

# RESEARCH PMO BROWN BAG LUNCH

## **Project Juggling Act:** Managing multiple projects and programs

Thursday, September 19, 2024

### **PRESENTED BY:**

Research PMO

# Housekeeping

## What to keep in mind for today's webinar:

- We encourage everyone to turn their camera on to increase engagement
- Everyone is muted, if you have a question or comment, please:
  - Type your question in the Chat Box
  - Ask a question using the Raise Hand function
  - If un-muted, please state your name and title/department
- Slides/webinar materials will be shared post-session
- The Research PMO values your opinions & feedback:
  - Please complete our post-session survey



# Introductions – Research PMO



**Ruth  
Caisse**  
  
Program  
Manager  
Research PMO



**Emily  
Cruse**  
  
Sr Project  
Manager  
Research PMO

# Research PMO Overview

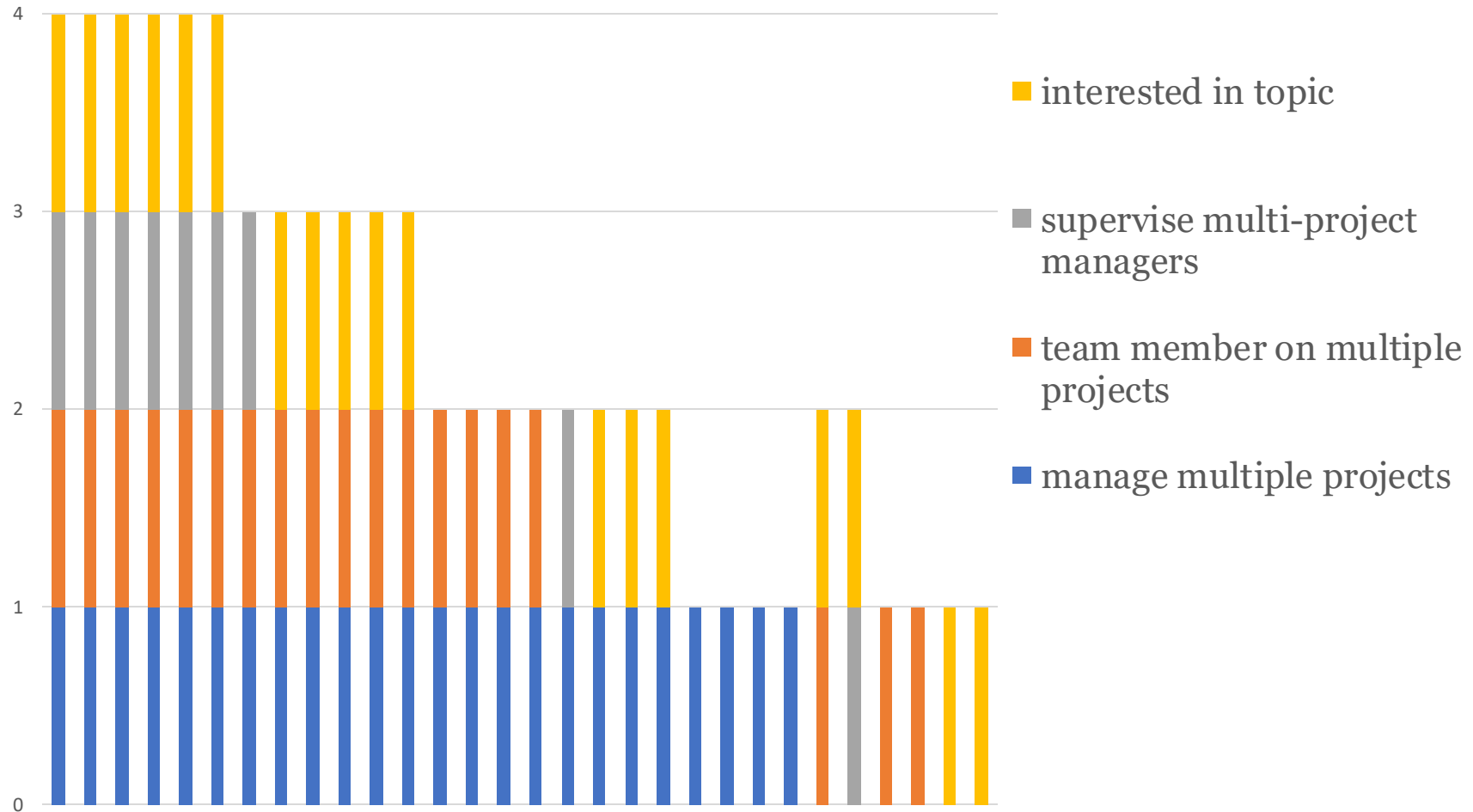
## Our Mission

*"To support excellence in research administration and beyond through strong partnerships and innovative project management solutions"*

## Services Provided:

- Advisory, Audit, and Governance solutions
- Project Mgmt. and Business Analyst Resources
- Process Improvement and Change Management
- Project Management Education
- Project Management Tools and Templates

# Who Is Here Today



# WHAT ARE YOUR PAIN POINTS?

# Agenda

- ✓ **When Managing Projects Becomes a Juggling Act**
- ✓ **Strategies for Common Pain Points**
  1. Project takes longer than expected/planned for
  2. So many projects, so little time
  3. Limited resources / Unlimited to-do's
  4. Drowning in documents
- ✓ **Pulling it all together**

# What do we mean by "project juggling"?

- Overlapping projects with
  - Same manager
  - Same team members
  - Interrelated content, processes, or scope
- Concurrent, repeating projects
- Multiple projects that constitute a “program”



Reference #1



# The Myth of Multi-tasking

- **Decision fatigue is real!**
- **Time costs**
  - More frequent disruptions
  - Greater inefficiency
  - Difficulty focusing
- **Shared resource challenges**
  - Overutilization
  - Underutilization
  - Burnout

# Mindset for Success

**"The mind is for having ideas,  
not holding them."**

*David Allen, Getting Things Done*

# Mindset for Success

**The role of the multi-project PM is  
"directing the traffic  
rather than driving the car"**

*Osama Aziz, The Ultimate Juggling Act*

# Toolkit for Success

## Project Templates

- ✓ Charter
- ✓ Kickoff call
- ✓ Progress updates
- ✓ Monthly status reports
- ✓ Dashboard
- ✓ Project close/Lessons Learned

## Collaboration Tools

- ✓ Teams
- ✓ SharePoint
- ✓ OneNote
- ✓ Outlook
- ✓ Smartsheet

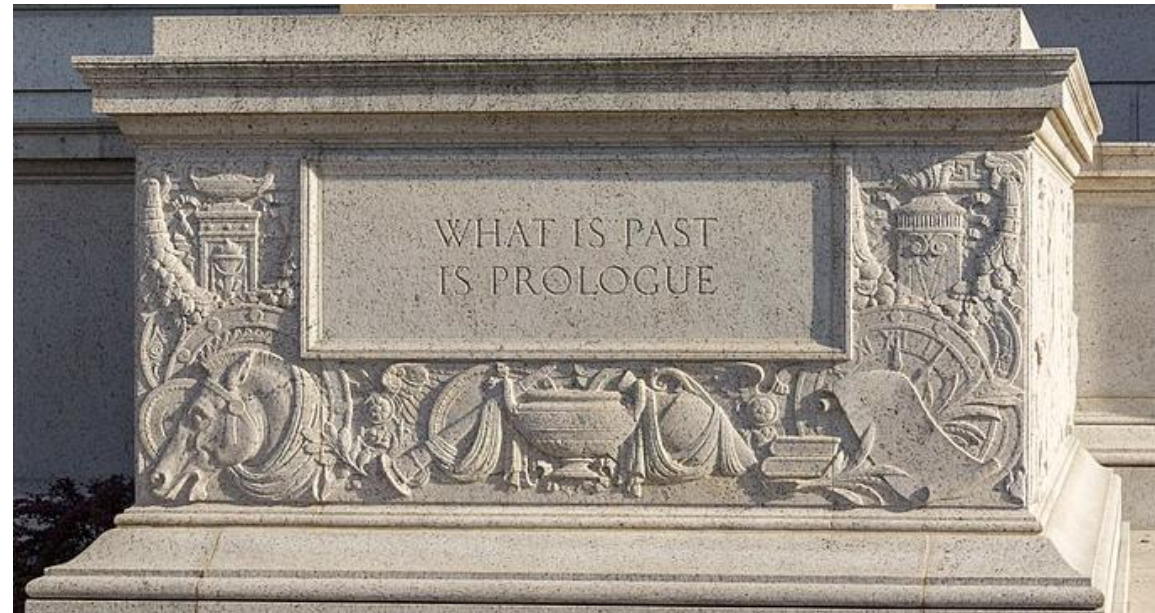


# Pain Point #1:

**Projects take longer than expected/planned for**

# Draw on Past Lessons Learned

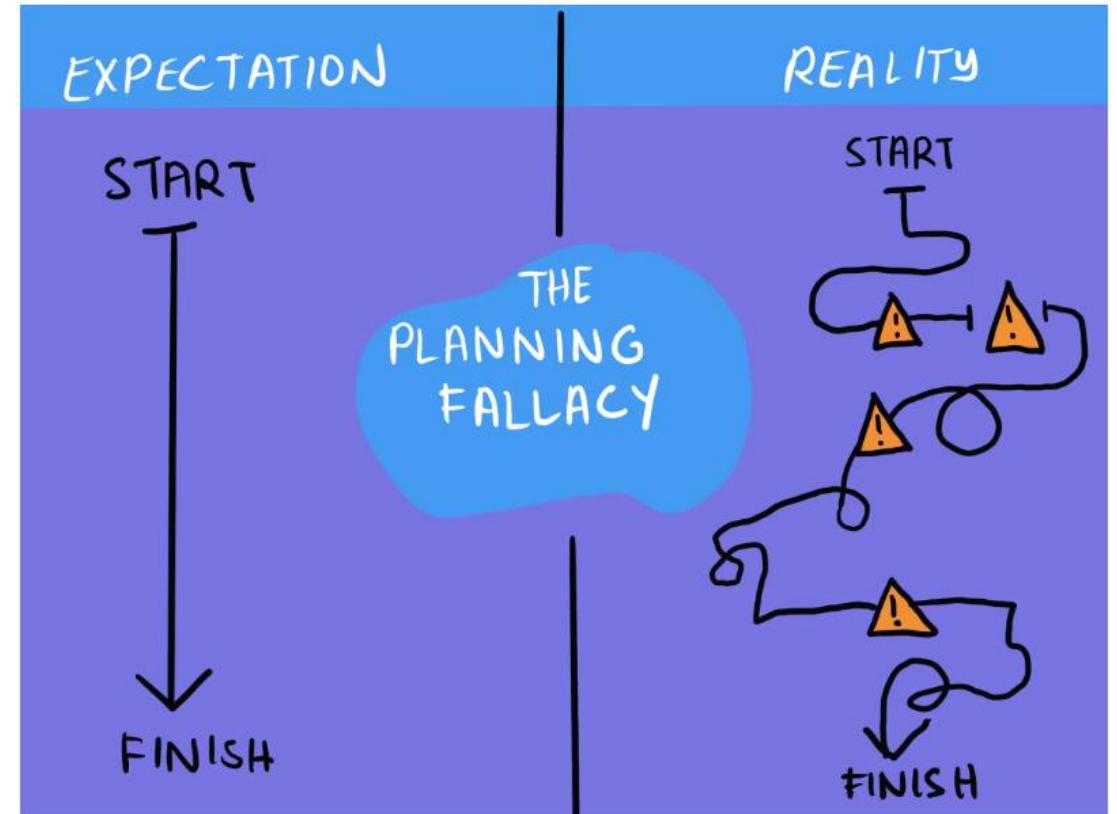
- **Plan ahead based on what has occurred before**
  - Lessons learned files
  - Contact others



Reference #4

# Counteract the Planning Fallacy (1/2)

- **What is meant by "the planning fallacy"**
- **Steps to take:**
  - Review past experiences
  - Encourage honesty & constructive realism
  - Ask someone else to review your plan
  - Account for unknowns
  - Black out dates / SME availability
  - Get detailed



Reference #5, 6

# Counteract the Planning Fallacy (2/2)

A project plan includes:

1. Project Phases
2. Milestones
3. Deliverables
4. Tasks
5. Durations
6. Dependencies
7. Resources

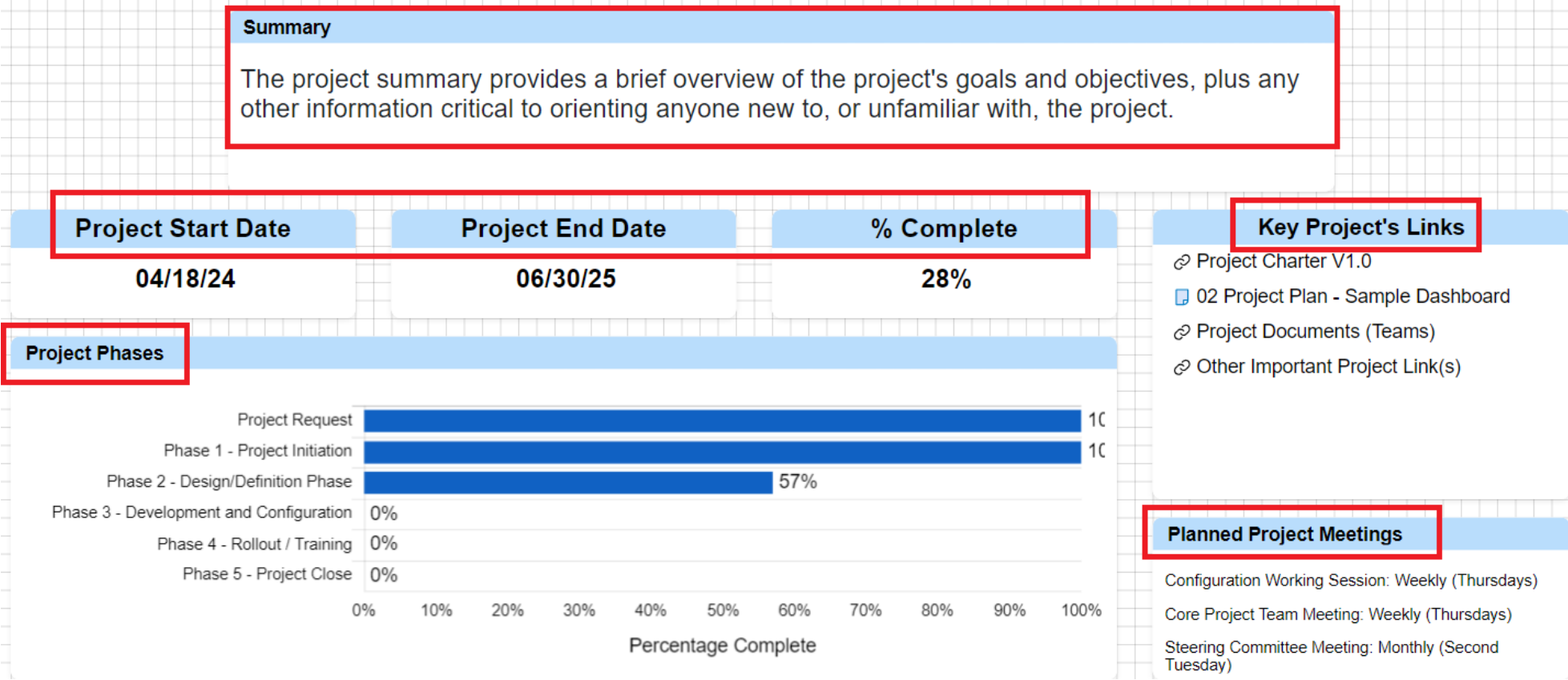
Task Name <span style="color: red; font-weight: bold; border: 1px solid red; border-radius: 50%; padding: 2px;">4</span>	Start Date	End Date	Duration <span style="color: red; font-weight: bold; border: 1px solid red; border-radius: 50%; padding: 2px;">5</span>	Assigned To	Predecessors	% Complete
<b>Sample Project Schedule</b>	04/18/24	09/08/25	363d			39%
+ Project Request	04/18/24	04/23/24	4d			100%
+ Phase 1 - Project Initiation	04/24/24	07/26/24	68d			100%
- Phase 2 - Design/Definition Phase <span style="color: red; font-weight: bold; border: 1px solid red; border-radius: 50%; padding: 2px;">1</span>	07/29/24	03/12/25	163d			66%
- Requirements Gathering - Interviews	07/29/24	09/17/24	37d			92%
Sponsor / Key Stakeholder	07/29/24	08/05/24	6d	Stakeholder 1	9	100%
Sponsor / Key Stakeholder	08/06/24	09/09/24	25d	Stakeholder 2	33	100%
Sponsor / Key Stakeholder	09/10/24	09/17/24	6d	Stakeholder 3	34	50%
<span style="color: red; font-weight: bold; border: 1px solid red; border-radius: 50%; padding: 2px;">3</span> Create Requirements Document Draft	09/18/24	09/25/24	6d	Business Analyst	32	0%
Finalize Requirements document	09/26/24	10/02/24	5d	Business Analyst	36	
+ Process, Procedures, and Reports	09/26/24	02/12/25	100d			76%
+ Design Elements	02/13/25	03/12/25	20d			0%
Project Design Approved [MILESTONE] <span style="color: red; font-weight: bold; border: 1px solid red; border-radius: 50%; padding: 2px;">2</span>	03/12/25	03/12/25	0	Project Manager	51	0%
+ Phase 3 - Development and Configuration	03/13/25	06/27/25	77d			0%
+ Phase 4 - Rollout / Training	02/13/25	08/06/25	125d			0%
+ Phase 5 - Project Close	08/07/25	09/08/25	23d			0%



# Make communications your friend (1/3)

- **Set cadence and frequency expectations**
  - Team Meetings
  - Project Status Report
  - Steering Committee Meetings
- **Transparency**
  - Project Dashboard
  - Project Status Reports
  - Meeting Agendas and Minutes

# Communications: Project Dashboard (2/3)



**Also include: Upcoming Milestones | Key Updates | Risks, Issues, and Decisions | Resources**

# Communications: Status Reports (3/3)

Essential features:	Update:
Updated-on date	Always
Project Summary	Only if changed
Timeline at-a-Glance	Only if changed
Current Status (Green/Yellow/Red)	Change as needed – make clear why!
Project Phases Overall Information	Only if changed
Key Project Updates	<ul style="list-style-type: none"><li>• Recently completed</li><li>• Work-in-progress, Upcoming</li></ul>
Top Issues and Risks	New and Updated
Project Hours	If tracking

# KNOWLEDGE CHECK

# Pain Point #2:

**So many projects,  
so little time...**

# Prioritizing: Scoring Models (1/2)

- Use to prioritize and select at the project-level
- Assign single, comparable number to all potential projects
  - Identify scoring criteria, such as:
    - Strategic
    - Financial
    - Risk factors (negative values)
  - Weight as needed
  - Average scores from all participants

**DON'T DO**

~~CLEAN~~ ALL THE THINGS!



(image credit [and apologies!] to Allie Brosh, Hyperbole and a Half)

Reference # 8

# Prioritizing: Scoring Models (2/2)

## WEIGHTED PROJECT SELECTION SAMPLE

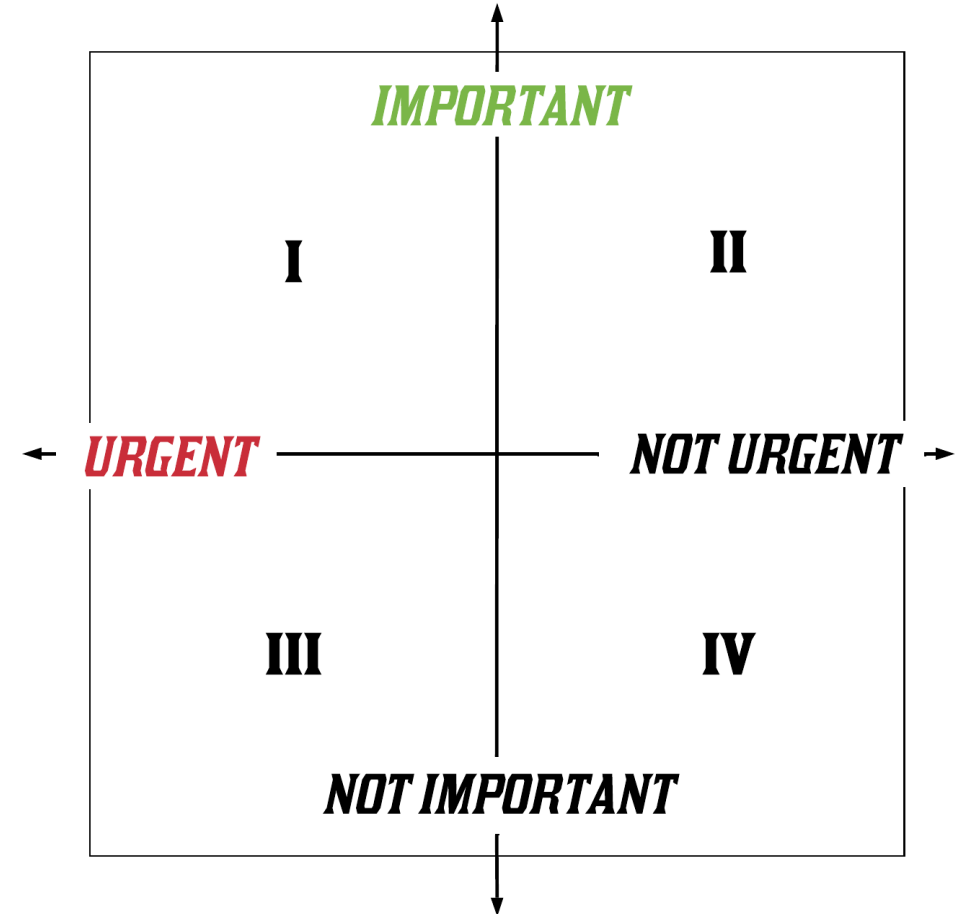
Assign each project a score from 1-5 for each criteria.

		15%	20%	20%	10%	15%	15%	5%	100%
PROJECT NAME	BRIEF DESCRIPTION	Research Incentive Goal	Strategic Imperative(s)	Foundational Imperative(s)	Financial Stewardship	Operational Benefit	Safety Impact	Efficiency Impact	TOTAL
Project XYZ	Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.	4	4	5	2	4	1	2	3.5
Project ABC	Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat.	5	2	5	2	5	3	4	3.8
Project Can't-Live-Without	Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur.	5	5	5	4	5	5	5	4.9
Project Pretty Good Too	Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.	3	5	5	5	5	3	4	4.4
Project Next on the List	Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat.	2	2	5	2	2	1	2	2.5
Project 456	Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur.	5	1	1	1	3	1	5	2.1
Project 789	Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor	4	4	5	2	4	1	2	3.5

Reference #9

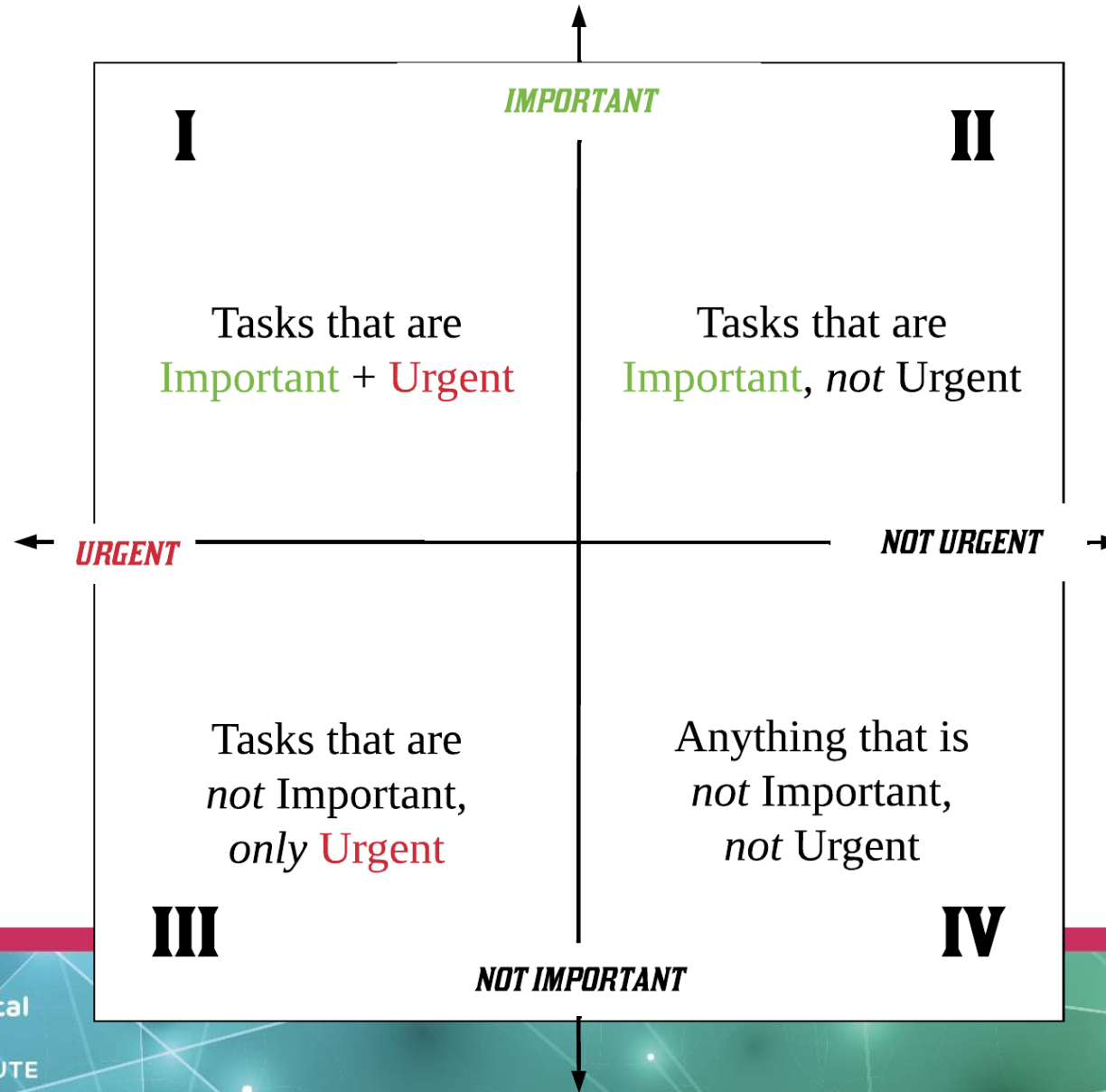
# Prioritizing: The Eisenhower Matrix (1/3)

- **Prioritize individual tasks and/or project approach**
- **Identify:**
  - Sources of stress/burnout
  - Areas for delegation
  - Targets for standardization or process improvements
- **Complete for:**
  - Specific individual projects
  - Different project roles
  - Cross-project tools and strategy

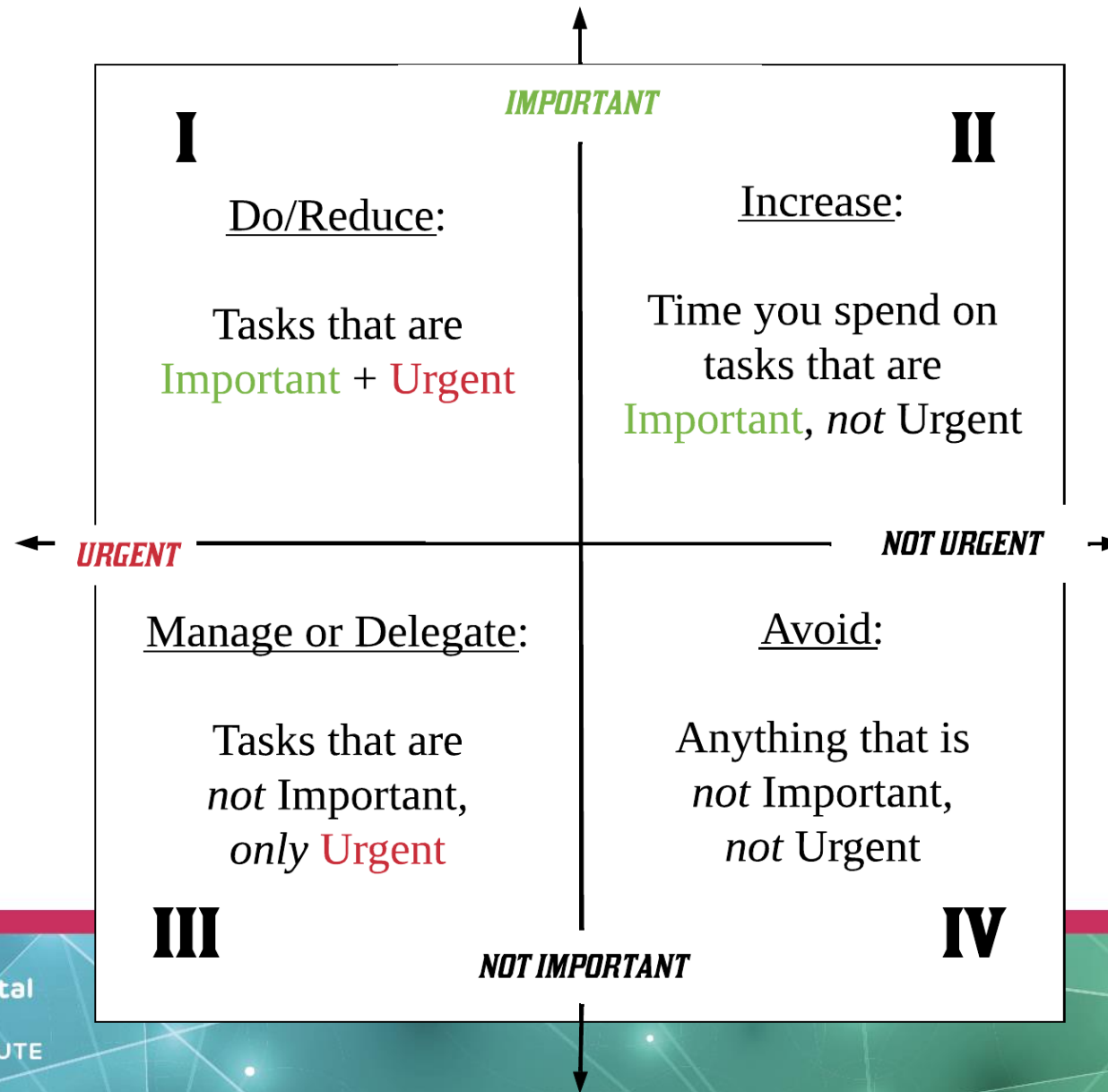




# Prioritizing: The Eisenhower Matrix (2/3)



# Prioritizing: The Eisenhower Matrix (3/3)



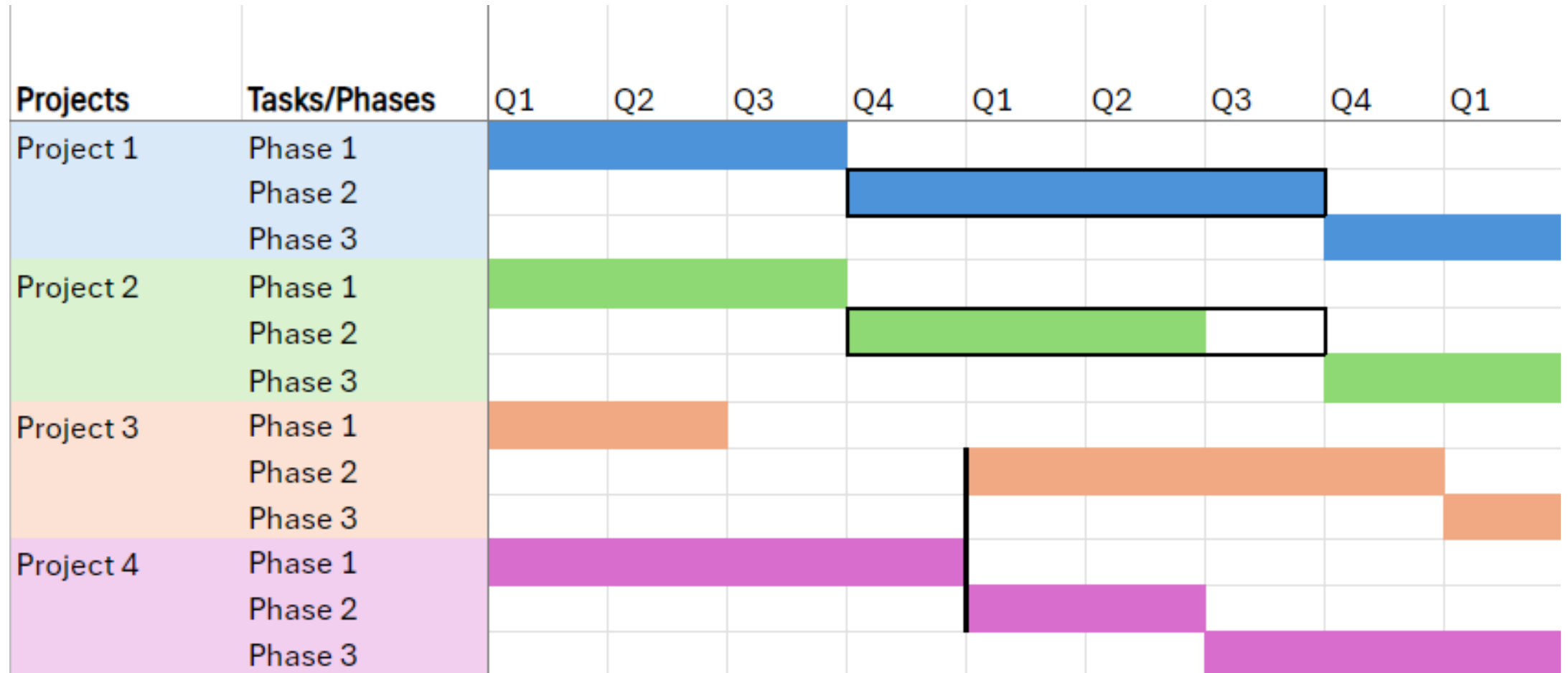
# Master Calendar Planning (1/3)

- **Phase projects, where possible**
  - Allows greater flexibility in cross-project scheduling
  - Easier to adjust downstream impact across projects
- **Look for dependencies and synergies**
  - Will outcomes from one project pose constraints on another?
  - Do deliverables from one project either support or build on deliverables from another?
  - Are any projects asking similar questions or producing similar findings? Are they relying on overlapping team members?

# Master Calendar Planning (2/3)

Projects	Tasks/Phases	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	
Project 1	Phase 1	█									
	Phase 2				█						
	Phase 3								█		
Project 2	Phase 1	█									
	Phase 2				█						
	Phase 3							█			
Project 3	Phase 1	█									
	Phase 2			█							
	Phase 3							█			
Project 4	Phase 1	█									
	Phase 2					█					
	Phase 3							█			

# Master Calendar Planning (3/3)



# When all else fails...Pause or postpone!



Up-to-date documentation is critical for ensuring team can pick back up efficiently in the future.

# Pain Point #3:

**Limited Resources /  
Unlimited To-Do's**

# Time Management

- **Time Management = Attention Management**
- **Strategies for focusing your attention:**
  - Chunk-Block-Tackle
  - Pomodoro Technique
  - "Eat the frog!"
  - Getting Things Done (GTD)
- **Find which approach(es) work best for you**



*Reminder: Our brains thrive on novelty!*

References #3, 12, 13



# Delegation and the 70% Rule (1/2)

If the person you are considering can perform the task at least 70% *as well as*, or *the same way as*, you would do it?

**Delegate it.**

# Delegation and the 70% Rule (2/2)

- ✓ Have a plan
  - Define objectives and standards for delegated tasks
  - Specify the range of discretion
- ✓ Involve team members in the delegation process. Match responsibility and authority.
- ✓ Inform others that delegation has occurred
- ✓ When problems arise, ask for recommended solutions
- ✓ Evaluate progress and results, and provide constructive feedback
- ✓ Continue to delegate!

References #10, 11

# KNOWLEDGE CHECK

# Pain Point #4:

# Drowning in Documents

# Toolkit for Success Redux

## Project Templates

- Charter
- Kickoff call
- Progress updates
- Monthly status reports
- Dashboard
- Project close/Lessons Learned

## Collaboration Tools

- Teams
- SharePoint
- OneNote
- Outlook
- Smartsheet



# Standardize Across Projects (1/2)

## Templates & Checklists

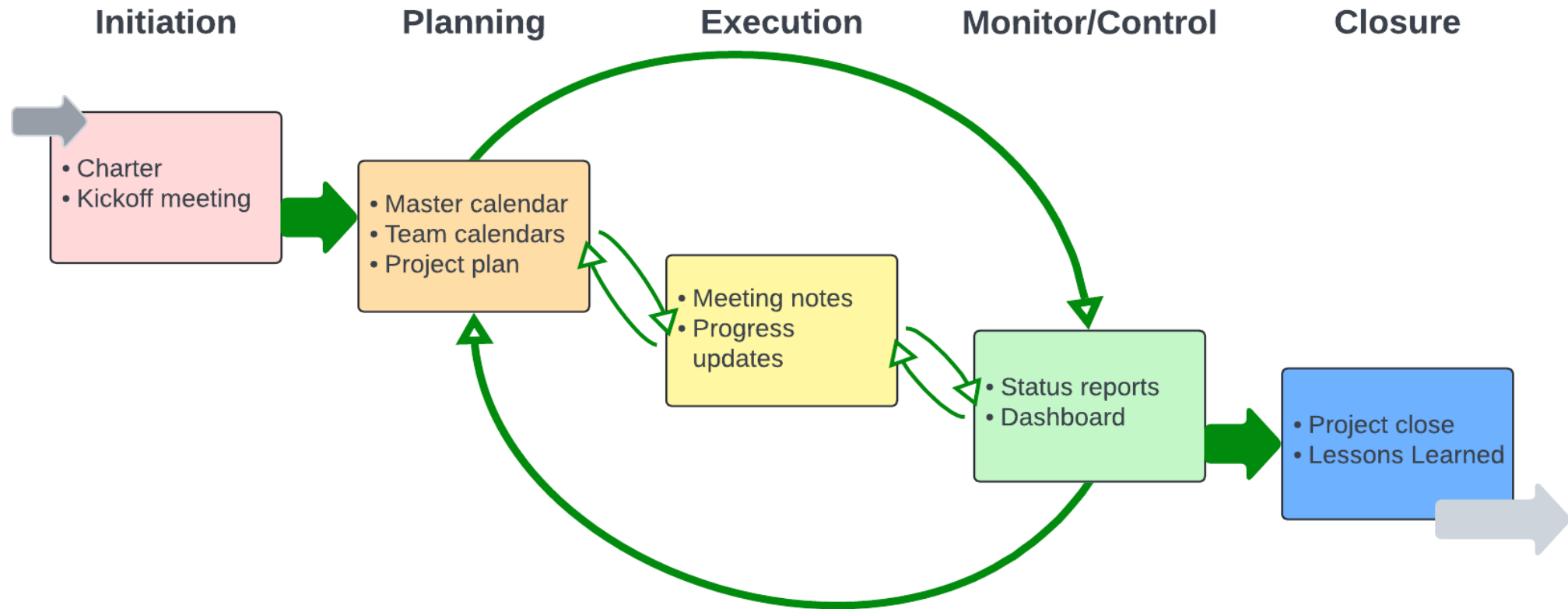
- Charter
- Kickoff call
- Progress updates
- Monthly status reports
- Dashboard
- Project close/Lessons Learned

## Benefits

- ✓ Ensure consistency
- ✓ Promote effective planning and continuous improvement
- ✓ Streamline communication
- ✓ Support time/attention management



# Standardize Across Projects (2/2)



# Facilitate Collaboration

## Collaboration Tools

- Teams and SharePoint
  - Centralized and self-serve templates, project docs, calendars, etc.
- OneNote and Outlook
  - Shared/shareable meeting notes
  - Set agenda for recurring meetings
- Smartsheet
  - Project planning, schedules, tracking, task completion

## Best Practices

- ✓ No attachments! Always use shareable cloud docs
- ✓ Provide clear guidelines for use
- ✓ Use consistent file organization across projects, as much as possible





# Long Story Short

# Summary (1/2)

- 1) Projects take longer than expected/planned for
  - Review past projects
  - Counteract the Planning Fallacy
  - Standardize communications
- 2) More projects than capacity
  - Prioritize projects via scoring models
  - Prioritize tasks & processes via Eisenhower matrix
  - Use multi-project calendars to plan and manage
  - Pause or postpone at gate points

# Summary (2/2)

- 3) More tasks than capacity
  - Delegation (Follow the 70% rule!)
  - Time management strategies
- 4) Documentation Best Practices
  - Templates & checklists
  - Collaboration tools

# Pick an Action!



# Who to call?

- **Research Project Management Office (Research Admin)**
  - Program and Project Management
  - Process Improvements, RFPs, System Implementations
  - Audit and Governance
  - DL email: [DL-ResearchPMO@chop.edu](mailto:DL-ResearchPMO@chop.edu)
  - [Project Request Form](#)
- **Office of Operational Efficiency (Enterprise)**
  - Project Management
  - Business Process Improvement
  - Change Management
  - [Submit an intake for review](#)
- **Center for Healthcare Quality & Analytics (CHQA)**
  - Clinical Process Improvement
  - Data & Analytics
  - <https://at.chop.edu/chqa>

# Additional resources (1/2)

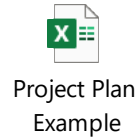


- **Charter**

- Workday Course: [Project Management at CHOP: Creating a Charter](#)

- **Project Plan**

- Example file:



Project Plan  
Example

- **Monthly Status**

- Example file:



Monthly Status  
Template

- **CHOP's Templates (Office of Operational Efficiency)**

- One Charter
- Stakeholder Log
- Meeting Agenda
- Work Breakdown Structure
- Communication Plan
- Executive Sponsor Report
- Stakeholder Sponsor Report
- Risk Registry
- Project Close Out

# Additional resources (2/2)



- **Take a class at CHOP:**
  - Project Management
  - Applying Improvement Methods (AIM)
  - Leading Improvement Course (LIC)
  - MS Office
  - DISC I & II with your team
  - CLI: Presenting with Impact: Presentations Skills Workshop
  - Virtual Meeting Technology Coaching Session
- **Continuous Improvement Class (recommendation from PMO) – CHQA Team**
  - <https://at.chop.edu/chqa/Pages/Home.aspx>
  - Clinical Process Improvement
- **Data Literacy Team**
  - Information:
    - <https://at.chop.edu/communities/datagovernancecmte/quick-links/data-literacy>
    - Open Office Hours: Every Friday from 10:00am-11:00am
  - Workshop and Micosession Flyers
    - [https://at.chop.edu/communities/datagovernancecmte/PublishingImages/Data%20Driven%20Micro-Sessions%20Flyer\\_FY23.pdf](https://at.chop.edu/communities/datagovernancecmte/PublishingImages/Data%20Driven%20Micro-Sessions%20Flyer_FY23.pdf)
    - <https://at.chop.edu/communities/datagovernancecmte/PublishingImages/Nucleus%20Workshop%20Flyer.pdf>
- **ServiceNow Service Portal:** <https://chop.service-now.com/esp>
- **QlikSense:** <https://at.chop.edu/communities/datagovernancecmte/quick-links/data-literacy/qlik-sense-consumer-guide>



# REFERENCES



# Reference list

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3. [Getting Things Done](#)
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