Setting Up A Program
For Success

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MBA, ITIL, FHIMSS, CPHIMS

Outline

- Program vs project
- Complex program examples
- What to do in the first 90 days
- Research
Level Set
Program vs. Project

- **Program** definition: “A group of related projects, subprograms, and program activities managed in a coordinated way to obtain benefits not available from managing them individually”  PMBOK Fifth Edition ©2013

- Reality? Term often non-PMI type of program
Question

☐ How many of you have led a program based on that definition?

☐ At your tables one or two volunteers give an elevator speech of a program or a mega project you led or were part of (10 seconds each)
Real Life Example 1

Organize Mayo Clinic Information and Knowledge, making it universally accessible, useful and actionable

...KCMS – Knowledge Content Management System Program

Elevator Speech
Complexity
Example 1 - KCMS

☐ 5 projects
☐ 100+ team members
☐ $11M & multiple checkbooks
☐ Over 50M visitors a month mayoclinic.org
☐ 5 major stakeholders
☐ Technology–ontology & content management
☐ 30 developers in Argentina
Example 2 - HLSL

A connected experience that leverages Mayo Clinic knowledge to encourage positive change in lifestyle behaviors for improving or maintaining health and well-being

...Healthy Living Service Line Program (HLSL)

Elevator Speech
Complexity Example 2 - HLSL

- 3 development organizations – Mayo Clinic, Everyday Health, Workplace Options (MN, NY, NC)
- Migrate hundreds of existing customers, gain new accounts (sales)
- Integrate with an on-site program too
- Multiple checkbooks
- More than $5M
Example 3 – Network Renewal

Aggressive refresh of Mayo Clinic’s network technology protecting Mayo’s patients and their information. Increase capability, scalability, and growth while offering increased security for all of Mayo Clinic business

...Network Renewal Program

Elevator Speech
Complexity
Example 3–Network Renewal

- 432 buildings
- Over $300M
- Over 11,000 devices
- 7 states
- 52,000 people affected
- Multiple stakeholders
- Refresh hardware in less than a year
Level Set
Initiation & Planning Activities

One day, someone had an idea

Vision, scope, schedule

Business case, charters, budget

Something was approved
Question

- What should you focus on in the first 90 days?
- At your tables each person share one item that comes to mind and someone write these down for me to take back for my research (2-3 min)
What to focus on in the first 90 days

- The what - vision & scope
- Relationships with key stakeholders
- Project organization & governance
- Cadence with communications
- Tools and processes
KCMS Project Organization & Governance

Stakeholder Leadership
- John Wald, MD

Project Steering
- Andrew Galbus, PM

Planning and Escalation

Core Team
- Wendy Flanery
- Anne Larsen
- Jane Shellum
- Chuck Charbeneau
- Jon Blixt

CMS (Sitecore) Team
- Sitecore Delivery Team

Semantic Services Environment Team

Content Reconciliation

4D Replacement

Workstreams versus projects
Project Steering Team Responsibilities

- Provide executive leadership guiding the overall project
- Communicate to the Office of Information and Knowledge Management on status of project
- Escalation point
- Act as an advisory board for changes and clarifications in scope, schedule, and resources
KCMS Core Team Responsibilities

- Overall resource, schedule, scope, cost management
- Draft operations model
- Project reporting, budget
- Communication & (project and organizational) change management
- Issue & risk management
- Vendor, implementation partner management
- Stakeholder engagement
Program Organization

1. **Equipment Refresh** – Replacement of legacy network equipment to support analytics, access control and segmentation capabilities.

2. **Network Analytics**

3. **Network Access Control and Segmentation**

4. **Secure Internet Presence**

5. **Operational Readiness** – Transition from the project to operations
Network Renewal | Implementation Program Structure

Build Relationships

Across 3 Organizations: Mayo IT, Mayo Security, Cisco, KPMG Consulting

Executive Oversight
Dr. Peter Amadio, Dr. Dawn Milliner, Dr. Kevin Whitford, Cris Ross, Darrell Sandeen, Michael Ryan, Jim Nelms, Jessica Grosset, Steve Demuth, Jeff Stevens, Randy Regimbald, Shawn Riley, Jodi Lee, Atif Mir, David Clingan, Steve Depoe, Tim Williams, Pat McCarty

Program Leadership
Jessica Grosset, Jeff Stevens, Shawn Riley, Jeff Tri, Jodi Lee, Atif Mir, Steve Depoe, David Clingan, Karen Ferrero, Rick Puetz

Program & Architecture Management Office (PAMO)

<table>
<thead>
<tr>
<th>Program Management &amp; Support</th>
<th>Architecture</th>
<th>OCM</th>
<th>IT Finance &amp; Procurement</th>
<th>Contract Management</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jared Johnson – PMO Support</td>
<td>Rick Puetz – Network Architect</td>
<td>Kelly Liebbe – Adoption Svcs. Liaison</td>
<td></td>
<td>Sherry Coleman – Project Manager</td>
</tr>
<tr>
<td>TBD – Coordinator</td>
<td>Tim Lake – Solution Architect</td>
<td>Diane Joyce – PA Liaison</td>
<td></td>
<td>Anne Barrett – Team Member</td>
</tr>
<tr>
<td>Caren Woodruff – Solution Analyst</td>
<td>David Knight – Solution Architect</td>
<td>Frank Wrogg – P/T comm. analyst</td>
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</tr>
</tbody>
</table>

Equipment Refresh
Dave Rahman – (R) Project Lead
Roger Ellsworth – Project Manager
Rahul Jain – Solution Architect
Terry Ammons – Waycross Coor.
Brian Kennedy – NWWI Coor.
Scott Goodwin – SWMN Coor.
Carol Smith – SEMN Coor.
Matt Hill – SWMN Coor.
Randy Morrel – FL Coor.
Shane Helton – AZ Coor.
Fieck & Mindrum – RST Coor.
Karla Stremitzer – D.C. Coor.
Tom Young – Other Coor.

Network Analytics
Scott Evers – (R) Project Lead
Mike Evans – Project Manager
Sam Rahman – Project Manager
Dale Lyke – Solution Architect
Ken Mills – Solution Architect
Steve Short – Solution Architect
Tom Nelson – NA Engineer
Hien Vu – NA Engineer
Karla Stremitzer – D.C. Coor.
New FTE (Q2 ’15) – TBD
New FTE (Q4 ’15) – TBD

Network Access Controls / NS
Brian Cada – (R) Project Lead and Solution Architect
Mike Evans – Project Manager
Niten Vedi – Solution Architect
Brenda Gottfredson – Solutions Architect
Karla Stremitzer – D.C. Coor.
New FTE (Q2 ’15) – TBD
New FTE (Q4 ’15) – TBD

SIP
Christina Ellenburg – (R) Project Lead
Mike Evans – Project Manager
Erik Barber – Solution Architect
Bernardino Tellez – Solution Architect
Phil Truesdale – TBD
Brian Wacker – TBD
Jessica HebenStreit – TBD
Richard Noel – TBD
Karla Stremitzer – D.C. Coor.

Operational Readiness
Jeff Tri – (R) Project Lead
Bjorn Hansen – Project Manager
Avro Roychowdhury – Solution Architect
Suresh Tummala – Solution Architect
Neil Wimmer – Solution Architect
Steve Jobes – TBD
Karla Stremitzer – D.C. Coor.
All Project Leads (i.e. the Rs) – Thread Leaders
Contractor (Q2 ’15) – TBD

Mayo Lab
Christina Ellenburg – (R) Project Lead
Todd Mumbleau – Project Manager

Cisco Lab
Rick Puetz – (R) Project Lead
Bob Holt – Project Manager
### Healthy Living Service Line 2014 Timeline

**PM’s for features**
Teams surrounding skills & focus areas

**May Release:**
- Enhanced HLO Homepage
- Promote Coaching Eligibility
- Healthy Living Base May Reports
- Coaching May Reports
- KAM Integration
- 2-way goals
- Customer Service Lookup May Tools

**June Release:**
- SSO Connectivity (6/6)
- Coaching registration with ID only
- 2 way messaging

**August Release:**
- Coaching view of HA data
- Import Biometric Data
- Points Program
- Device Integration (Fitbit, Withings Scale)
- Stand-alone Coaching (with dual enroll)
- Customer Support/Lookup August Tools
- IDM registration enhancements
- Self-enroll Coaching without Health Assessment
- Expert Videos
- Client Data Migration

**December Release:**
- Enewslette/Syndication Suite
- HLP onsite (Individualized Fitness Plan)
- Contact Us Enhancements
- Spanish Health Assessment
- Coach Viewing of Tracker Data

### Requested Enhancements:
- Team Step Challenge
- Team Weight Challenge
- Food and Fitness Native Mobile App
- Stand Alone Health Assessment
- NCQA Accreditation
- Health Assessment – other languages

### Communications Example:

**GBS Begins Implementation of New Clients**

- 5/19: Earliest Go-Live (New, w/o SSO)
- 8/11: Earliest Go-Live (New, w/SSO)

**GBS Begins Transition of Existing Clients**

- 8/18: Earliest Go-Live (existing clients)

**NOTE:** RED font indicates a request to move to prior release – request under evaluation or clarification of deliverable pending.

### GBS Begins Transition of Existing Clients

- 8/18: Earliest Go-Live (existing clients)

**Release Components Delivered Monthly**

**Release Complete**

**Earliest “Go-Live”** (Actual Go-Live dates coordinated through Client Services Team)
Communications & Meeting Cadence

- Timing & regularity of meetings
- Clear agendas & timely minutes and action items
- Purpose and goals of agenda topics
- Audience
- Roles and responsibilities
- Regularly review what is/isn’t working
- Agile standup meetings
  (what did you accomplish, what’s next, blockers?)
Communication – Weekly / Every Other Week Status Reporting

Healthy Living Service Line Program Status

9-July-2014 Overall Status

- Yellow: Schedule
- Green: Budget
- Yellow: Scope

Overall Summary

With the August release features now being aligned to be implemented just in time for when they are needed by clients our overall program now changed to yellow.

- Budget remains green maintaining costs with the existing project.
- Scope is yellow because we have much in scope but we try to complete everything we can and are unable to remove any more scope.
- Schedule is yellow because although we now have a schedule that aligns with the needs of the business there is still moderation to meet the schedule.

Overall project status is green.

- Budget is GREEN.
- Scope is GREEN.
- Schedule is GREEN.

9/4 Release:

- HA Biometric Upload: Deployed
- 2 Way Secure Messaging: Deployed

SSO (WPO book of business migration): Testing has started, along with review of claims data to work out kinks in the WPO set up.

Expert videos: On schedule for 9/22 maintenance release with the full implementation of the videos.

Reporting: (multiple releases)

WPO developed:

- Final development continues on Operational Metrics and still on schedule to provide by 9/15.
- Monthly EmH metrics were provided on 9/5 and outcome mock is still in progress as development continues on Outcomes report.

Healthy Living Key Metrics

Total site visits: 8/31 - 9/6 - 530
Tools & Processes
Processes - Some ‘a’gile

- Co-location
- Project room
- Iterations
- Releases
- Daily scrums
- Scrum of scrums
- Retrospectives
- React and revise processes as needed
- Backlog
- On-boarding
- On-boarding
Tools

- **SharePoint**
  - Universal access for whole team
  - Version control
  - Single repository
  - Wiki

- **Microsoft Lync/Skype for Business**
  - Excellent for remote teams and IM for local teams too
  - Group chat, voice, video, share desktop
Tools

- MS Project master project (program) & subprojects (projects)
- MS Project Server/PWA/Team Foundation Server
  - Issue tracking and SQA done in same system linked to task and requirements
  - Project Plan tasks linked to TFS

Result - one cohesive plan used by entire team
Transparency

Accountability

Openness
Stories

- Use of Humor
- Site visit stories
- Holiday parties
- Happy hours

Argentina Beef

Baby Pictures for Holiday Party

Snow Tubing Break

Burndown
What to focus on

- The what - vision & scope
- Relationships with key stakeholders
- Project organization & governance
- Cadence with communications
- Tools and processes

Program definition: “A group of related projects, subprograms, and program activities managed in a coordinated way to obtain benefits not available from managing them individually” PMBOK Fifth Edition ©2013
Research To Date – Demographics of Respondents

128 participants

- PMP: 73%
- PgMP: 2%
- PfMP: 1%
- PMI-BA: 1%
- PMI-ACP: 1%
- Other (please specify): 21%
Research To Date – Demographics of Respondents

Experience as a PM

- 0-5 yrs: 12%
- 6-10 yrs: 24%
- 11-15 yrs: 24%
- 16-20 yrs: 26%
- 21+ yrs: 14%
Research To Date –
Demographics of Respondents

Nbr of projects managed

- 1-9 (16%)
- 10-19 (13%)
- 20-29 (24%)
- 30-39 (6%)
- 40-49 (6%)
- 50-59 (10%)
- 60-69 (3%)
- 80-89 (2%)
- 100-199 (14%)
- 200-299 (6%)
- 100-199 (14%)
- 20-29 (24%)
- 10-19 (13%)
- 50-59 (10%)
- 60-69 (3%)
- 80-89 (2%)
- 100-199 (14%)
- 200-299 (6%)
- 1-9 (16%)

Nbr of projects managed
Research To Date – What to Focus On

- 26% The what - vision & scope
- 26% Relationships with key stakeholders
- 25% Project organization & governance
- 23% Cadence with communications
- 3% Tools and processes

64 out of 128 answered this question
Research To Date – Other Themes

- 20% Confirm/acquire resources
- 14% Validate the budget
- 9% Schedule
- 8% Confirm requirements
- 8% Create a roadmap
- 8% Program management plan
- 6% Risk
- 6% Success criteria
Challenges - Themes

Communication
Adequate resources
Governance
Funding
Focus
Start before ready
Lack of leadership & direction
Unrealistic expectations
Not understanding the complexity or resource needs
Goals and defining success / Measurement
Troubles with Vision not clearly aligned with projects, etc
Conveying difference between a project and a program

0 1 2 3 4 5 6 7 8 9
Analysis Continues...

- Email me if you want the rest of the results
- Article being drafted for projectmanagement.com

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