Project Metrics

How to Monitor Project Progress

Presented by: Roberta MacDonald
Senior Manager

Date: October 8, 2009

BEACON® PARTNERS

HEALTHCARE MANAGEMENT CONSULTANTS

IT and Health Care: Current State

- Healthcare is in a continual state of change
- IT Projects are changing from a well defined event to a complex, ongoing process
- Projects are larger and more complex : integration, number of components, workflow or processes impact, regionalization
- Increased amount of change in organizations
- Heightened pressure to “prove” that value was achieved
- Increased complexity of IT Infrastructure and application portfolios
- Decreased tolerance for performance problems

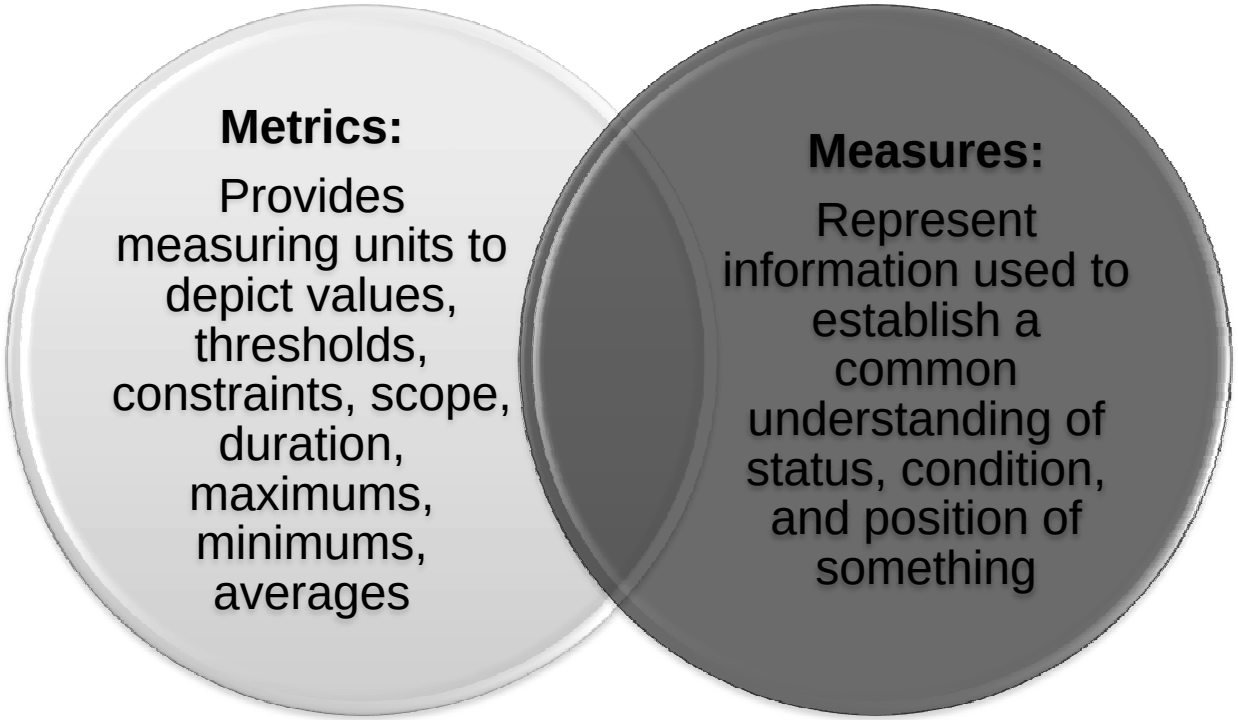
BEACON® PARTNERS

Are we there yet?

"Well, we are just under budget but we have another two months to go which is a month more than we planned but that is OK because the scope blew out a bit early on and that was all approved. It has taken more hours then we expected to complete the current phase. Given everything, I think we will probably be all right."

BEACON®
PARTNERS

What are “Metrics”



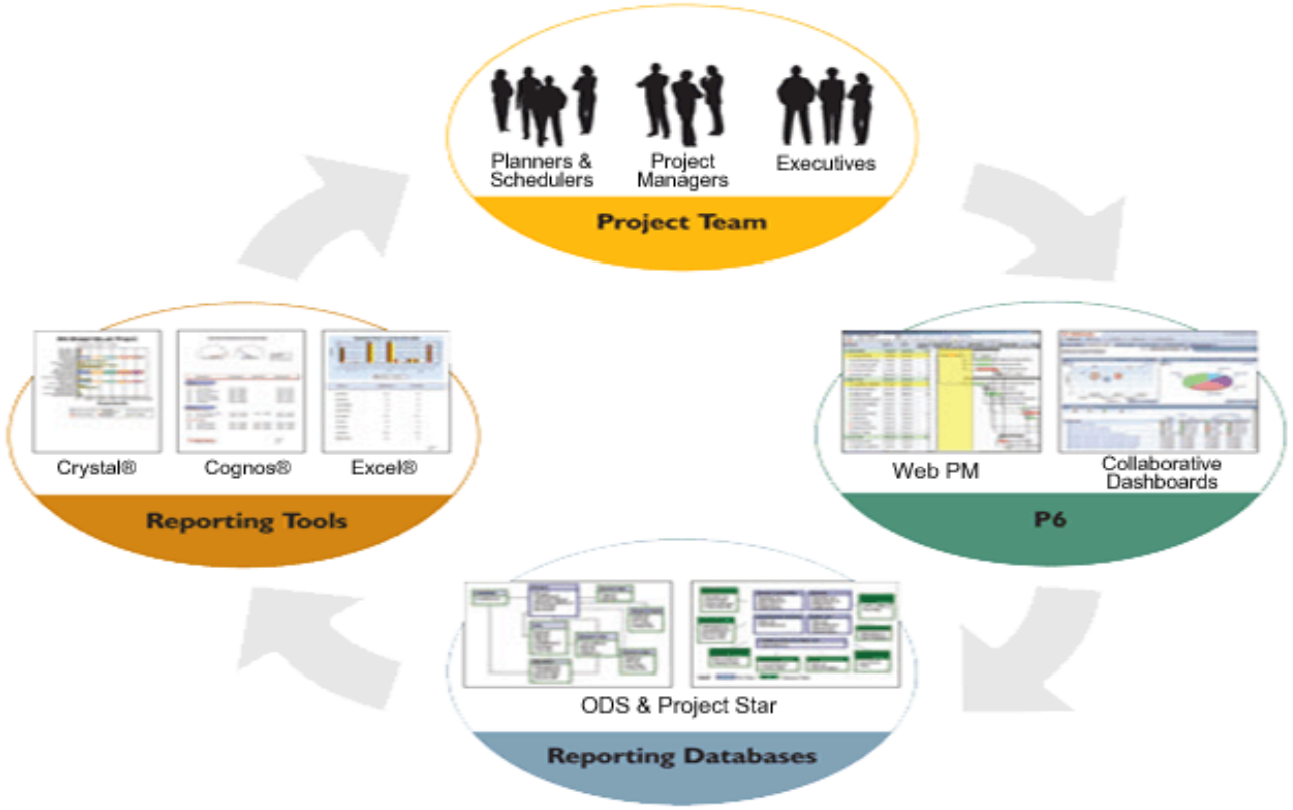
BEACON®
PARTNERS

Metrics in Action

CAL

BEACON®
PARTNERS

Project Metrics – The Model



Enterprise Reporting Databases - Cycles (Sample Diagram)

BEACON®
PARTNERS

Project Metrics – The Reality

- Keep it simple
- The reporting metrics must add value, not just add work
- Have a clear vision and expectations of project success
- Reflect the essence of project objectives
- NO extraneous information
- One metric does not fit all the requirements for a project or situation
- One metric does not fit all projects
- What works for **your** organization for **this** project?

BEACON®
PARTNERS

Where to Start?

An Assessment

BEACON®
PARTNERS

Step 1: Stakeholder Assessment

- What is the level of detail required: CEO vs CFO
- Frequency of reporting
- What is their comfort zone for different types of metrics?
- **Know your audience**

BEACON®
PARTNERS

Step 2: Project Assessment

- Short term v.s. long term
- External or internal budget
- External reporting requirements (C.H.I. eHealth funding)
- Use of external v.s. internal resources or both
- Vision of success
- Articulate project objectives
- Understand the scope
- Define deliverables

BEACON® PARTNERS

Strategies for Defining Metrics

- Evaluate strategies by project and stakeholder requirements
- Evaluate options for metrics with S.M.A.R.T. criteria:
  - Specific
  - Measureable
  - Achievable
  - Relevant
  - Timely

BEACON® PARTNERS

Project Metrics: The Top 5

- Time (schedule)
- Cost (budget)
- Resources
- Scope
- Quality
- Actions (Action items Outstanding)

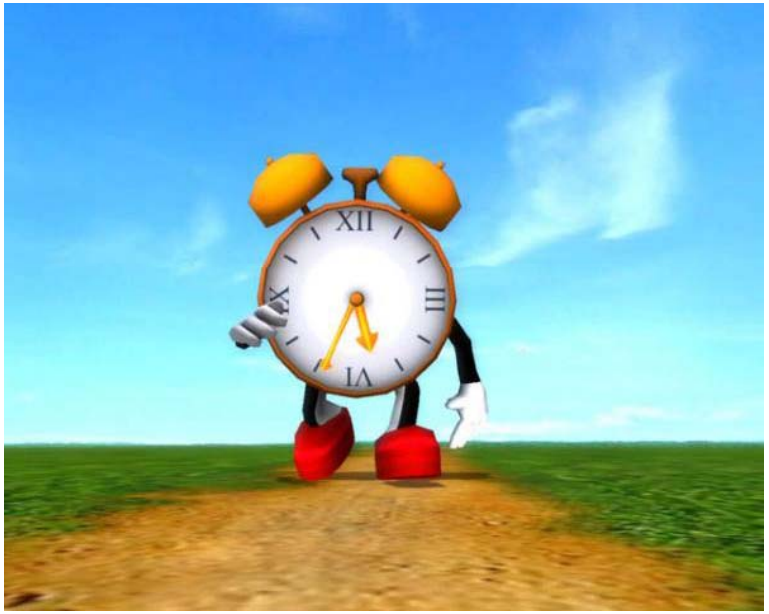
Summary Project Status
Based on the color legend below, indicate green, yellow, or red for the reporting periods of each item. Any item classified as red or yellow requires an explanation in the comment boxes that follow this section. Additional priority items can be added to the list for status reporting.

Select one color in each of the Reporting Period columns to indicate your best assessment of:	Last Reporting Period [MM/DD/YYYY]			This Reporting Period [MM/DD/YYYY]		
1. Overall Project Status	Red	Yellow	Green	Red	Yellow	Green
2. Schedule	Red	Yellow	Green	Red	Yellow	Green
3. Budget (capital, overall project hours)	Red	Yellow	Green	Red	Yellow	Green
4. Scope	Red	Yellow	Green	Red	Yellow	Green
5. Quality	Red	Yellow	Green	Red	Yellow	Green
	Red	Yellow	Green	Red	Yellow	Green

BEACON® PARTNERS

Are we on Time?

- % task complete
- % tasks incomplete
- % tasks over due
- # milestones met on time
- # milestones outstanding
- Set caution and red flags at critical points, for example:
  - the project has an issue when 80% of tasks are incomplete when project is half completed



BEACON®
PARTNERS

Project Cost Management: Are we on Budget?

- Create a cash flow, e.g.
  - Project budget of 18,000 for a 6 month project = $3,000 per month
- Create a month by month of expenditure
- Assign project codes for analysis to measure time spent on specific projects

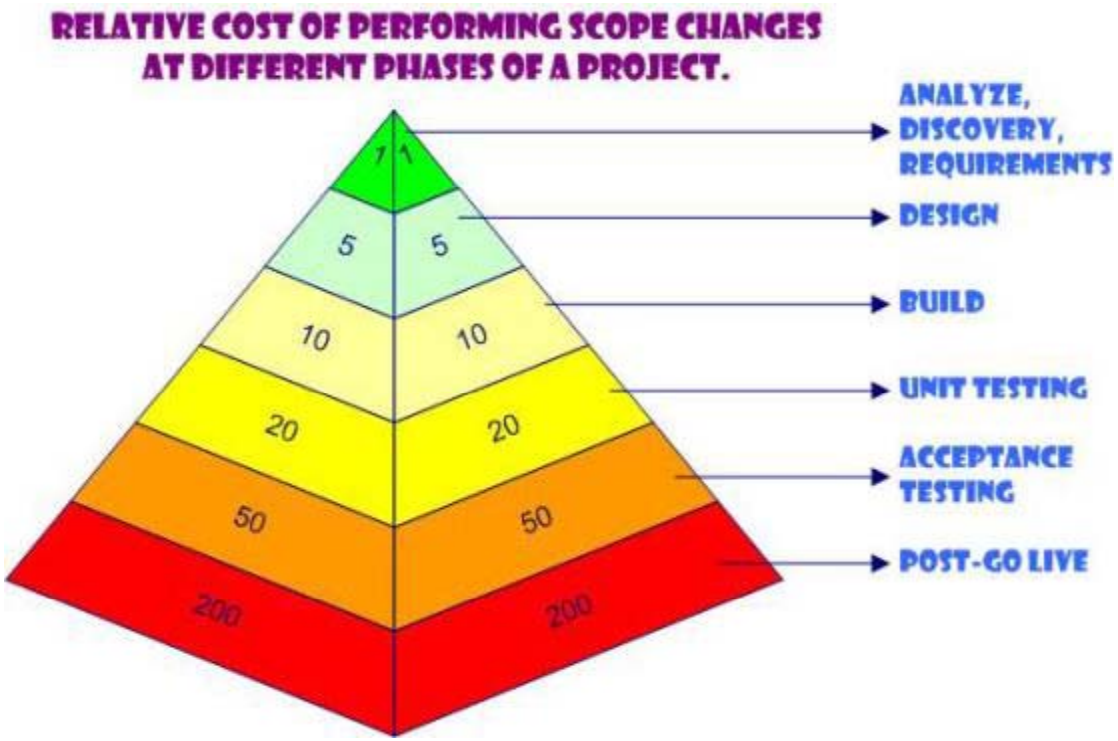
BEACON®
PARTNERS

Resources

- Too many?
- Not enough?
- The right resources?
- Availability
- Right skill set: consultant may be more expensive per hour, but able to complete the work faster
- balance

BEACON® PARTNERS

Scope

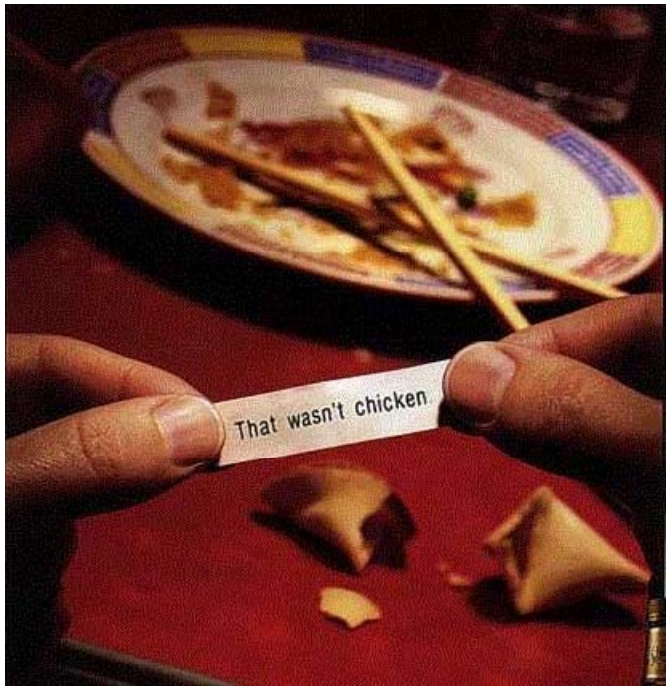


- Implement formal change management documentation
- # of change requests

BEACON® PARTNERS

Quality

- Have the deliverables been met?
- Have the objectives been achieved?
- Are there many outstanding issues?
- Are the users (customers) unhappy?



BEACON®
PARTNERS

Actions

- # outstanding items on task list
- # remaining items on task list
- # show-stopper items open before go live
- # issues on Risk Log
- Create an action item for every problem, assign a responsible person and date for resolution
- Key: how many actions are overdue!

BEACON®
PARTNERS

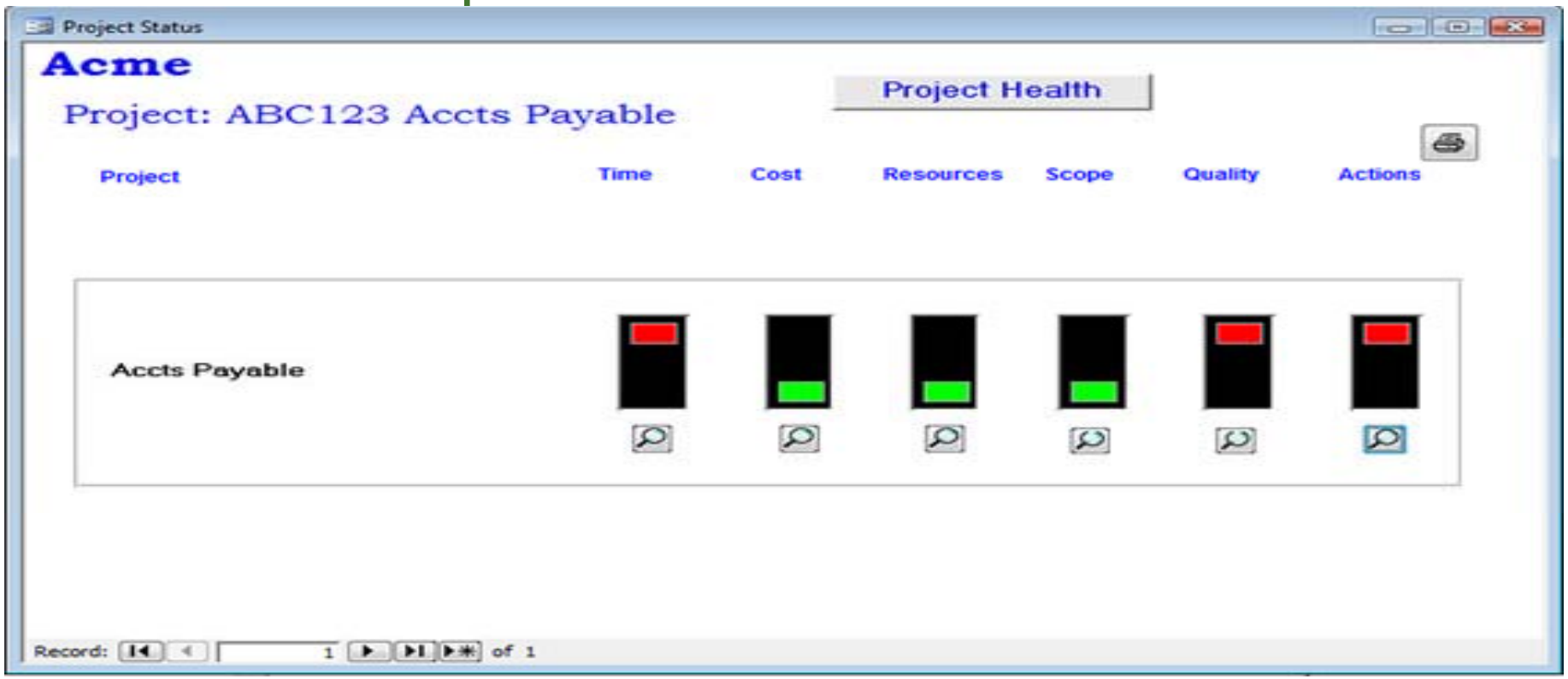
Collection

- Lots of software options:
  - Eclipse
  - Workspace.com
  - Project Insight
- Use the tools you have: excel, MS Project
- Investigate options to maintain internal project hours (true cost of projects)
- Keep it simple

BEACON®
PARTNERS

Reporting Options

- Keep it focused and specific to the audience
- Visual options



Reporting Options: Status Report

Project Metrics		
Measure	Numbers	Percentage
Tasks Complete	[13 of 54]	[24%]
Tasks in Progress	[26 of 54]	[48%]
Tasks not Started	[28 of 54]	[52%]
Time spent	[18 of 86 weeks]	[21%]
Time remaining	[68 of 86 weeks]	[79%]
[Project Specific Measure]		

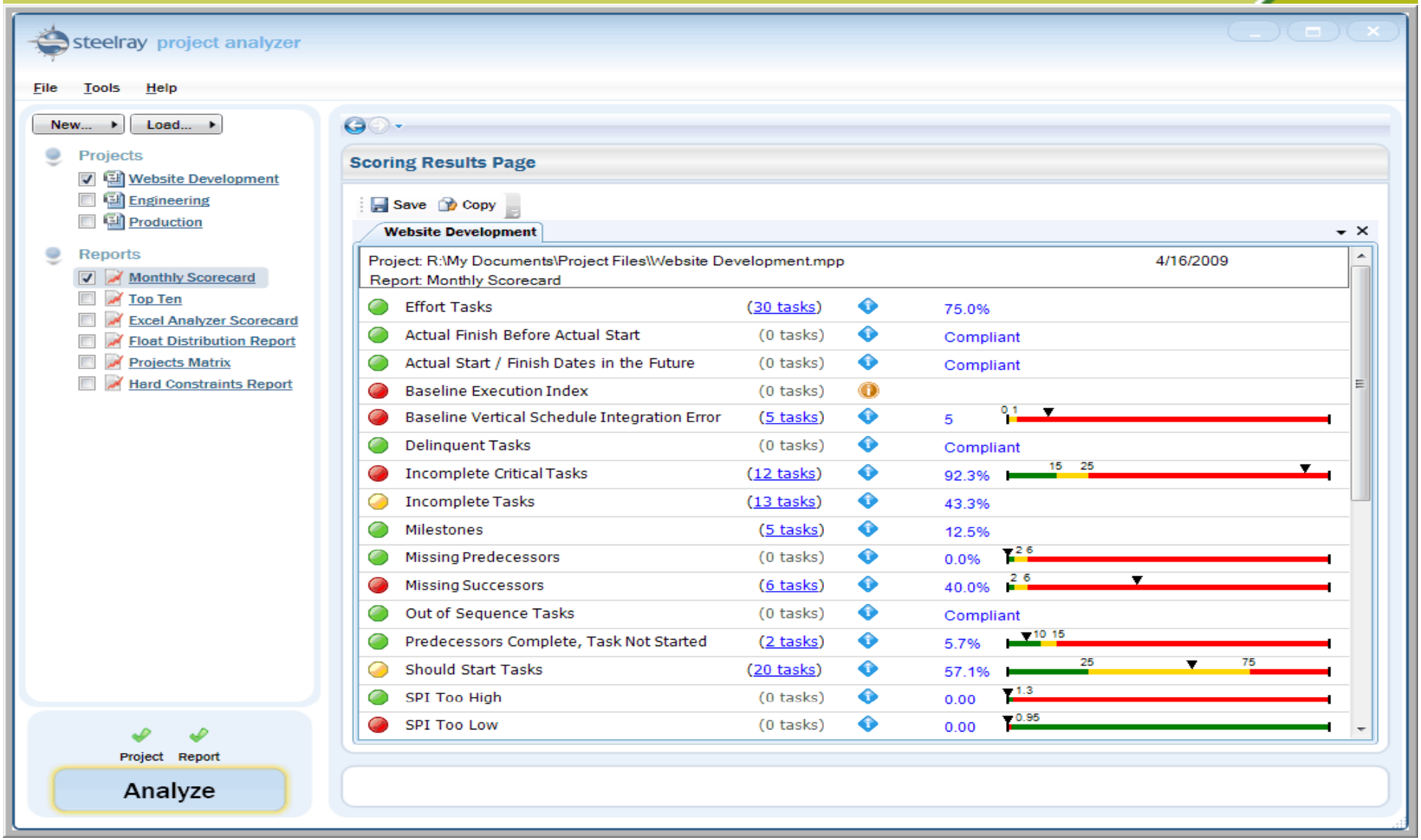
BEACON® PARTNERS

Balanced Score Card Reporting

Financial Perspective Project Costs Business Value	**Customer Perspective** On time delivery Final product usability Workflow issues Client satisfaction
Internal Business Processes Improved work processes Reduced or reallocated staff Improved clinical communication Reduced Length of Stay	**Learning and Growth** Improved data quality Improved access to clinical information

BEACON® PARTNERS

Dashboard Reporting

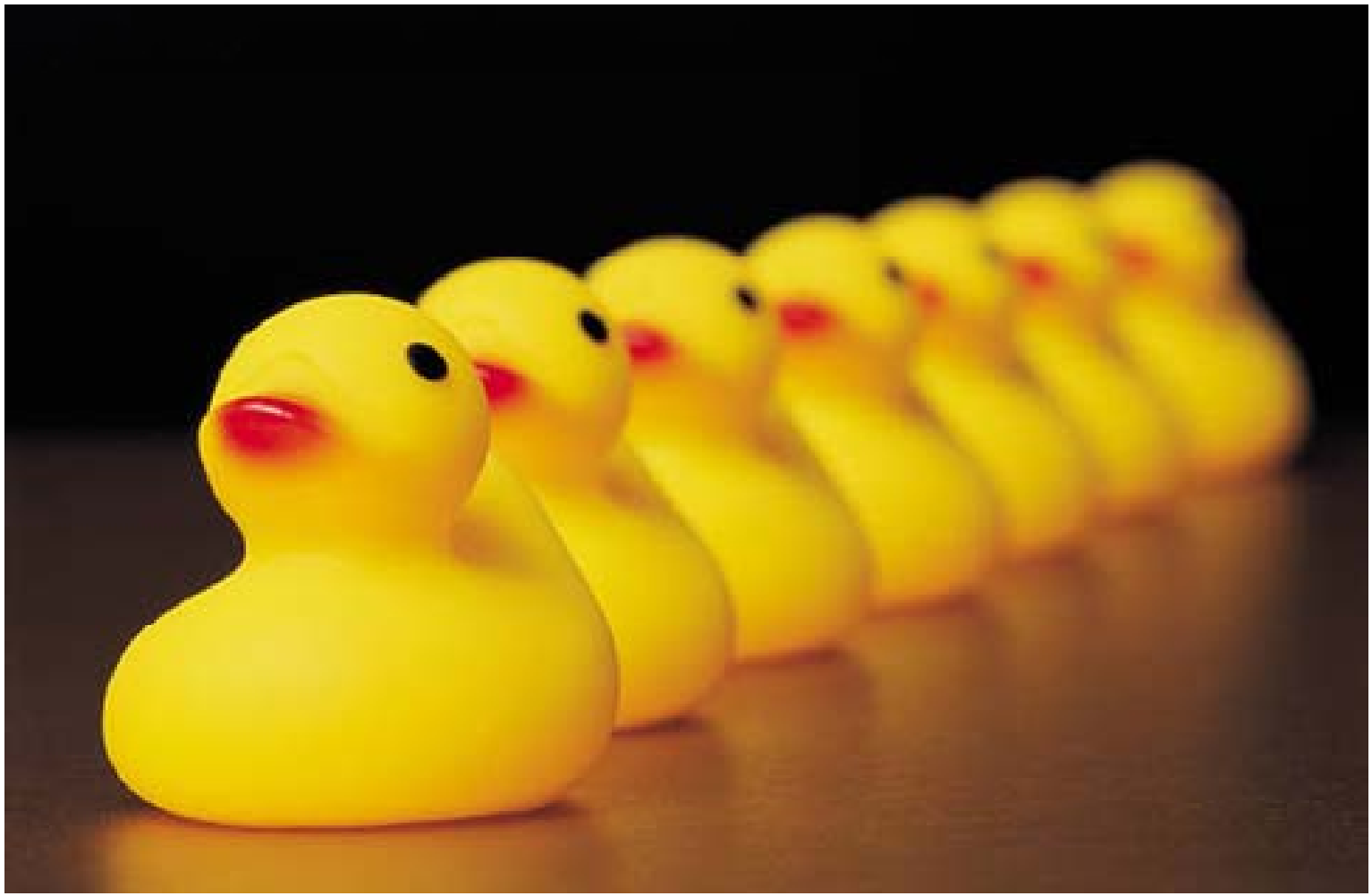



PROJECTMANAGER.com
Sign up NOW
Health
settings
Project
Time
Cost
Resource
Progress
Efficiency
Project A
Project B
Project C
Project D
Remkos Project
Jasons Project
print
email
Cost
actual
planned
baseline
50,000
40,000
30,000
20,000
10,000
0
Project A
Project B
Project C
Project D
Remkos Project

PM Dashboard

BEACON®
PARTNERS

Questions?



BEACON®
PARTNERS

Thank You

Roberta MacDonald
rmacdonald@beaconpartners.com

BEACON® PARTNERS

HEALTHCARE MANAGEMENT CONSULTANTS