

KU Project Management Playbook



"No matter what natural talents an athlete brings to the sport, the game can be won or lost by the skill of the coach."



Coaches can be patient instructors, demanding bosses, and enthusiastic cheerleaders. Their job is to prepare athletes for competition and victory. In a business setting, an organization is like a sports team, and you, the project manager, are the coach. Without you coordinating the execution of broader business strategy and making sure everybody is making the right plays, winning is nothing more than a pipe dream.

This Playbook is intended to be a guide on how to "up your game" as a project management professional.

INTRODUCTION

Project management is a vast topic area with many different schools of thought that continue to evolve. This Playbook provides a general, flexible framework to project management at The Kinetix Group (TKG). Keep in mind that you may encounter variation in your role. The information in this Playbook is applicable to day-to-day work and will help you understand how the stakeholders we interact with operate.

USING THIS GUIDE



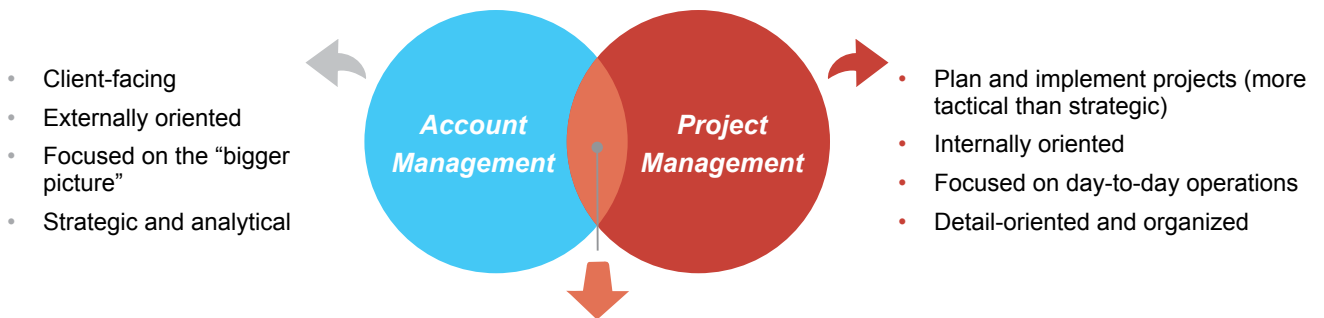
Be on the lookout for **Tools/Tips** throughout. Click on the icon to access additional resources and learn more!

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TRADITIONAL HEALTHCARE AGENCIES VS TKG: What's Unique at Project Management at TKG?

Before understanding the phases of project management and best practices in executing projects successfully, it is important to understand how TKG is unique. TKG's model optimizes each team member's role, creating flexibility to adapt to market conditions and streamline business, and offering opportunities for each employee to create their niche. As TKG is a small and nimble organization, one key area where roles and responsibilities may differ from a traditional agency is in project management.



While the roles may be more siloed at other agencies, at TKG, account and project management responsibilities often overlap to a certain extent. For the purposes of this Playbook, we will be referring to this position as “project manager (PM).”

Due to this overlap, a TKG PM functions in both a strategic and tactical capacity – maintaining the client relationship while also managing the project lifecycle. This allows the PM a 360° view of the project, from inception to completion, and encompasses a range of responsibilities within each project life cycle.

While roles and responsibilities vary depending on the client relationship and nature of the project, TKG's model creates several key differentiators in project management:

STRATEGIC OVERSIGHT/DEVELOPMENT

Although, traditionally, strategic oversight aligns with Account Management, a TKG PM may be involved in working with the Account Lead to:

- Develop proposals and statements of work (SOWs)
- Play an active role in program planning, strategic development, and tactical execution
- Leverage TKG's network of expert advisors and key opinion leaders (KOLs) to access to information about areas affecting customers

KOL Database



CREATIVE EXECUTION

TKG uses a freelance model that allows for a flexible and efficient team structure. This differs from a traditional agency in which the creative staff is part of the core agency team. Advantages to TKG's model include quicker response to client needs, broader access to a variety of diverse creative professionals with various skill sets and knowledge bases, and cost-effectiveness. This model has the following implications on the TKG PM's scope of work:

- At project initiation, a PM must identify and onboard their creative team. Throughout the project lifecycle, a PM must communicate effectively with the creative team on project development and client needs. Because the creative team is not usually involved in client calls, the PM must keep creative team members fully informed and effectively convey the client's perspective

Agency 101 Presentation



Creative Services Internal Training



Editorial Style Guidelines



- A PM is responsible for managing the Pharma Review Committee (PRC), Human Pharma Review Committee (HPRC), and medical, legal, and regulatory (MLR) processes. They will work with the client and creative team to pull through changes and obtain final approval for use

FINANCE

A TKG PM liaises with both internal and external stakeholders to keep a project within budget. As in traditional project management, a PM must manage project-related costs, while being aware of profitability.

- Track personal hours on Harvest

Time tracking at TKG



- Work with finance team to create job numbers and manage vendor invoicing
- Set and manage budgets across workstreams (e.g., profit and loss [P&L] review process, Harvest reconciliation)
- Coordinate monthly client invoicing with the finance department

KEY TERMS

Term	Acronym	Definition
Creative		
Creative Services		'Creative services' refers to the engagement of freelance vendors, often referred to as creative partners, that TKG works with to execute the design or editorial portion of a project. Services provided by creative vendors may include editorial support (e.g., copyediting, proofreading, medical writing), design support (e.g., designer, presentation specialist), or developer support (e.g., digital builds).
Creative Brief		When engaging a creative vendor for a new project, the creative brief is a form used to explain the project needs, billing information, and timing expectations. Access the form via Dropbox .
Proofing Process		During the proofing process, a proofreader will examine a deliverable to ensure that there are no errors including typos/grammatical errors, improper referencing, broken hyperlinks, or formatting or animation issues.
Finance		
Check Request		A check request is a form completed when processing payment for an external entity (e.g., advisor honorarium). Access the form via Dropbox .
Job Code		Job codes are used to track billing and hours accumulated in relation to specific projects. Upon receiving a purchase order from a client, a new job code will need to be opened with TKG's finance department using the " Open Job Code Form ." Open job codes will appear in Harvest.
Profit & Loss Statement	P&L	The P&L statement is a financial statement summarizing the revenues and expenses associated with a project.
Purchase Order	PO	The PO is a document generated by the client organization defining the agreed-upon services and associated costs. It will be opened upon execution of the consulting agreement and prior to the initiation of work.
W-9		A W-9 is a form generated by the Internal Revenue Service (IRS) used to collect a person's or company's taxpayer identification number (TIN) and address. It is required for payment to external entities including vendors and advisors. Access the form in Dropbox .

KEY TERMS (CONTINUED)

Term	Acronym	Definition
General Project Management Terms		
Charter		A project charter describes the initiative's primary objectives, in-scope and out-of-scope activities, key stakeholders (e.g., sponsor, lead, project team), and any boundaries/limitations.
Deliverable		Common term used to describe an asset TKG has agreed to develop for a client as defined in the scope of work.
Harvest		Harvest is the online time tracking software that TKG uses to track hours accrued under specific job codes. This helps the organization bill for client-related activities and optimize operations.
Key Performance Indicator	KPI	Measurable values indicating progress toward a goal.
Meeting Minutes		Written notes taken during a meeting to archive key takeaways, general notes, and next steps.
Milestone		A mark of activity completion along a project's execution.
Out of Scope		Outside of the agreed-upon services defined in the SOW.
Planning Fallacy		Planning fallacy is the tendency to underestimate how long work will actually take. Use the planning fallacy tool to minimize delays.
Project Manager	PM	A PM is responsible for overseeing the planning and execution of an initiative. At TKG, a PM functions in strategic and tactical capacities – maintaining the client relationship while managing the project lifecycle and ensuring progress toward goals.
Project Plan		A timeline detailing all action steps necessary to develop a client deliverable, action step owners, and corresponding estimated timing – often completed in a Gantt chart. (Also called a Project Timeline or Work Plan).
Scope Creep		A sequence of small changes that expand the work to be done on a project (beyond what was agreed upon) or which are out of scope. These seemingly unimportant changes can aggregate to create tremendous changes in the schedule and lead to cost overruns when neglected.
Scope of Work	SOW	Agreement between the consultancy and client describing the project's purpose/objectives, planned activities, deliverables, expected timing, and budget.
Stoplight Chart		A mechanism for visually representing the status and risk of a project.
Weekly Status Report	WSR	Weekly summary sent to a client to describe the current status across workstreams and to list next steps.
Workstream	WS	Ongoing stream of activities required to accomplish work under a project/client team. Workstreams may be categorized by deliverable or group of activities (e.g., advisor engagement, marketing & public relations (PR), curriculum development, etc).

KEY TERMS (CONTINUED)

Term	Acronym	Definition
Lean Six Sigma and Project Management Tools		
Define, Measure, Analyze, Improve, and Control	DMAIC	A six-sigma process improvement methodology that uses data to optimize processes and performance. Comprised of five steps: Define, Measure, Analyze, Improve, and Control.
Gantt Chart		A horizontal bar chart that provides a visualization of the project schedule and clearly displays which activities will overlap in time. Used in project planning.
Lean		An approach developed within the manufacturing realm that is focused on efficiency, waste reduction, and demand responsiveness. It emphasizes continuous improvement, increased efficiency, and increased quality.
Pre-Mortem		A method leveraging prospective hindsight to help project teams identify risks at the onset of a project. Consists of a manager imagining that a project has failed, and then working backward to determine what potentially could lead to the failure of the project.
Responsible, Accountable, Consulted, Informed Matrix	RACI Matrix	A RACI matrix is a chart that defines the roles and responsibilities for various stakeholders involved in the planning and execution of a project.
Suppliers, Inputs, Processes, Outputs, Customers Diagram	SIPOC	A six-sigma tool used to help understand and define a process before taking steps to alter or improve the process.
Stoplight Chart		A mechanism for visually representing the status and risk of a project.
Strengths, Weaknesses, Opportunities, and Threats	SWOT	A SWOT analysis evaluates potential strengths, weaknesses, opportunities, and threats facing the project.
What's In It For Me	WIIFM	An ideology/tool that can be used to help facilitate change within an organization. It begins with identifying a change, and then describes the benefits that will be enjoyed by each impacted stakeholder group.
Work Breakdown Structure	WBS	A WBS is a visual, hierarchical, and deliverable-oriented deconstruction of a project used by the PM to work backwards from the final deliverable of a project, identifying necessary activities needed to achieve a successful project outcome.
Pharma Review		
Human Pharma Review Committee/ Medical, Legal, and Regulatory/ Material Approvals Process	HPRC/ MLR/MAP Review	<p>Process used by life sciences organizations to review, approve, and submit promotional materials subject to regulatory compliance. This generally includes all provider and patient-facing materials.</p> <p><i>Each organization has a preferred name/acronym for the process, but the intent and sequence of events generally remain consistent across all organizations.</i></p>

KEY TERMS (CONTINUED)

Term	Acronym	Definition
Phases of Project Management <i>(Please refer to page 17 for additional details)</i>		
Planning Phase		The planning phase of project management includes the development of a project charter, involvement of key stakeholders, and establishment of all necessary collaboration agreements. The planning stage is the first phase of project management.
Build-Up Phase		The build-up phase of project management includes the setting of client expectations, establishment of a project plan, and creation of a client team. The build-up phase is the second phase of project management.
Implementation Phase		The implementation phase of project management includes ongoing project management activities (e.g., status meetings) and operationalization of the project plan. The implementation phase is the third phase of project management.
Closeout Phase		The closeout phase of project management includes the completion of work outlined under the SOW, reflection of performance both internally and with the client, and collection of final billing milestones. The closeout phase is the fourth and final phase of project management.

PROJECT MANAGEMENT TOOLS

The table below depicts common project management tools & resources, and also their commonly associated use cases.

Tool/Resource	Use Case	Audience
Charter	Defines the project's primary objectives, in scope and out-of-scope activities, key stakeholders (e.g., sponsor, lead, project team), and any boundaries/limitations	Client
Dashboards	Overview of various disparate sources of information informing one initiative	Internal/Client
DMAIC	Framework for process improvement	Internal
Planning Fallacy Tool	Used in the planning phase of project management to avoid planning fallacy or the tendency to underestimate how long the work will actually take	Internal
Project Plan <i>(also called work plan, timeline, or Gantt chart)</i>	Overarching timeline which organizes workstreams and ensures the team is on track and hitting appropriate milestones across all deliverables	Internal/Client
RACI Matrix	Defines the roles and responsibilities for team members involved in the planning and execution of an initiative	Internal
SIPOC Diagram	SIPOC diagrams are used to identify all relevant elements of a process improvement project before work begins	Internal
Status Updates	Working agenda for internal and/or client status calls and/or weekly updates	Internal/Client
Trackers	Often used to keep track of outreach – source of truth when sending out emails to multiple respondents and requesting action (must update frequently)	Internal
WIIFM	Facilitates change management by identifying key benefits that stakeholders affected will enjoy as a result of a change	Internal
WBS	Identifies key activities/necessary steps to successfully execute a deliverable	Internal



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PROJECT MANAGEMENT TOOLS/EXAMPLES

The section below illustrates examples of commonly used project management tools. Please note that preferred formats for project management materials vary by team.

Always start by asking your team lead whether they have a preferred format or existing templates.



Charter Example

Project charters are tools used by many client teams to clearly display goals/objectives, activities that will be considered in scope or out of scope, key stakeholders and team members at the client organization, and any boundaries/limitations. They are typically brief one-page summaries that can be easily reviewed and shared with the client and team members.

Project Charter: Insert Project Title *Process Owner

Overall Project Sponsor: Insert Name Business Lead: Insert Name

Project's Primary Objectives	Description of Work	Boundaries																		
Business Situation: • Insert text Implications: • Insert text Objectives: • Insert text	What's in scope? • Insert text What's out of scope? • Insert text	Major Milestones: Insert text Constraints and Dependencies: • Insert text																		
		<table border="1"> <thead> <tr> <th>Project Team</th> <th>Role</th> </tr> </thead> <tbody> <tr><td>Client</td><td>Role</td></tr> <tr><td>Team Member</td><td>Role</td></tr> <tr><td>Team Member</td><td>Role</td></tr> <tr><td>Team Member</td><td>Role</td></tr> <tr><td>Team Member</td><td>Role</td></tr> <tr><td>Team Member</td><td>Role</td></tr> <tr><td>Team Member</td><td>Role</td></tr> <tr><td>Team Member</td><td>Role</td></tr> </tbody> </table>	Project Team	Role	Client	Role	Team Member	Role	Team Member	Role	Team Member	Role	Team Member	Role	Team Member	Role	Team Member	Role	Team Member	Role
Project Team	Role																			
Client	Role																			
Team Member	Role																			
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Dashboard Example

Dashboards allow you to show multiple pieces of information important to a project or team in one place in a visually digestible format. Dashboards are good snapshots when an audience has limited time to dig into multiple source documents.

Squarespace Website Utilization: User Traffic Mar. 28 - Apr. 28

NASHNET 2020 Marketing Goals

Description	Baseline	Goal	Current Progress	Percent Complete
Engage (by email) 50 new potential affiliates by end of June	0	50	0	0%
NASHNET website in top 10 average search result by 2021	28	10	21	98%
Reach 120 followers on Twitter	0	120	7	6%
Reach 100 followers on LinkedIn	0	100	0	0%

NASHNET Marketing Dashboard

Tasks	Target Deadline	Assigned To	Status
Confirm Podcast #1 availability with interviewers	27-Mar	Eric/Kristi	Complete
Send calendar invites for Podcast #1 recording	27-Mar	Eric/Kristi	Complete
Revisit NASHNET LinkedIn and update as needed	27-Mar	Kristi	Complete
Develop and send draft social media posting schedule	27-Mar	Kristi	Complete
Request PR contacts from advisors	27-Mar	Eric	Complete
Test webex recording for podcast	31-Mar	Eric/Kristi	Complete
Record Podcast #1	02-Apr	Eric/Kristi	Complete
Circle back on recent events/conference details	02-Apr	Kristi	Complete
Confirm Podcast #2 availability with speakers	10-Apr	Eric/Kristi	Complete
Develop Podcast #2 questions and script	10-Apr	Eric/Kristi	Complete
Develop blog content (i.e. transcribe Podcast #1)	10-Apr	Kristi	Complete
Host Podcast #2 taping session	23-Apr	Eric/Kristi	Complete
Select podcast editing vendor	24-Apr	Eric/Kristi	Complete
Send Podcast #1 for editing	27-Apr	Kristi	Complete
Connect with client on website	30-Apr	Eric/Kristi	Complete
Develop health system newsletter and circle back on industry newsletter	01-May	Eric/Kristi	In progress
Set up RSS feed/host for podcast posting	01-May	Eric/Kristi	In progress
Identify speakers for Univision	08-May	Eric/Kristen	In progress
Send Podcast #2 for editing	08-May	Eric/Kristi	Not started
Follow-up on Univision collaboration and set recording date	08-May	Eric/Kristen	In progress

OVERDUE TASKS

Tasks	Target Deadline	Assigned To	Status
Connect with advisors and NASHNET team on LinkedIn	27-Mar	Kristi	Not started
Develop and distribute client enrollment dashboard	10-Apr	Eric/Kristi	Not started
Circle back on payer network and start white paper discussion	10-Apr	Team	Not started
Follow-up on CEA posting timeline	10-Apr	Team	Not started
Follow-up with Anna on marketing materials	17-Apr	Kristi	Not started





DMAIC Framework Example

The DMAIC framework is a six-sigma methodology to approaching a problem and optimizing a process. During the **Define** stage, the project team establishes a project charter and high-level process map. The **Measure** stage helps the team understand the magnitude of the problem and identifies KPIs that will help monitor process performance (e.g., lead time). This serves as the baseline for process improvement. During the **Analyze** stage, the team will determine the root cause of the process issues. After identifying the cause of the problem, the project team will design and deploy an intervention to **Improve** the process. At this point, the team will measure any change in metrics compared to the baseline to determine if the intervention achieved the desired outcome and refine the approach if needed. During the **Control** phase, the process is evaluated to ensure that improvement is sustained and that the root cause has been appropriately addressed. This requires ongoing process monitoring and management.

Define	Measure	Analyze	Improve	Control
Describe the problem statement.	Determine the performance metrics.	Identify the root cause of the problem.	Implement and refine the intervention.	Implement and refine the intervention.
Tools: <ul style="list-style-type: none"> • Project charter • Tree diagram • Stakeholder analysis • SIPOC • Swimlane map 	Tools: <ul style="list-style-type: none"> • Data collection plan • Checklist 	Tools: <ul style="list-style-type: none"> • Fishbone Diagram • 5 Whys • Pareto Charts 	Tools: <ul style="list-style-type: none"> • PDSA 	Tools: <ul style="list-style-type: none"> • Monitoring plan • Control plan



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Planning Fallacy Tool

The planning fallacy tool is used to reduce the tendency to underestimate how long work will actually take when developing a project plan or estimating the time necessary to complete a client ask. (Source for tool below: eCornell)

Strategy 1: Ask Someone Else

The planning fallacy is focused on you looking at how much time it will take for you to do something. When you ask the next person, that personal bias evaporates. Asking someone else to give their estimated duration is a very useful mechanism to try to get a more accurate and less-biased estimate of how long something will take.

Strategy 2: Use Historical Data

You can make comparisons very explicit in your assessment by relying on historical data. How long have similar activities taken in the past? Using historical data removes that personal bias, reducing the effects of the planning fallacy.

Strategy 3: Use a "Pre-mortem"

Using a "pre-mortem" process is a very useful way to structure the discussion of how long something will take to complete. For example: instead of saying to a team member, "How long will this take?" You could say, "Imagine this task takes this amount of time. What do you think would cause that extended duration?" The process of anticipating potential causes of interruptions/delays can assist with formulating a more accurate estimate.

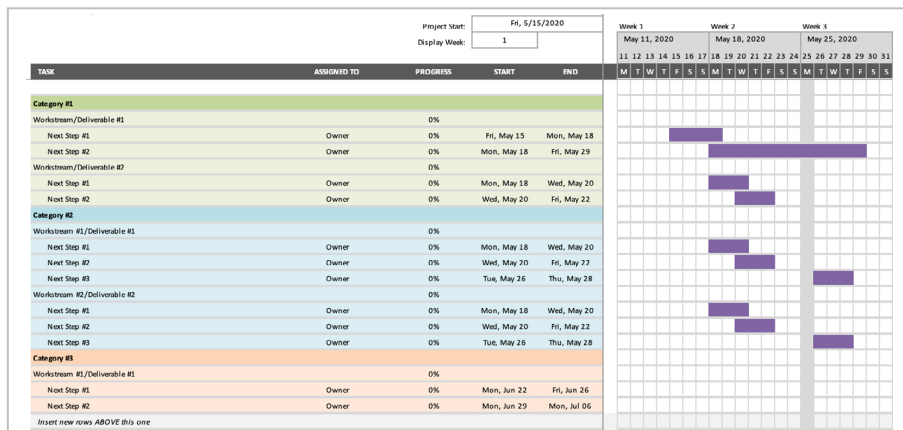
Strategy 4: Processes

Having sound processes for monitoring progress and encouraging honesty in the identification of issues by team members is a very important piece of addressing the planning fallacy. This will give you the chance to implement interventions as effectively and quickly as possible.



Project Plan Example (Daily)

A project plan allows you to track progress against goals on a day-to-day basis. It is best utilized for projects with shorter timelines or where a stepwise approach is critical (e.g., pharma content development, MLR/HPRC review & build).





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Project Plan Example (Weekly)

A weekly work plan allows you to track progress against goals on a weekly basis. It is best utilized for projects with longer timelines or where your client/team is comfortable with a higher-level timeline.

Task	Task Owner	Status	Start Date	End Date	2020									
					Oct.	Nov.	Dec.							
Workstream #1														
Next Step #1	Task Owner	Not started	Anticipated Date	Anticipated Date										
Workstream #2														
Next Step #1	Task Owner	Not started	Anticipated Date	Anticipated Date										
Next Step #2	Task Owner	Not started	Anticipated Date	Anticipated Date										
Next Step #3	Task Owner	Not started	Anticipated Date	Anticipated Date										
Workstream #3														
Next Step #1	Task Owner	Not started	Anticipated Date	Anticipated Date										
Next Step #2	Task Owner	Not started	Anticipated Date	Anticipated Date										
Next Step #3	Task Owner	Not started	Anticipated Date	Anticipated Date										



RACI Matrix

The RACI Matrix establishes which members of the team are going to be responsible for getting the work done and executing the task (R), accountable for overseeing the task and ensuring the the work is done properly (A), consulted to provide information or support needed to execute a task (C), or informed of the progress of the task or deliverable (I).

	Product Manager	UI Designer	Content Writer	Financial Analyst	Design Director	VP of Product	VP of Design	CTO	CEO
Responsible									
Accountable									
Consulted									
Informed									
Project Tasks									
Initiation Phase									
Financial Study				R		A	I	I	C
Feasibility Study	R					A	I	I	I
Planning Phase									
Technology Recommendations	R					C		A	I
Financial Plan				R		A	I	I	I
Sprint Plan	R					A			
Execution Phase									
Design UI		R			A	I	C	I	I
Write Content			R			A			
Create Mockup	R	C			I	A	I	I	I
Control Phase									
User Testing	R					A	I	I	I
Close Phase									
Create Lessons Learned	R					A			
Create Closure Report	R					A	I	I	I



SIPOC Diagram Example

A SIPOC diagram is a six-sigma tool used for understanding and defining a business process. It describes the suppliers to the process (S), inputs to the process (I), major steps in the process (P), process outputs (O), and customers of the outputs (C).

Suppliers	Inputs	Processes	Outputs	Customers
Who supplies the process inputs?	What inputs are required?	What are the major steps in the process?	What are the process outputs?	Who receives the outputs?



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Status Update Example

There are many forms of weekly status reports that can be provided by clients. The example below depicts a stoplight status report. This is best utilized for internal teams or clients who prefer very high-level visual updates. Of note, this can be included in the body of an email as an image. Depending upon your audience, they may be unlikely to open an attachment.

Overall 	Category #1 	Category #2 	Category #3
Accomplishments: • Weekly accomplishments			
Next Steps and Deliverables: • Next Step #1 (<i>OWNERS</i> : Insert Action Item Owner) • Next Step #2 (<i>OWNERS</i> : Insert Action Item Owner) • Next Step #3 (<i>OWNERS</i> : Insert Action Item Owner)			
Risks: • Any risks impacting project timing			
KEY : no challenges : risk for delays : working through challenges			



WIIFM

The What's In It For Me (WIIFM) brainstorming tool depicted below can be used to help the internal team ideate about key benefits that impacted stakeholders will enjoy as a result of a change. This can be beneficial for messaging and gaining internal buy-in.

Description of Change	
Role	Possible Outcomes Resulting From Change



Work Breakdown Structure

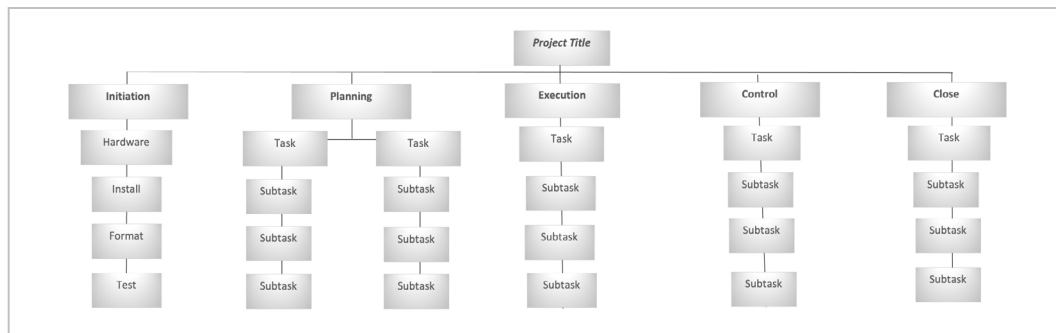
A work breakdown structure (WBS) is a visual-hierarchical-and deliverable-oriented deconstruction of a project. It is a helpful diagram for PMs because it allows them to work backwards from the final deliverable of a project and identify all the activities needed to achieve a successful project.

At TKG, this information may actually be captured in a Gantt chart or other tool, but it is a helpful construct to apply when developing. The underlying concept is to subdivide complex activities into their most manageable units.

To create a WBS:

- Ask, “What will have to be done in order to accomplish X?”
- Continue to ask this question until your answer is broken down into tasks that cannot be subdivided further.
- Estimate how long it will take to complete these tasks and how much they will cost in terms of dollars/person-hours.

In a formal WBS, the steps of a project are outlined in an organizational charter. The final deliverable rests on top of the diagram, and the levels below subdivide the project scope to indicate the phases, deliverables, and tasks that are needed to complete the project.



THE PHASES OF PROJECT MANAGEMENT

Adapted from: The Four Phases of Project Management



Overview

Planning

Setting out the project scope, goals/objectives, business case, organization of the project, stakeholders, constraints, risk, project controls, etc.

- Identify the need
- Identify stakeholders
- Define objectives
- Determine scope, resources needed, and major tasks
- Prepare for trade-offs

Build-Up

The roadmap to take you from Point A to Point B, which means creating a schedule of tasks, deadlines, and resources needed to complete the project on time.

- Assemble your team and plan the assignments
- Create the timeline
- Hold a kickoff meeting
- Develop a budget

Implementation

Putting the project plan into action

- Monitor and control process and budget
- Report progress
- Hold weekly team meetings
- Manage problems

Close-Out

Formally closing a project

- Close the project
- Hold After-action reviews/review lessons learned

Identify the Need

- Take time to think critically about the need or issue the project is supposed to fix (it's not always obvious). The rigor with which a problem is defined is one of the most important factors in finding an optimal solution. Take a simple example of a client request to create a presentation. The requirements for a presentation used at a conference versus for a presentation used during a screen-share are different. Asking thoughtful questions early (e.g., Who will use it? How will they use it? Who is the audience? How soon is it needed?) will help minimize the risk of wasting time and money by creating a solution that is too simplistic or complicated, too late, or that does not do what users need it to do

"If I were given one hour to save the planet, I would spend 59 minutes defining the problem and one minute resolving it."

Albert Einstein

Identify Stakeholders

- Understand who needs to be involved in a project to get the work done; having early agreement around roles, expectations, and commitments will increase the project's chance of success. Depending on the scope and complexity of a project, you may need to consider this from a few perspectives, i.e.:
 - Internal conversations: Do you need a medical writer, designer, digital agency, etc.?
 - External conversations:
 - » Do specific contractor requirements exist? (e.g., a client's internal IT team may be needed if building a website)
 - » Which outside groups must be contacted for resources/approvals? (e.g., some pharma teams that work on unbranded efforts may need to secure budget from brand teams)
 - » Who will be using and benefitting from the project's output? (e.g., field teams)

*WIIFMs (see **Key Terms** and **Project Management Tools** section)*



*RACI Matrix (see **Key Terms** and **Project Management Tools** section)*



- Meld stakeholders' various expectations into a coherent and manageable set of goals. A project's success will be measured by how well you meet those goals. The more explicitly you state them at the outset, the less disagreement you will face later about whether you have met expectations

Integrating objectives into your planning documents can help to ensure alignment, particularly for complex projects.



SMART (specific, measurable, action-orientated, realistic, time-limited) is a mnemonic acronym that can be used to set objectives.



Determine Scope, Resources, and Major Tasks

- Projects often fail either because of underestimations related to time and money, or because a significant part of the work was overlooked. One tool/concept that can help avoid this is the Work Breakdown Structure (WBS), which aids in the process of determining scope and tasks, and in developing estimates
- The WBS can take many forms, but the underlying concept is to subdivide complex activities into their most manageable units. To create a WBS:
 - Ask, “What will have to be done in order to accomplish X?”
 - Continue to ask this question until your answer is broken down into tasks that cannot be subdivided further
 - Estimate how long it will take to complete these tasks and how much they will cost in terms of dollars/person-hours
- Why does a WBS matter?
 - Work breakdown structures show the dependencies of various workstreams on one another and allow you to communicate the duration of tasks, where they fall on a timeline, and how each impacts the overall deadline
 - They also provide insight into how well resources are being used and whether there is a need to secure additional resources, cut down on the resources being used, or adjust the budget



*Work Breakdown Structure (see **Key Terms** and **Project Management Tools** section)*

- The duration of tasks is best identified by analyzing similar methods/projects completed in the past. These can provide insight into the time needed to complete a task. One tool/concept that can help with this is the Planning Fallacy Tool.
- Other things to consider are that:
 - » Certain tasks can be performed in parallel, and may contribute to efficiencies
 - » Some tasks cannot be performed until the task prior has been completed. It is important to communicate dependencies clearly



*Planning Fallacy Tool (see **Key Terms** and **Project Management Tools** section)*



*Gantt chart (see **Key Terms** and **Project Management Tools** section)*

Prepare for Tradeoffs

- Time, cost, and quality are three related variables that influence what you can achieve. Changing any of these variables may change outcome
- Alterations can often occur in the middle of a project. For example, if the timeframe for developing a new deliverable is suddenly cut in half, twice the number of people may need to get involved to get the job done (thereby increasing the cost), or else stakeholders may need to accept a deliverable that isn't as robust as originally planned. It is important to identify mission-critical activities when this occurs and understand the necessary level of quality to meet the stakeholders' needs
- Knowing from the start which variable is most important to each stakeholder will help guide the right changes along the way. It is the PM's responsibility to keep everyone informed of any tweaks and to tell them what the consequences will be in terms of time, cost, and quality
- Managing risk/uncertainty
 - Resources
 - » There may be times when the resources allotted to a project change, or when there is uncertainty about the availability of a resource within a certain timeframe. It is important to try to identify and monitor any pockets of uncertainty that may exist
 - Scheduling
 - » By building buffers into the project schedule, you can preemptively prepare for any scheduling uncertainties that come up
 - » Uncertainties are often out of our range of control (e.g., when client priorities change), but by being prepared, you can position yourself to provide recommendations and ideas that will help complete the project in a timely fashion
 - Scope
 - » Often PMs will find themselves dealing with project scope changes/uncertainties. This can happen due to the competitive landscape changing, adjustments in the client's priorities for the quarter, or even the reduction in resources to complete a project
- In this case, it is important to continuously refer to the initially developed scope and build in room for any potential changes. If one forecasts uncertainties within an initial scope, there is a good chance that scope creeps/uncertainties will not impact the bottom line



*Pre-mortem (see **Project Management Tools** section)*



*Charter (the “what/why/how/who/when”): (see **Key Terms** and **Project Management Tools** section)*

In the build-up phase, you create your roadmap for the project, which includes assembling the team, your time estimates, and creating budgets based on your cost estimates.

Assemble Your Team and Plan the Assignments

- Assess the skills needed for the project so you can get the right people on board. The people on your team are resources for the project so it is important to scope out resources which can provide value to the project efficiently. This requires looking at skill sets, securing the bandwidth to accommodate the timeline, and the ability to be flexible within a team setting
- Understand the expectations of the project, whether those are client-facing or internal. That will help provide clarity as to how to build out a timeline. It is also helpful to understand which project components the client wants to focus on – this will help you take a top-down approach when it comes to budget management



Templated SOW

Create the Timeline

- Most projects come with fixed beginning and end dates, regardless of the available resources; to create a realistic schedule within those parameters, work backward from any hard deadlines to see when your deliverables must be ready
- It is important to perform a pre-mortem to identify any areas of unknown, which could help identify scope creeps. If possible, you should build a buffer into your timeline
- Often, team members will have competing priorities, diminishing their bandwidth to work on a particular project. By assessing team member schedules over the timeline of the project, you can identify areas where more time can be built in to account for fewer available resources



Refer back to the Gantt Chart (see Key Terms and Project Management Tools section)

- Assess the timeline with your team regularly
 - Consider an errors, oversights, or bottlenecks, which could also be considered unknown creeps.
 - » **Errors:** Have preceding tasks been completed?
 - » **Oversights:** Have any tasks been overlooked or left out (i.e., proofing)? Previous projects can help you create a high-level to-do list and avoid potential oversights
 - » **Bottlenecks:** Are there circumstances causing work to pile up (i.e., if you have 20 submissions but only one person submitting)? Are you waiting on feedback from the client? Consider proactive correspondence and checking in on team member bandwidth to ensure that any potential bottlenecks have been addressed

Hold a Kickoff Meeting

- As soon as you've chosen your team members and have set the schedule, bring everyone together for a kickoff meeting. Go over the project's plan and objectives and review the proposed timeframe. Be sure to clarify roles and responsibilities. Encourage people to point out spots where problems may occur and where improvements could be made. Take all suggestions seriously—especially in areas where the team members have more experience than you do—and adjust your estimates and activities accordingly
- Ask experienced people for their insights into potential unknowns, scopes, and best practices, and proactively factor these into your project plans

Create the Timeline

- To determine your costs, break down the project into the following categories: resources, time, travel, training, supplies, space, research, capital expenditures, and overhead. Don't forget to think of potential gains in your bottom line when putting together a budget
- After you've entered figures into the budget from these standard categories, ask a trusted adviser to review it and offer their insight into what the general cost range should be
- A budget, no matter how carefully planned, is just your best guess. Expect actual numbers to deviate from the original estimate. Stay as flexible as possible within your limitations of time, quality demands, and total money available. Budgets are subject to change with competing client priorities, internal reallocation, or changes in the project's direction. Use your budget spreadsheet as a live document and revisit it frequently



TKG budget tracker

It's time to put the plan into action. The implementation phase is often the most gratifying, but it can also be the most frustrating. The details can be tedious and, at times, overwhelming. You will face times where deliverables are well-received and ahead of schedule, but other times you may find yourself receiving critical feedback. All of these components are just part of a project lifecycle and will help you grow and learn, so take it all in stride!

Monitor and Control Process and Budget (i.e., Manage Scope Creep)

- Whether you have a formal control system in place or you do your own regular check-ups, try to maintain a big-picture perspective
 - Project controls can refer to any sort of tool, system, method, or idea that helps minimize gaps between project plans and execution. Status reports, frequent meetings, daily check-ins, and clear communication are all examples of project controls which can help keep things on track
 - People's working styles and the project's scope will affect which project controls you use; it is important to establish and communicate those upfront
 - Being proactive when it comes to competitive research, potential schedule changes, and budget forecasting can prevent large mishaps. By addressing potential roadblocks upfront, you will save time effort and money later
 - Review budgets on an ongoing basis to ensure that you are on track to make a profit and complete the project. Monthly budget reconciliation, projecting the next month's forecast based on trends, and communication within the team about vendors used and hours taken for project components, can all help control the overall budget



*Status reports, project plans, dashboards, and stoplights (see examples in **Project Management Tools**)*

Report Progress

- Clients and project stakeholders (both internal and external) will generally want regular updates and status reports. Ask your client how they would like to receive communication. Would they prefer weekly hot sheets, or a more formal status report? Would your client prefer a set call time each week, or are they more spontaneous? Understand your clients' needs upfront and organize yourself accordingly

Hold Weekly Team Meetings

- With different team members working on different parts of a project, it may be hard to keep track of all the small occurrences. You and your team can stay focused by meeting once a week to communicate with each other on happenings, client communications, and what has been working well, etc. These meetings also reinforce team bonding and understanding

- Set clear agendas for your meetings. Try structuring them around weekly and monthly deliverables, client expectations, budget trajectory, and long-term goals. Many of your agenda items will naturally stem from targets the project has missed, met, or exceeded. For instance, you may need to discuss whether to reallocate the budget of a specific part of the project. Alternatively, you could discuss some positive feedback that you received from a client or a new idea that has stemmed from some insightful conversations. You can discuss vendors, internal obligations, and project trends as well. Keep the momentum going by following up on tasks and by connecting them to the metrics being used to evaluate the project's overall performance. Also, celebrate small successes along the way—this will help keep up the team's enthusiasm as you make progress toward your larger objectives.
- Prepping the meeting
 - Assess whether the meeting is necessary (could the issues be addressed effectively via email?)
 - Clarify the meeting objectives
 - Provide an agenda that supports the objectives
 - Ensure that the correct attendees are included
 - Encourage people to come prepared
- Running the meeting
 - Restate the objectives to sharpen the focus
 - Allow everyone to have a say
 - Keep the discussion focused on key issues
 - End with a confirmation about next steps and timing
- Follow-up
 - Circulate notes
 - Document next steps with dates if possible

Manage Problems

Some problems can threaten the success of the entire project. The most common problems are:

- **Time slippage:** The most common problem in project management is falling behind schedule. This is often unavoidable, but there are usually ways to improve the situation. The key is early recognition of the problem through proper monitoring/tracking (e.g., through status reports, weekly meetings, reviewing timelines)
- **Scope creep:** This can result from pressure to alter the scope of a project (e.g., multiple rounds of feedback from multiple stakeholders when you had originally envisioned two rounds from two stakeholders). When stakeholders ask for changes, our role is to communicate clearly how those changes will affect time, cost, or quality
- **Quality issues:** Quality assurance plays a major role in any projects, but unfortunately, it sometimes gives way under deadline pressures. Resist the temptation to rush essential quality checks and put controls such as checklists in place



Read Atul Gawande's [article](#) (or [book](#)) on the efficacy of simple checklists

Close the project

- Take whatever steps are needed to wrap things up (e.g., that ensure all files are saved and organized appropriately, share final deliverables with appropriate and/or involved parties)
- If all has gone as planned with your project, celebrate! Even if there are some rough spots along the way, it's still important to recognize efforts and accomplishments

Hold after-action reviews/review lessons learned

- Especially for larger projects, make sure that there is a post-evaluation (often referred to as an after-action review) or time to reflect on, debrief, or document the project process so that the full benefits of lessons learned can be shared and realized. This is an opportunity for discovery, not for criticism and blame



It's easy to immediately turn your focus to other projects. Keeping a checklist (mental or otherwise) can help you prioritize and complete close-out tasks.

