

A View From Inside (The Sponsor's Head)

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- Executive Vice President Tabula Rasa Health Care
- Executive Vice President, Cognisight
- COO and VP Marketing @ EBS-RMSCO
- Division Head for Medicaid @ Excellus BCBS & Executive Director of Univera Community Health
- VP Marketing Operations
- Project Management for 25 years
 - More than \$250M worth of projects
 - Individual contributor & Sponsor
- Lead Team of Marketing PMs to obtain PMP certification in 2005
- Project Management since 1980s

Outline

- Satirical look at PMs across the PMBOK Knowledge Areas
 - personalities are real; identities withheld!
- What *great* PMs do
- Personal perspectives about sponsors

Framework & Organization

Framework

- These phases are just administrative hassle
- Trust me – the work will get done
- Be sure to surprise me when you're not going to make a phase exit

Framework & Organization

Organization

- It doesn't matter or don't know how the company/project is organized
 - Functional, matrixed, projectized
- “I don't know who **they** report to, I just need more resources to stay on schedule”

From A Sponsor's Point of View, A Great PM....

Lifecycle

- Thinks about the next phase before we actually get to it
- Begins managing the phase exit documentation in advance

Organization

- Knows the form of organization and leverages it
- Knows the stakeholders and how they fit into the project
- Leverages the sponsor for internal navigation, political literacy guidance and/or assistance

Integration Management

- It was the shortest chapter so it really isn't that important
- So long as everyone does what they're supposed to do, the project will be fine
- I don't have time to look at historical information
- I don't have time for lessons learned, I'm already assigned to my next project, or, better yet...
- Conduct Lessons Learned as a single contributor

From A Sponsor's Point of View, A Great PM....

- Is a great integrator and values collaboration
- Understands that the time spent upfront in integration saves times (& reduces risks) throughout the duration of the project
 - Embraces the inherent value of understanding historical perspectives
 - Review prior Lessons Learned & conducts new Lessons Learned.
- Conducts frequent & regularly scheduled “huddles” to maintain pulse on integrated activities
- Looks for ways to bring integrated perspectives & stakeholders to the table with the Sponsor

Scope Management

- Has the attitude that the only “real” stakeholder is the sponsor. “As long as s/he is happy, I’m good!”
- Is ignorant of, or benign to regulatory constraints and doesn’t manage the impact on a project.
- Has posture of silence = approval

Scope Management

- Isn't thorough with Vision/Scope.
- Takes a release or iterative approach to execution based on when work gets done

From A Sponsor's Point of View, A Great PM....

- Advocates for what is best for the project
- Embraces stakeholders and conducts a thorough stakeholder analysis
 - Stakeholder Inventory
 - Who are they?
 - What is impact of project on them? (H/M/L)
 - What is their level of influence? (H/M/L)
 - What is their current attitude? (+/-/u/n)
 - Have a planned response
 - Conduct at onset and each phase gate

From A Sponsor's Point of View, A Great PM....

- Dogs sign off of Vision/Scope
 - Non response \neq approval
 - Escalates when needs help from the Sponsor
- Uses iterative releases to begin delivery/ROI as soon as it is possible.

Time Management

- Assumes/defends the work will get done on schedule because everyone is working hard.
- Don't make time to regularly communicate with the team and/or PMs on dependent projects – because you shared the dependency at the kick-off meeting.
- Slack is for slackers!
- Don't build in enough contingency & don't track your burn rate

From A Sponsor's Point of View, A Great PM....

- Methodically determines & communicates objectively where we are with a project in terms of timeliness & variance
- Is thinking/planning ahead
 - Ties to Resource management to ensure that when we get “there”, we are ready
 - example

From A Sponsor's Point of View, A Great PM....

Portfolio Resources							
Status	RT #	Team	Description	Requested Start Date	Impacted Milestone	Yellow* (date)	Red** (date)
Filled		IT Product Infrastructure	Project Manager/Administrator	4/3	DST delivery	5/15/07	
Filled		Benefit Accumulator (dependency)	Product Manager (Project dependency for New Blue/Green Rx cap)	7/15			

* Project status will go YELLOW if resource is not secured by indicated date

** Project status will go RED if resource is not secured by indicated date

From A Sponsor's Point of View, A Great PM....

- Knows when it is best to crash or fast track
- Is savvy when there is a need to re-estimate
 - Really critical w/dependent projects

Cost Management

- Believe that if a sponsor wants to keep a project on track s/he will always give you more money
- Don't worry about cost variance until the end – it's a moving target
- Don't know the organization's view on cost of internal staff (charged/not charged to the project)
- Beg for celebration funds

From A Sponsor's Point of View, A Great PM....

- Asks for a comparable project to begin analogous estimation
- Thoroughly understands & conveys budget impacts (+ or -) as the project moves through planning
- Intimately understands & conveys upcoming budget risks and win falls

From A Sponsor's Point of View, A Great PM....

- Responds to sponsor requests for monthly budget meetings
 - Better yet, s/he requests them
 - Is prepared w/ incurred but not reported expenses that impact the variance
- Understands & provides triple constraint options
- Budgets for reasonable celebration funds

From A Sponsor's Point of View, A Great PM....

- Articulates the cost of automation vs. the cost of manual

200 clients x 30 min / 2 x \$25/hr = \$750 + \$250
(100% quality check) + 5% rework @ \$65 = \$1065

vs.

\$60,000 disposable development + testing \$ +
debugging \$

Quality Management

- If you want it on time - here's what has to give.
- 95% accuracy is perfectly respectable
 - Don't present quality review/defect data in relation to the whole, and
 - Don't present implications of the quality review/defect data
- Improving an existing process is gold plating
- Believe quality is a post implementation dynamic

From A Sponsor's Point of View, A Great PM....

- Understands that ROI is a determinant of gold plating vs. process improvement
- Respects operations and sizes the impact of manual work
 - Overtime, staff burnout and/or quality risks
 - Understands acceptable limits and the tangible fallout
 - 5% of 100 = 5
 - 5% of 1,000,000 = 50,000

From A Sponsor's Point of View, A Great PM....

- Presents quality/defect data as
 - A % of the whole
 - With specific implications
- Integrates quality into the process
 - better yet, invites meeting with Internal Audit

Human Resource Management

- By all means, assume the project sponsor is wired the way you are
- Only care about the project team. Dealing with Sr. Management, Stakeholders & Functional Managers is just clutter
- Don't worry about or manage resource allocation – you asked for them in your plan and/or CBA

From A Sponsor's Point of View, A Great PM....

- Gets input on what the sponsor needs and shares wants s/he needs as a PM
- Understands all of the project roles and leverages the sponsor for items affecting Sr. Mgmt, Stakeholders and functional managers
- Is manic about resources
 - Right person in the right role
 - Illuminates/escalates when someone isn't delivering
 - Is always thinking about the next phase

From A Sponsor's Point of View, A Great PM....

- Embraces team building opportunities as the team progresses; has no or low cost/low resource intensive ideas in their PM toolkit.
- Applies the different PM powers & leadership styles based on situational analysis
 - Recognizes value in expert & reward power
 - Knows when to use facilitating, coaching, support consultations and consensus (w/caution)

From A Sponsor's Point of View, A Great PM....

- Is an assertive risk manager and minimizes conflict
- Embraces conflict when it arises and “burn the churn”
- Budgets for, and collaborates with the sponsor on celebrations and recognitions
 - Little events with big impact
- Tests & reports team temperature

Communications Management

- Don't prioritize communications
 - No news is good news
 - No need for regular updates
 - Only talk to sponsor when there is a problem
- Don't worry about administrative close-out
 - You only needed to know that stuff to pass the PMP exam

From A Sponsor's Point of View, A Great PM....

- Respects and expect that communications is 90% of the job.
- Routine communication is vital to a healthy project
- Can't afford not to have regularly scheduled meetings
 - Sponsor Meetings
 - Stakeholders/Steering Committee

From A Sponsor's Point of View, A Great PM....

- Treats Administrative Close Out is as importantly as the other phases
 - Collaborative lessons learned
 - Present to sponsor/other key stakeholders
 - Release (and thank) resources

Risk Management

- Deny it when asked, but you know risk planning is a waste of time; deal with it when the issue hits
- If it can't be quantified, then it isn't a real risk
- Avoidance and transference are your only risk management strategies

From A Sponsor's Point of View, A Great PM....

- Conducts thorough risk analysis at the onset of the project and revisits prior/post phase exit
- Gets input from the team
- Isn't dealing with risks/conflicts than s/he isn't working hard enough
- Shed a PM who doesn't professionally deal with risk

From A Sponsor's Point of View, A Great PM....

- Add higher % of management reserves when dealing with new technology
- Reviews risk as part of lessons learned and updates as part of historic documentation

Procurement Management

- Hands-off – that is for the purchasing and/or legal departments
- Don't ask/follow organization's SOP on RFP guidelines
- Don't have objective selection criteria
- Don't worry about contract closeout
 - Belongs solely to purchasing/legal

From A Sponsor's Point of View, A Great PM....

- Complements the efforts of the purchasing/legal departments
- Has fundamental understanding of the types of contracts (pros/cons)
- Manages the status/ completed work as part of the WBS
- Understands the risk/issue of an un-signed contract.

From A Sponsor's Point of View, A Great PM....

- Understands organization's RFP processes and invokes professional responsibility when needed
- Leads with objective selection criteria
- Ensures smooth transition of contract from project to business owner

Professional Responsibility

- PMPs have PMP credential so don't worry
- Have to give PMP time off to go to the conference to earn PDUs or will lose certification
- There is only one stakeholder to care about and that is the sponsor

From A Sponsor's Point of View, A Great PM....

- Manages professional responsibility professionally
- Planful around earning PDUs
 - Shares what s/he knows for the benefit of a project
- Is masterful at balancing stakeholder interests
- Drives professional & cooperative interaction with team and stakeholders

Personal Perspectives About Sponsors

- You have the right and need to have routine time with your sponsor
- You have a professional responsibility to each other
- You may need to guide a novice sponsor
- Hold your sponsor accountable
- Introduce a team temperature measure

Personal Perspectives About Sponsors

- Sponsors should be insisting on regular sponsor meetings
 - PMs should invite others to attend; consider team leads
- Sponsors should be conducting a Peer Stakeholders/Steering Committee
 - Ensure routine communication:
 - Status, upcoming events/activity/big deliverables
 - Illuminate/escalate/vett
 - Share divisional concerns that aren't coming up through the project team
 - Ask about “noise”
 - Celebrate successes

Personal Perspective About Sponsors

- Your experience with a really awesome sponsor?



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