



Improving People's Lives Through Innovations in Personalized Health Care

Success with Workflow Powered Status Reporting

9/19/2014



THE OHIO STATE UNIVERSITY

WEXNER MEDICAL CENTER

The Ohio State University Wexner Medical Center

Nationally Accredited Research and Academic Medical Center

- 1000 Beds
- 50K Admissions
- 16,000 Employees
- IT PMO & EPMO
- ~ 500 Users
- ~ 300 Active Projects
- 8 years with CA Clarity
- On Premise - Clarity 13.2



UNIVERSITY HOSPITAL
ROSS HEART HOSPITAL



Business Problems & Challenges

Business Problems to Solve:

- Improve Internal & External Visibility – The PPM Sweet Spot
- Standardize PMO Led & Non-PMO Led Project Status Reporting
- Data Reliability & Confidence
- Simplify Communication Tools Utilized

Challenges:

- Differing Formats, Templates, Cadences & Audiences
- Timeliness & Accuracy of Data

Tools:



PPM Sweet Spot



OSUWMC Executives

Properties Contents Scorecard Audit

Portfolio: CIO - Scorecard

Portfolio Scorecard

Scheduled Finish	Overall Health	Project Name	Stage	Health Comments	Schedule	Scope	Cost	Resources	Open Issues	Executive Owner	On Time Tasks	On Time Milestones	On Time Actuals	Change Requests	Status Report	Project Class
4/1/13	Green			The 2012 Upgrade activities are scheduled to be completed by 3/30/13. The project is in the process of being closed. Lessons Learned were conducted.	Green	Green	Green	Green	Green		52%	93%	88%	0		Class A
4/9/13	Green			All of the Reports and ETL jobs that needed modification have been converted and have been moved into PROD.	Green	Green	Green	Green	Green		0%	0%	0%	0		Class B
4/10/13	Green			No status report filed for period.	Green	Green	Green	Green	Green		0%	0%	0%	0		Class B
4/15/13	Green			Phase 7 of the Re-cabling project is in progress. All IT equipment has been relocated and the nine Emergency Department exam rooms have been closed and are being turned over to Turner Construction on March 29 for demolition.	Green	Green	Green	Green	Green		62%	100%	100%	0		Class B
4/18/13	Green			The last two measures (went live this week. The now has all ten measures available to view.	Green	Green	Green	Green	Green		88%	43%	67%	3		Class B
4/20/13	Red			Last interface changes moved into production. This is the last step in mitigating the scope. If this doesn't work we will need to revert to the current antiquated system and help HeartLife.	Red	Green	Green	Green	Red		25%	25%	94%	0		Class B
4/25/13	Green			No post deployment issues have been reported. Need details on the data migration from VMS tapes to VMS storage from the labs.	Green	Green	Green	Green	Green		97%	88%	100%	3		Class A
4/26/13	Green			The project team is currently testing the functionality of the web application. The and the testers are document the issues so that they can	Green	Green	Green	Green	Green		0%	17%	54%	0		Class B
4/29/13	Yellow			firewall. Outover now delayed	Yellow	Green	Green	Green	Green		100%	100%	100%	0		Class A
5/9/13	Green			es. Sending messages. The side. VMS connected to problem.	Green	Green	Green	Green	Green		95%	86%	100%	0		Class B



IT Managers



Customers



Project Managers

Communication

& Reporting

Bottom Up Aggregation Into Scorecards



Portfolio Mgrs & Leadership

Review Status Reports for Portfolio

Portfolio Scorecard

Project Name	Health	Project Dates	Start	Health Comments	Schedule	Scope	Cost	Resource	Open	Expended	Estimate	Est. On Time	Est. Budget	Change	Status
5513	Green			Work on 5513. The project is on track. The initial meeting was completed and the project will be closed in Q3.	Green	Green	Green	Green	Green	Green	62%	95%	85%	3	Class A
5512	Yellow			The project is complete and the project will be closed in Q3.	Green	Green	Green	Green	Green	Green	98%	75%	94%		
5510	Green			No change in status. All green standing on final deliverables from final meeting in the week meeting.	Green	Green	Green	Green	Green	Green	91%	97%	100%		
5511	Green			Closed project.	Green	Green	Green	Green	Green	Green	100%	97%	100%		
5514	Green			This project is complete and the project will be closed in Q3. The project is on track. The initial meeting was completed and the project will be closed in Q3.	Green	Green	Green	Green	Green	Green	98%	97%	100%		
5515	Green			Project is on track. All green standing on final deliverables from final meeting in the week meeting.	Green	Green	Green	Green	Green	Green	98%	97%	100%		
5516	Green			Project is on track. All green standing on final deliverables from final meeting in the week meeting.	Green	Green	Green	Green	Green	Green	98%	97%	100%		
5517	Green			Project is on track. All green standing on final deliverables from final meeting in the week meeting.	Green	Green	Green	Green	Green	Green	74%	94%	100%		



Program Managers

Review project Status Reports & completes program level Status Report each week.

Program Scorecard

Sub-Project	Health	Project Dates	Start	Health Comments	Schedule	Scope	Cost	Resource	Open	Expended	Estimate	Est. On Time	Est. Budget	Change	Status
5513	Green			Work on 5513. The project is on track. The initial meeting was completed and the project will be closed in Q3.	Green	Green	Green	Green	Green	Green	62%	95%	85%	3	Class A
5512	Yellow			The project is complete and the project will be closed in Q3.	Green	Green	Green	Green	Green	Green	98%	75%	94%		
5510	Green			No change in status. All green standing on final deliverables from final meeting in the week meeting.	Green	Green	Green	Green	Green	Green	91%	97%	100%		
5511	Green			Closed project.	Green	Green	Green	Green	Green	Green	100%	97%	100%		
5514	Green			This project is complete and the project will be closed in Q3. The project is on track. The initial meeting was completed and the project will be closed in Q3.	Green	Green	Green	Green	Green	Green	98%	97%	100%		
5515	Green			Project is on track. All green standing on final deliverables from final meeting in the week meeting.	Green	Green	Green	Green	Green	Green	98%	97%	100%		
5516	Green			Project is on track. All green standing on final deliverables from final meeting in the week meeting.	Green	Green	Green	Green	Green	Green	98%	97%	100%		
5517	Green			Project is on track. All green standing on final deliverables from final meeting in the week meeting.	Green	Green	Green	Green	Green	Green	74%	94%	100%		



Project Managers

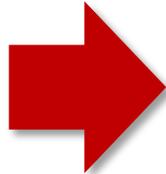
Complete their project Status Reports each week.

Weekly Business Process...

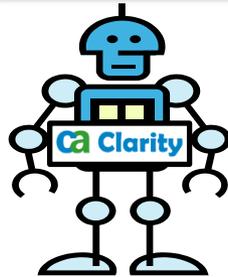
Monday - Tuesday



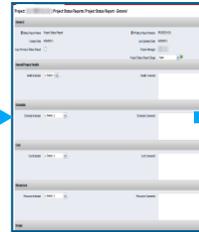
Portfolio Mgrs update projects (content) of the Portfolios



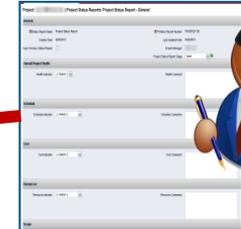
Wednesday



Based upon Portfolio content, Clarity creates Status Report for each project, and sends Project Mgr a Notification/ Action Item



Wednesday - Friday



Project Mgrs complete Status Reports and mark Action Item "Ready for Review"

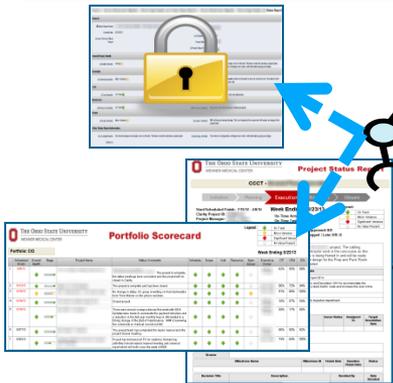
Saturday



Wednesday - Friday



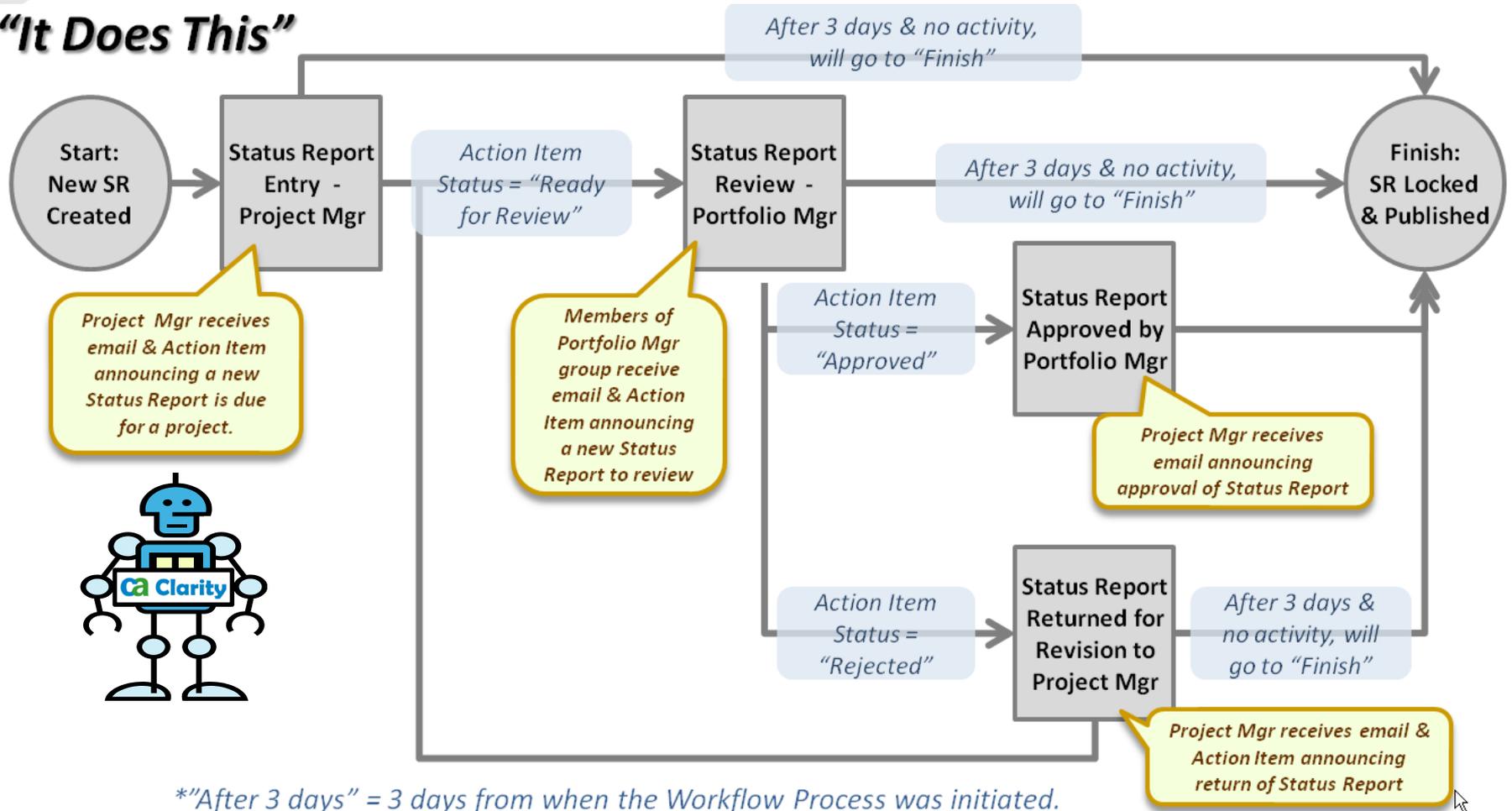
Portfolio Mgrs review Status Reports



Clarity locks all Status Reports for the week & runs weekly Scorecard & Reports

...Codified in the Clarity Process Engine

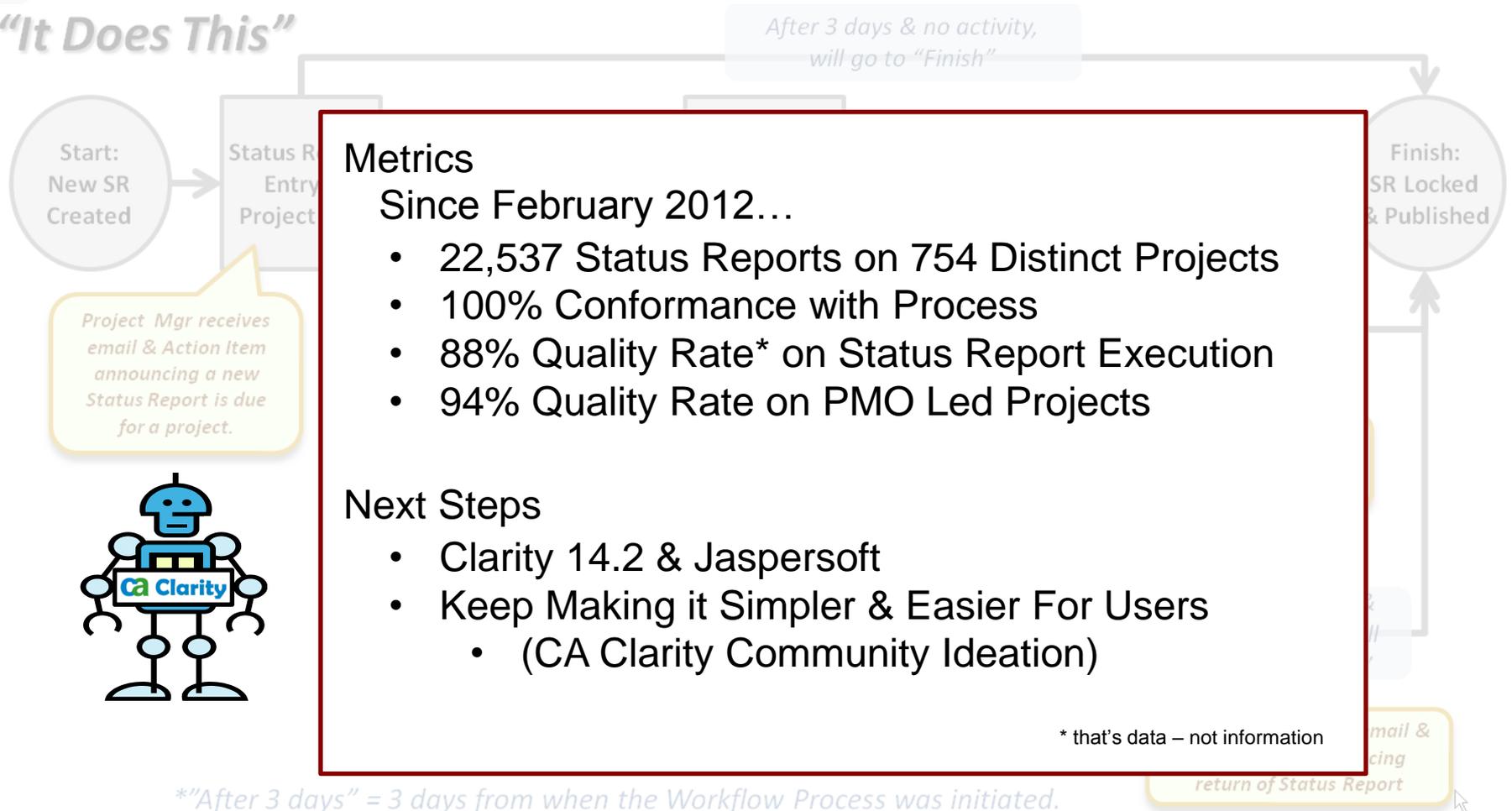
"It Does This"



*"After 3 days" = 3 days from when the Workflow Process was initiated.

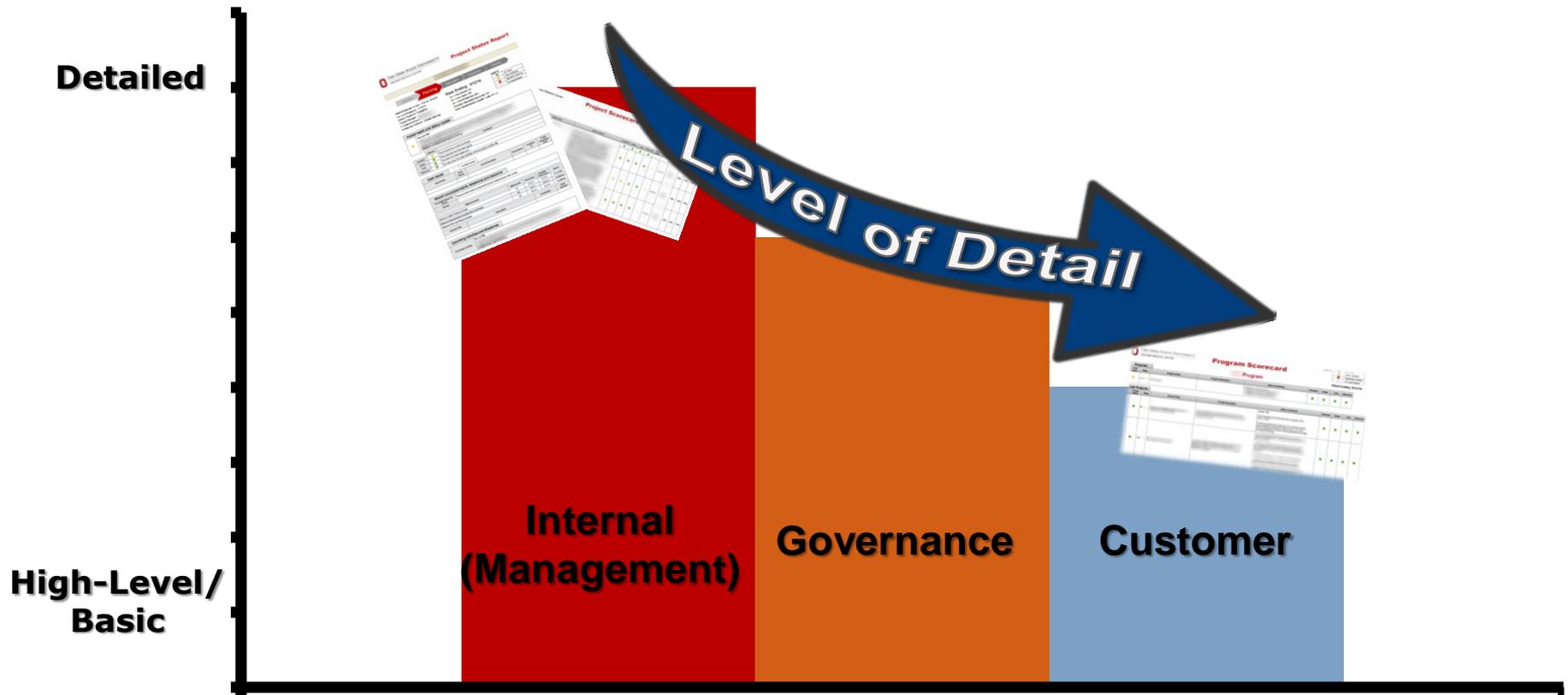
...Codified in the Clarity Process Engine

"It Does This"



Communication Tools

- Different Customers, Different Information Needs



Lessons Learned

- Status Reporting is a PM's communication aid.
 - It exists to support *conversations*.
- Beware scientism. The PM is the "I" in BI.
 - Document business process and support PMs.
 - Not all data that can roll up, should.
- Value consistency/reliability over perfection.
 - Stand behind *the process* and *the automation*.
- Subjective 'RAG' crosses methodology.
 - Waterfall or Agile, status updates are the responsible thing to do.



Questions?