



BRIDGE Academy Toolkit

Project Management Basics

Effective Project Management requires attention to three areas of focus:

- Authority
- People & Teams
- Communication

Authority

The organization's structure and environment must support implementation for it to be successful. This requires buy-in and approval from senior management and the commitment of the necessary staff time and financial and technological resources necessary to implement the identified solution(s).

Before beginning a process improvement project, approval should be sought from the Executive Sponsor, Process Owner, and your direct supervisor.

People & Teams

Team Member	Roles and Responsibilities
Executive Sponsor	<ul style="list-style-type: none">• Member of leadership who has the ultimate authority to implement changes• Signs off on the project• Helps remove organizational barriers• Allocates resources to the project (staff time, etc.)• Must be kept in the communication loop
Project Lead	<ul style="list-style-type: none">• Requests approval from Executive Sponsor & Process Owner• Manages the project and the team• Primary POC for project-related communication• Responsible for maintaining project-related records• Works to resolve conflicts among team members
Process Owner	<ul style="list-style-type: none">• Individual who is ultimately responsible for seeing that the project gets implemented• Signs off on the project• Participates in the Project Team• Does not have to be the Project Lead
Other Team Members	<ul style="list-style-type: none">• Additional individuals who are motivated to improve the process• May include:<ul style="list-style-type: none">○ Colleagues○ Customers○ Stakeholders○ Subject Matter Experts○ Fresh Perspectives



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RACI Matrix

The RACI Matrix is a chart that creates clarity about roles and responsibilities within in a project. RACI stands for:

- **Responsible:** The person who performs an activity or does the work
- **Accountable:** Person who is ultimately accountable for the work; has Yes/No veto power
- **Consulted:** Person whose feedback is required and who contributes to the activity
- **Informed:** Person who needs to know of the decision or action

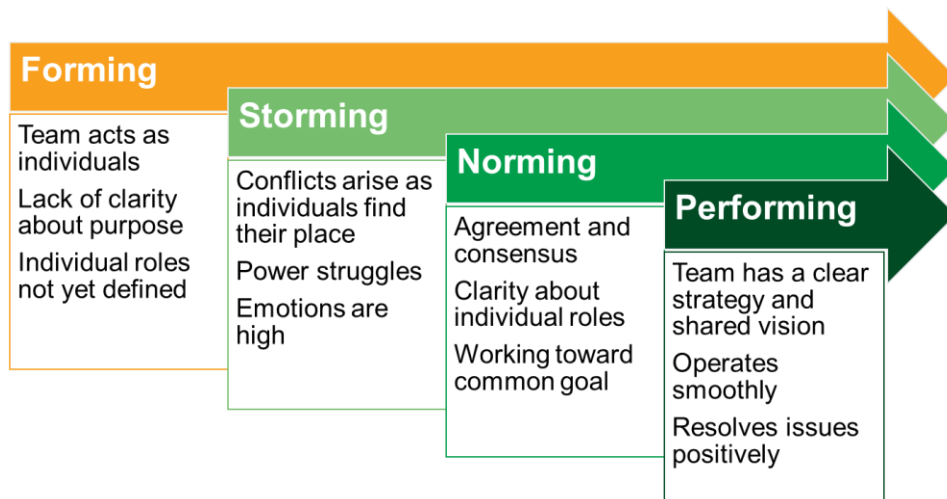
Project Title: RACI Matrix Date:				
Activity	R	A	C	I
Task 1	Peggy	Joan	Don	
Task 2	Pete	Don	Harry	Bertram
Task 3	Joan	Roger		Pete
Task 4	Don	Roger	Peggy	Joan

Creating a RACI Matrix can be helpful during situations in which there is a lack of clarity over what is expected from individual team members or stakeholders of a project.

Team Dynamics

To maintain positive team dynamics throughout a project, consider the following guidelines:

- Clearly define roles and expectations for team members
- Define the expected time commitment
- Pick and stick to ground rules
- Develop clear decision-making protocols
- Equal participation
- Stay out of the weeds
- Ideal team size: 5-8 members





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Communication

Clear, concise, and consistent communication is key to project success.

Effective Team Meetings

The Project Lead is responsible for ensuring that team meetings are productive and well-run. Team members' time is a limited resource. Ensure that it is well used.

- Schedule meetings in advance and prepare meeting agendas
- Send out agendas at least a day in advance
- Stick to the agenda
- Use a Parking Lot if needed

Project Title: Team Meeting Agenda Date:			
Time	Topic	Desired Outcome	Who / How
10 min	Check in, review agenda	Info only	Don
10 min	Review pre-work	Info Only	Betty
30 min	Brainstorm solutions	Idea generation	Pete / Affinity Diagram
5 min	Next Steps	Assignments	Don / Action Register

Action Registers

Project Title: Action Register Last Updated:		
WHAT	WHO	WHEN

The Action Register is a simple tool that creates clarity about:

- **WHAT** task needs to be accomplished?
- **WHO** will take the lead in seeing that it gets done?
- **WHEN** it will be completed?

The team should update the Action Register regularly and ensure that all team members have access to the most current version.



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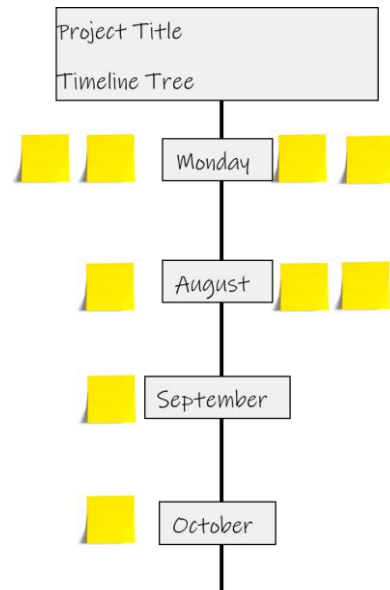
Project Schedules

Project schedules are useful tools for keeping track of planned deadlines and identifying delays and dependencies. There are many tools available for tracking and communicating project schedules.

Timeline Tree

A Timeline Tree is a simple tool for a project team to identify all the dates and high-level tasks identified in an Action Register and display them visually.

- Horizontal axis represents time
- Post-its are used for each task on the Action Register



Gantt Chart

A Gantt Chart is a more sophisticated graphical illustration of a project schedule that helps plan, coordinate, and track specific project tasks.

- Can be built with Excel or other software tools
- High level of detail
 - Phase
 - Task
 - Progress
- Helps identify dependencies and delays

