

Business and Strategic Planning • part 2

# Project management for representatives

## LEARNING OBJECTIVES

- **Describe** the elements of project management.
- **Identify** questions that must be answered in order to plan and schedule a project.
- **Explain** how Gantt charts are used in project management.
- **Explain** how network analysis is used in project management.
- **Describe** project management tools.

*This second article in a three-part series presents an overview of project management, including planning models and project management tools.*

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Today's healthcare representatives have greater responsibilities than ever before, and are expected to manage their territories as businesses. The success of your territory/business depends in part on your ability to manage projects. Project management involves organizing multiple tasks, deadlines and priorities in order to ensure the most successful outcome.

Formulating a business plan for your territory requires project management. Typically, a series of objectives or goals for a territory is identified. Next, a series of supporting activities or projects required to accomplish each objective is listed.

As an example, the objective "to place ABC antibiotic on formulary at Epsilon HMO by December 1" may call for more complex activities, such as arranging a pharmacy and therapeutics committee presentation in coordination with your national account manager. Project management techniques and tools will help you control the planning process necessary to undertake such a project.

### Basic elements of project management

Project management begins with the process of breaking down a project or task into its component parts. The basic steps include:

- **Set a goal.** Determine the desired outcome or end result of your project. Make sure it is a concrete objective.
- **Set a final deadline.** If a specific project deadline has not been established, be sure to set one anyway. Factor in some extra time to cover unexpected problems or delays.
- **Break down the project into subtasks or actions.** This is one of the most important steps, because it allows you to see the steps required to meet your goal clearly.
- **Organize by sequence.** Determine the appropriate order for subtasks to be performed. Some actions will be handled sequentially, while others may be handled in parallel (simultaneously).
- **Set target dates and milestones.** Establish interim target dates for significant subtasks. Set aside designated points of time, called milestones, to evaluate your overall progress and modify your plan if necessary. These milestones will help you

determine if you are going to meet your final project deadline.

- **Delegate.** Assign subtasks to yourself and others. If appropriate, delegate to other members of the business team. Identify critical links between tasks (where completion of one task is dependent on the results of another task). If you are working on the project alone, you should assign yourself a certain number of subtasks each day to help keep yourself focused.
- **Monitor your progress.** It is important to check your progress regularly, as well as the progress of those working with you.
- **Communicate.** Regularly update every person involved in, or affected by, the project. Report to them on the project's goals, overall progress or delays, and results. Many companies have policies or guidelines regarding who must be kept informed about the ongoing status of a project.

### Project planning and scheduling

The basic approach to project planning and scheduling is to identify the relationships between tasks and timing. You must analyze the individual tasks involved in the project, prioritize them based on their relationships to each other and determine their effects on the overall schedule. The following are important questions to ask yourself:

- What is the desired outcome?
- What are the primary activities of the project?
- What is the sequence of these activities?
- Which activities can be conducted simultaneously?

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- What are the estimated time requirements for each activity?

If you cannot answer these questions, you may not be properly prepared to undertake the project. You may be able to find answers by reviewing past projects, talking to your manager or colleagues, or talking to your customers. After you understand the project's requirements and the relationships between activities, you are ready to make use of project planning models such as the Gantt chart or network analysis.

### Gantt chart

Developed during World War I by Henry L. Gantt, this planning model lists activities on the vertical axis, and their duration (days, weeks, months) on the horizontal axis (see figure above). This technique generates a range of possible activity schedules by analyzing the effect of starting each activity as early as possible (early start approach), and as late as possible (late start approach).

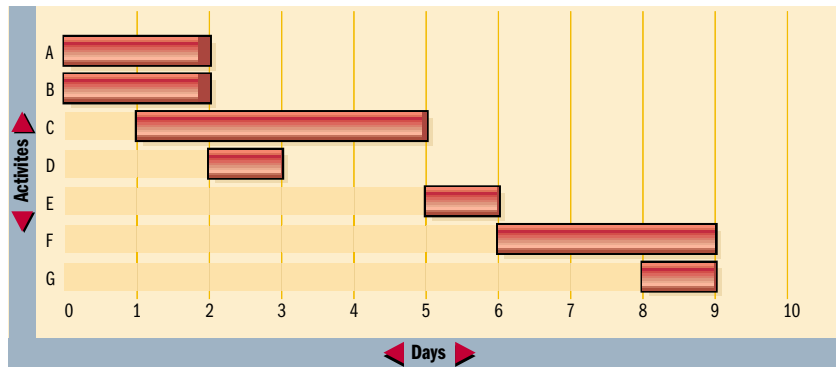
**Early start approach.** When employing the early start approach, you determine how early you can begin each task without adversely affecting any other task. In this way, you can establish the earliest possible end date of the project.

**Late start approach.** To apply a late start approach analysis, schedule activities backward from the end date. Any tasks that can be initiated later rather than sooner are moved to the right accordingly. With this technique, you can estimate the latest possible start date of the entire project.

The difference between the start times (or end times) of a task on the two schedules is called the slack. Activities that do not have any slack time are considered critical. The series of activities that connects the beginning of the project with the end of the project is known as the critical path. A delay in any activity along the critical path will delay the entire project past its estimated end date.

The Gantt chart has two fundamental weaknesses: an inability to show interdependencies between more than two tasks, and time and resource tradeoffs.

### Gantt chart



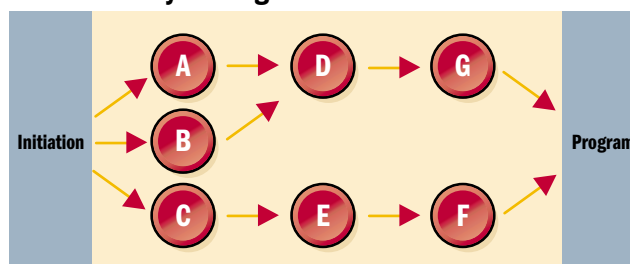
### Network analysis

This planning model graphically illustrates the relationships between tasks in a project. Diagrams and symbols, representing networks, are used to visually link the events and activities involved in a project. Networks are designed to reflect a continuous flow toward desired end points. The commonly used flow chart is a form of network analysis.

Networks consist of arrows, representing activities, and nodes, representing events (see illustration below). Events are specific starting points or ending points for an activity (or group of activities) and occur at a specific point in time. Activities are defined as the work necessary to progress from one event to another. These can occur over a period of time.

Network analysis is clearly indicated for the planning and scheduling of projects that have many activities and interrelationships. It forces a project planner to identify all the activities involved in the project and consider their interrelationships. Although this is a crucial step in effective planning, it is often neglected.

### Network analysis diagram



### Project management tools

There are a variety of tools that can help you manage groups of tasks. There is no right or wrong choice. These tools include: project planning sheet, master list, status reports and project management software.

**Project planning sheet.** The project planning sheet is a simple but effective organizational tool. It is set up as follows:

1. Create several columns on a piece of paper or on your computer.
2. In the first column, record all the subtasks you have identified as part of the project.
3. In the second column, record the length of time required to complete the task (days, weeks, months).
4. In the third column, enter the task's start date.
5. In the fourth column, enter the task's end date.
6. In the fifth column, add names of resource people, if appropriate, for the project.
7. In the sixth column, record budget information.

If you list the project tasks sequentially, the start date for the second task should immediately follow the end date for the first task and so on.

As an alternative, you may want to organize your list of tasks according to levels, rather than chronologically. Level-one tasks are basic preliminaries and first-stage tasks that do not rely on any others. Level-two tasks hinge upon completion of one or more level-one jobs. Level-three tasks

are the most complicated and rely upon completion of one or more level-two jobs.

This method is particularly useful for managing projects composed of many parallel tasks. Organizing them by level can help you clarify which items must come first and avoid wasting time on premature tasks.

Keep your project planning sheet in a special place, and check it daily. Cross off completed tasks and highlight any items that are lagging behind schedule.

**Master list.** The master list is an itemized, running inventory of things that need to be done. It is important to centralize your listings in one document and not generate numerous to-do lists.

Master lists are usually kept on a weekly or monthly basis. For example, if you kept a weekly master list, you would write down everything that needed to be done for the week, and update it continually throughout the week. At the end of the week, you would transfer any activities not completed to the next week's list.

Here are several tips on using master lists effectively.

- Record everything.
- Consolidate whenever possible.
- Scan your list periodically throughout the course of a day.
- Try to schedule the most important activities during your most productive time.
- Cross off or delete completed items.
- Review your list at the end of the day.
- Do not redo your list every day.

**Status reports.** Status reports are brief reports designed to convey a snapshot of a project at any given time, and highlight any significant issues that arise. Status reports provide documentation of your activities, any issues that came up during the process and how they were resolved. You may find this information to be useful in the future, for things such as planning similar projects or supporting performance objectives.

Sample items for a status report include: accomplishments, pending items, concerns and recommendations.

**Project diary.** A useful tool for storing all your relevant project documents is the project diary. These documents may include:

- The project proposal or business plan.
- A development plan and schedule (may be a project planning sheet, master list, etc.).

- Your budget.
- Project status reports.
- Any other miscellaneous records.

Project diaries are usually maintained either as electronic files or in a three-ring binder or folder. If only some of the project documents are stored in your computer, you may want to print out hard copies, so that all documents can be kept together.

A project diary may also serve as a historical reference to allow you to review your project's successes, problems, budget and timing issues.

**Project management software.** There is a wide range of project management software programs that can help organize any project. These range from simple scheduling aids to comprehensive professional management packages. Many incorporate Gantt charts and network analysis modeling. Some programs can even integrate groups of smaller projects into a master project or automatically allocate resources to the individual tasks involved in the project.

### Sample situation

The following is a sample scenario which illustrates how to approach project planning.

A healthcare representative has scheduled three lunch programs at the offices of his top accounts. The first luncheon is 10 days from now, the second is in 11 days, and the third is in 12 days. Each will feature a video and handouts. He will need to obtain a copy of the video from his manager and assemble the handout. He wishes to complete his preparations nine days from now (the day before the first program). He needs to confirm the appointments with each office.

The following are the basic project planning questions he needs to answer, with suggested answers.

- What is the desired outcome of the project?
  - To obtain a commitment for greater use of the product or products presented.
  - To build rapport with top physicians and their office staff.
- What are the primary activities of the project?
  - Confirm date and time with each office.
  - Obtain video from manager.
  - Obtain journal articles and clinical reprints.
  - Arrange for food.

- Assemble handouts.
- Prepare presentation.
- Review responses to common objections.

- What is the sequence of these activities?

A possible sequence might be:

1. Obtain video from manager.
2. Obtain journal articles and clinical reprints.
3. Prepare presentation.
4. Assemble handouts.
5. Confirm date and time with each office.
6. Arrange for food.
7. Review presentation, handouts and responses to common objections.

- Which activities can be conducted simultaneously?

- What are the estimated time requirements for each activity?

Estimating the time required to conduct these events, as well as determining which ones may be conducted simultaneously, depends largely on the individual planner. PR

*The final article in this series will focus on the fundamentals of financial decision making.*

### ARTICLE SUMMARY

- Project management begins with the process of breaking down a project or task into its component parts.
- The basic approach to project planning and scheduling is to identify the relationships between tasks and timing.
- Two project planning models are the Gantt chart and network analysis.
- The Gantt chart generates a range of possible activity schedules by analyzing the effect of starting each activity as early as possible (early start approach), and as late as possible (late start approach).
- Network analysis graphically illustrates the relationships between tasks in a project. Diagrams and symbols, representing networks, are used to visually link the events and activities involved in a project.
- There are a variety of tools that can help you manage groups of tasks. There is no right or wrong choice. These tools include:
  - Project planning sheet.
  - Master list.
  - Status report.
  - Project management software.