



# Managing Outside the Work Plan

## Part I: Managing Internal Expectations

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August 15, 2007

MMIS Implementations: Planning and  
Managing for Success  
2007 MMIS Conference



# Professional Project Management

- Project Management Institute  
[www.pmi.org](http://www.pmi.org)
- Any project management book  
[www.amazon.com](http://www.amazon.com)
- NOT this presentation!
- This presentation is about the things you need to know OUTSIDE the professional project manager's Project Work Plan
- Some of this may actually be in books somewhere

# Elements of Any Project

- Managing People – Yours, other agencies', providers, constituents, and vendors
- Managing Things – Facilities, equipment, supplies, utilities, and services
- Managing Resources – State funds, federal funds, county or city funds, grant funds
- Managing Time – The Work Plan assures stakeholders that all will be accomplished in the expected time frame – OR DOES IT?

# Outside the Work Plan

- Internal issues: Staff expectations, sponsor commitment, expenditures in addition to the vendor contract, resistance to change, time for staff participation and “real work”
- External issues: Provider expectations, stakeholder commitment, changes in State fiscal picture, cooperation with other agencies, managing one or more vendors
- The Goal: to bring in your project on time, within budget, and as painlessly as possible

# Managing People

- Goals come from the top down – Project Sponsor, Steering Committees
- Remember what your goals are – there will be lots of distractions
- Your internal change agents need to know about your goals and the reasons that you are undergoing this procurement
- Change agents are key to developing and maintaining staff buy-in

# How to Identify Change Agents

- In a small state – you probably know them; in a large state – maybe supervisors know who they are
- Sometimes at leadership rank, but often in middle management or hourly worker level
- They naturally embrace change and new technology, minimize fear, communicate their enthusiasm to their colleagues
- Can be your strongest asset in bringing along the rest of the staff over months and years of change

# Staff Involvement

- Small state: Virtually everyone is involved
  - Can disrupt ongoing operations because all are needed to design, review, etc.
  - Can slow down project decisions, approvals due to non-project workload and obligations
  - Buy-in should be relatively easy to achieve
- Large state: Only certain individuals involved
  - Need to develop communications plan to keep other staff involved/interested
  - When to put plan into effect for maximum buy-in?
  - Change agents can make or break the team

# Staff Participation

- Staff turnover an issue regardless of state size – and at every organizational level
- Negatives: Loss of institutional memory, may reveal lack of written procedures
- Positives: New points of view, experience with new systems, enthusiasm
- Could go either way: New views could lead to scope creep, hijacking of project, or new insecurities and failure to make decisions

# Staff Will Have Questions

- They probably will have fears and worries which they won't admit to or talk about, but they are real and will affect the efficiency of the implementation
  - Am I going to lose control?
  - Will I need new skills?
  - Will I be criticized for (whatever)?
  - Will I be asked to do different things, or approach things differently?

# Designing, Delivering Training

- To whom, by whom, at what time?
- Use those internal change agents!
- Do “train the trainer” after identifying those who are enthusiastic about the change
- Trainers need to know old system and new system so they can explain changes
- What do these staff need to know to keep them ahead of the curve and ahead of the concerns that other staff have?

# Managing Things

- What kind of things outside the new system might change or need to be addressed?
  - New equipment (new computers, servers, T1 lines)
    - are they being acquired in a timely manner?
  - Policies (including administrative rules, State Plan Amendments) and procedures
  - Forms, signature requirements
  - Reporting needs, new reporting protocols
- Need to think about and respond to all these things in conjunction with the fiscal agent
- Won't work effectively if state and fiscal agent work separately – things will be forgotten; transitions will be missed

# Managing the Work

- Will there be office moves to plan, staff changes to consider, new job descriptions?
- Different types of questions now that providers and/or consumers have access through a web portal
  - immediate online response to routine questions
  - questions will change/require faster turnaround
- Workflow will change – work will come in electronically rather than in a pile of stuff; may be overwhelming
- New system will require staff to do different things, which may require new skills (e.g., the “dream” of user-defined reports means users need to understand the data and know how to ask the right questions)

# Money Matters

- Budget – may find that money you thought you had, you don't.
  - Lost money may not be specifically related to the procurement, but may be related to the funds needed to manage related aspects (e.g., purchase of new state equipment; \$\$ to support training if not included in the fiscal agent contract).
  - Can never assume that funds will not be cut; need to make sure budget folks understand the importance

# Value Matters

- Hard to quantify the cost/benefit of a new system –
  - Usually years since last procurement
  - Major changes in technology since last procurement
  - Change in staff versus automation costs – need fewer people, but often at higher levels of skill and responsibility
  - Results of greater efficiency (such as using a data warehouse versus hard coding programming changes)

# The “What if?” Plan

- Need to develop a contingency plan
- Staff will be reluctant – after thinking about procurement, developing RFP, putting out to bid, awarding, doing JAD sessions, doing UAT – what could go wrong?
- May need contingency plan just to counter other stakeholders who will be looking for guarantees (such as periodic interim payments)
- Don't palm the contingency planning off on the vendor – needs to be done by both parties and the contingencies need to be understood by all
- Can there be a back-out period?

# Back Outside the Work Plan

- Lord, grant me the serenity...
  - To embrace and take charge of the things I can control, or that I'm getting paid to control
  - To pull up my socks and cope with the things I can't control, even if my boss thinks I should be able to control them
  - And the wisdom to know the difference
  - And the humility to take it to my Steering Committee sooner rather than later