

CREATING A PROJECT INITIATION STORYBOARD TEMPLATE

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ABSTRACT

How do we best decide which projects to move forward? While a wide range of project and quality management tools and templates exist, little is available in the current literature and practice to assist leaders in selecting projects. This paper offers a simple, flexible template to improve decision making and communication. The template aligns with vocabulary and techniques from project and quality management, making the project “kick-off” more successful. Moreover, this low-tech solution is easily understood and used by most from novices to experts in project management.

KEYWORDS

project management, agile, quality improvement, decision making

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Introduction

This is a critical decision point: having a formal project kick-off, despite blocked key precursors of success risks, not only the viability of the project, but draws away limited resources from other work that would more likely succeed. Failed project initiation also damages the credibility of project managers and sponsors. These project initiation gates act as a check before effort is wasted. There are many tools available to manage active projects, improve quality, and analyze results. There are few frameworks that help one evaluate projects early in development. In this paper, I offer a template to better understand project value proposition, expected work, and requirements for success. The **Project Initiation Storyboard (PISB)** template is based on many project management (PM), quality improvement, and design tools. Once a project is kicked-off, the PISB may be used to track the project at a high-level. It is important to note that the PISB is intended for use by a project leader or sponsor and not to replace any other PM tools or output from a project team or manager. The PISB is potentially relevant to other leaders who are looking to fill a similar need.

The PISB is deliberately a highly-visible, hand-written document intended to be kept nearby and visible to others. It serves as a cue to the team to value continuous quality improvement using simple, reproducible, learnable, and effective methods. Moreover, it creates a source for conversation and energy about process improvement and project management. Therefore, the PISB is designed to be accessible to people regardless of their knowledge of PM methods. It can be explained in minutes, and others can reproduce the use of the tool quickly.

Template Elements

The PISB template is a collection of many well-known tools from project management, quality, and design. In this section, I describe some specific elements and provide examples. It is important to note that this template is designed to be flexible and adaptable to the individual projects and user. It is not a prescribed path or methodology. See Appendix A for a sample.

A3

Like the PM tool named for a standardized paper size, the PISB deliberately distills the focus to one page with bullets, data, and limited prose. This is not a multipage text document to read. This is a billboard. As such, it also has a lot in common with the A3's bigger sibling, storyboards.

Storyboards

The PISB concept and language draws heavily from iterative, agile methods, including the Sticky-Notes for tasks and the columns for tracking progress from "Not started," to "In progress," to "Completed." The Institute for Healthcare Improvement (IHI) has advocated for the use of storyboards for grass-roots improvement projects, including agile – a methodology that enhances team excitement as tasks hit the completed space (IHI, 2004; Scoville, 2014).

Voice-of-customer (VoC)

Writing the project goal or specific task using the VoC value proposition statement helps to identify stakeholders, their needs, and the specific outcomes necessary for success. A simple structure is: "As a _____, I want to _____ so that I can _____" (Shaffie, 2012) For example, "As a family physician, I want to have effective decision support tools so that I can reliably screen the right patients for colon cancer."

Model for Improvement

Another key component of the PISB is the central role of three questions: 1) What are we trying to accomplish? 2) How will we know that the changes have led to improvement? 3) What changes can we make that might lead to improvement? (Langley, 2009). The sequence of the questions and the specific word choice are critical and should not be adjusted. Questions 1 must be answered first. Question 2 requires review of current-state data

and SMART metrics¹ (Wikipedia, 2018). Question 3 begins a brainstorming process that might become the early tasks on the storyboard. Using the VoC proposition format, we might state that “Within 12 months of the project kick off date, 100% of patients with a Primary Care Physician in Manchester Family Medicine clinic will have had any necessary colon cancer screening. In order to accomplish this, we will train office staff, promote patient education material, implement new tools in the electronic health records, and manage a patient registry for preventative services.”

Data display

Current-state data may be displayed in several ways. An example of data visualization is time-series data. When using a tool such as a run-chart, adding a year or more of past data can help identify trends, progress, variation, and outliers (Perla, 2011). Highlighting and including footnotes for any special cause variation as a teaching moment for any people passing-by in the hallway.

Pre-charter tasks

There are several tasks that go on the PISB early for any proposal. These help evaluate project viability before additional work is done. The outcome of the task work will inform the charter and scope-of-work documents. Such tasks include: 1) Stakeholder preliminary support; 2) Rudimentary financial ROI analysis; 3) Technology initial review; 4) Pilot site acceptance.

Gates

The early tasks act as “gates.” Each task must be completed with a successful outcome in order for the project to advance to formal chartering and kick-off. A blocking task is any task that cannot be put into the “Completed” column or whose output identifies a significant barrier or risk. While waiting for a blocking task to get resolved, work might continue on other tasks. As long as there is a single blocking task, the project proposal does not move forward toward formal chartering.

Tasks assignments

Each task should be assigned to one person for responsibility tracking. Since there is no project team or PM at this preliminary stage, all tasks belong to the project owner. At times, tasks may be assigned to someone if specific information or input is needed from them. For example, one may need information from a financial analyst in order to calculate return on investment (ROI). Note the name of the delegate and a reasonable response date on the task Sticky-Note.

Task size points and pseudo-critical path

It may be possible and helpful to include a numerical value to a task on a Sticky-Note. Sometimes, I may also write on the task Sticky-Note a numerical value for estimated effort, much like “story points” in Agile PM (Tyagi, 2017). An easy method is to use the Fibonacci values to help differentiate relative effort. Story points help focus efforts appropriate to the work. This creates a rudimentary critical path. The tasks with the big numbers need more work to get done, and neglecting these will slow the process.

Go/No-go

The project owner can use the PISB daily or weekly to decide whether to continue work on tasks. Blocked tasks or gates might not mean abandoning the project. If the project is of high strategic priority, then the project owner needs to engage other key stakeholders to get support. If the project is not a top priority, it may be put on hold until circumstances make it more viable, or the sponsor may choose to kill the project entirely – before chartering and kick-off.

Flexibility

The PISB is meant to be helpful to the sponsor. It is meant to be customized, to incorporate a new design element, to alter the format, to skip certain features depending on the project. Not all projects have the same background or goals. The PISB

¹ SMART is a goal setting acronym that stands for Specific, Measurable, Achievable, Realistic, and Timely.

should be adapted to fit the needs of the project, the owner, and the organizational context.

Analysis

After initial trials with the PISB, three key strengths emerge: 1) having a designated, visual space to track ideas and progress; 2) engage colleagues in the projects and learning more about PM tools; and 3) the flexibility within the template to adapt as need to the project.

As is often the case, the strengths may also be weaknesses. As these are helpful in creating a project and do not have a team supporting updates, boards may easily become out-of-date with only periodic updates. Developing the habit of creating a “huddle of one,” may help to mitigate this factor. The project owner should huddle around their PISBs regularly. Even better, huddle around the boards with a few stakeholders to get their early input.

It is also possible that the oversimplification of the project in this early storyboard will overlook critical paths to success. For most ideas this will not be detrimental to the project, but project owners should keep in mind that the PISB is very preliminary and therefore (and by design) contains many blind spots.

Finally, the flexibility to use certain elements in a storyboard or not may also be a weakness. Many wise people have identified the value of these elements, and there is a reason the elements are part of the original template. As with many tools, once people skip certain elements, the risk of missing something increases. Should this template be adopted more widely in an organization, this issue increases and standardization may be more important.

Recommendations

With the basic PISB template in place, the next steps include training three to four people in our local environment. The ideal candidates are those who already have ideas for improvement projects.

Having a team who use the template may also help mitigate some of the limitations noted above.

As other people use the template, we will first endeavor to use a standard template – using all of the items, gather feedback about each of the elements, and adapt purposefully.

Not all ideas will become projects. One purpose of the PISB is to provide a structure to creatively and critically evaluate ideas. Using the PISB can be used to create a culture where is acceptable to *stop* an idea from moving forward to the project stage. Simply marking a big red X through the storyboard with some explanation text about why the idea is not moving forward provides the team with helpful information for the next ideas and encourages dialog.

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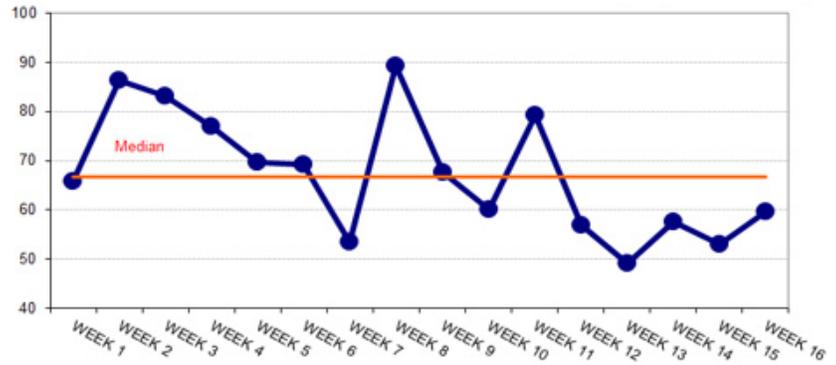
Appendix A: Sample PIBS

Project Initiation Storyboard: Colorectal Cancer (CRC) Improvement

Goal: 100% of patients with colorectal cancer screening completed as needed.

Baseline: 63% of patient have necessary colorectal cancer screening completed.

Baseline data: % pts w appropriate CRC screen



Initiation date: 6/22/2016

Sponsor: Dr. Burdick

Estimated Kick-off date: Q3 FY2017

Model for Improvement Questions:

- 1) What are we trying to accomplish? Improve CRC screening in Manchester Family Medicine
- 2) How will we know that changes led to improvement? We will have a registry for preventative services, and 100% of patients needing CRC screening will have the services completed within 1 year of project kick-off date.
- 3) What changes can we make that might lead to improvement? See Tasks below:

