

# RESEARCH PMO BROWN BAG LUNCH

**Steadying the ship: Bringing  
structure to your side project**

Wednesday, December 4, 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



**Bob  
Bazinet**  
  
Principal  
Project  
Business  
Analyst,  
Research PMO



**Sam  
Camblin**  
  
Sr Project  
Manager,  
Research PMO

# Research PMO Overview

## Our Mission

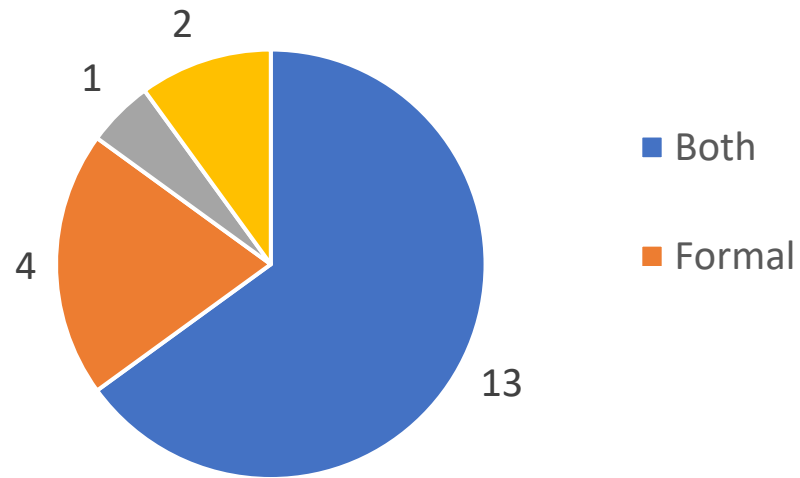
*"To support excellence in research administration and beyond through strong partnerships and innovative project management solutions"*

## Services Provided:

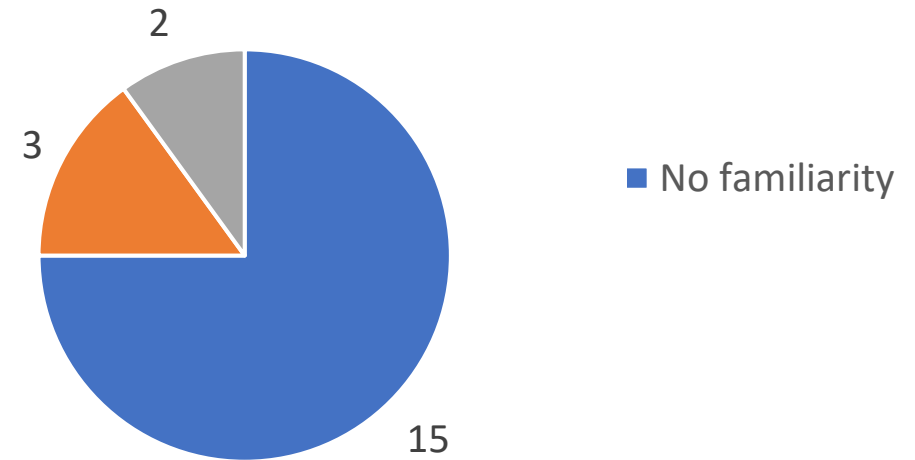
- Advisory, Audit, and Governance solutions
- Project Mgmt. and Business Analyst Resources
- Process Improvement and Change Management
- Project Management Education
- Project Management Tools and Templates

# Registration Question Results

Registrants handling formal or informal projects?



Registrants familiar with the Iron Triangle?



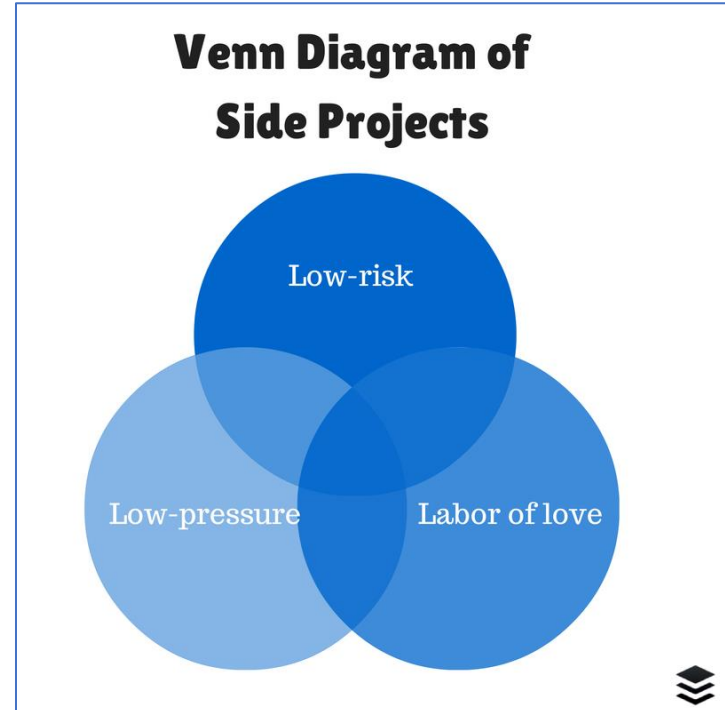
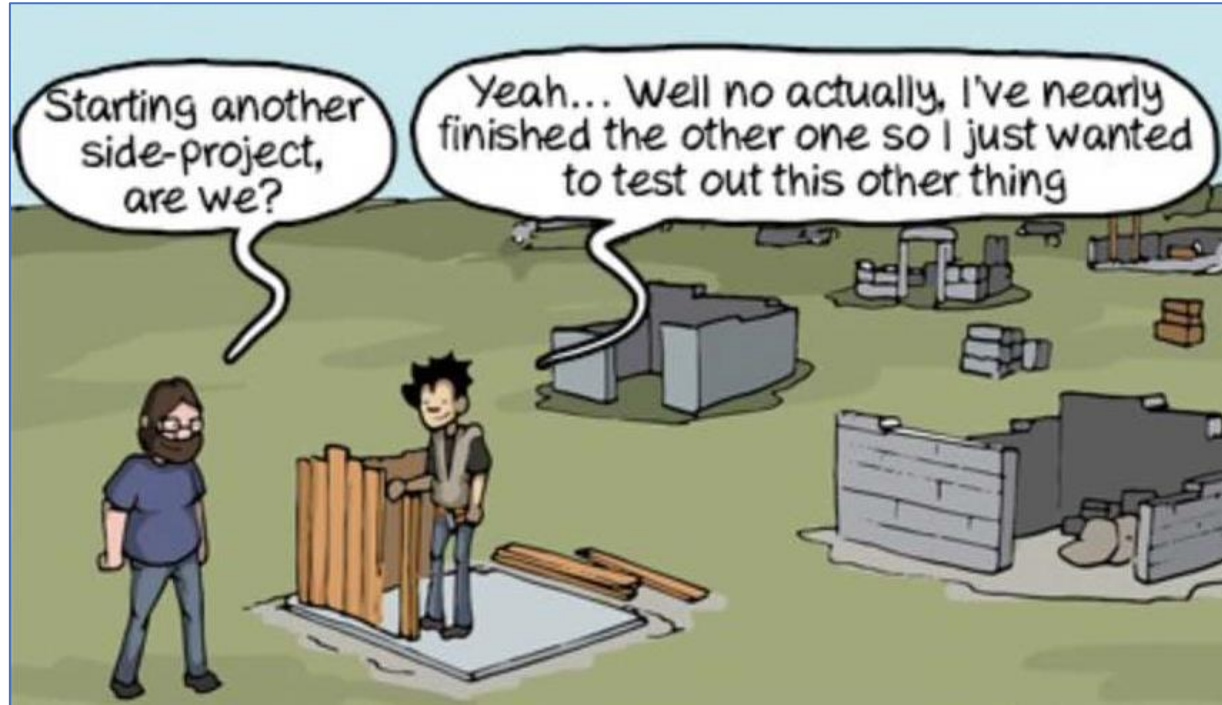
# Agenda

- **Pre-face**
- **Current state**
- **Breakdown issues**
- **Benefits a different approach might have**
- **Key points, Actionable Takeaways**
- **Iron Triangle**
- **Circling back**



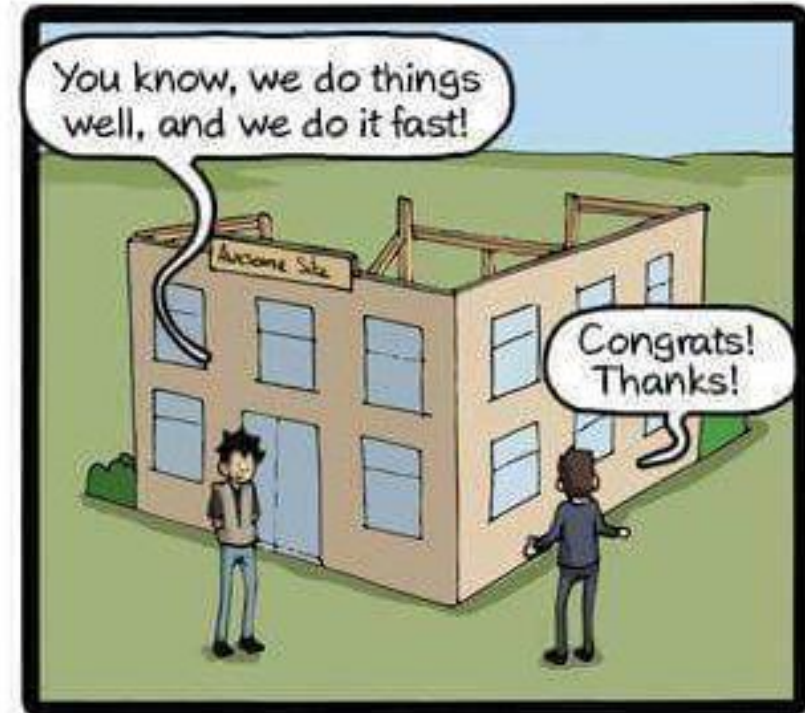
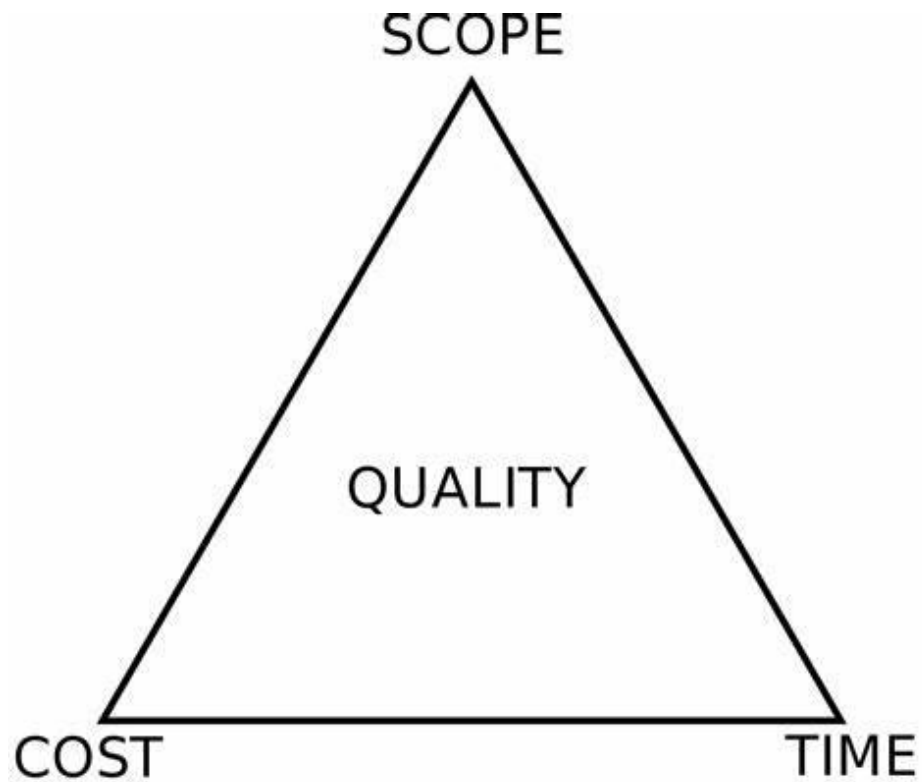
# Pre-face

# Preface – the lovable side project





# Preface – your friend the iron triangle



# Current state

**Story time – The Setup**

# A tale of the dashboard side project

- **Formal vs Informal Projects:** How do we define them?
- **Formal Projects** – Use a specific PM methodology, detailed planning, closely managed, defined decision structure, less flexibility in approach
- **Informal Projects (“side projects”)** – May or may not use PM methodology, variations in level of planning, decision structure unclear, more flexibility in approach



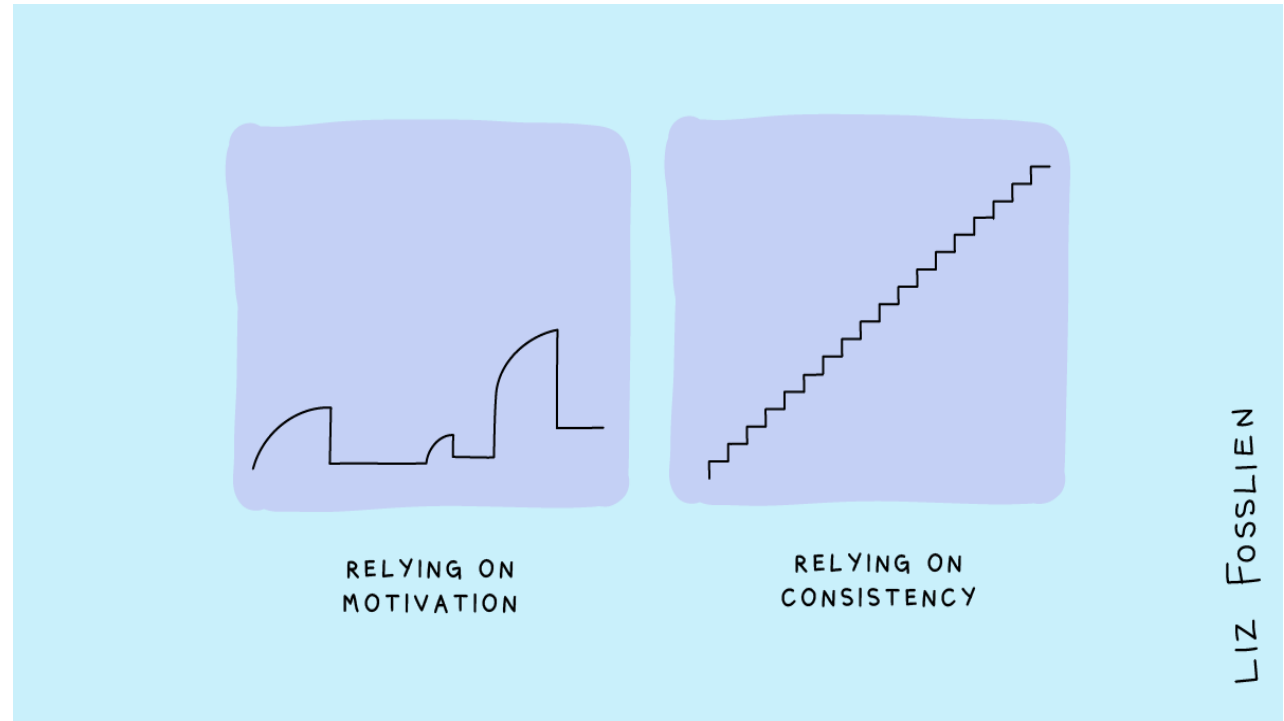
# A tale of the dashboard side project



- You get the green light to start some conversations and resources get on board with the best of intentions
- You meet regularly to check in on progress, which is strong in the beginning
- Good ideas are flowing, and features/functionality are being discussed, added ad-hoc

# A tale of the dashboard side project

- Progress is consistent – until it isn't, due to competing priorities
- Challenges and roadblocks begin to appear
- The methodology to get from point A to point B is unclear





# Problem statements re: side projects

- **Problem:** You can talk about the end goal, but is it documented? Is it clear?
- **Problem:** Prioritization (within the project, among other projects)
- **Problem:** Decisions need to be made, and the responsibility of who can/cannot make the decision isn't clear
- **Problem:** Availability of subject matter experts is limited, pulling people in ad-hoc slows progress
- **Problem:** Inability to influence individuals outside your immediate department/organization
- **Problem:** Little visibility to overall completion





# Breakdown issues

# Breakdown of issues



Root cause:

1. No sponsor; unclear ownership
2. Unclear scope (specific deliverables, milestones, outcomes)
3. Unknown cost/budget

# KNOWLEDGE CHECK #1

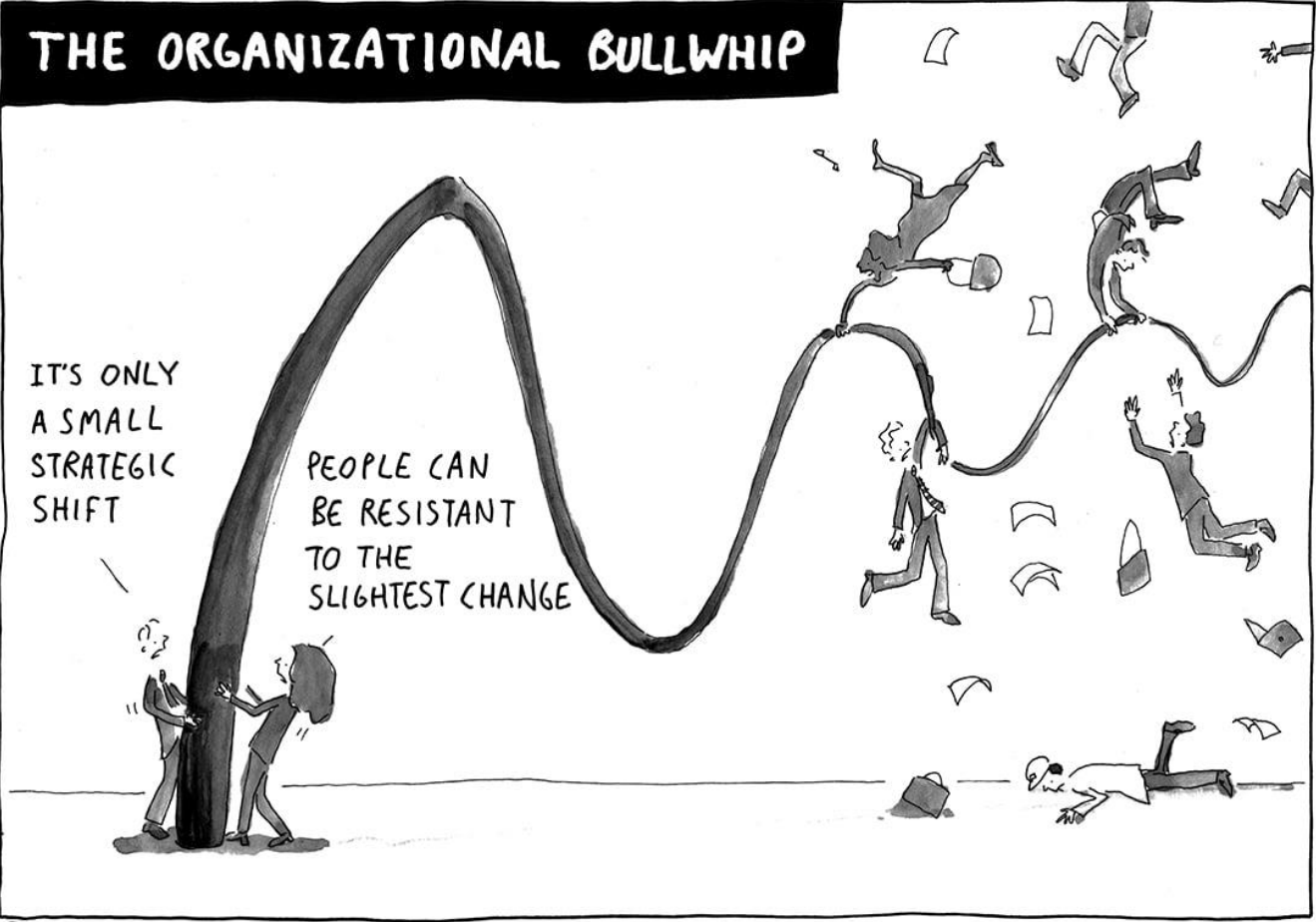
# Benefits a different approach might have

# How can we approach this differently?

- What specific activities can add structure to our side project?
- Think of project activities and decisions in terms of the Iron Triangle
- Benefits:
  - Commitment of resources
  - Decision makers identified, structure defined
  - Turning “unknown unknowns” to “known unknowns”
  - Established tried-and-true methodology
  - Increased accountability









# Key point – a little structure helps a lot!

- One slide charter
- Project schedule basics
- Status meetings basics
- Resource List



# What do these help accomplish?

- **One slide charter**
  - Tells us the basics of the project, guardrails, determine what is in scope or out of scope
- **Project schedule basics**
  - Gives us a “game plan” to track against, determine if progress is continuing as expected, identify dependencies
- **Status meetings basics**
  - Keep conversation pointed, relaying updates to key resources, maintain lines of communication
- **Resource List**
  - Define responsibilities and identify knowledge gaps
  - “What are the expectations of YOU on this project?”

# One slide charter & Project schedule basics

# One-slide Charter – “Project Summary”

- **Robust Charter**

- Project Sponsors / Project Owners
- Project Overview
- Deliverables
- **In Scope / Out of Scope**
- Project Approach (Waterfall/agile)
- **Timeframe, Duration**
- **Budget estimates (if applicable)**
- Benefits
- Risks

- **One-slide Charter**

- Vision Statement or Problem Statement
- Project Sponsors / Project Owners
  - Sign OFF is KEY
  - Who is the decision maker?
- **In Scope / Out of Scope**
- **Timeframe, Duration**
- **Budget estimates (if applicable)**
  - \* Is scope, timeline, or budget most important?*

# One-slide Charter – “Project Summary”

## **Vision statement:**

Our dashboard will transform complex research data into clear, actionable insights, enabling faster and smarter decisions for my department through intuitive visualization and real-time analytics.

## **Project team:**

- Sponsor – Anne Geary
- SME/PM/training – Sam Camblin
- Engineer/Reporting – Dave Schlich

## **In scope/ out of scope:**

- Utilize real time research data sources.
- Incorporate department goals by month.
- Utilize existing reporting system.

**Timeframe:** Goal is to deploy in June and finish department training by end of July.

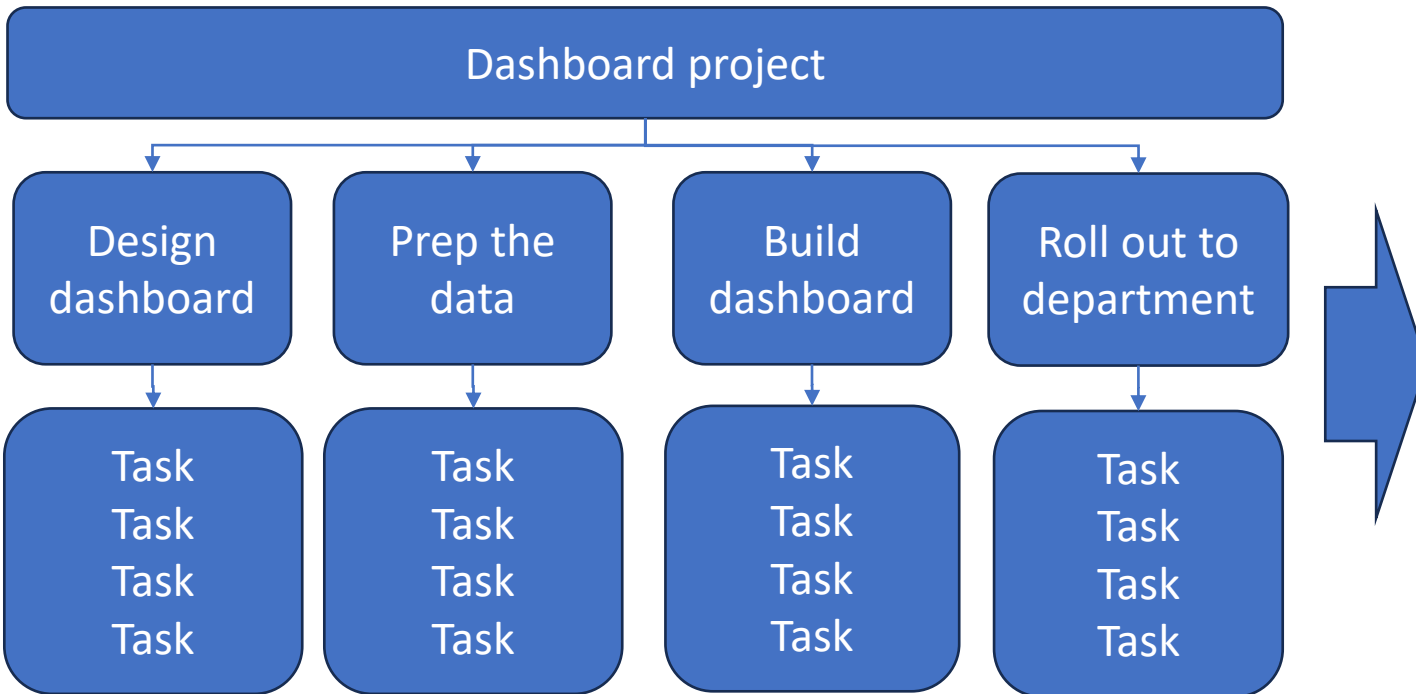
**Budget estimate:** \$10,000 setup; \$200/month user license for 4 users.

**Sign off:** Anne Geary approved on XX/XX date.

1. Who is the decision maker?
2. What's most important?
  - scope
  - timeline
  - Budget

# Project schedule basics

## Work breakdown structure



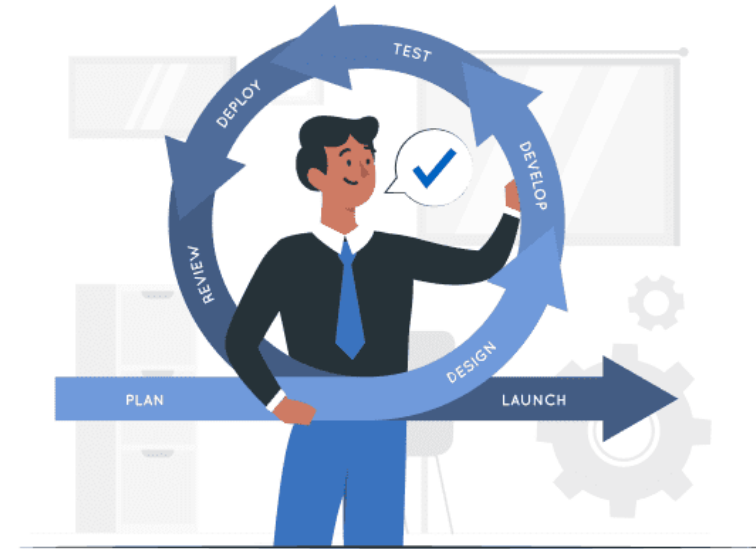
## Project schedule

No	Component	Status	Start	End	Resource	Dependency
1	<b>Design dashboard</b>					
2	Task	Complete	XX/XX/XXXX	XX/XX/XXXX	Sam	
3	Task	Not started	XX/XX/XXXX	XX/XX/XXXX	Dave	2
4	Task	Not started	XX/XX/XXXX	XX/XX/XXXX	Sam	
5	<b>Prep the data</b>					
6	Task	Not started	XX/XX/XXXX	XX/XX/XXXX	Sam	
7	Task	Not started	XX/XX/XXXX	XX/XX/XXXX	Dave	
8	Task	Not started	XX/XX/XXXX	XX/XX/XXXX	Sam	6,7
9	Task	Not started	XX/XX/XXXX	XX/XX/XXXX	Sam	
10	<b>Build dashboard</b>					
11	Task	Not started	XX/XX/XXXX	XX/XX/XXXX	Sam	
12	Task	Not started	XX/XX/XXXX	XX/XX/XXXX	Dave	
13	Task	Not started	XX/XX/XXXX	XX/XX/XXXX	Sam	
14	<b>Roll out to the department</b>					
15	Task	Not started	XX/XX/XXXX	XX/XX/XXXX	Sam	
16	Task	Not started	XX/XX/XXXX	XX/XX/XXXX	Dave	
17	Task	Not started	XX/XX/XXXX	XX/XX/XXXX	Sam	

Creating the schedule is a team building activity!



# Projects are a group activity!



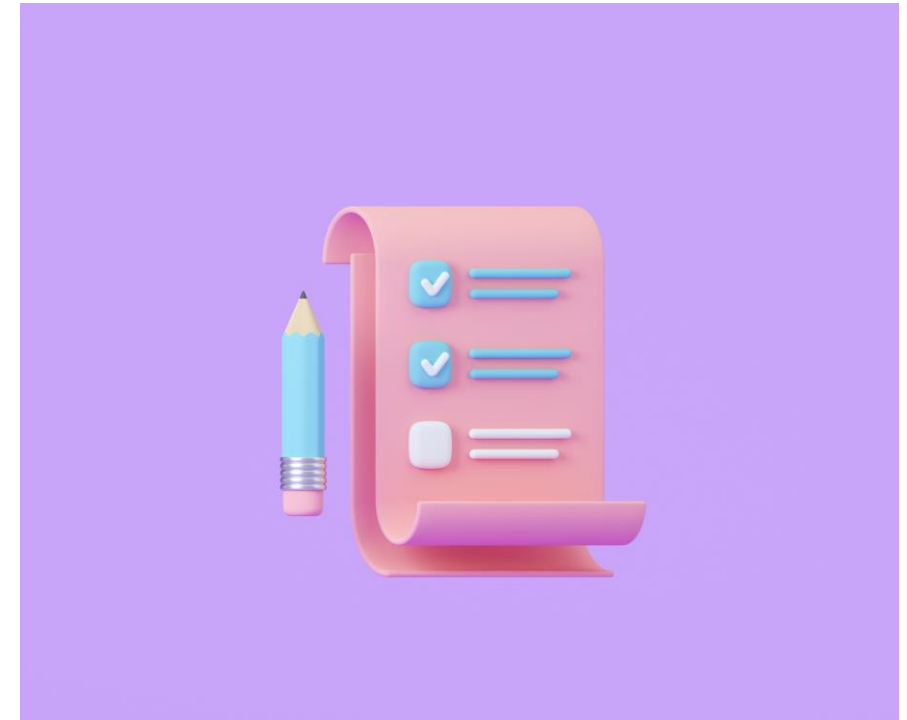
Project team will identify things you didn't think of:

- Testing, feedback, evaluation
- Communications, change management, training, SOP & Policy updates
- Post-go live support, operational ownership

# Status meeting basics & Resource List

# Status Meeting Basics – Meeting Mgmt

- Differentiate working sessions from status meetings
- Standing Agenda:
  - Progress updates (completion) since last update
  - What work is up next
  - Blockers/challenges
  - Risks
  - Decisions
- Preparing for status meeting – sending agenda in advance (or included in invite), sending recap / action items, minutes



# Resource List – Who & What?



- **Do you have a documented Resource List?**
  - Recommended Info: Name, Title, Dept, Project Role
  - Optional: Time commitment (% of time, hours per week)
  - Alternate resources
- **Why is this important?**
  - Up front activity to find gaps in knowledge, responsibility
  - “Do we have all of our subject matter experts?”
  - Decision making
  - Who is doing the work?
- **“Upgraded Version” RACI Matrix**
  - More involved, more intense planning activity
  - Learn more about RACI Matrices in the references

# Resource List – Who & What?

Name	Title	Department	Project Role	% of Time
George Orwell	Senior Manager	DTS	Sponsor	5%
Stephanie Meyers	Research Lead	Research Admin	Project Owner	15%
Ruth Caisse	Project Manager	R-PMO	Project Manager	20%
Sarah J Maas	Creative Services Manager	RCS	Communications	5%
Bob Bazinet	Business Analyst	R-PMO	Business Analyst	15%
Walt Whitman	Data Analyst	Research Admin	Data SME	10%
Stephen King	Visualization Specialist	Analytics	Tableau SME	20%
Agatha Christie	Change Mgmt Specialist	R-PMO	Change Manager	10%
?	?	Info Security	Security SME	5%
?	?	DTS	Consultant	?
?	?	HR	Training SME	?



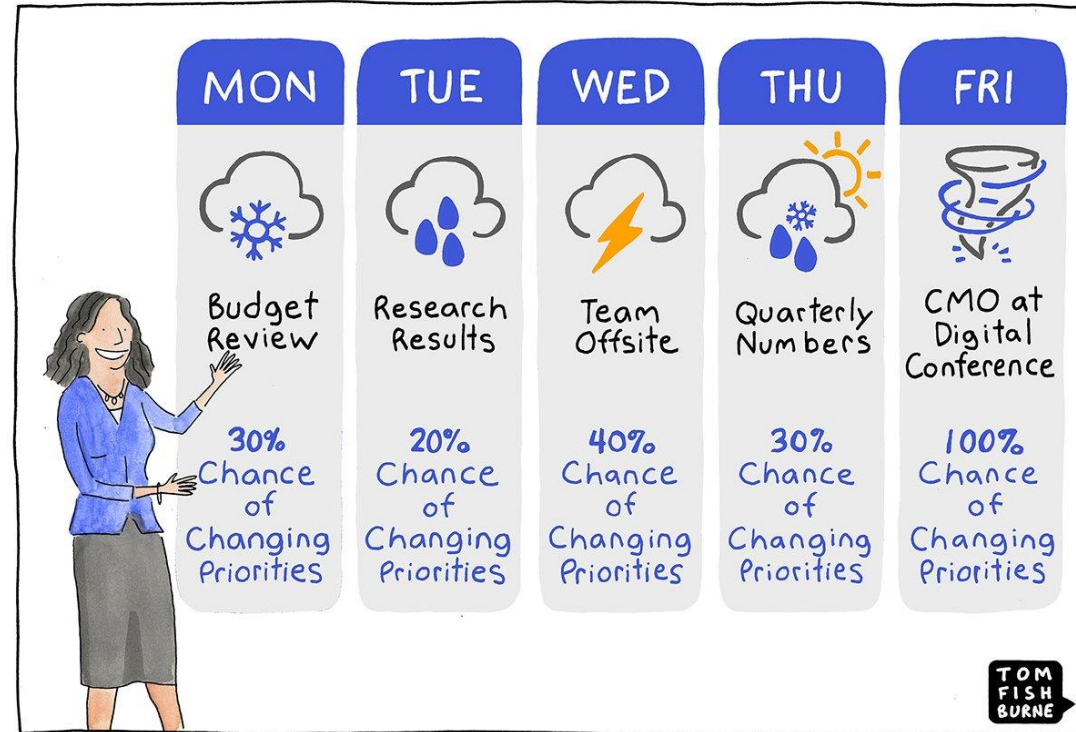
# KNOWLEDGE CHECK #2



# Iron Triangle

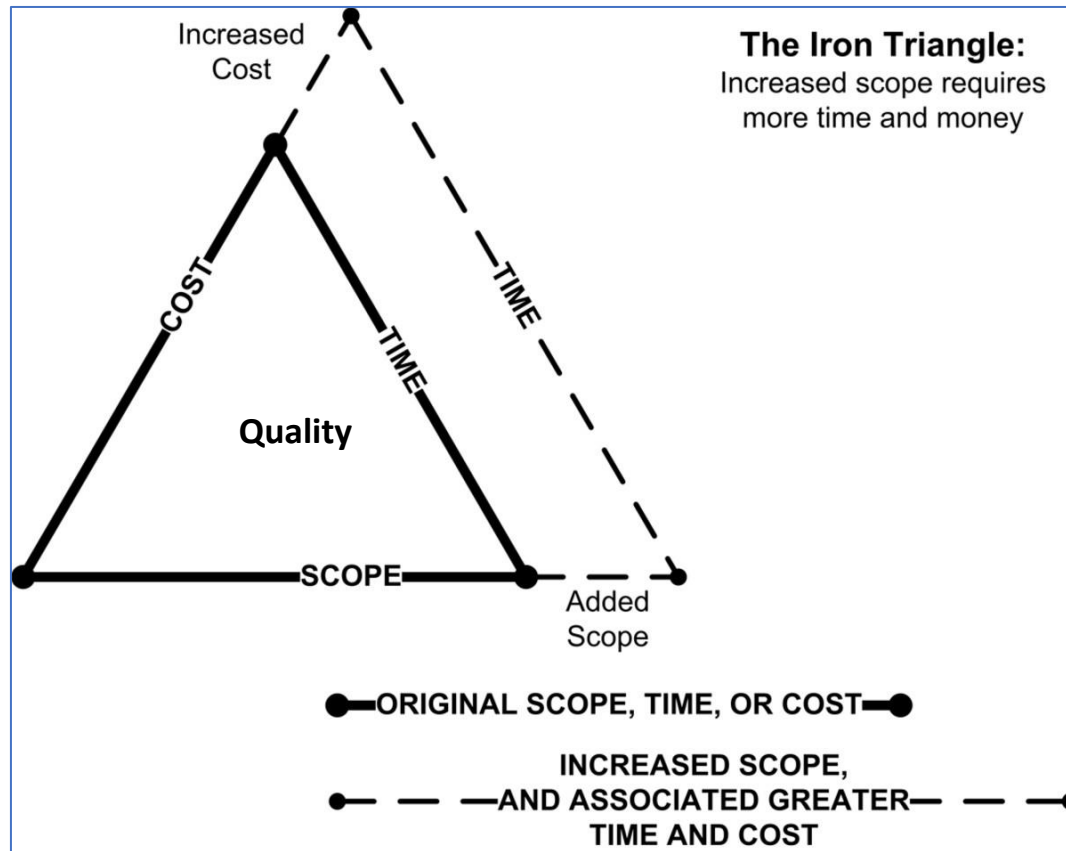
# Iron Triangle – your friend to steady the ship when things change

- How do we keep on track? How do we get this back on track?
- Something always changes – how do you prepare yourself for changes?
- Let's use the Iron Triangle to assess the impacts of decisions

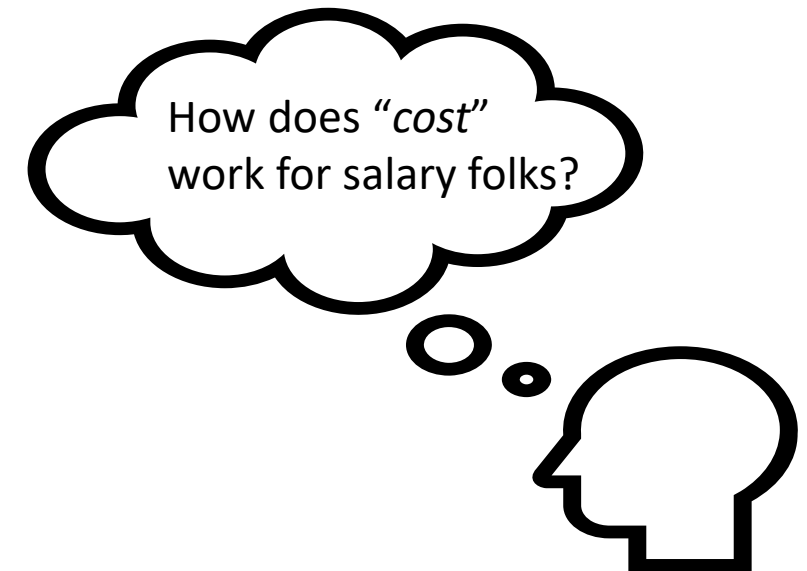


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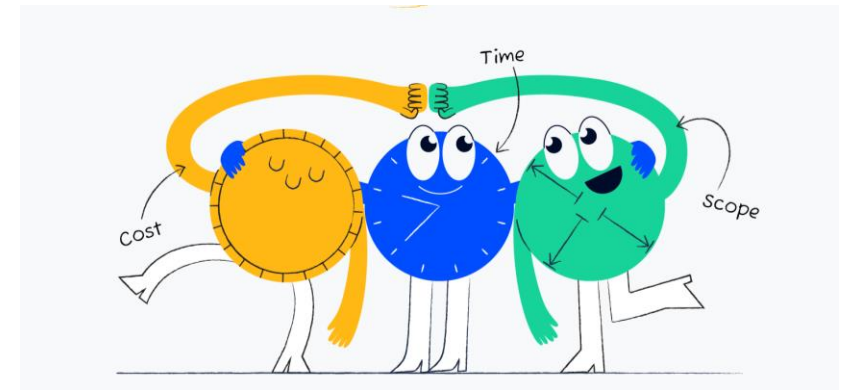
# Iron Triangle – your friend to steady the ship when things change



The Iron Triangle is a reminder that changes in one constraint necessitate changes in others to compensate or quality will suffer.



# Iron Triangle - examples



Priority	Example scenario	Impacts
<b>Cost</b>	You must stay within a fixed budget	<ul style="list-style-type: none"> <li>• Scale back the scope</li> <li>• Reduce quality of deliverables</li> <li>• Adjust the project schedule</li> </ul>
<b>Time</b>	You must accelerate the timeline	<ul style="list-style-type: none"> <li>• Use more resources, increased cost</li> <li>• Cut back on scope and/or quality</li> </ul>
<b>Scope</b>	You must accommodate new features	<ul style="list-style-type: none"> <li>• Increase time as scope changes</li> <li>• Increase costs as new features are added to scope</li> </ul>

# KNOWLEDGE CHECK #3



# Circling back

# Tying it all together



- Adding structure to our side project with planning activities
- Discuss possible challenges, road blocks that could de-rail the effort
- Remember the Iron Triangle when making decisions when the project is in progress
- “Right size” the project and “right size” the structure

# What can I do right now?

- **Identify who is your support/sponsor/project owner**
  - Draft a project charter to share and get approval
- **Assess your project plan or create one**
  - Determine collectively how to track progress and solicit input from the working team
- **Send communications to all involved at this time letting them know you are adding structure**
  - **Potential: Meeting more frequently**
  - **Set expectations regarding status meetings vs working sessions**
- **Review & update your resource list**
  - **Call out any gaps in representation, confirm who is responsible for each area**

# The Dashboard side project revisited

Before	After
<ul style="list-style-type: none"><li>• Inconsistent progress</li><li>• Little accountability</li><li>• Side project mentality</li><li>• Unknown go-live</li><li>• Meetings not frequent enough</li><li>• No set agenda other than “updates”</li><li>• Unable to determine downstream impacts, dependencies (Iron Triangle who?)</li></ul>	<ul style="list-style-type: none"><li>• Consistent progress</li><li>• Increased accountability</li><li>• Committed resources</li><li>• Go-live date / project end is known</li><li>• More frequent meetings</li><li>• Pointed agendas, notes for reference</li><li>• Decisions are reviewed and assessed for impacts (Iron Triangle, our friend)</li></ul>



# Call to action – Take this and run!



Add formalization to your side projects with the following:

- One slide charter
- Project schedule (group activity)
- Status meetings
- Resource List
- Iron Triangle mentality

If all else fails, reach out to the Research PMO for support!



# Final Questions?



Don't Forget to Complete your Survey

# 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 (1/3)



- **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 (2/3)



- **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>

# Additional resources (3/3)



- **All previous RPMO BBL Materials:**
  - <https://www.research.chop.edu/research-project-management-office/events>
- **Work Breakdown Structure (WBS) reference:**
  - <https://www.research.chop.edu/sites/default/files/2022-09/Research%20PMO%20Brown%20Bag%20Lunch%20FY23Q1%20Final.pdf>
- **RACI Matrix references:**
  - <https://www.projectmanagement.com/wikis/234008/raci>
  - <https://clickup.com/blog/raci-matrix-examples/>
  - [https://en.wikipedia.org/wiki/Responsibility\\_assignment\\_matrix](https://en.wikipedia.org/wiki/Responsibility_assignment_matrix)



# REFERENCES



# Reference list

Image source slide 3: [The Psychology of Side Projects and Creative Hobbies \(buffer.com\)](#)

Image source slide 3: [Side Projects \(devdojo.com\)](#)

Image source slide 4: [Project management triangle – Wikipedia](#)

Image source slide 4: [We do it well – ProgrammerHumor.io](#)

Image source slide 12: [Digital leadership](#)

Image source slide 13: [Liz Fosslien image](#)

Image source slide 14: [Priority blocks](#)

Image source slide 16: [Breakdown of issues](#)

Image source slide 19: [Planting tree](#)

Image source slide 20: [bull whip](#)

Image source slide 21: [pillars](#)

Image source slide 27: [projects are a group activity](#)

Image source slide 27: [holistic software development](#)

Image source slide 35: [changing priorities cartoon](#)

Image source slide 36: [SoHow to Lay Out a Project Management Plan – HubPages](#)

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