

42. Hohenadel, D'Penha, Roos, & Plowman:

Winners

0:00:02 Kendall Lott: Hey there, PMs and welcome to another episode of PM Point of View. I want to remind you that PM Point of View can be found on the PM Podcast Network along with Fix My Project Chaos and Scope of Success. PM Podcast Network, which can be found on iTunes is an excellent resource for serious project managers.

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0:00:22 Andre D'Penha: Never underestimate the impact of any change however small on the end user because people take change and they transition through change internally very differently.

0:00:33 Joanne Hohenadel: You have to have enough knowledge to be able to carry the conversation that shows that respect for them and their expertise, but also that you've taken the time to learn the lingo, because you've really got a knowledge pool and it's important that you're able to converse with your stakeholders.

0:00:51 Greg Roos: We did a lot of listening to the stakeholders as we were laying out what needed to be done and set up the mutual expectations.

0:01:01 Connie Plowman: And get some sales training. In project management, you are always selling for something. You're selling your ideas. You're selling for resources. You're selling to extend a deadline.

0:01:12 KL: Those are voices of winners. Every year, PMI gives out a number of awards, honoring programs, projects and project managers in professional and academic arenas. In this episode, we will hear from winners of three awards, Joanne Hohenadel and Andre D'Penha represent the team which won the 2015 PMI award for project excellence in North America. From Chevron, we have Greg Roos whose team won the 2015 Project of the Year award. And finally, Connie Plowman, the 2016 winner of the Eric Jenett Project Management Award of Excellence.

0:01:46 Announcer: From the Washington DC Chapter of the Project Management Institute, this is PM Point of View, the podcast that looks at project management from all the angles. Here is your host, Kendall Lott.

0:01:57 KL: From Toronto, Ontario, Joanne Hohenadel and Andre D'Penha worked together on the University Health Network project, Advanced Clinical Documentation, Inpatient Electronic Patient Record. This huge undertaking involved shifting all of the record keeping in the hospital network from a random mix of paper and digital to 100% digital media, so that records can now be accessed by all the network members at any time. The project which took place over the course of about two years was completed on time and within the allocated budget. Joanne acted as Senior Project

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Manager and Andre was the Project Manager for the implementation aspects of this project.

So set the scene for me. What year is it when this all got kicked off?

0:02:38 JH: It was around July 2012 and it was a two-year project.

0:02:43 KL: July 2012 happens. Who gets the phone call?

0:02:45 JH: Well, we've actually been on a long journey at UHN around our electronic patient record and how we can use it more robustly.

0:02:53 KL: So you didn't have to invent new things. You were modifying features essentially?

0:02:57 AD: I would say that, while we had an existing system, we hadn't used it to its full potential at the time. We had a very hybrid paper-based and electronic-based clinical documentation environment, and we wanted to move more towards a digital documentation for clinical care. And so we wanted to use our existing system, but however we had to start off from scratch around how we were going to approach this, given that there were nine different professions involved. Complex care environments across 10 clinical programs, 51 inpatient units across the hospitals, but also the appetite for change at the time, it was... [chuckle] Joanne always says it's a paradigm shift that we had to navigate across. So there were a lot of factors that kind of made us want to focus on our existing EPR, but start from scratch in terms of gathering requirements, engaging clinicians, getting the right people at the table and deciding on an approach that would help us be successful.

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0:04:03 KL: So how big was your team?

0:04:04 JH: I think on the project management side, we had, of course, Andre, and I think we had four senior analysts or analysts, and then we expanded that when we went to implementation, because of course, this was a UHN-wide initiative, so we had to go to all inpatient units across the organization. We are four large academic health science hospitals here, so it's quite a lot. And Andre, you have the information on how many people we had to train.

0:04:34 AD: Yes. So we started with four senior analysts and analysts, and myself and then Joanne, but then we expanded to about eight or nine project management staff to provide go-live support and implementation support. But we also had our technical team of another, I'd say five technical specialists to help us build on the clinical requirements that we had gathered, and we had nine working groups with 77 clinicians also as part of this project because we had a joint clinical project and technical focus. And so, we worked together as one giant team. So overall, I'd say we were close to 100 people, 100 strong, dedicated to the project.

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0:05:23 KL: This is really interesting in the cross-currents of your stakeholders, I imagine. So you have a lot of expertise and that may have come with positions, I mean the ideas of people have a position or an idea about what should happen?

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0:05:36 JH: Yeah, so I think it was a marrying of a lot of expertise, as you say. So you have your clinical expertise: nurses, respirologists, speech and language pathologists, all the different professions that brought their professional expertise of what the content should be, of what they really need in the tool. And then you have your technical expertise of how you can actually program to make the tool work and whatnot. And then you have the bridging of that technical to clinical, in that they have to really understand the clinical side of it to be able to translate, not just taking a paper document or a thought, and making it into technology, but making the logic and all of that work. And then you've got the project management group who are trying to coordinate all of that and bring the right people together at the right time, have the right governance structures in place for decision making, all of that kind of thing. So it really was a combination of lots of different expertise, and it's bringing that together that was the key part of this one that I think made it award winning.

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0:06:43 AD: This was a lot of learning because clinical folks improved their technical informatics confidence. The technical folks got a new understanding and appreciation for the complexity of clinical care that we provide, and both groups got newfound appreciation for our solid project management approach which was really instrumental to our successes. Not everybody could be at the table because, as you can imagine, everyone has an opinion about how things should happen in a complex environment, but they all respected the process that we followed and found value in the methodologies that we used because they were solid, they were based on project management science and PMI methodology and our collective experience.

0:07:26 KL: This is fascinating to me and something I had never picked up on before. We talk a lot about the complexity of dealing with stakeholders, and that's been increasingly highlighted in the last couple versions of the PMBOK. But you just hit something really, really interesting and I think twofold. One is these two different groups or experts began to be better at what they do because they understood another aspect of their environment, a key partnered side of this informatics in the clinical. And the second part is project management methodologies enabled and empowered that.

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0:08:02 JH: In healthcare, we talk about best practice all the time, best practice in how you care for your patient, best practice in treatment of cancer. So that is the paramount word for everything that you do needs to be based in some sort of research and grounded in that there is proof that you are doing the right thing. I think it was a really good learning opportunity for everybody involved, in that Andre, especially, and his team, brought that best practice to project management. And when we started saying, "Well, you know, we've done a lot of work and we have a lot of expertise in project management, and just as you're talking best practice in how you do your business, we're bringing this to the table in terms of best practice, grounded in research and there's a methodology, and there's a whole professional organization." I think we could speak the same language as our clinicians in terms of getting their buy-in in this methodology or their trust in this methodology to make everything work more smoothly.

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0:09:04 KL: Now, Andre, how did you see your role as a leader in this?

0:09:07 AD: I came in at a time where there was a lot of change that even the project team was experiencing. I used whatever project management knowledge I had at the time and was learning ongoing. But I used that as a base for our team to actually follow that as a solid process, so that they could get ready for implementation and go-live and the engagement that had to happen. And so it wasn't just leadership in terms of project management, it was leadership in terms of mentoring other project management staff or our team members, making sure that when we did hit challenges, that I was able to lead even our clinical stakeholders and technical stakeholders and leadership in terms of providing the data and the information they needed to make the right informed decisions. So that was a different kind of leadership. As project management staff, we don't have, as Joanne mentioned, all the knowledge to answer all the questions that clinicians have, but I was able to lead them and we were able to appoint the right people or super users to help them navigate those changes where we couldn't lead and provide that leadership.

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0:10:18 KL: Andre, are you a medical doctor?

0:10:20 AD: I am not. So, I'm an industrial engineer by background.

0:10:24 KL: An industrial engineer. Were the clinicians medical doctors?

0:10:27 AD: There were a number of professions. So primarily, nursing. There were eight other professions. So some were physicians but documentation for this project was primarily nursing, speech-language pathology, social worker, a respiratory therapist. But we also had people with a nursing background on our project and technical teams, and that actually helped us grow in our clinical informatics competence, and making sure that what we developed and what we implemented was more meaningful to the end user.

0:11:00 KL: And this is the tension we often see. The project manager doesn't have to be the expert in that space, and in fact, stares in the face of experts, and yet, it is helpful when the project team is very aware of their own industry and the expertise needed. So it's helpful to have that cross happening even on the team.

0:11:14 JH: I can't emphasize enough that you have to have enough knowledge to be able to carry the conversation, to be able to help your clinicians feel heard but not overpowered in that. And it actually is a nice balance. It shows that respect for them and their expertise, but also that you've taken the time to learn the lingo to be able to talk intelligently during a conversation, but being able to respectfully listen. The other thing is to be able to have a project team that intertwines those expertise. So being able to have nurses, pharmacists on the team has been a real plus, because as soon they hear and they can start relating to each other, then you can start inserting some of the ideas because you gain a mutual respect for all components of the knowledge that's coming to the table. Because you've really got a knowledge pool and it's important that you are able to converse with your stakeholders.

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0:12:22 KL: What are some specific and key lessons learned that others who are going to

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undertake, let's say a \$2-5 million project, perhaps in healthcare or perhaps even broader, should know from what you learned?

0:12:36 JH: So within this project, when we brought all of the various clinicians together, we did have an interprofessional facilitator, and I think that was a huge benefit to the project. And these were specifically trained healthcare interprofessional collaboration, so it's specifically around healthcare and understanding different disciplines in the perspective towards a single patient's care. What it did was it brought the views of all the people in the room, and able to hear them without the bias, because everyone's into their own thing, you know, "For my profession, I need to document XYZ." Well, the other person isn't documenting that. "For my profession, I need to know ABC." And so really that interprofessional collaboration, and then being able to have a governance and leadership structure where, okay if the group themselves come to a stalemate or can't make a decision, where do you take it next? And then, so you go to the next layer and the next layer. So I think that would be a structure that I personally used over and over again.

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0:13:43 JH: The other thing was the project management things that really kept the focus. So having things like guiding principles, having things like a scope document, having a process around containing scope, having those really really strong was paramount. And then the third one would be the lessons learned around having a clear vision of wanting to prevent harm to our patients, of wanting to have the information available to all of the clinicians.

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0:14:15 KL: So, Andre, from a project management perspective, lessons learned, what do other project managers need to hear from your experience?

0:14:21 AD: I think, to echo Joanne's point, there's value in utilizing solid project management best practice, but above that, I think one of the major learnings was the need to be adaptable. We had to change constantly, based on scope, schedule, budget, but also go-live implementation approaches, complexity of inpatient units or sites, site environments within different hospitals, and also most importantly, the needs of the clinicians and patient care. So adaptability was a major point in our success that we had to consider, and that I would advise any project manager to keep in mind. The other thing that I would say is, never underestimate the impact of any change however small on the end user, because people take change and they transition through change internally very differently. And so our change management and communication plan was very important to make sure that we addressed people's concerns, as Joanne mentioned, that they felt heard and that we had the right people to answer questions and provide support throughout important stages of the project.

0:15:28 KL: I want to dig into that just a bit because that's easily said and often people miss it. What were the key characteristics of your change management plan that made it effective?

0:15:38 AD: Because the clinical environment was our primary stakeholder in this project, mediums that worked well for communication from the clinical aspect were important. Clinicians, for us as end users, they're very busy, they don't have a lot of time to look at email, for example, and so choosing the right medium. So going through their nurse managers or their professional practice committees was more effective, for example, for relaying messages and cascading them down than

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actually sending an all-user email. So the medium of communication was very important for us. And also getting buy-in from the top. So we made sure that executive level and clinical leadership level was aware of our messaging each time, that they were onboard and supported the messaging, and would take that forward with their teams.

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0:16:35 JH: You have to realize the age that we're in right now is quite different than we were 20 years ago, and that this project itself was really moving the organization to a more digitally enabled practice. So you're looking at a little bit older workforce that has worked a particular way for many, many years on paper, and all of a sudden, it's very scary to move into having to document on a computer, and even use of the computer can be challenging. So really having that sensitivity of where people are, of what they grew up with in terms of their skills, and adapting your training and your support to make sure that you're not just catering to a generation where, "They can do this in a heartbeat, it was not challenging to them at all", to a very respectful and supportive environment where, okay, this person, the change is much greater than some of the other people on your unit. So we needed to adapt our support styles.

0:17:36 AD: And another effective tool that we used for our change management and communications was the role of super users. So we had a super user identified in every single clinical service or inpatient unit that was a peer that would be the first point of contact for our staff for any information about the project, also any information about using the application or any communication information. And so it was someone on the inside who was giving them the information, and who understood their challenges and their concerns and what they were competent at. And so those people played a key role in our communication and change management.

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0:18:17 KL: How do you see the benefits realization as you were moving the project through and releasing it? Were you anticipating what people would find effective or interesting or better, and being able to measure that and did you plan for that?

0:18:29 JH: Sometimes getting the measures is a little more difficult in healthcare, in that a lot of the benefits may not be realized within the hospital, but realized when the person's back in the community. So are they healthier? Are they healthier when they leave here? In terms of, is their length of stay shorter because they didn't fall? Well, you don't know if they would have fallen in the first place. So you have to really marry what sort of the longitudinal evidence tells you and go on that, for part of it, as well as having solid data. So UHN has really made a solid effort in terms of getting data and utilizing data. And this project was really at the forefront of that.

0:19:16 JH: Previously, everything that was in on paper, to do an audit of that paper just took you forever. For example, we looked at one incidence and prevalence of pressure ulcers, and it cost us \$93,000 a year to do an audit to find out if we were actually doing a good job. Now, it can be done by the click of the button in terms of the technology being there. So really, being on a digital journey is allowing us to now have that data. So I think in the future, we will be better equipped for that type of thing, but having said that, there's a lot of things that we did find are the benefits. Increased accuracy in quality of our documentation, being able to access it anywhere for across the organization, having discrete datasets for clinical research encoding. So now we have it. So even

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though we don't have pre-data to be able to tell us, now we have it. So the benefits part continues to be a challenge, but we're getting much better at it, because we do have so much information that you can collate and analyze, and tear apart and put together in different ways.

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0:20:31 AD: There has been a shift in the last few years in project management from just opinion and best practice towards project management that's based on data and evidence. And so I now manage a portfolio that actually is totally based on data, data to drive decisions, data to influence change and data to inform project management. But through the project that Joanne and I worked on, we did start to use and highlight some of the gaps in how data was collected, areas that we could improve, as Joanne mentioned, longer term. So the organization actually learned how we actually can use clinical data a lot better than we were at the time. And since this project has happened, we have learned a ton that we have implemented in terms of data and implementation science around project management.

0:21:20 KL: That's fascinating. Did you plan for that?

0:21:23 JH: So the organization was definitely moving towards it, so there was a real push to have the benefits framework. I think it's just evolving. Now that you've got more, you use the framework and it just becomes clearer and clearer and clearer. And also as a research and academic hospital of how we can contribute that data to population health and from a provincial level or from a Canadian level. So how can that data then move onto the next level? So we may not have had it at the time in terms of planning in 2012 or executing a couple years later, but it was definitely on the cusp of, this is a really big strategically important component of what we do here at UHN.

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0:22:13 KL: Wow! That was a monumental shift they pulled off, and the benefits, which are manifold, have yet to be fully realized. One of the most interesting aspects to me was the attention they gave to communicating and planning for the change itself, taking into account the specific needs of their audience and tailoring their approach accordingly. In this case, stakeholders weren't categorized according to their profession: Doctor or nurse or clinician, but according to their relationship to the project and their comfort level with technology. Also, I'd like to commend them for the use of a very effective best practice, super users. Yeah, super users were identified in every unit to help move the change forward.

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0:23:01 KL: After graduating from Cooper Union in the late 1970s, Greg Roos got a job at Chevron and worked his way up through the ranks. He was the Project Engineering Manager for Chevron's award-winning Coke Drum Replacement Project in El Segundo, California. To give you a little background, the El Segundo Refinery is the largest oil refinery on the West Coast of the United States. Each steel coke drum weighs 400,000 pounds and is as large as a three-story apartment building. When six of them needed to be replaced, yes, that's six, Greg Roos and his project team took the three-year \$150 million challenge head on. They completed the project four months early and \$7 million under budget.

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The coke drum is something that is used to heat up the oil as part of the process of refinement?

0:23:47 GR: The coking unit in the refinery, what it does is process very, very heavy "resid". This is hydrocarbon but boiled at over 1000 degrees, and then we flash it into these drums. And in the process of flashing, the molecules crack, and that's when we get the much smaller molecules that can be converted to gasoline, jet, and diesel. And then we end up with what is called 'petroleum coke' as a byproduct and that's what gradually fills the drum. And then we have to switch drums, so they operate in pairs, and then we have to cut the coke out of the drum that's not feeding, and then switch back and forth, about every 12 hours between them.

0:24:37 KL: So we're taking heavier hydrocarbons, heavier oil products essentially and turning them into lighter ones, more valuable. The drum is how long and how big?

0:24:45 GR: The drums are approximately 100 feet tall and the... Our particular drums were 26 feet in diameter.

0:24:55 KL: It's like looking at space shuttle fuel pieces or something. They are just huge. [chuckle] It's amazing.

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0:25:06 KL: You needed to replace, what was it, six of them?

0:25:08 GR: Yeah. There were six in the unit and we replaced all six at once.

0:25:11 KL: And you ordered them from Spain. Are they concrete or metal?

0:25:14 GR: They are made out of an alloy steel.

0:25:16 KL: So, we have to procure them, get them manufactured, get them sailed across the ocean. Originally thinking heading towards the Port of Los Angeles, realized that that was going to mean you had to drag them too far through the city, of a highly populated area. And so, Chevron had the plan to go to a smaller marina nearby, probably not as used to some of this heavy equipment. And so, beyond the procurement and acquisition, then you had the, "Where do we bring it into our community to get it in here?"

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0:25:48 KL: How long was the original schedule?

0:25:51 GR: We kicked off in January of 2011 and placed the order for the drums in late 2011. Drums were shipped roughly at Christmas 2012, and then the main activity of bringing them in the refinery was March of 2013. And then we finished all of the preparation work onsite because there was a lot of work to do to upgrade the structure to accept them. And then installed them in May-June of 2014.

0:26:22 KL: Oh, so you had them shipped to you a year ahead of time, sounds like.

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0:26:25 GR: Yeah. We needed to insulate them onsite, so that gave us plenty of time to do that. But we also had a lot of steel structure modifications as well to support them on the structure, because we had to upgrade to new California earthquake regulations as we were executing this project.

0:26:40 KL: So there's our scope and schedule, and the budget as I read was \$150 million.

0:26:45 GR: Correct.

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0:26:50 KL: And now, we want to talk about why it won the award. As I was reading, what I was observing was a lot of kind of teamwork, and collaboration highlights was what seemed to be why the Project Management Institute liked your project and thought it was award-worthy.

0:27:04 GR: Yeah. Early in the project, we realized it was going to take a very tight collaborative effort to pull this off. And we knew in particular that very difficult process of bringing the drums into the refinery, we were going to be out in the public. And that always gives you less control and certainly a lot more scrutiny over all of your activities. And that we needed to be able to execute with really very efficient teamwork to pull this off. So early on, we created the incident injury free leadership team for the project, and we created a very powerful vision for the project. And the key punch on the vision was that each of us was going to be a difference maker.

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0:27:51 GR: We hired the constructor very early in the project, and we had them in the engineering office for six weeks during the early design phase.

0:28:00 KL: In some of my other podcasts when we're talking about what makes excellent projects and where people really need to take project management, one of the big issues, particularly in construction, was that the experts need to be brought in way earlier into the project than is typical.

0:28:14 GR: Early design phase. Yes, we hired our crane contractor, we hired our mechanical contractor, because we knew those were going to be critical items and then we wanted the engineering to be very compatible with the needs of those key contractors.

0:28:31 KL: So when you hit those milestones later, they already know what's coming, where everything is, what they are going to be needing to be doing, and they helped build the...

0:28:37 GR: More importantly, they had a chance to put their expectations and needs into the design.

0:28:42 KL: Okay. Yeah.

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0:28:48 GR: We had a very collaborative effort as well with our fabricator. Now they were 7000 miles away from us. [chuckle] But it was very important for them to be able to produce very high quality drums, meet a very aggressive schedule. The original estimate was over 18 months to

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fabricate the coke drums and that was too long to really meet our schedule. So we had a very collaborative effort that as soon as we awarded the purchase order, we kicked off weekly video meetings, so that we could get to know each other better that way. And then small groups of us made seven trips over to Spain during the fabrication process to make sure that everything was correct, that they understood the specifications very clearly, they understood our expectations as far as schedule and quality. And we ended up significantly influencing the safety culture with our fabricator over the course of the project and brought them our practices. And at the same time we also negotiated an improvement in the schedule with the target of getting them shipped out by Christmas of 2012, because we had to be very careful about the window of time that we were bringing them into the small boat marina in Redondo Beach. We had to get it in ahead of yachting season. [laughter] So we had a window of like between January 1st and April 1st that we could bring the drums in.

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0:30:28 KL: The safety improved and the schedule got crunched, there wasn't a trade off.

0:30:33 GR: Safety was always considered a key value and it was never something to be traded off in the engineering effort, fabrication effort, and the construction, and the move, the transport effort and also the final construction. And success then started to build on things. We had the drums in LA in late January, and then we were able to transfer them by barge up to the small port to bring them the final four miles into the refinery. The small boat marina had never seen anything like this, so we created some graphical videos that we could share with them as to what this move was going to look like, so we could convey to these public officials, "Here's how it's going to fold out. Here's how the drums will come in on the barges. Here's how they'll land. Here's how they'll come off. Here's how they're going to come up the streets." That was very helpful.

0:31:30 GR: Worked very closely with our public relations folks there, every door, every business along the way. We had early on canvassed and let them know what was going to be happening and that's when we set up the website as well. We had a hotline setup if anybody had any calls or questions. It was very important to make that a very public move for how do we convey the message ahead of time so that people are not surprised and people were willing to sign up and come onboard with us.

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0:32:06 GR: We had to build a very large team. It took over 230 people involved. And some of these same contractors had moved the space shuttle and they were each individually good at what they were doing. Because we only had six hours available on the nights that we needed to make the four-mile move, we had a room where we laid out every single intersection that we were going to have to come through on that four-mile basis, and, "Okay, so who needs to be here when?" Because we had to do things like take down traffic lights and rotate them so that they would be out of the way. Pre-move, we had already taken care of raising any power lines that we needed to do, or actually some of them went underground, and we were working very closely with the power company there, but the move itself and the transport, just for the traffic control, the collaboration. We had seven different police departments involved, local police plus the State of California.

0:33:03 GR: We had several key workshops where we brought all the key supervisors together

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from each, just worked out in detail who needed to be where, when, how we're going to keep out of each other's way, and laid that all out into a very detailed master schedule that was laid out in 15-minute increments. And we had to do this without waking anybody up. [chuckle] So first move, we had, I think one mom complained that we woke her kids up in the middle of the night, so we figured out, "Okay, those vehicles, we'll route them back to the beginning on a different street." And second, third moves, we did not have any complaints at all. And in fact, they became parades. We had people lining the streets, watching them go by. One of the mayors of the city, Redondo Beach, they brought out the key to the city.

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0:33:57 KL: It sounded like there was an early recognition in PM-speak of a communications plan, relationship building among the local political leadership, as well as the citizenry itself. You guys exchanged requirements to make this work.

0:34:12 GR: Yes. When we settled on bringing them in through Redondo Beach is probably our best bet. Yeah, that's when we started with our public relations folks starting to address some key leaders there, and kind of socializing the idea with them. That's when we started to get into the issues, working with some of the utilities. The initial estimate from the power company, had to cut off power to about 20,000 people. We said, "Nope. [laughter] We can't do that." So we started getting very... Again, the creative relationship, working with them, "Okay, how could you backfeed power? Which lines?" Okay, we elevated some lines but we paid some money to bury some other lines under the road, so that actually nobody ended up losing power. So we did the same thing with the cable TV and such and forth. Nobody lost any utilities the nights of the move. Again, that collaborative effort we set up with those utilities to supply, so we can understand, "Okay, what are your needs?" to make sure these bad outcomes don't happen for the public. It was always looking out to try to make sure that the stakeholders understood what we were doing and to get any questions answered upfront.

0:35:18 KL: It sounds like expectations management. You kind of knew what you had to do, but you were willing to change requirements. You mentioned a second ago, this was an unusual thing, they're not used to seeing big drums being pulled down their streets.

0:35:31 GR: Basically this is like pulling a small apartment building down the street, yeah.

[laughter]

0:35:35 KL: I highly recommend people to watch the video, because it was so impressive, and in fact, it looks a little bit like a parade you'd see at a fun park.

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0:35:48 KL: So then you had the third part where you actually had to do the installation and the change. Do you want to tell us anything about the highlight on safety there?

0:35:55 GR: So the towers that these coke drums went into basically went from ground level to about 262 feet in the air. So all of the pre-work that we were doing was all the scaffolding at height. So, two very key programs, and we laid this out very clearly as we brought every group of craft

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worker on. [chuckle] In fact, our leadership team made presentations on the project to every group of craft worker, since they were coming on to the projects, and we were doing this every week or every other week, for well over a year, we explained the project to them, we explained the operation of the coker with them. We had our project operations rep in all those sessions as well, just to kind of, you know, "Welcome to our house."

0:36:47 GR: And so they understood the nature of the hazards and the nature of how to work within this operating unit, especially around the high temperatures, working off the scaffolding, double lanyarding people. We just made that very clear as an expectation, you were not going to stay on the job if you could not. We could tolerate firing you, but we are not going to tolerate you dying. And we were out there observing on a very routine basis, and people bought in. I think we only had to let two people go [chuckle] and that was fairly early on. "Okay, yeah, they are serious." And so people heard that message. And we made it very convenient for them to clip on and off; we were modifying scaffolding every day as needed for them to get to their work. And then the other piece was *Stop the drop*: any tools, materials, anything that was up in the structure, it was going to be tied off at all times so that nothing would fall.

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0:37:49 KL: It sounds like you guys made safety easy.

0:37:51 GR: That's exactly right. We facilitated, we listened to what they needed, and made sure they had the equipment, materials that they needed to make it happen. We met their expectations as well. We flat out told them that also during the sessions, "Hey, if you find out there that something was not consistent with the message that we are giving you here in this upfront presentation, please tell us." And by that effort, again, we were able to also enlist them as difference-makers. They came up with a lot of their own ideas as to how to make things work.

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0:38:27 GR: As we shifted little different phases of the project, we made sure they knew what was going to happen, had the chance to ask questions and... It took five weeks to build the crane, and the space that that was going to occupy. And then later on, they had a derrick structure, we had to take it off, and set it on a structure that we had built on the ground, and we had to put it back, and nothing twisted as it was... I was standing next to the refinery manager, we were watching it sail back up to the structure, and I commented to him, "Yeah, I could definitely see my career hanging in the balance," and he said, "Yeah, mine too." But it set down just perfectly. Over a 30 x 300 foot structure, we had 20 touch points that had to just, bam, fit again. And they did. We were well on our way at that point, but we had set ourselves up for that success with an awful, awful lot of planning and discussion, and a lot of hazard evaluation as to what things could go wrong and what we could do to mitigate them.

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0:39:33 KL: What are some key elements that leadership had to think about to make it a very, very successful project?

0:39:39 GR: It was a highly complex project, and we took a pretty innovative approach. So it was

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looking at what we were trying to do relative to the communities, relative to the workforce, relative to our refinery leadership. And we did a lot of listening to the stakeholders and set up the mutual expectations. Something very common to projects, though, is having a very defined project vision as to what you're trying to achieve. We, very carefully, in one page, set out that we were going to be bold, courageous and unyielding in our stand for excellence. We set a very high standard amongst our team to make that happen. So, this was really about four of us, plus our facilitator, pulling together this vision initially. And again, respecting the values of the community and to be respected back by them. So just setting the tone for that collaborative nature that we knew we needed to have, and that this was going to be something they look back on fondly, and then communicating that very carefully and constantly to all of our contractors and workforce that we had on the project, by saying, "This is what we are trying to achieve and here are some of the successes we've had so far, and hey, we need you to be part of the success in the next phase."

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0:40:57 KL: This was a high precision and highly collaborative project. When you have that many stakeholders, from manufacturers in Spain, to marina owners in Redondo Beach, power companies, the onsite workforce, and then factor in the high stakes safety concerns, a clear well-articulated vision is key. At any point, a single error could have been catastrophic. That's why it's so important to pull in the leaders of all the phases of the project early on so everyone's expectations and requirements can be incorporated into the design.

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0:41:35 KL: As many of you know, I was out on the Appalachian Trail during the summer of 2017, and while I was gone, I asked a good friend and frequent PM Point of View guest, Mike Hannan, to be the host for the next interview with Connie Plowman. Mike is founder and CEO of Fortezza Consulting. He is also a consultant, author, innovator and speaker on topics related to project management and Agile.

0:41:58 KL: Connie Plowman is an entrepreneur, educator project management practitioner and retired corporate executive. She's also writing her first book on project management which is due out in 2018. In 2016, she was awarded the PMI Eric Jenett Project Management Award of Excellence. This award is for individuals who've made an outstanding contribution to the project management profession or its practice through leadership, technical project management and strategic and business management acumen.

0:42:28 Mike Hannan: I think any of us over 40, we didn't have the benefit of project management training programs and classes and degree programs that are quite prevalent today. So let's hear your story, how you got started with project management.

0:42:43 CP: You know, many people say they're an accidental project manager, and I guess I would put myself in that category. I actually started my career with IBM and while I was at IBM, I got involved with training. And that was kind of my passion, was helping people in terms of classes and customer training and employee education. And then one day, when my husband had joined IBM and we were raising little IBMers, I said, [chuckle] "It's time for me to leave IBM." So I left IBM after 12 years and I joined a company called Cadence Management. And those guys did training, and I said "oh this is great" because I love training, but they only in trained one thing. And that

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thing was called 'Project Management', I had no idea what that was. So I figured I'd better learn about project management if I was going to enjoy this training opportunity. And so that's when I found PMI, the Project Management Institute.

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0:43:39 MH: So why did project management capture your passions and interests so much?

0:43:44 CP: As a kid I just loved jigsaw puzzles, and I found that jigsaw puzzles are very much like projects in the fact that you have boundaries, that's the border, and you have constraints in projects. You have the big picture of a puzzle on the cover and you have a big picture in a charter. And so I just found puzzles and project management to be my thing. You know, and it came down to people. I love people in terms of being around people. I get energized around people. And if you don't like people, don't be in project management [chuckle] because that's truly the people business. It's the people side of project management which is the most difficult side when you think about it in terms of getting stuff done, because if we didn't have to work with people, sometimes we'd get a lot of stuff done.

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0:44:29 MH: Obviously, the project management profession has grown considerably over the time you've been involved with it. University degree programs proliferate, PMI, Project Management Institute membership has exploded globally, but not all of us have seen it as all that important to get involved in the project management community. But you've taken much greater advantage of it than most. So what motivated you to get involved with PMI and where has that taken you over the years?

0:44:58 CP: Early on, I realized that if I wanted to succeed, I needed to take charge of my career, nobody was going to do it for me. And so I needed to know more about what is project management. So I joined PMI, I guess in 1998, but I didn't start volunteering until 2001 because I wanted to see, what is this professional association all about? So I kind of sat back and watched to see what could I gain in terms of knowledge or networking. And for those of you that aren't involved in professional associations, I encourage you to do so because that is one of the first interview questions I would ask when I was hiring a project manager, "Are you involved in a professional association for what we do?", because I want to hire people that are connected with the community. And so early on in my career, I realized I needed to get connected with this community, because PMI and the chapters do two things very, very well: They provide opportunities for knowledge and networking.

0:45:56 CP: And from there, I just started getting more involved with the PMI, but I also, along the way, realized I've got to have a credential. I needed to get certified to give me credibility. So I studied, studied, studied, and I took the exam, and I did not pass the first time. So being surrounded by my colleagues at PMI, and because I was VP of Certification, I took some more classes and some more training and had tons of support, and about a month or two later, I took the test and passed. And when I got back to my car on the radio, Barry Manilow was singing, "It's a Miracle." And to this day I remember that song as being, it's a miracle that I passed the exam.

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0:46:44 MH: You're a chapter president, you're a regional mentor, and for those who don't know what that means, you're basically mentoring a whole region's worth of chapter presidents. And then you've sat on multiple leadership and advisory groups at PMI Global. So tell us a little bit about the progression there and what motivated you to follow that path?

0:47:03 CP: So I started out volunteering for PMI as... My first volunteer role was VP of Certification. Why? Because I wanted to get certified. And in order to do that I could hang out with people that were already certified and be great resources for me and support me as I went down my certification journey. Once I got certified, then I wanted to really grow my leadership skills. So I raised my hand to become Chapter President. Of course, anytime you raise your hand in a volunteer group, next thing you know you're elected. [chuckle] So I got elected as our Chapter President for our local chapter, which at that time had 650 members. And it's a three-year commitment, but it really helped me grow my leadership skills. And in doing so, my boss could see that, "Hey, now she's working with strategic plans and board of directors, and budgets and strategic decisions." And so he promoted me to be COO of the company, because I was Chapter President.

0:47:58 CP: So for those that don't see the value of professional associations, here's a success story. So I encourage you to take on leadership roles whenever you can. And from there I wanted to grow my virtual leadership skills, so that's why I ended up being the region mentor, and so I was the region mentor for a couple years. And then I went on to be involved in the Leadership Institute Advisory Group because I love and thrive on leadership. And then I went on to be on the... Gosh, I think it was the Professional Awards Member Advisory Group to help recognize project excellence. I went on to be a part of the Chapter Member Advisory Group to help our chapter succeed. And then I went on the PMI Nominating Committee to help find the candidates to be on the PMI Board of Directors. So I continue in that global space because it drives me. It's my passion.

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0:48:57 MH: Can you tell us a little bit about Eric Jenett and this award? I noticed on the website, you're one of only 17 people who've ever won it.

0:49:05 CP: The PMI Eric Jenett Project Management Award of Excellence is truly the epitome of my career, and I am truly honored to be one of those 17 people. Eric Jenett is one of the founders of PMI and his passion was to share knowledge and information about the growing and evolving project management profession. He has since passed away and I never had the opportunity of meeting him, but I could picture us sitting together in a Starbucks, talking about our passion of project management.

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0:49:41 MH: Eric Jenett had a passion for teaching and mentoring, and you've made that a passion of yours. What motivated you to start teaching?

0:49:51 CP: I didn't start out to be a teacher or a mentor in project management or anything. About 10 years ago, somebody on LinkedIn said that they were looking for guest speakers in their classes at the community college, and he taught project management and was looking to bring in guest speakers on project management. And I'm sitting at my desk, selling project management training

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services, and I said, "Hey, I could go be a guest speaker on my lunch hour." So I started being a guest speaker in the classroom about 10 years ago. To open up the eyes of kids, and many of them professionals as well, to this thing called 'project management' is a very, very rewarding and inspiring, to say, "Wow, the light bulb has come on", to say, "Here's something that can help you organize getting stuff done." And that thing is called project management.

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0:50:48 MH: The other day, you mentioned a story from one of your classes, one of your students I believe, that used project management in a very real, entrepreneurial way. Do you want to share what that was about?

0:51:00 CP: Yeah. The student in the MBA class had a company, and his company was to develop tattoo creams, so that when you get a tattoo, you put this cream on and it doesn't infect your skin and whatnot. And he had started his business once and that hadn't worked out, and so he was going after his MBA and one of his classes was project management. And so he took, as we all do in those courses, we work on real projects, he started to restart his business, and put together a project plan and probably more of a business plan, and he was successful because of the training and project management to actually go out and restart his business. And so he was able to get investment funds from our class. And to this day, his company is still thriving, but yeah, he used project management as the foundation to restart his business and I think that's pretty cool.

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0:51:56 MH: You used the word 'recipes' to describe the best way to use the PMBOK. Tell us a little bit what you mean by this term 'recipe' when you refer to the PMBOK using that term.

0:52:08 CP: Well, first of all, I just want everybody to know I'm not a cook and the kitchen came with the house. [laughter] It's the only reason I have one. So I just want to put that out as some sort of disclaimer. [laughter] So I don't even own a cookbook except for the PMBOK Guide. [laughter] So I view the PMBOK Guide truly as a guide. It is written by project managers, for project managers and it's our guide to guide us through getting results. And so with any guide, you tailor that guide to whatever works for you. And so I refer to the guide as my 'cookbook.' But we have to put together our own recipes to make things happen. So just because the PMBOK Guide says, "Do this", the foundation, we can tailor that foundation to however it fits for our projects. Because the guide is for all size of projects. When you think about the International Space Station, they've use that guide to get to and from. But you think about a Rotary Breakfast they've used that guide. And so this guide, which is our global standard, is the foundation for which we can build all of our different recipes and put in on our own ingredients to get stuff done.

0:53:19 CP: For example, stakeholder management, which is one of our chapters in the guide, and they talk about aligning expectation with our stakeholders. So I created a little shared expectation exercise that I do, either with my teams or I've even done it with my direct reports or with stakeholders, that basically says, "Okay, what can you expect from me as your project manager?" and we list some things. "What can I expect from you as a team member on this project?" and we list some things. And then, "What can you expect from each other as team members?" and then we list some things. One page, we all sign it, and then there's commitment that there's no surprises, and we all know what's expected of us, so it's a pretty cool exercise that you don't... You won't find that

in the PMBOK Guide. You will find that we need to align expectations.

0:54:05 MH: Oh, that's a great example, and the way you describe it... We spend so much time talking about getting stakeholder buy-in, but it sounds like what you've done is you've removed the need to get buy-in, because you've built it in from the get-go.

0:54:18 CP: Yeah, yeah. So we do that upfront, at the start, and then everybody is on the same page, and I rarely hear the question, "Well, I didn't know that was expected of me."

[music]

0:54:33 MH: PMI is just about to release version 6, I believe, of the PMBOK.

0:54:37 CP: Yeah.

0:54:38 MH: In fact, by the time this podcast airs, it probably will be live. We hope they'll keep that focus on giving us the ingredients, so we can make our own recipes. [chuckle]

0:54:47 CP: I also want to make sure that I'm using current materials, so when that new PMBOK Guide comes out, the textbooks that we use in our classrooms have to be PMBOK Guide-aligned with the sixth edition. So I have worked with the author of our current textbook that I use in terms of contributing to his textbook for the next edition.

0:55:04 MH: So, in addition to helping your textbook author that produces the textbook for the class you teach, you're also working on your own upcoming book, as I mentioned in your intro. Can you tell us little bit about that project and what that book's going to be about?

0:55:19 CP: Yes. In teaching project management, one of the chapters in our textbook is talking about strengths and maximizing the strengths in your team and whatnot, and that being a critical success factor. So I got really, really interested in StrengthsFinder by Tom Rath. Have you ever done StrengthsFinder, Mike?

0:55:36 MH: See, I haven't, but Kendall Lott, our normal interviewer, is a Gallup-Certified Strengths Coach.

0:55:41 CP: Oh, that's right. Yeah, yeah. So, on project teams, we want to build on our strengths and maximize the strengths that we have. And so I started giving presentations about StrengthsFinder. And so the author of a textbook that I used in the classroom reached out to me and said, "Hey, would you be interested in writing a book on strengths and project management? And I would co-author, or put you together with a..." , like Kendall, "a certified Gallup Strength coach." And so the two of us started collaborating about strengths and project management. Now she is certified in strengths and I'm certified in project management, so it's been a great match, and so the book will come out sometime next year or so.

0:56:23 MH: I'm definitely going to be looking out for it because it sounds like one of those books where you can put two high impact things together and have it be like one plus one equals eight.

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0:56:38 MH: What would your advice be to... Well, I want to hear about both aspiring PMs who haven't started in the field yet, but are very interested in it, maybe folks, like who take your class, but we also have quite a few listeners on the line that are seasoned mid-career PMs looking to go to the next level themselves. What advice would you give to both of those groups?

0:57:00 CP: Well, there's a couple things. First of all, for the seasoned people, as well as the aspiring people, I encourage everyone to get involved in the professional association for what you do. If it's project management, it's PMI, or if it's something else, just get involved. And don't just be a member, but take on an active role, volunteer, network, grow your knowledge. My second piece of advice, and I think this is advice for everyone, get some sales training. In project management, you are always selling for something, you're selling your ideas, you're selling for resources, you're selling to extend a deadline. And then of course, the hands-on experience just by doing projects. It's one thing to sit in the classroom, but it's another thing to actually do projects. And then finally, one thing that helped me along the way was to get a mentor. I knew early on that I had to be in charge of my own career, and so I have had mentors along the way and I've found that to be hugely beneficial. So I encourage aspiring and seasoned project managers to get a mentor.

[music]

0:57:58 KL: Connie really laid out the value of volunteering. Beyond helping out and making connections, you can gain experience in an area that might interest you, but which you are not yet quite qualified to take on in a professional setting. For her, it led to a promotion to a leadership role. Another thing I found interesting was her pitch for sales training. An effective project manager has to be proficient in the arts of communication and persuasion. So many of us seem to miss that.

0:58:26 KL: I hope these winners have inspired you to get involved in your PM community and to strive for optimal outcomes in your projects. Remember to clearly define and communicate everyone's expectations upfront, build a collaborative atmosphere. And that includes listening and being flexible. And by using PM best practices, you will inspire respect among all of your stakeholders.

0:58:47 KL: Special thanks to my guests, Joanne Hohenadel and Andre D'Penha, Greg Roos and Connie Plowman. And of course, very special thanks to my excellent stand-in, Mike Hannan.

0:59:00 Announcer: Our theme music was composed by Molly Flannery used with permission. Additional original music by Gary Fieldman, Rich Greenblatt, Lionel Lyles and Hiroaki Honshuku. Post-production performed at M Powered Strategies and technical and web support provided by Potomac Management Resources.

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0:59:16 KL: PMPs who have listened to this complete podcast may submit a PDU claim for one PDU in the Talent Triangle Technical Project Management with the Project Management Institute's CCR System. Use provider code C046, the Washington DC Chapter and the title 'PMPOV0043 Winners'. Visit our Facebook page, PM Point of View, to comment and to listen to more episodes. There you will also find links to the transcripts of all of our one-hour productions. You can also leave a comment on the projectmanagement.com portal, evaluate us on iTunes, and of course, you

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may contact me directly on LinkedIn. I'm your host Kendall Lott and until next time, keep it in scope and get it done.

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