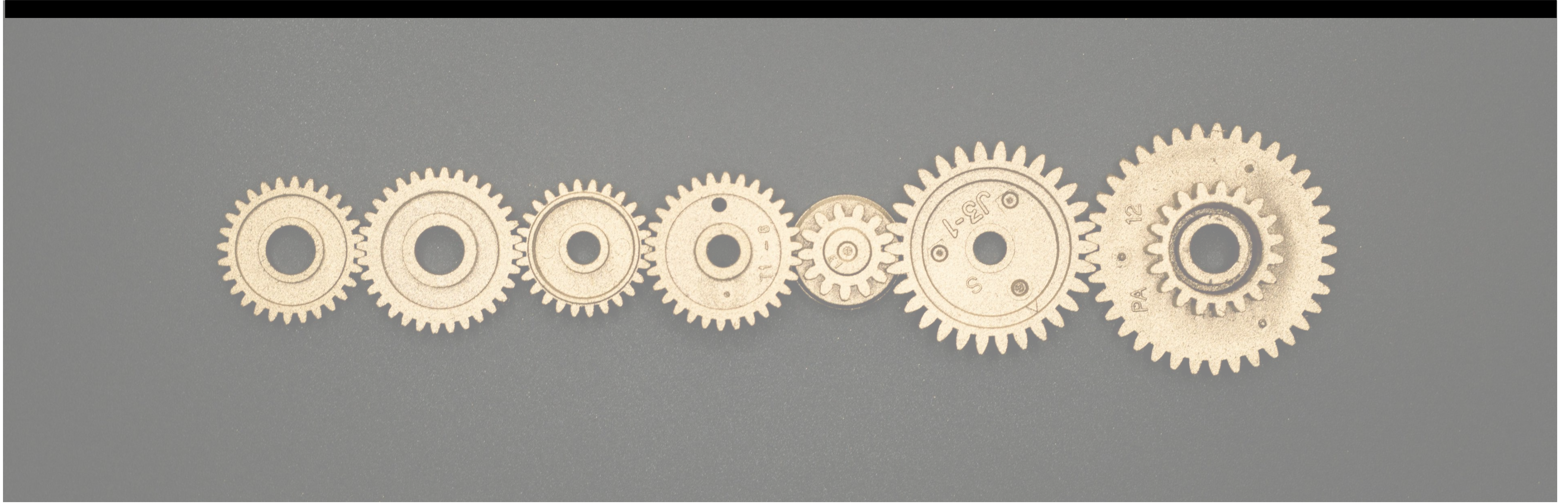
The questions above may not seem interrelated, but if you're considering a job in healthcare or project management or project management in healthcare, wherever you end up, you're bringing your whole self to work. You're bringing your passions, your strengths, your weaknesses, your biases - all of you. And that's a great thing! Diversity is so valuable in maintaining a balanced team.

The issue lies in lack of self-awareness. Understanding and becoming fully aware of your strengths and weaknesses, your passions as well as the things you really don't enjoy doing, is paramount in achieving success in any role you take on.

Please take some time now to reflect on your personal goals and areas of growth and start to think about what biases you may have that need to be considered and managed as you dive into the world of healthcare project management.

Let the journey begin!





*Photo Credit:* Miguel A. Padrinan

# OVERVIEW:

## *THE PROJECT LIFE CYCLE*

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### **Begin with the end in mind. - Stephen R. Covey**

Projects have a defined start and a defined end. I repeat....a defined end. You may have experienced being on a 'project' that was never-ending. Where statuses remain unchanged meeting after meeting. Where basically everything has stalled and there's no sign of movement.

Or maybe there's a 'project' that turned into a program and all of a sudden you look up and now you're managing a program and there's a faint or blurred line where the end of the project should have been.

The Project Life Cycle consists of 5 phases that act as guardrails. They're meant to keep you focused on various stages of the project and can act as stop gates to help identify when you're ready to begin the next phase.

The 5 phases are:

- Initiation
- Planning
- Execution
- Monitor & Control
- Closeout

The rest of this guidebook will focus on providing a deeper dive into the 5 phases. Interactive activities have been included throughout the book to allow opportunities to use the knowledge gained. It's meant to encourage critical thinking and to immediately put the lessons learned into practice.

***Life is like riding a bicycle.  
To keep your balance, you  
must keep moving.***

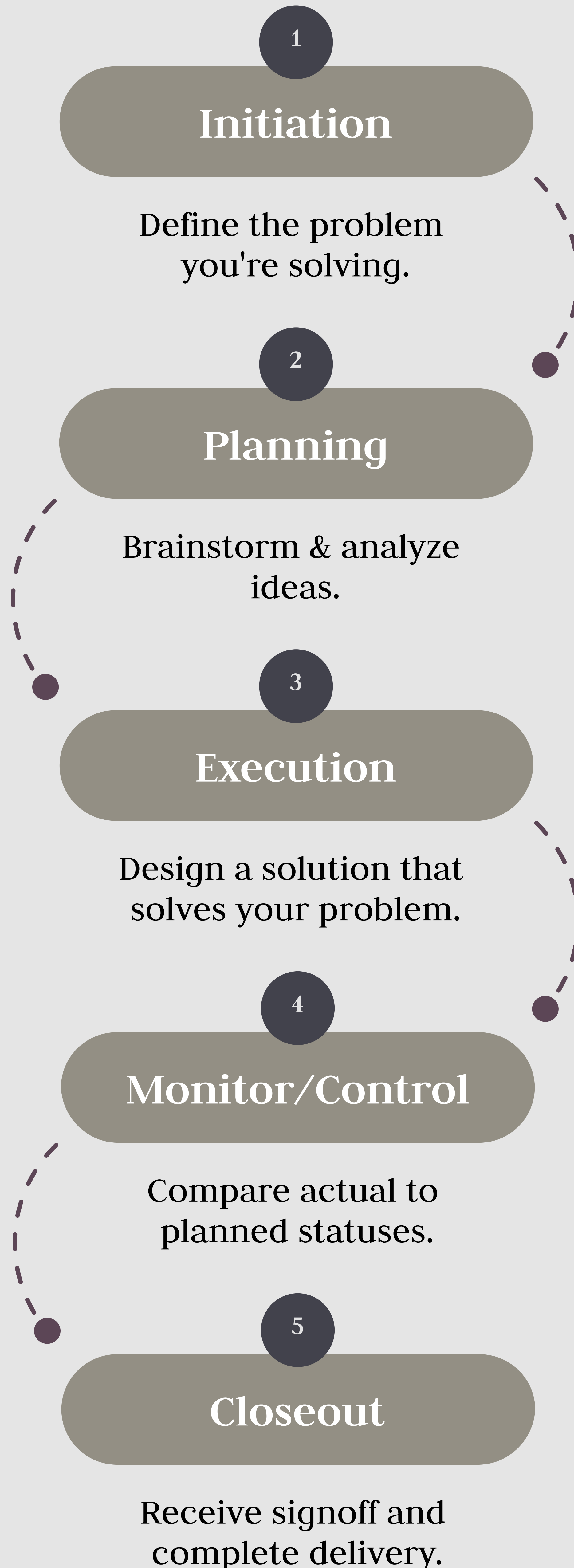
- Albert Einstein

To get the most out of this guidebook, I'd like you to take some time to think of potential projects you'd like to reference as you proceed through the rest of the readings. They can be personal projects, like start a side gig in project management consulting. Or they can be actual projects you're about to begin at your organization.

You'll have space in the next section to narrow down your thoughts. But for now, let's start getting the creative juices flowing!



# The Project Life Cycle





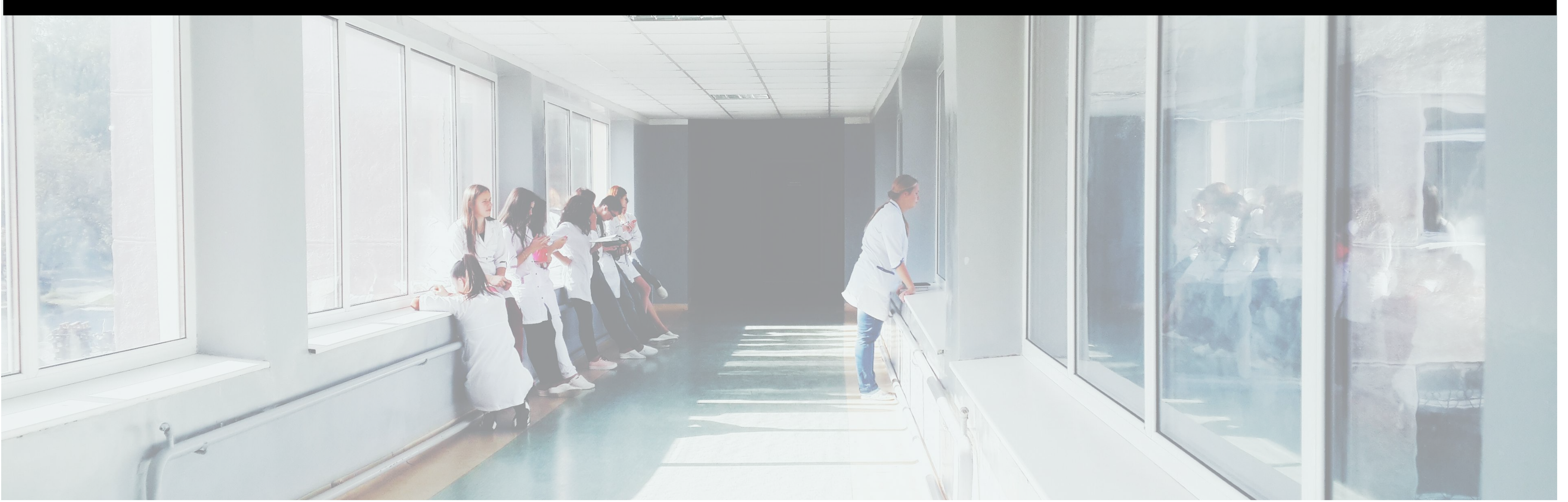


Photo Credit: Oles kanebckuu

# LIFE CYCLE:

## *INITIATION*

# PHASE

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**The journey of a thousand miles begins with a single step. - Lao Tzu**

The Initiation Phase is basically the start of the project. It's the period of time where the key stakeholders come together to define the project. This is where the boundaries are set - what is or isn't included in the project. This is where the boundaries are set - what is or isn't included in the project **No. That wasn't a typo - it's that important.**

Members of the team often have their own perceptions of what the project is all about, so it's of utmost importance at the beginning to clearly define the project and set guardrails to prevent things like scope creep from sending your project off track later down the line.

In the Initiation Phase, you'll want to define the purpose, scope, and goals of the project. You'll also identify the sponsor and key stakeholders, note the high-level milestones and target dates to achieve them, identify potential risks or blockers, list out the assumptions, and summarize budget requirements.

Project assumptions are basically scenarios you're presuming to be true and if so, your project will proceed as planned.

It's very important to spend time brainstorming the assumptions so stakeholders are aware that the project may be at risk if any of those scenarios don't hold true.

***“Do not wait until the conditions are perfect to begin. Beginning makes the conditions perfect.”***

- Alan Cohen

The information collected during the Initiation Phase is then documented in a charter. The team reviews the charter, updating it as needed, and it is eventually signed off on by the project sponsor(s). From this point on, the charter is used to guide the project.

The charter protects the project from deviations. This is not to say that the plan may not change, but if that occurs the team will have to pause and consider the impact to schedule, time, and cost for any requested changes. At that point, the charter may have to be addended, reviewed, and receive additional signoff.



Complete the following exercises in preparation for building out your charter.

## **EXERCISE 1** Whiteboard out the problems you'd like to solve.

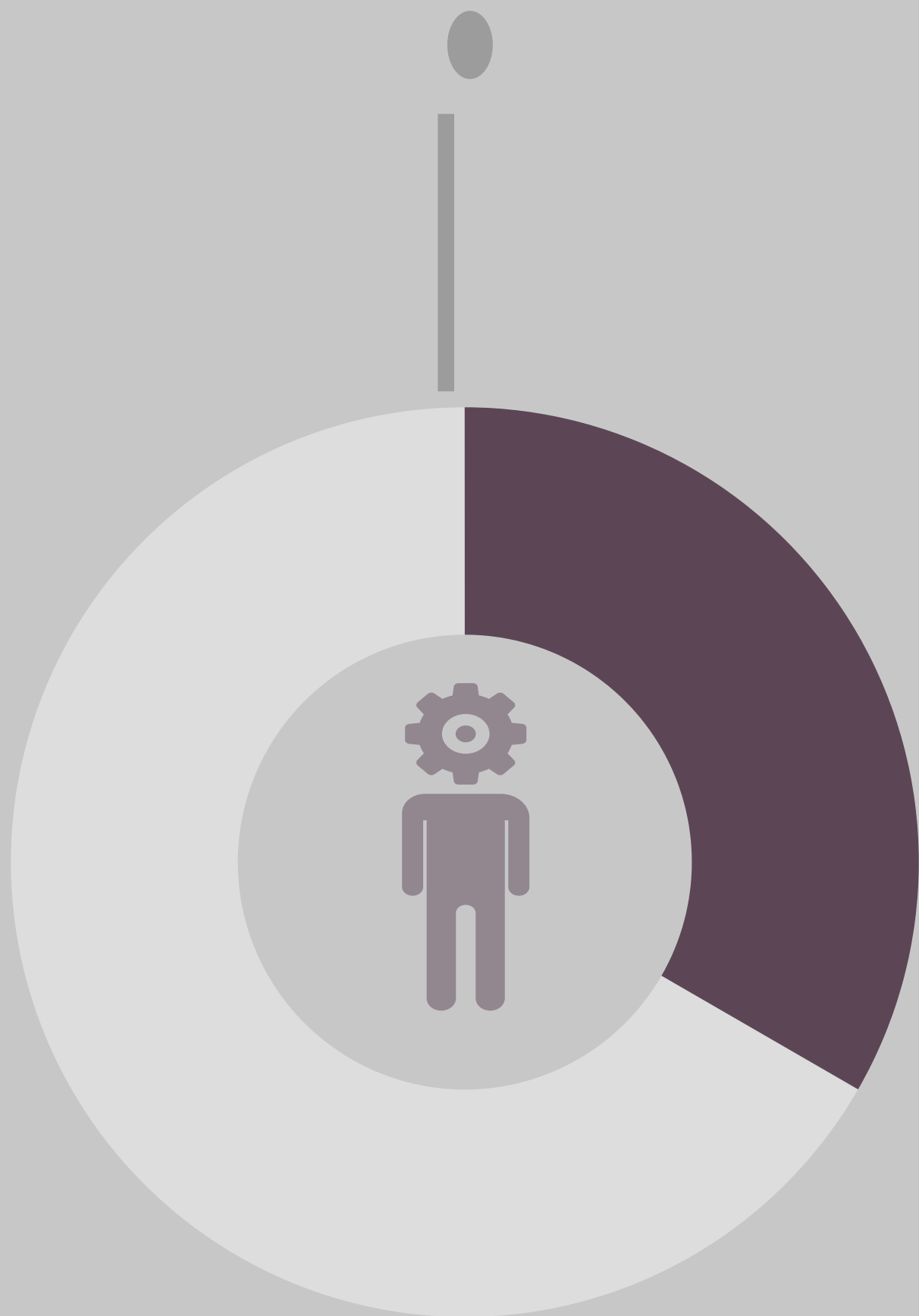
Pick 1 problem to be the focus of your project.

### **What is a Business Case?**

The purpose of the project is typically written out as the business case. The business case links the need for the project to a larger organization objective. For example, the larger business objective may be the need to reduce the incidence of falls and the project could be developing and implementing a new falls program.

## **EXERCISE 2** Write out the purpose of your project - or the Business Case.

# Exercise 3: Draft a Charter



STEP  
01  
—

**BRAINSTORM**

This is where you work with the team, or teams, to collect the requirements for each of the sections of your charter. It's important to understand the subject matter experts (SMEs) for each section to make sure you're connecting with the correct people.



STEP  
02  
—

**REFINEMENT**

After you've brainstormed on all of the pertinent data to include in the charter, you want to start grouping it into meaningful categories. Affinity diagrams can be a useful tool to define logical groupings around your content.



STEP  
03  
—

**COMPLETION**

Now you want to put it all together! Start drafting out the charter and identify the lead stakeholders who should review and provide feedback prior to providing it to the sponsor(s) for final signoff.

Note: Charters are living documents and should be updated throughout the project as needed.



Now it's time to put your knowledge into practice. Using the example below as a guide, create your own charter and start to input information based on the information collected for your project.

### SAMPLE PROJECT CHARTER

**Project Title:** e.g. Telerehab Program Implementation

**Project Sponsor:** e.g. Jane Smith, SLP – Rehab Dir. **Date Prepared:** e.g. 10/27/19

**Project Manager:** e.g. Joe Jones, PT

#### Project Purpose Statement:

e.g. The purpose of implementing the Telerehab Program is to utilize current technology to standardize management of appropriate patient populations and improve patient outcomes.

#### Project Description:

e.g. This project involves the comprehensive rollout of a HIPAA compliant, secure telerehab program, from finding an equipment vendor, to successfully completing end user training, and finally ensuring new processes are firmly integrated into clinical practice.

#### Risks:

e.g.  
1. Staff resistance  
2. Technical challenges

Stakeholder(s)/Contact Information	Role
e.g. Jane Smith – Rehab Director, janesmith@email.com	Project Sponsor

### SAMPLE PROJECT CHARTER

Objectives	Success Criteria	Person Approving
e.g. This project involves the implementation of a telerehab program only. CHF and DM program rollout are not included in this project.	1. All staff are successfully signed off on training as designated by passing scores in the learning management system 2. The program has been implemented with at least 5 patients and success is noted through positive satisfaction surveys.	Jane Smith – Rehab Dir – Project Sponsor
e.g. This project is anticipated to be completed and successfully handed off to the Operations Team in 8months.	1. After 8mos, the Operations Team has received Project Team handoff and they report confidence in moving forward with the project independently.	Jane Smith – Rehab Dir – Project Sponsor
e.g. This project will be completed at the projected cost of \$_____.	1. Budget remains within \$_____ by project completion.	James Williams – Chief Financial Officer

#### Milesteons:

Summary Milestones	Due Date
e.g. 1. Vendor Selection	2/2/2020
e.g. 2. Policy and Procedure Manual updates	4/1/2020
e.g.3. Complete clinician education/competency signoff	6/1/2020
e.g. 4 Complete hand off to Operations	7/1/2020

### SAMPLE PROJECT CHARTER

#### Estimated Budget:

e.g. The project will cost approximately \$\_\_\_\_\_ (+/- \$\_\_\_\_\_)

#### Project Manager Authority Level

e.g. The project manager has the authority to select prospects for the project team, but each team member's direct supervisor must provide signoff prior to their participation in the project.

The project manager has the authority to track the budget but must immediately notify the project sponsor of any expectation of going over budget.

The project manager has authority to develop the project plan, which must receive final approval from the project sponsor. Any alterations from the originally agreed upon project plan must be reviewed with and receive sign off from the project Sponsor prior to making any adjustments.

All conflicts must be taken to the project sponsor who will work with the project manager on identifying resolution plans.

#### Approvals:

Project Manager Signature

Sponsor Signature

Project Manager Name

Sponsor Name

Date

Date

# KEY *TAKEAWAYS* FROM THIS SECTION

*Setting your project up for success!*

Highlights to keep at the forefront of your mind during the Initiation Phase include:

- 01 Identify all Stakeholders...some may surprise you!**

Keep in mind that stakeholders are not only those people or groups that impact the project or are impacted by the project, but also those that perceive themselves to be impacted by the project.
- 02 Success criteria for project goals should be SMART**

Be sure that when you're documenting the objectives and goals of the project that you're considering how to eventually measure success. Using SMART success metrics, or Key Performance Indicators, are a way to make that process easier. SMART stands for Specific, Measurable, Achievable and Actionable, Relevant and Realistic, and Time-based.
- 03 Take time to collect all assumptions**

Everyone should be on the same page about the assumptions required to keep the project on track. Take some time to brainstorm everything that's assumed to be true so you can quickly identify and manage any deviations through your Risk Management Plan.
- 04 Communication is key!**

The primary benefit of a charter is to communicate out the project details and to make sure the message is clear to everyone involved. It's paramount that everyone is on the same page at the start. You'll also find that communication plays a key role throughout the project. I encourage you to learn about good communication techniques for your own personal growth, but also so you can lead your team by example.

## *Putting it into practice.*

*Take a minute to write down some of the less obvious stakeholders for your project.*

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*Practice writing one success metric using SMART.*

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Now that your project has officially started, let's get moving. There's so much planning to do!





**Photo Credit:** Christina Morillo

# LIFE CYCLE:

## PLANNING

# PHASE

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**A goal without a plan is just a wish. - Antione de Saint-Exupery**

The output of the Initiation Phase is the charter. You now have a high-level outline to use to build out your project plan. At this point, you just entered the Planning Phase.

The Planning Phase is where you start to bring to life everything entered in the charter. Your project plan is documentation of the processes that will be followed to successfully bring the project to a close. You'll want to identify all of the stakeholders. Stakeholders include not only those impacting or being impacted by the project, but those that perceive themselves to impact or be impacted by the project. Neglecting to take time to identify all possible stakeholders and develop the plan on how to manage communication to them can negatively impact your project.

The Stakeholder Register and the Communication Management Plan are key documents in the processes used to guide the amount and frequency of communication and to which individuals.

Now that you've defined the high-level milestones in the charter, you'll need a process of breaking down the tasks required to complete those milestones,

designating owners for each, and developing a timeline to complete them. This process will most likely involve developing a Work Breakdown Structure or WBS.

As you create the task list, you can start to build out your timeline and map of events. Your organization may use a specific project management tool or software to track this. But depending on complexity, a spreadsheet may also do the trick.

***By failing to prepare, you are preparing to fail.***

*- Benjamin Franklin*

All of these processes, documents, and tools are laid out in your project management plan to guide your organization's 'way' of managing projects. This is beneficial to maintain standardized approaches, but is also useful to identify the root cause of any noted issues. If you have a clear process to follow, you can easily identify if a step was missed or if a step is missing and continue to refine your project plans and processs moving forward.



## **EXERCISE 4** Whiteboard out all possible stakeholders.

Next, build out your  
Stakeholder Register - See page 15

### **What is an Affinity Diagram?**

An affinity diagram is a process of jotting down ideas on virtual or real paper sticky notes, and then grouping them into themes or categories based on their logical relationships. This is beneficial for consolidating ideas or organizing steps of a process.

## **EXERCISE 5** Brainstorm out the major steps of your project.

Using an affinity diagram, start to  
build out your WBS - see page 15



# Examples of a Stakeholder Register and WBS

## SAMPLE STAKEHOLDER REGISTER

Project Title: e.g. Telerehab Program Implementation      Date Prepared: e.g. 10/27/2019

Name	Position	Project Role	Contact Information	Requirements	Expectations	Influence
e.g. Jane Smith	Rehab Director	Project sponsor	<a href="mailto:janesmith@email.com">janesmith@email.com</a>	<ul style="list-style-type: none"><li>- prefers communication via email in form of weekly status report</li><li>- requesting immediate notification of any movement from original timeline, budget, and scope</li></ul>	<ul style="list-style-type: none"><li>- anticipating project completion in 3 months with goal of reducing hospital readmissions by 25% in the first quarter post program rollout</li></ul>	<ul style="list-style-type: none"><li>- High</li></ul>

## SAMPLE WORK BREAKDOWN STRUCTURE

Project Title: e.g. Telerehab Program Implementation      Date: e.g. 10/27/19

e.g.

- 1. Milestone 1 – Select an equipment vendor
  - 1.1. Task 1 – Identify telerehab unit vendors
    - 1.1.1. Subtask 1 – research local and national vendors
    - 1.1.2. Subtask 2 – perform analysis of each
  - 1.2. Task 2 – Research vendors
  - 1.3. Task 3 – Create pros/cons list of each vendor
  - 1.4. Task 4 – Review pros/cons with leadership team
  - 1.5. Task 5 - Make vendor selection
  - 1.6. Task 6 – Vendor contract signed

**Exercise 6:** Using one milestone from your project charter, follow the sample structure above. Break down the steps required to achieve that milestone into tasks and subtasks as appropriate.

Repeat with any of the other milestones to gain more practice and to get comfortable with the process!





Photo Credit: fauxels

# LIFE CYCLE: *EXECUTION* PHASE

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**Nothing will work unless you do. - Maya Angelou**

Congratulate yourself (and your team!) - you just completed the hard part! Planning the project involved identifying the team, the requirements, and plotting out the picture of a well-oiled project machine. Now you're ready to start the engine!

The Execution Phase is where you complete the tasks identified in the Planning Phase's project roadmap. The goal of this phase is to produce the anticipated deliverables within quality standards, on time and within budget.

Now I hope that everything proceeds according to your plan. However, it's not uncommon for Murphy's Law to take effect and your project may begin to head off course. You should have already captured some potential risks during prior phases, but sometimes unknown unknowns appear.

One document that will be very important is the Risk Register. A Risk Register is where you log any risks that may impact your project. Managing risk involves:

- Risk Identification
- Risk Analysis
- Risk Response

The Risk Register captures any identified risks, the probability and impact of each, the plan on if/how to manage it, and tags an owner to each so the team is clearly aware of who is addressing and monitoring it.

***“I long to accomplish a great and noble task, but it is my chief duty to accomplish small tasks as if they were great and noble.”***

~ Helen Keller

Another important tool in the Execution Phase is your list of Key Performance Indicators, or KPIs. This should have been completed during the Initiation Phase and may have been included in the charter. The KPIs are how you determine success or achievement of your project's goals and objectives.

KPIs should follow the SMART concept. They should be Specific, Measurable, Achievable, Relevant, and Time-Based. This is a key concept because you have to be able to clearly know if your KPI was met or if your project is beginning to head off course.



# Example of a Risk Register

ID#	Date Identified	Description	Probability	Impact	Owner	Action (Mitigation/ Contingency)
#1	5/26/24	The Education Team hasn't finalized their summer vacation calendar. Time off may impact the education requirements time-line for our project.	Medium	High	Jane Doe, PT	Mitigation Plan: Initiate creation of training material templates ahead of schedule to reduce the amount of work required during the summer months to ensure the work can be completed with fewer resources if needed.

**Exercise 7:** Using the table below, jot down a few risks to your project and brainstorm some possible action plans.

ID#	Date Identified	Description	Probability	Impact	Owner	Action (Mitigation/ Contingency)





**EXERCISE 8** Write down 3-5 Key Performance Indicators (KPIs) for your project

Next to each, define what indicates success for that KPI.

**EXERCISE 9** For each KPI, write down 1-2 methods of measuring them.

Develop a plan to routinely evaluate progress.





Photo Credit: fLukas

# LIFE CYCLE:

## *MONITOR & CONTROL*

### PHASE

**Honesty and transparency make you vulnerable. Be honest and transparent anyway. -Mother Teresa**

To this point, your team is executing according to your project plan, you have the charter as a guardrail to guide the project, and KPIs to measure success. Now you just need to keep things moving along smoothly.

The Monitor and Control Phase is where you compare actual/current state to where you anticipated to be at this point in the project plan. You created projections of your planned timeline, cost, and scope. Now, with the support of your team, you need to track actual progress against those planned projections.

Team check-ins are necessary to stay on top of gaps in actual versus planned statuses, but they're only successful if your team feels comfortable providing honest, transparent updates.

Some methods of creating a safe space for your team include things like:

- having leadership encourage transparent, honest feedback, clear of punishment or repercussions
- anonymous surveys/feedback forms

It's also important to capture updates from all relevant stakeholders. Some people feel comfortable talking in front of a group while others don't. Some require time to process requests and prepare for meetings, while others are great presenting on the fly.

***“Not everything that is faced can be changed, but nothing can be changed until it is faced.”***

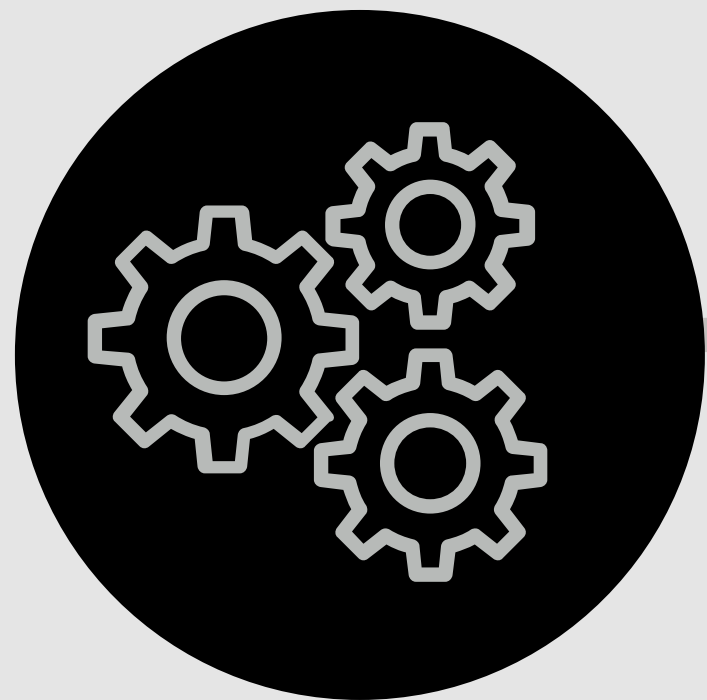
*-James Baldwin*

It's important to understand your audience, or team, and lead meetings using tools that encourage participation from all types of personalities.

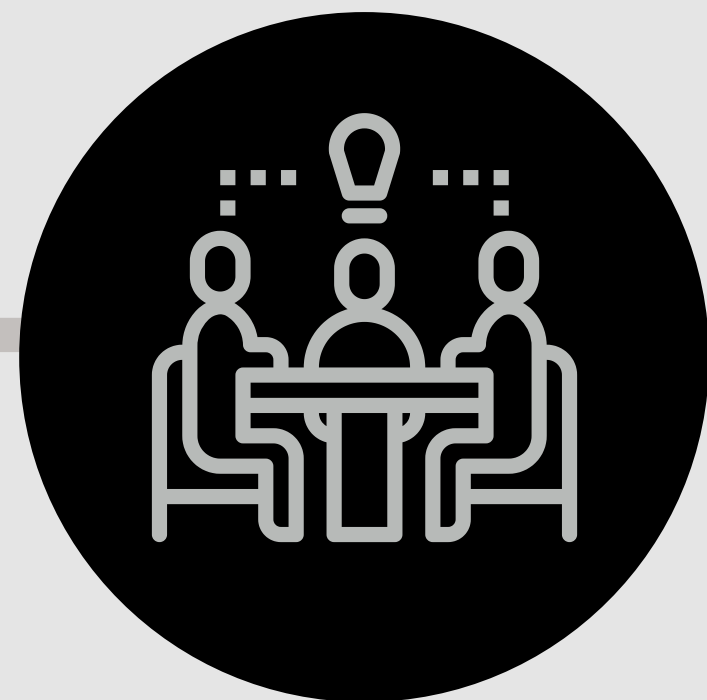
Meetings are valuable tools during the Monitor and Control Phase but only if they're managed well. Next, I'll give you a quick guide to leading successful meetings!



# Meeting Management



## 01 Prepare



## 02 Run It



## 03 Follow Up

### Preparing for your meeting...

After you determine it's actually necessary to pull the team, or client, together for a meeting, you want to make sure to set everyone up for a successful call.

The following steps are valuable and necessary for proper preparation:

- **Purpose:** Create a concise statement of the purpose of the call - the *why* behind your meeting
- **Agenda:** Develop an agenda. Even if it's just 1 - Brainstorming session and 2 - Review next steps, owners, and due dates
- **Pre-work:** Identify if it's beneficial for the team to review anything prior to the call so everyone is prepared for the discussion. If so, send out pre-work steps in a timely manner so the group has ample time to review and come prepared to the call.
- **Prior Tasks:** If this is a follow up call, send out the action items or next steps from the last call so participants will be reminded of the work they were to complete and will have ample time to prepare an update to report out during the call.

### Running the meeting....

Now that you've well prepared, you're ready to run the meeting. It's nice to schedule meetings to begin 5 minutes or so after the hour or half hour to allow

for checking voicemails, emails, or for bathroom breaks before the call. That will increase the chance that your team will be more focused on the content of your call. Whenever possible, it's also beneficial to set meeting rules, like no phones, no checking emails while the call is in session, and requiring the use of video conferencing during virtual meetings.

During the call, it's important to begin with a review of the purpose and agenda to align expectations. It's also beneficial to consider your audience and use tools that allow the entire group to be heard, rather than a select few dominating the conversation. I recommend looking up tools like **liberating structures** to encourage group participation if appropriate for the purpose of your call.

You'll also want to take thorough notes, recapping action items and owners before the call ends. This is valuable to ensure everyone heard the same thing and no one is surprised at the expectations of them.

### After the meeting....

After the call you'll want to log your notes and send out formal minutes to all attendees. In your notes, you'll want to highlight the action items, owners, and due dates. After that, it's helpful to set calendar reminders for yourself for any additional follow ups required to ensure all items are completed as expected.



Think about how you, or those in your organization, currently lead meetings....

**EXERCISE 10** Create a meeting 'Keep Doing' List.

Keep up  
the great work!

**EXERCISE 11** Create a meeting "Stop Doing" List.

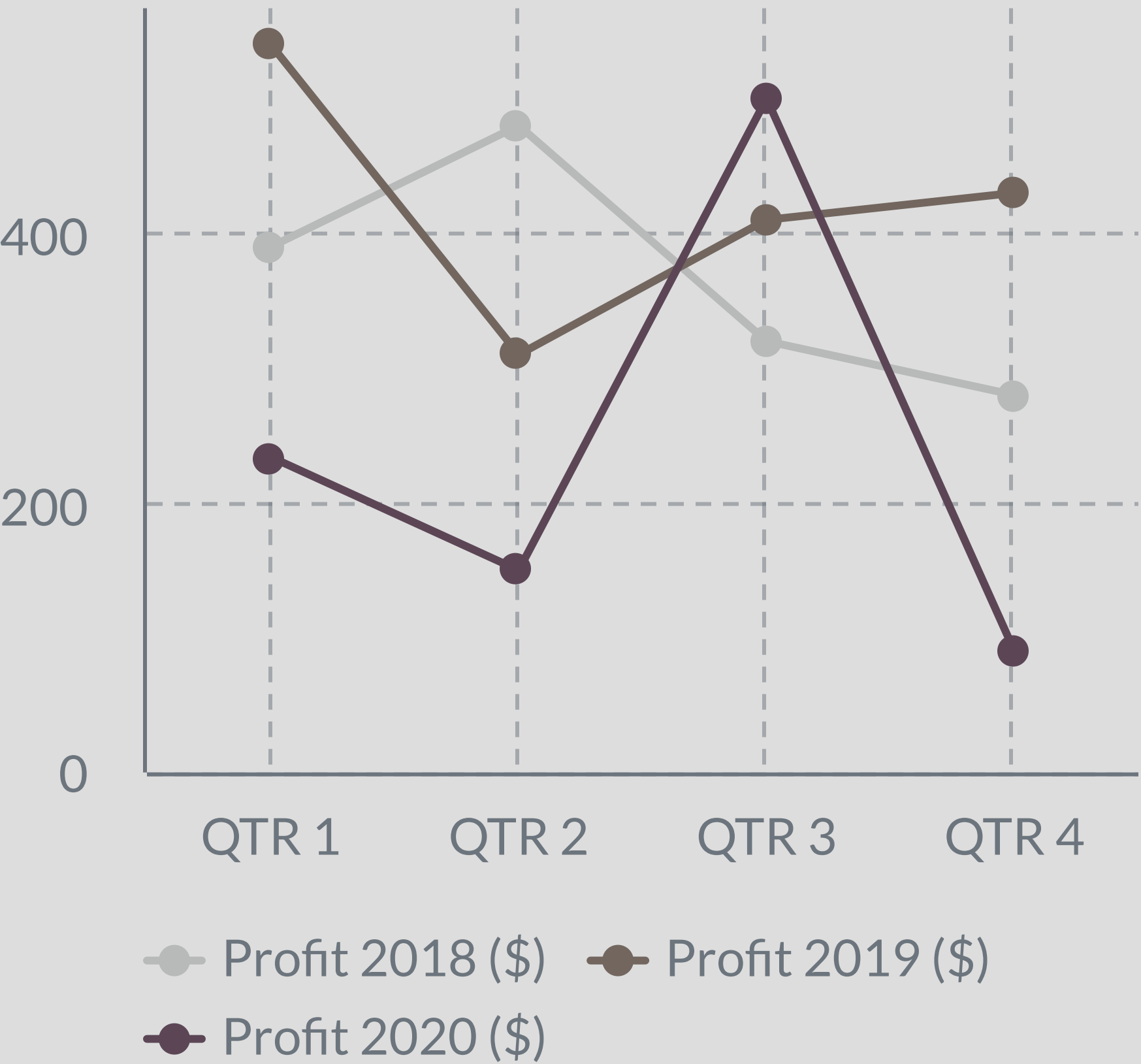
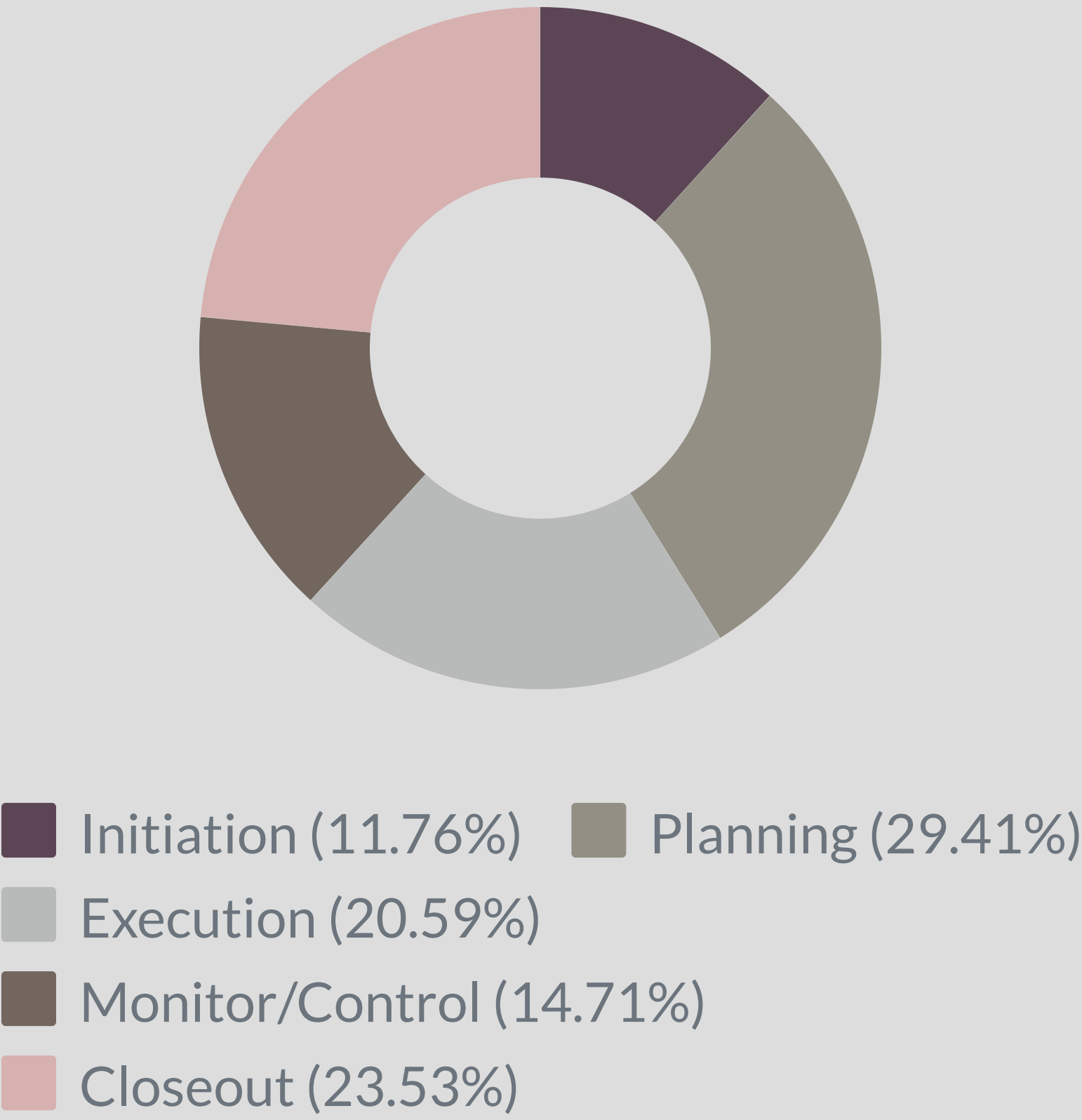
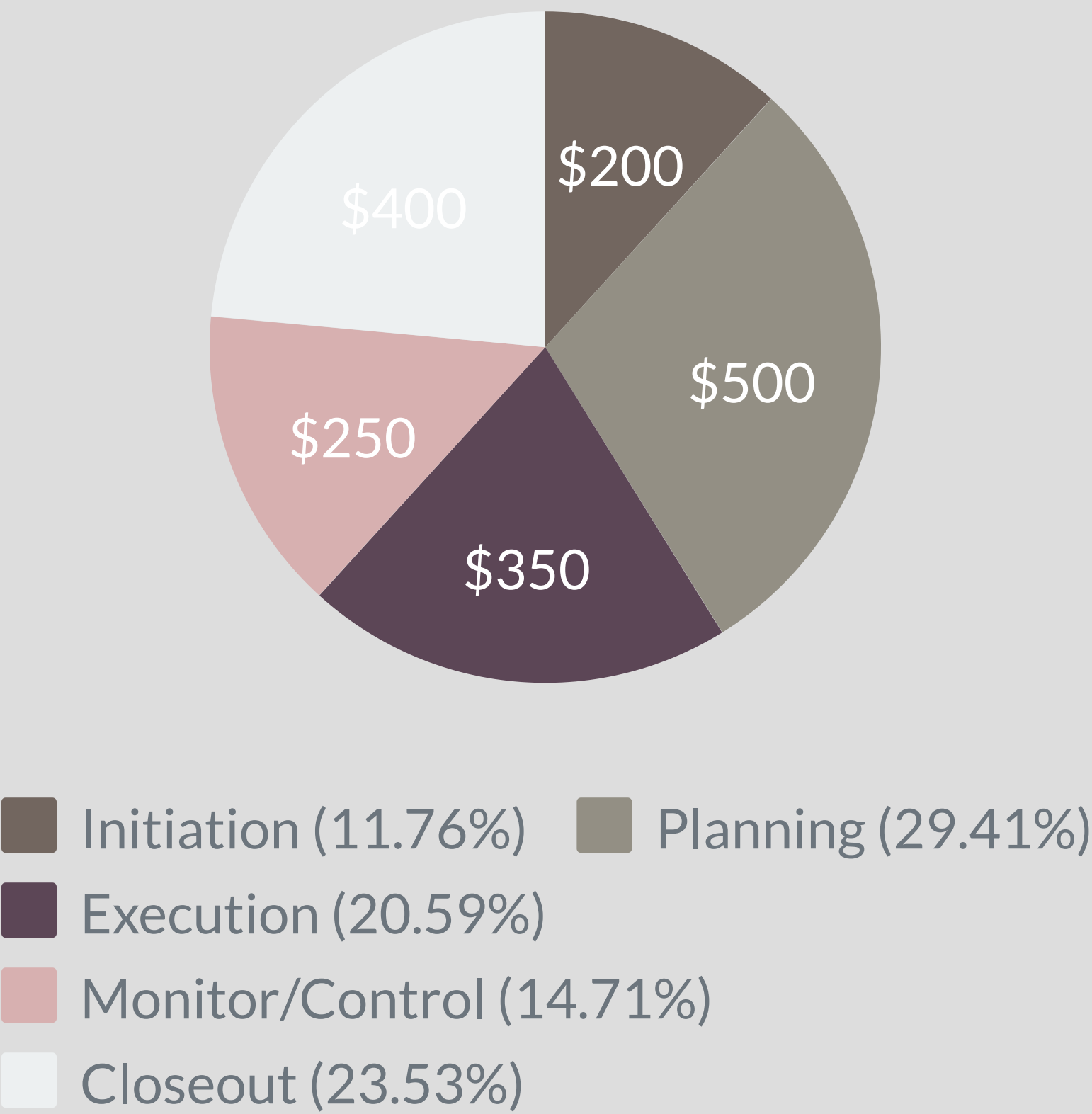
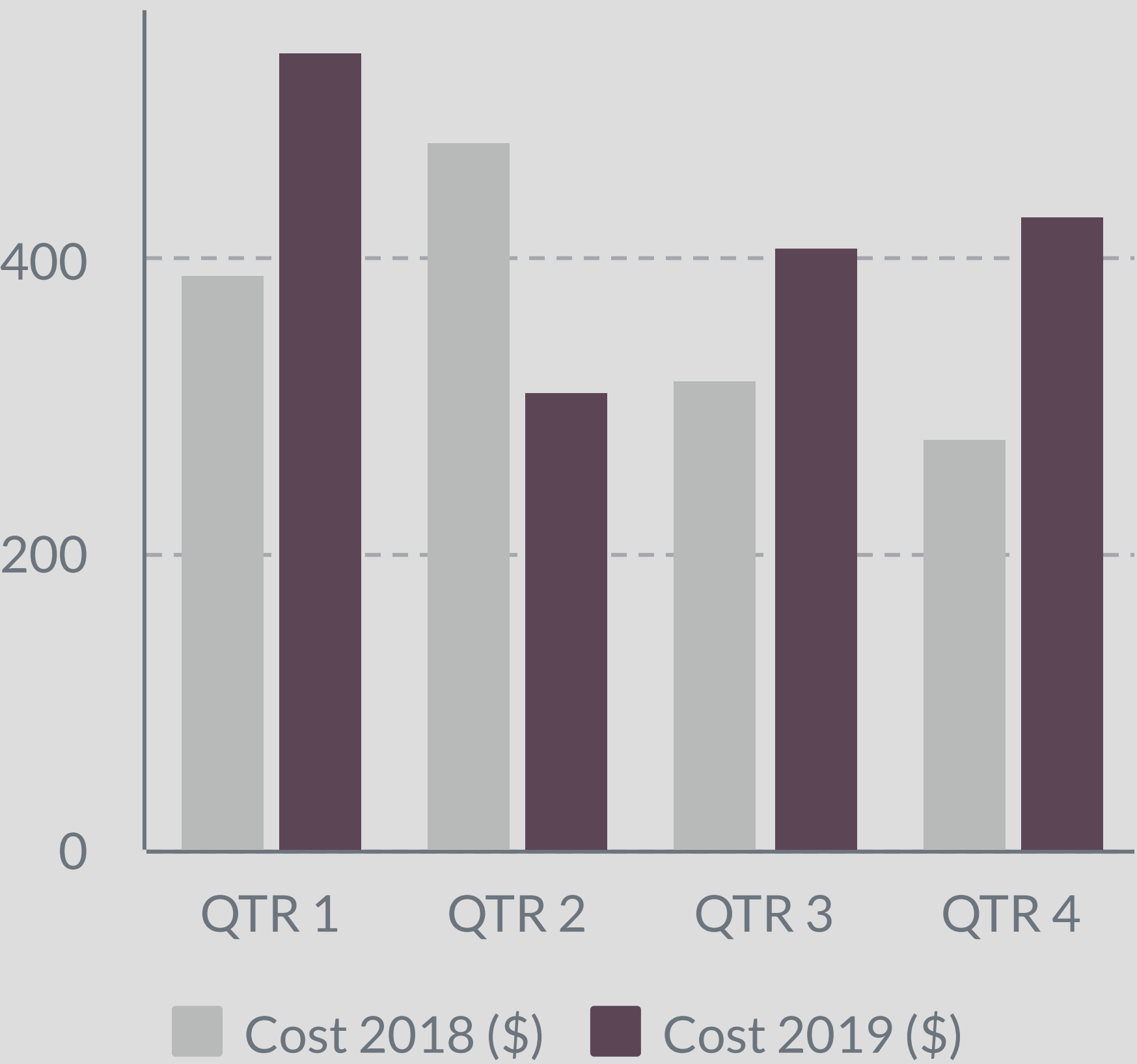
Develop a plan to ensure  
compliance.



# Presenting the Data

**Does presentation matter? YES!**

You can have the most amazing collection of data, but if you don't invest time and thought in presenting it in a way that's easily and quickly digestible to your audience, it may all be for nothing. Do you have pre/post implementation survey data, post closeout adoption metrics, cost/budget summaries, etc.? Refer to your stakeholder list and communication plan and identify who needs what type of information. One group may benefit from a detailed graph with an accompanying data spreadsheet to drill down into the details on their own time. Another group may just want a high-level dashboard to quickly see the project overview. Know who you're presenting the information to and what they want to see. Then identify the best format to use to present your results.







*Photo Credit:* Pixabay

# LIFE CYCLE: *CLOSEOUT* PHASE

## **Begin with the end in mind. - Stephen R. Covey**

By definition, a project has a defined beginning and a defined end. That end is the Closeout Phase.

If you're implementing a new technology, the project may be closed when the product is successfully installed, end users are trained on it, and skills assessment verifies understanding. However, some project deliverables may be processes or program development that will need to be carried on and monitored operationally after closeout.

If you've developed a new process around wound assessment, you may have provided education and signed off on the current team's skills, but what about next year? How and when will this information be reviewed with new hires? Should content from the process be added to new hire onboarding? Are there certain tools or supplies required to maintain compliance with the new process? If so, is there a plan in place for maintaining adequate supplies, ensuring they are available for the team moving forward?

At times, things may go really well during the project but when the deliverable becomes an operational task, adoption or the success of the program may

fizzle out. It's imperative to have a handoff checkpoint included in your closeout plan. This is the period where knowledge transfer is completed and whoever will own the deliverable moving forward is adequately equipped to do so.

***“It always seems impossible  
until it's done.”***

*- Nelson Mandela*

Checklists are great tools to use during handoff at the end of the project. If you've been diligent about documentation throughout the project, it shouldn't be difficult to know what information is necessary to pass on and who should be receiving it.

The final step during closeout is officially completing a Lessons Learned session. After the project team and related stakeholders have determined what went well and what can be improved on, you'll want to update any documents/tools as needed based on feedback and get final charter signoff.



# Lessons Learned



What did we do well



What can we do better



Continuous Improvement



Organizational Change

SAMPLE LESSONS LEARNED

Project Title: \_\_\_\_\_

Date: \_\_\_\_\_

	What Worked Well	What Can Be Improved
Scope: Definition & Management		
Schedule: Development & Management	1- Using Affinity Diagrams really helped to complete an accurate task list to track against	1- Opening the dated project plan spreadsheet during weekly calls so the team can see actual vs. planned status – this was skipped on a majority of the calls and we missed noting a delay in the project until it was 2 weeks behind schedule
Cost: Estimating & Controlling		
Quality: Planning and Controlling		
Communication: Management	1. Creating the communication management plan was helpful in ensuring the correct communication types and frequency went to the correct people	1. Meeting minutes should be sent out to the team within 24hrs 2. Action items should be reviewed at the end of each call (owners/dates)
Stakeholder: Management	1. The brainstorming session with the cross-department project team helped to identify all major stakeholders	
Risk: Identification and Management		
Procurement: Planning and Management		
Process Improvement: Planning and Management		
Other		



# KEY TAKEAWAYS AND NEXT STEPS...

Now that you've gotten down some of the basics of project management, I'd like you to start putting it into action...

**01 Identify Barriers**

Brainstorm alone, or with your team, to identify the top 2-3 barriers to project success at your organization.

**02 Identify Tools**

Identify one tool or technique to positively impact each of the barriers listed in Step 1.

**03 Develop a Plan**

For each tool or technique, identify how you can begin incorporating it into your organization's processes.

**04**

**Develop Success Criteria**

For each plan above, develop a SMART success metric to ensure you can measure success and identify early on if you're at risk of not meeting your targets.

This guidebook provided you with a high-level overview of project management basics. You also received some tools and techniques to support setting your projects up for success.

I hope you found the information helpful and learned something new to bring to your organization. I also hope you've been inspired to learn more about project management, change management, and communication management.

For more in-depth courses covering topics on project, change, and communication management and other components of successful healthcare project leadership, please visit:

<https://www.remembermyresults.com/courses>



*“Great things are  
done by a series of  
small actions  
brought together.”*  
- Vincent Van Gogh

**Take time to  
reflect.**

**Take a minute to write  
down something new you  
learned that you'd like to  
start incorporating into  
your project management  
methodology.**

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# Jane Doe Consulting LLC

## My Mission:

To utilize project management, user experience, and change management principles to **improve organizational success** with project, product, and process development and implementation

## My Vision:

To be the catalyst that **inspires and empowers individuals and teams** to take their healthcare projects, products, and processes to the next level

