

# Project initiation: your case for change

**PCRS UK Workshop**

**June 2017**

# Part 1: Planning your project

# Project myths

- Projects are for geeks who like paperwork & systems
- Projects are linear
- Projects are initiated from the top
- Projects are all about IT & finance
- You have to speak the right language to be a good project manager

# The good news

**Project Management = Common Sense**

# A project is...

- A set of activities with a beginning & an end
- Set up to achieve a particular purpose
- To a set quality
- Within given time constraints
- And cost limits
- Different to a programme

# The reality

- You can make your idea a reality if you:
- Are clear about what you want to achieve
- Engage the right people
- Work out what is needed
- Agree who will do what, by when & how
- Monitor progress
- Make sure it sticks
- Celebrate successes

# Why do projects fail?

- Lack of top level support & leadership
- Don't effectively engage key people
- Poorly planned & ill-defined
- Inadequately monitored, controlled & managed
- Fail to take account of the bigger picture
- Poor communication
- Fail to split into bitesize chunks

# Suggested approach

- Find your allies: establish your “project team”
- Clarify aims and objectives
- Identify where you are starting from
- Agree targets, risks and actions
- Develop the plan
- Get data collection under way
- Carry out actions
- Monitor and check progress
- Communicate, celebrate & close

So what is your project?

# Be clear about what it is you want to achieve

- How would you describe your project?
- In pairs, take a minute each to describe your project.

Now each explain your partner's project to someone from another pair

- What is the project?
- Why does it matter?
- Who will benefit?
- When will it be finished?

Do not interrupt your partner while they are explaining your project!

# Stock take

What is Person A's project?

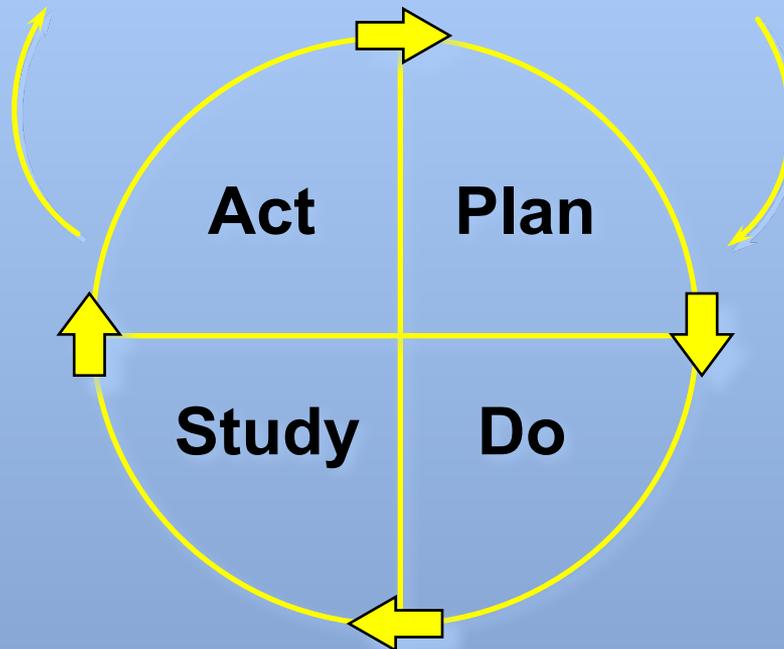
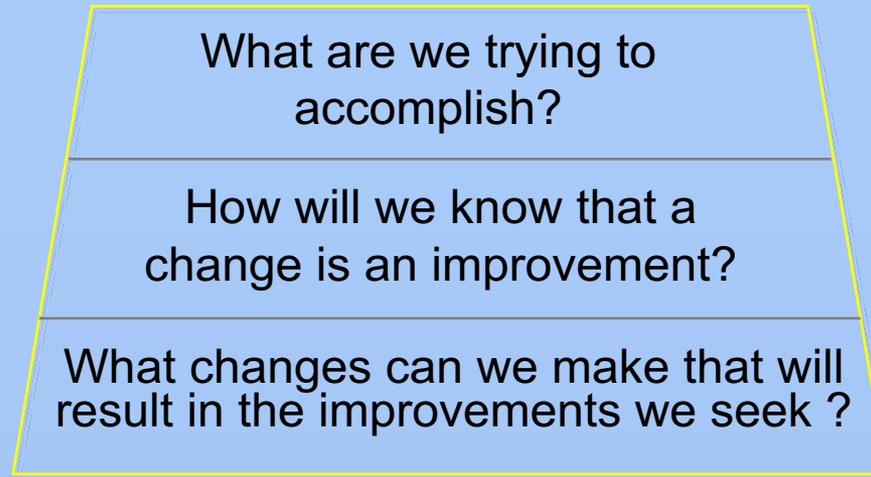
How do you feel about it?

How accurate is that assessment?

What was difficult?

What was good?

# Model for Improvement



# Define your goal

- What we are doing
- Why
- For whom
- How much
- By when
- Compared to what?
- And so what?

## Aim statement

What will we do?	<i>Describe the project</i>	
For whom?	<i>Who will be affected by it? Which patient groups / teams / organisations are you targeting?</i>	
By when?	<i>When will you have achieved it by?</i>	
How much?	<i>Quantify the impact (eg no. of people affected, savings made). How will you know you have succeeded?</i>	
Compared to what?	<i>When and where are you starting from – what is your baseline?</i>	
Why?	<i>What difference will this make? Why does it matter?</i>	

# Part 2: Developing the plan

It's easy...

X

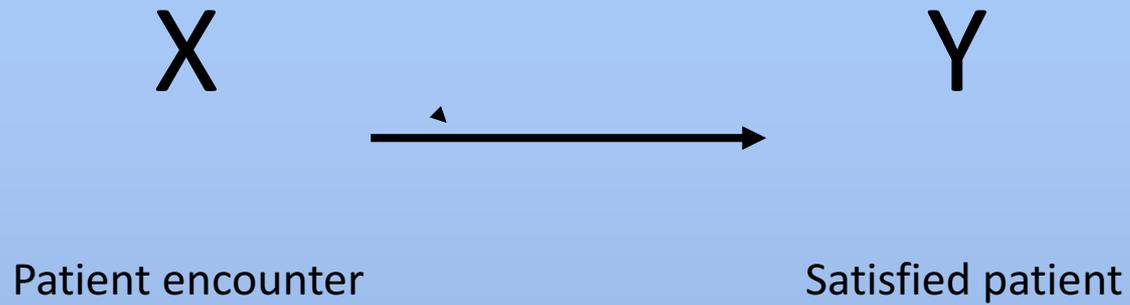
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Just do it

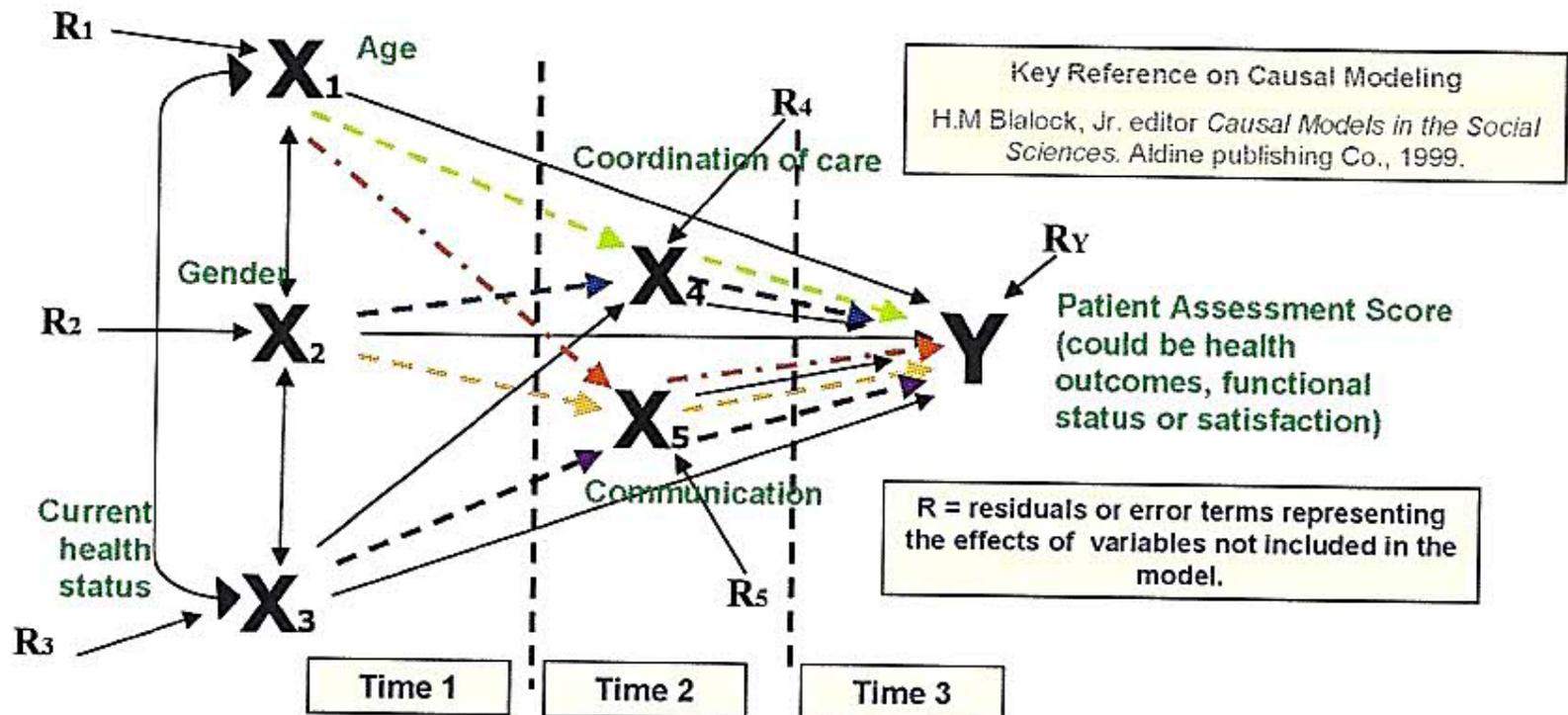
Efficient service

It's easy...



# Actually, it looks like this...

In this case, there are numerous direct and indirect effects between the independent variables and the dependent variable. For example,  $X_1$  and  $X_4$  both have direct effects on  $Y$  plus there is an indirect effect due to the interaction of  $X_1$  and  $X_4$  conjointly on  $Y$ .

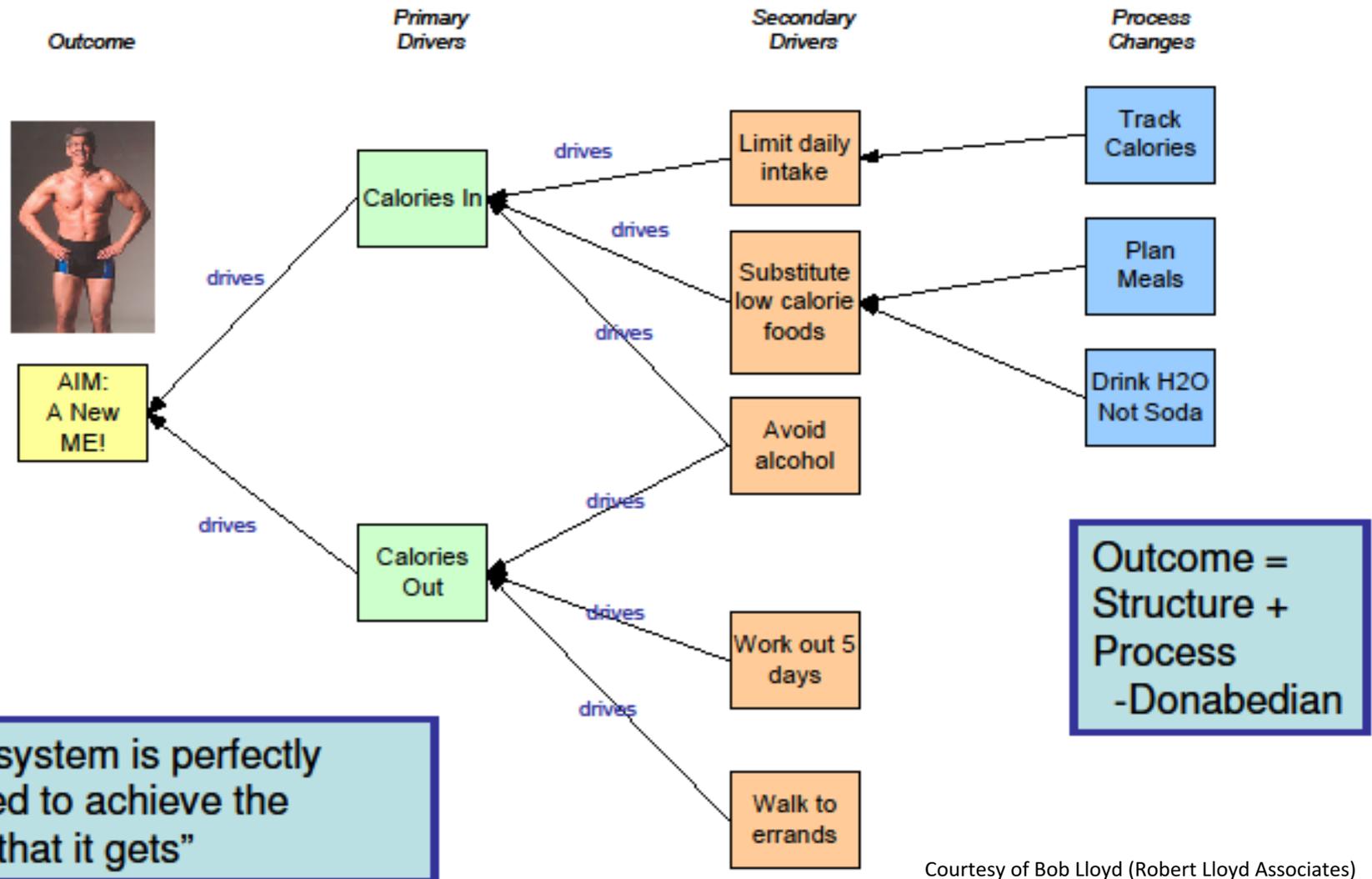


# Driver Diagrams

- A concept developed by the Institute for Healthcare Improvement in the USA
- A simple way of focusing your efforts by considering which actions and factors contribute most to achievement of your aim

# What Changes Can We Make?

## Understanding the System for Weight Loss



# Driver Diagrams can help you:

- Identify the key areas that will contribute to achieving your project aim
- Logically focus your efforts on those key areas
- Develop appropriate & meaningful measures
- Recognise cause and effect relationships
- Simply communicate your aim and priority areas for maximum impact

# Driver Diagrams include:

- The aim of your project - what you are trying to achieve
- Primary drivers – two or three key elements that will deliver that aim or goal
- Secondary drivers – elements or factors that contribute to the primary drivers.
- Relationship arrows – linking drivers. Secondary drivers may contribute to more than one primary driver
- Actions or interventions (change ideas)

# Driver Diagrams may also include:

- Associated measures – For each driver or change idea you can identify what measures will indicate the progress you are making towards your aim.
- This ensures you only focus on meaningful measures

# The home made version

- Write down your goal on your flip chart
- Agree the two or three primary drivers (5 minutes)
- Take 2 minutes to individually record your ideas of what you need to do to make it happen – one post-it per idea
- As a group, share ideas (10 minutes)
  - One at a time add post its to flip chart. Build on ideas
  - What other tasks are they dependent on?
  - What do they affect?

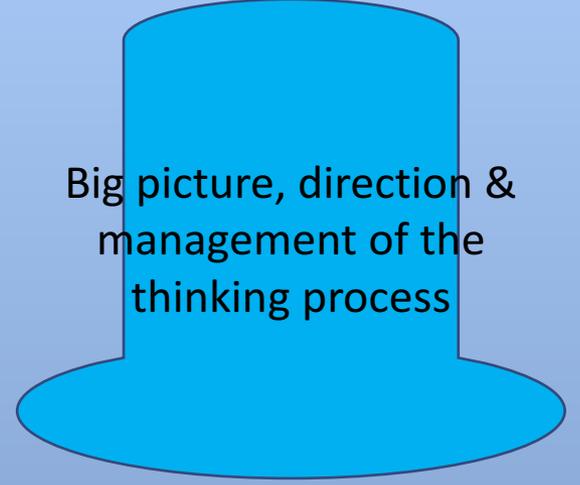
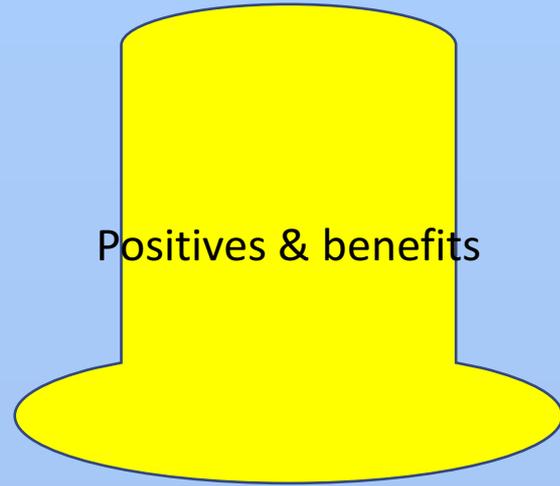
# Driver Diagrams: Summary

- Help identify the essential factors
- Help you prioritise your improvement efforts
- Help you define meaningful measures
- Help break down a big task into manageable steps
- Help communicate your aim and why you are doing certain things
- Work well when you involve others in developing and sharing them

# Refining our ideas

- Not all ideas are equal – but all are important
- Explore your idea from different perspectives before diving in
- “The main difficulty of thinking is confusion. We try to do too much at once. Emotions, information, logic, hope and creativity all crowd in on us. It’s like juggling too many balls.”
  - Edward de Bono, *Six Thinking Hats*, Penguin London 2000

# Edward de Bono: Six Thinking Hats



# Recap

- Be clear about what you want to achieve – what is your aim?
- Know where you are starting from
- Develop a plan
- Keep things simple
- Work with others
- Take time to review & refine ideas
- Think about measurement: how will you know when or whether you have succeeded?

# Your lift pitch – think about:

- Emotive words
- The practical element of your project / idea / service
- What makes your project special?
- What benefit is / will be experienced?
- Make it sound natural & conversational, keep eye contact
- Avoid jargon
- Make solid points (not waffle)
- Emphasise how people will benefit
- Call to action

Based on “Some people call it an elevator pitch”,  
Megan Hills, [Mymarketingthing.com](http://Mymarketingthing.com)

- *“I run Well House which people often call Hereford’s Health Sanctuary.*
- *We’re a little different from many other Chinese Medicine clinics because we really are holistic. We combine acupuncture with massage and herbal supplements, and we take the time to give diet, exercise and lifestyle advice.*
- *This combination and the level of care creates great health results – and our clients leave feeling better about everything.”*
- *“We give free 20 minute initial consultations to talk about what’s going with your health – here’s my card if you know anyone who might find that helpful.”*

# The power of three

- Feature
  - What do we do
- Advantage
  - Why do we do it
- Benefit
  - What that means for you

# Project Initiation

## Part 3: Engaging others

**Catherine Blackaby**

# Why do we need people to know?

- engagement
  - support
  - awareness
  - problem solving
  - sabotage...
- Who are our stakeholders?

# Who are our stakeholders?

- Who are the stakeholders in your project?
- Brainstorm a list – one per post it note
- Think about those who use, fund, promote, support, have influence over or compete with your service / project

# Use the '9 Cs' to ensure that you have included all relevant stakeholders:

- Commissioners: those who pay the organisation to do things
- Customers: those who acquire and use the organisation's products
- Collaborators: those with whom the organisation works to develop and deliver products
- Contributors: those from whom the organisation acquires content for products
- Channels: those who provide the organisation with a route to a market or customer
- Commentators: those whose opinions of the organisation are heard by customers and others
- Consumers: those who are served by our customers: i.e. patients, families, users
- Champions: those who believe in and will actively promote the project
- Competitors: those working in the same area who offer similar or alternative services

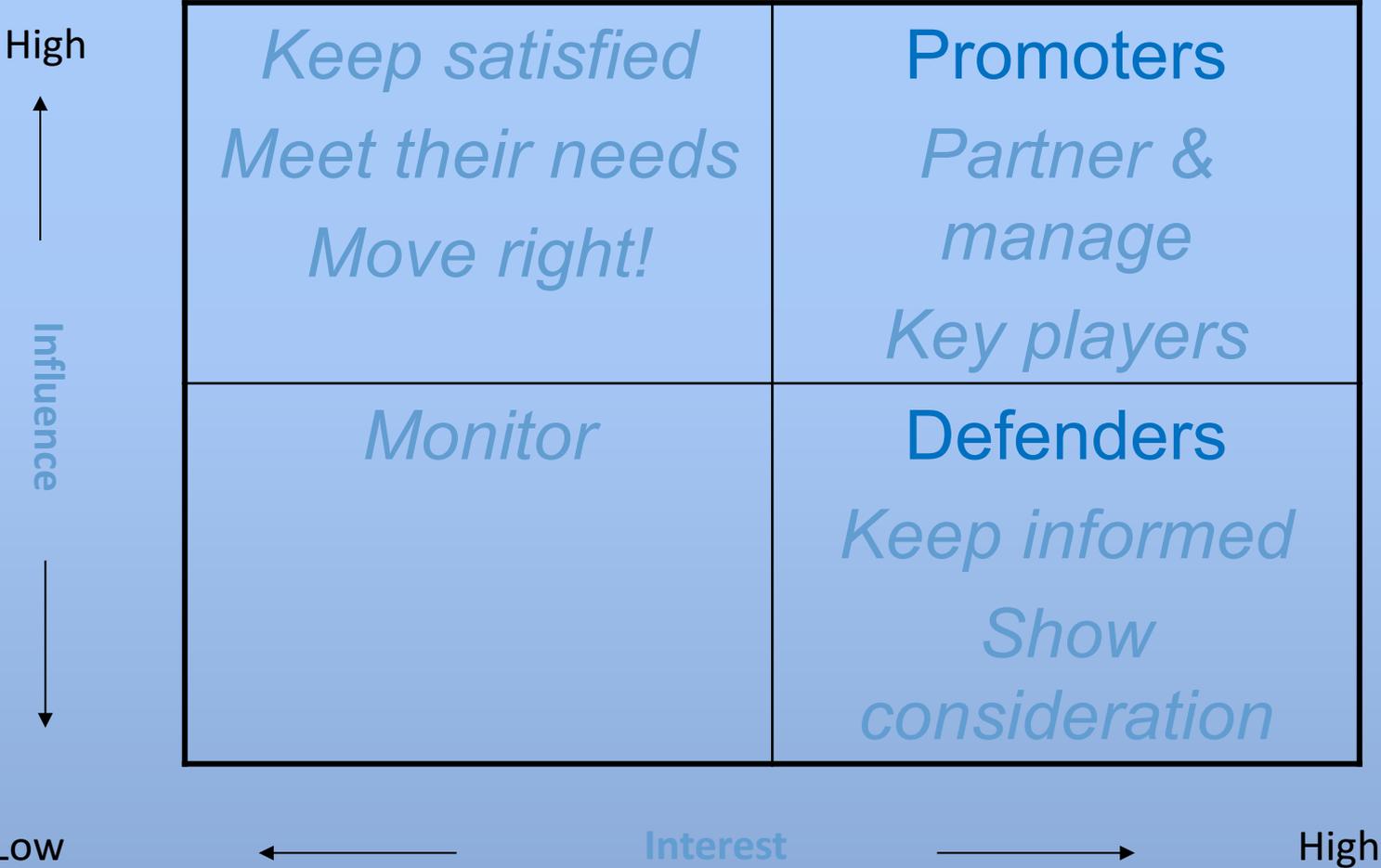
# Who are your stakeholders?

- Take five minutes individually to identify stakeholders for the project.
- Write each one on a separate sticky note
- Share your thoughts in your group
- How many did people come up with?

# Stakeholder mapping

- Influence over / Power:
  - Power or authority in this area (not always formal)
  - No. of contacts?
  - Effectiveness & reputation?
- Interest in / Passion:
  - Level of expertise or knowledge
  - Affected by / active in this area
  - Impacted by project

# Stakeholder mapping



# What do stakeholders need to know?

- What we are doing
- Why we are doing it
- Who is doing it
- How well we are doing...  
... which includes measurement and data

# What do we need to know about them?

- What might different stakeholders want to achieve in this area?
- Who has power and influence and are they interested in this topic?
- What motivates patient, public and staff behaviour?
- What resistance or support for change is likely?

Who are they?

*Specify their roles but also consider their status, connections, whether they are supporters, peers, influencers, saboteurs, funders, delivery partners...*

What do they know?

*About you, the subject, the language, the history, the context, the people*

What do they fear?

*Costs, time, boredom, requests they can't meet, missing something, letting people down, more work, bad publicity*

What do they want?

*To make a difference, save money, hit targets, promotion, fame, a cause, their lunch...*

# The Business Case

# Why do one?

- Provide information to enable a decision to be made
- Ensure relevant facts and factors have been considered
- Outline the risks and benefits
- Demonstrate relevance to wider goals
- Shows it will fix a problem / provide an opportunity
- Test value for money

# Components of the business case

- The Executive Summary

- *a short, informative summary of the business case (one page maximum)*
- *Outline the subject, scope, analysis and key findings;*
- *objectives of the project*
- *A summary of the outlay and financial return (it will cost £x; it will save / avoid £y)*
- *summary of the conclusions as a result of the study*

- Introduction and overview (what and why)
- Analysis of the current situation: context
- Why this is better than doing nothing
- Cost and benefit (what we get by doing it)
- What you recommend and why
- What might affect the project
- Risks
- Costs
- Timescales

# A few tips...

- Make it interesting, clear and concise.
- Show how it supports your organisation's wider goals and mission
- Write the Executive Summary last.
- Avoid jargon and conjecture or unsubstantiated opinion.
- Provide details as appendices
- Give a clear vision of the end goal
- Ask for help so you can demonstrate the value the project brings to the organisation and its financial bottom line (the Return on investment or ROI).
- Demonstrate how it improves quality
- Explain the options you have considered and indicate your preferred option. One option should be to highlight the ramifications if we 'Do Nothing'
- See <http://whatis.techtarget.com/reference/How-to-write-a-business-case> or <https://resources.workfront.com/project-management-blog/how-to-write-a-business-case-4-steps-to-a-perfect-business-case-template> for more info

# Recap and next steps

- Your goal and aim
- Where you are starting from
- Driver diagram – steps to success & indicators
- Model for improvement
- Refining your plan – constructive thinking
- Stakeholder mapping & different perspectives
- Lift pitch
- Business plan content & help
- Have a go at putting it together....