

Project Management Information Systems: Helping or Hindering?

Isaac B. Mitchell, FACHE, LSSBB, PMP, CPHQ

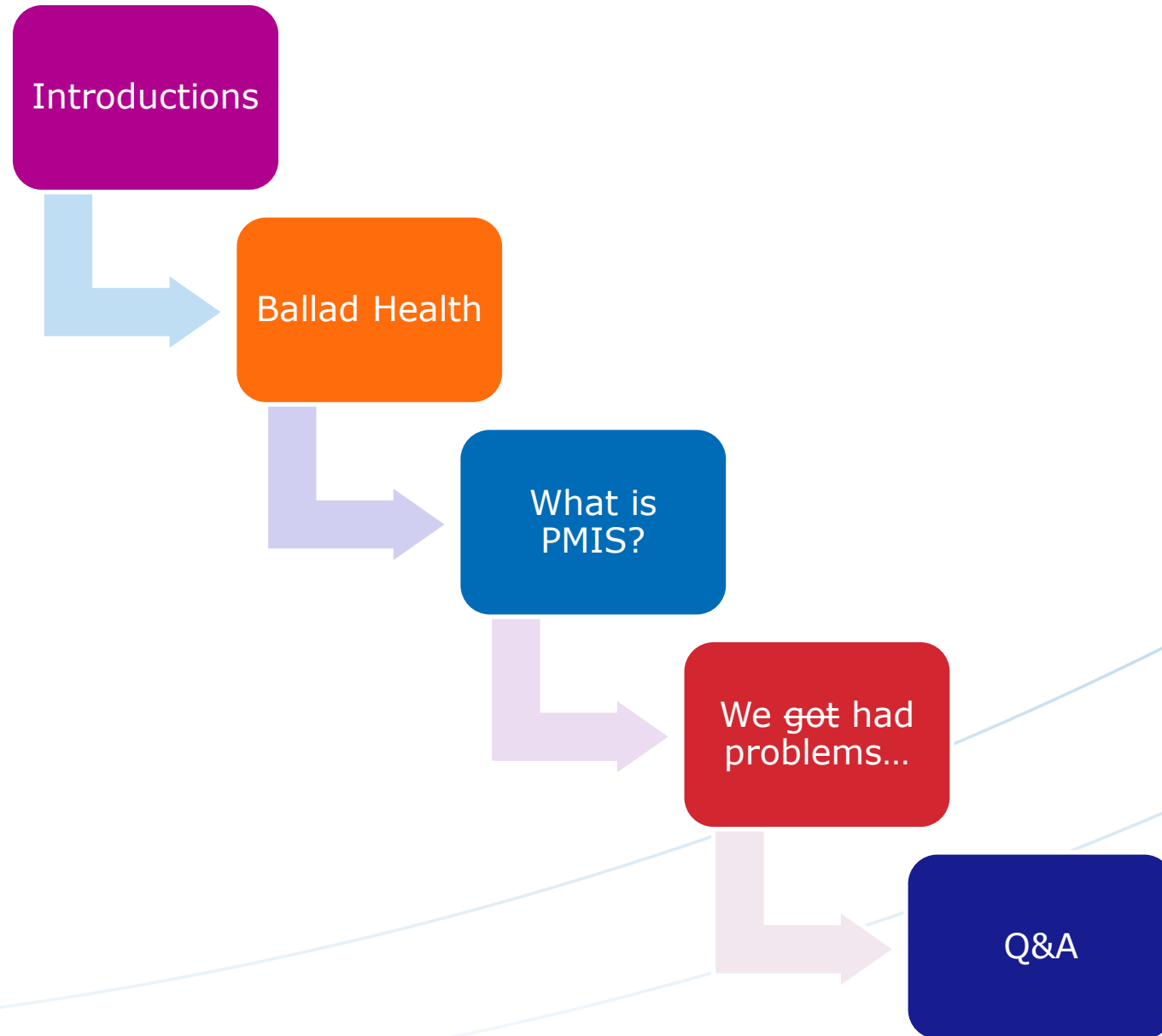
AVP, Project Management and Operational Excellence



It's your story. We're listening.

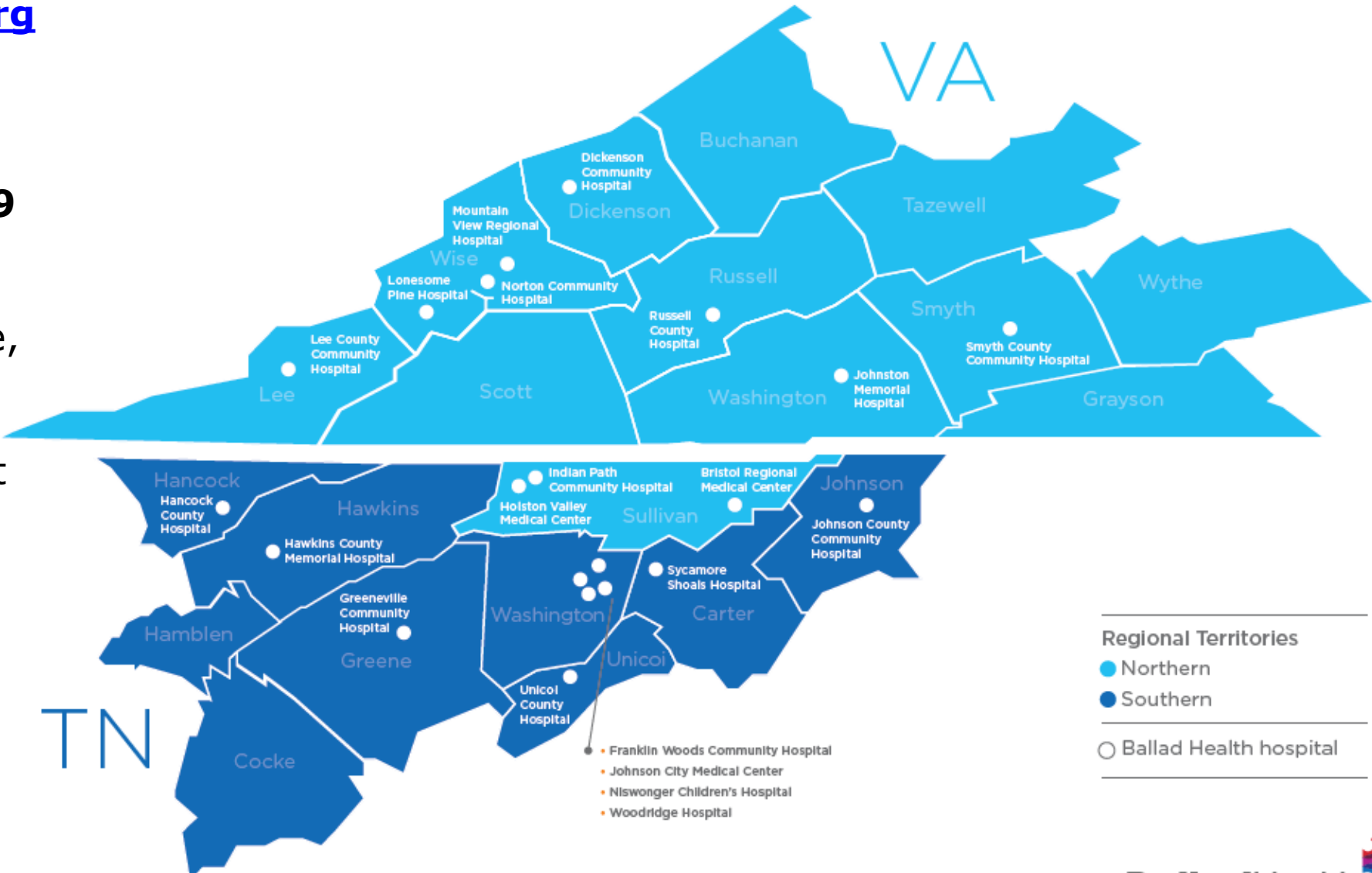
April 18, 2023

Agenda



Ballad Health

- www.balladhealth.org
- Ballad Health is an integrated community health improvement organization serving **29 counties** of the Appalachian Highlands in Northeast Tennessee, Southwest Virginia, Northwest North Carolina and Southeast Kentucky.
- System of **21 hospitals**, post-acute care and behavioral health services, and a large multi-specialty group physician practice.



What is PMIS?

Project Management Information System

- Software programs that organize and control project data and information flow.



SCAN ME

Will I get
copies of the
presentation?

NO

Why?



Est. 1828

Dictionary

Thesaurus

relic



Games & Quizzes

Thesaurus

Features

Dictionary

Definition

Synonyms

Example Sentences

History

Phrases and Idioms

Entries Near

Show More

Save Word

relic noun

rel-ic 're-lik

[Synonyms of relic](#)

- a** : an object esteemed and venerated because of association with a saint or martyr
b : SOUVENIR, MEMENTO
- relics plural** : REMAINS, CORPSE
- : a survivor or remnant left after decay, disintegration, or disappearance
- : a trace of some past or outmoded practice, custom, or belief

What problem
are we trying
to solve?

We ~~got~~ had problems...

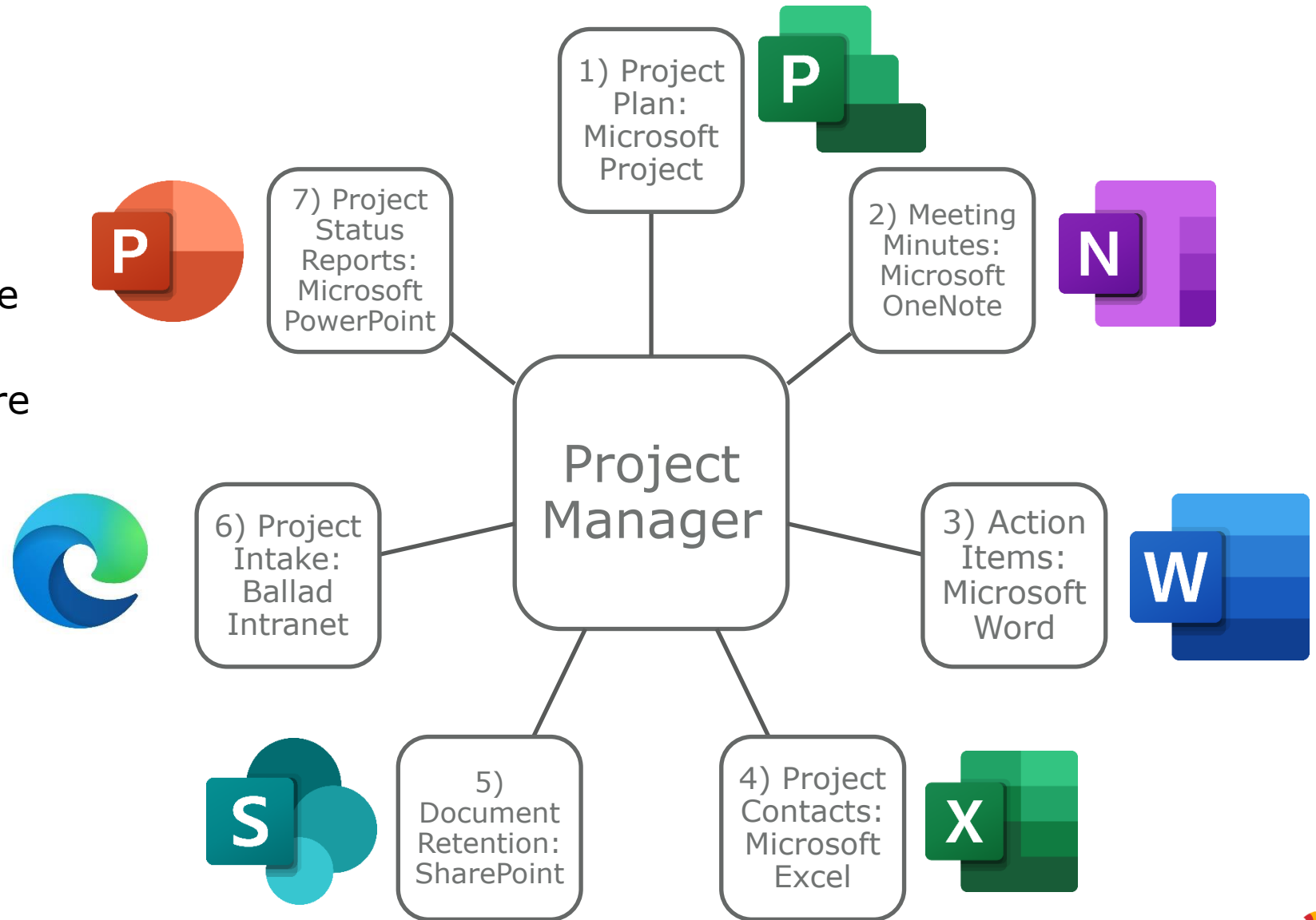
1. Project Management documentation in multiple systems. Sometimes duplicative.
2. Cumbersome and confusing project request process.
3. Lack of transparency of project intake status.
4. Static, out-of-date, and time-consuming project reports.
5. No way to determine resource capacity and workload.
6. Limited transparency and variation of project progress and needs.
7. Inconsistent on-boarding plan and variation between project manager practice.
8. Continuous improvement and PMIS enhancements.
9. Showing Value of Project Management and Operational Excellence

1) Project Management documentation in multiple systems. Sometimes duplicative.

Problem: Project Management documentation in multiple systems.

Issues:

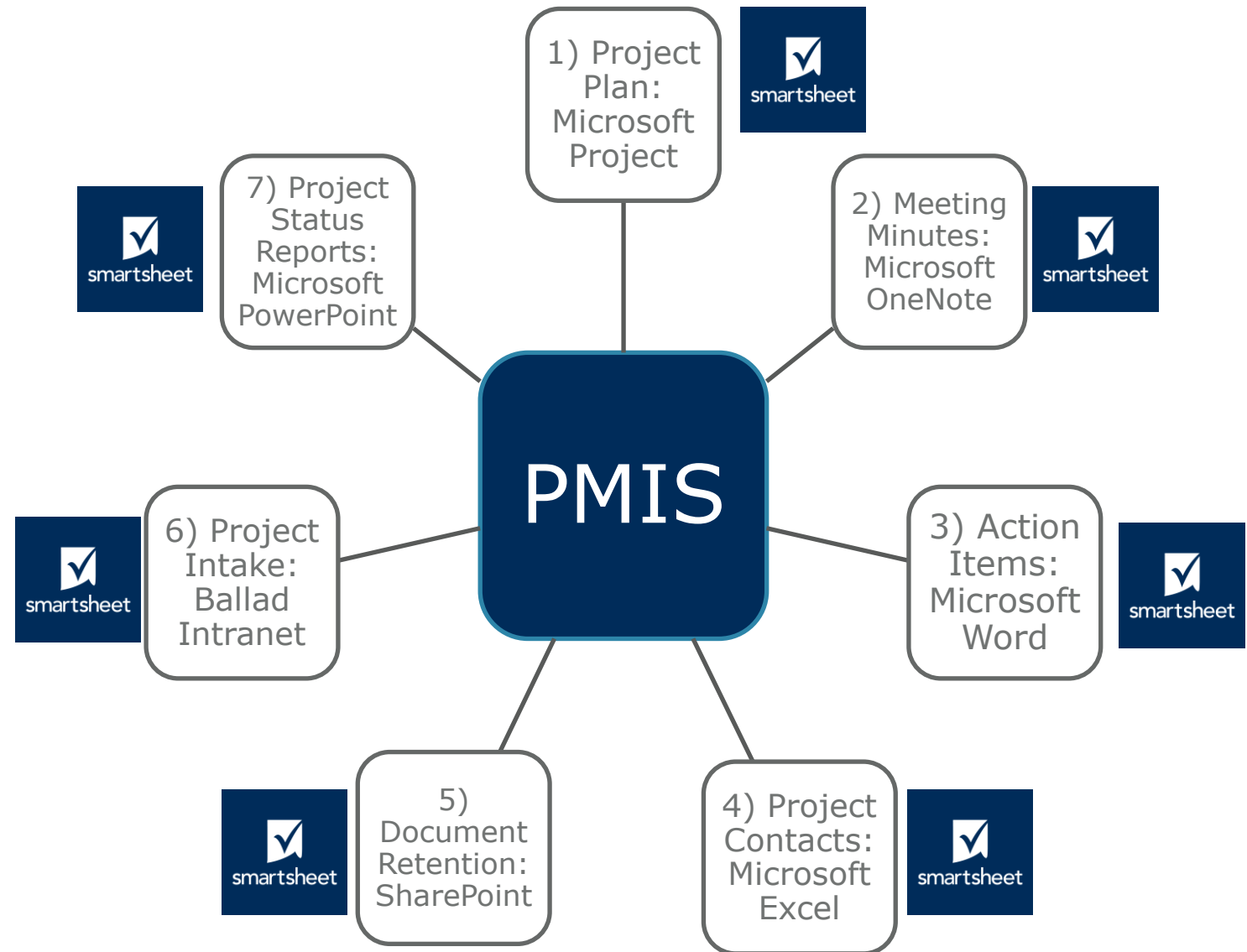
- i. PM pushes information to stakeholders
- ii. Documentation in multiple systems
- iii. Statics documents that are out of date the moment you publish them
- iv. MS Project required user license to view without converting



Solution: One stop shop for all project information using Smartsheet PMIS.

Resolutions:

- i. Stakeholders pull information from PMIS, www.Smartsheet.com
- ii. One source of truth for documentation
- iii. Dynamic documents that update in real time
- iv. Smartsheet is web0based software that does not require a license to view and edit project information.



Smartsheet

Smartsheet is a web-based software offering for collaboration and is used to assign tasks, track project progress, manage calendars, share documents, and manage other work, using a tabular user interface.

[smartsheet](#) [Why Smartsheet](#) [Product](#) [Enterprise](#) [Resources](#) [Pricing](#) [Contact](#) [Watch a demo](#)

[Log in](#)



Risk	Ticket #	Request Title	Requestor	Urgent	Due Date	Status	Service	Priority	PM	Depa
	12870	Web form bug	Floreia Fitzgerald	<input type="checkbox"/>	11/01	New Request	Bug Fix			
		→ Personalization								
	12868	Segmentation test	Lazarus Barros	<input type="checkbox"/>	08/30	Requirements	Testing	3 - Medium	Burcu Langlois	Dema
	12865	Search results	Lazarus Barros	<input type="checkbox"/>	08/23	To Do	Website	2 - High	Leigh Gibbs	Mark
	12846	Customer home	Lazarus Barros	<input type="checkbox"/>	08/18	Blocked	Bug Fix	1 - Highest	Leigh Gibbs	Exper
	12841	Pricing Tiers	Lazarus Barros	<input checked="" type="checkbox"/>	07/03	In Progress	Testing	3 - Medium	Burcu Langlois	Mark
	12852	Industry Verticals	Lazarus Barros	<input type="checkbox"/>	08/12	In Progress	In-App	4 - Low	Cole Jeanes	Mark
		→ Campaigns								
	12848	Landing page	Burcu Langlois	<input type="checkbox"/>	07/07	In Review	Website	3 - Medium	Leigh Gibbs	Mark
	12837	Social post	Burcu Langlois	<input checked="" type="checkbox"/>	07/03	In Progress	Social	1 - Highest	Burcu Langlois	Mark
	12854	Email Campaign	Burcu Langlois	<input type="checkbox"/>	07/26	Closed	Email	2 - High	Burcu Langlois	Auton
		→ Product								
	12844	Empty State	Sabira Jagoda	<input type="checkbox"/>	08/17	Requirements	In-App	1 - Highest	Cole Jeanes	Exper
	12853	Onboarding	Sabira Jagoda	<input type="checkbox"/>	08/08	To Do	In-App	2 - High	Cole Jeanes	Exper
	12850	Splash Screen	Sabira Jagoda	<input type="checkbox"/>	08/05	In Progress	Testing	4 - Low	Burcu Langlois	Prod.
	12849	Add Page Animation	Sabira Jagoda	<input type="checkbox"/>	08/05	In Progress	Video	3 - Medium	Burcu Langlois	Exper
	12839	Tool Tip	Sabira Jagoda	<input type="checkbox"/>	07/01	Closed	In-App	2 - High	Cole Jeanes	Exper

Modern work management solutions

Pioneer new ways of working with consistency, scale, and ease on a secure modern work management platform you can trust.

[Try Smartsheet for free](#)

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2) Cumbersome and confusing project request process.

Project Request: Easy as 1, 2, 3

The screenshot displays the Ballad Health website interface. At the top, a blue header contains the 'Ballad Health' logo on the left and the name 'Mitchell, Isaac' on the right. Below the header is a navigation bar with 'Quick Links' on the left and 'See all news' on the right. The 'Quick Links' list includes various resources such as 'URL', 'ACTS of Service Appreciation', 'Alertline', 'Aquire', 'Ballad Health Benefits', 'Ballad Health Code of Ethics', 'Ballad Health Direct Line', 'Ballad Health Forms', 'Ballad Health Policies', 'Ballad Health Store', 'Ballad Teams Mobile App', 'BCA Epic Downtime', 'CareLink', 'Covid-19 Communication', 'Diet Manual - Adult', 'Diet Manual - Pediatric', 'EBSCO (Open in Chrome)', 'EPMO Project Request Form', 'HealthStream - My Learning and Performance', 'HR & Payroll Service Center', 'HR Employee Assistance Program (EAP)', 'Invoice Approval (APIA)', 'Joint Commission Hospital Accreditation Manual - All Markets', 'Learn how to customize My Links', 'MSDS Online', 'On Call Schedule', and 'Operational Excellence Project Request Form'. A purple arrow points to the 'EPMO Project Request Form' link.

The main content area features a 'Ballad Health News' section with three articles:

- COVID-19**: A thumbnail image showing a document with a blue header.
- CEOC memo: Update on masking requirements, effective Monday, April 3**: Includes a 'Read More' link.
- Enter to win tickets to the Food City Dirt Race at Bristol Motor Speedway!**: Includes a 'Read More' link.
- Reminder: Deadline is March 31 for tuition applications**: Includes a 'Read More' link.

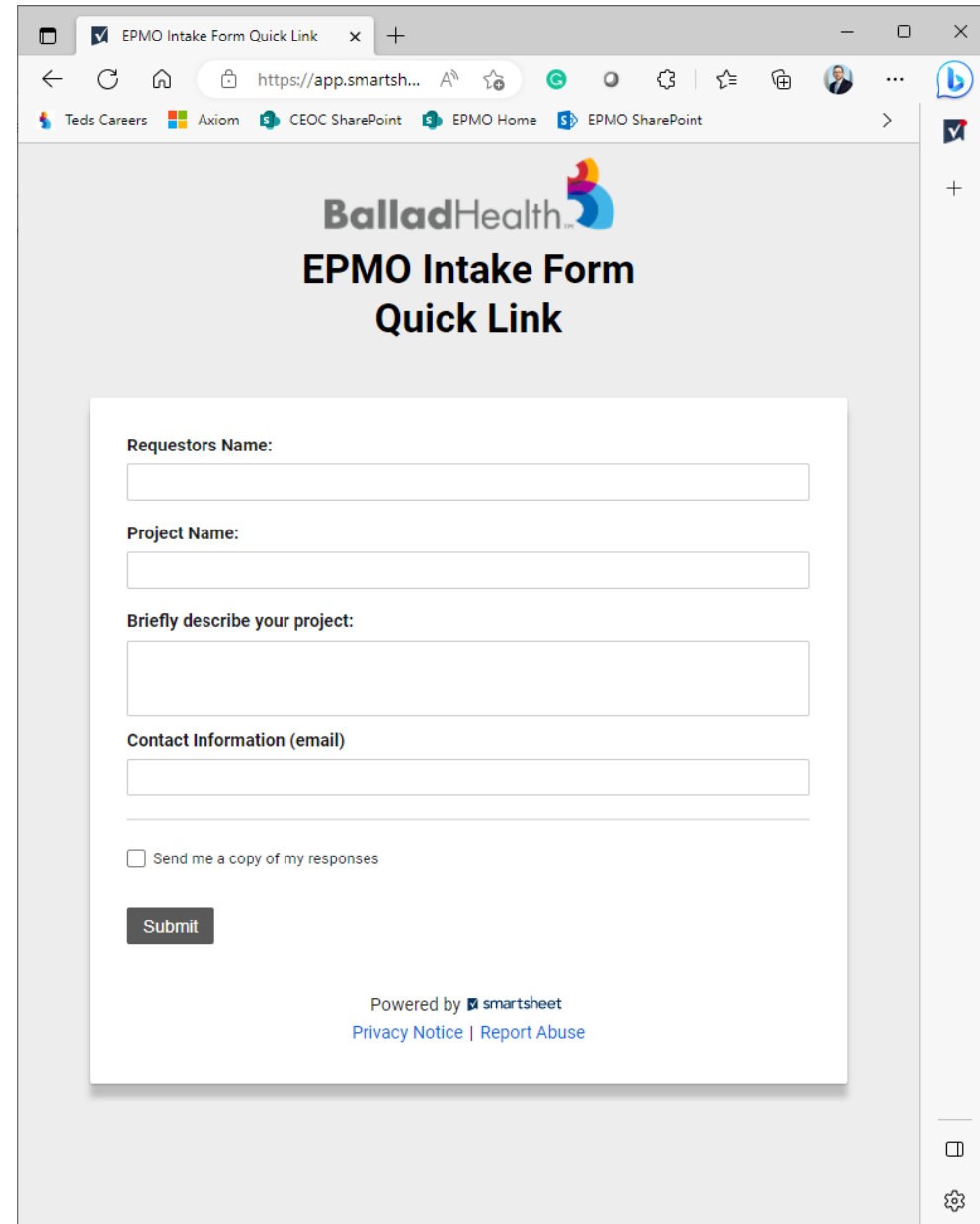
To the right of the news section is a video player titled 'Ballad Health Niswonger Children's Network Hope Rising'. The video shows a young girl in a pink dress sitting on a slide at a playground. The video player includes a play button, a progress bar at 0:00 / 5:30, and volume and full-screen icons.

At the bottom of the page, there are three promotional banners:

- Ballad Health HR**: Find your pay stubs, benefit information and more. Includes a 'Learn more.' link with a right-pointing arrow.
- Balladhealth.org**: Learn more about Ballad Health on our new website. Includes a 'Visit the site.' link with a right-pointing arrow.
- Ballad Health News**: Keep up with system news at balladhealthnews.org. Includes a 'Visit the site.' link with a right-pointing arrow.

EPMO Quick Intake Form

- Customer fills out a quick four field web-based form.
- Once submitted, the EPMO coordinator is alerted via email of the submission.
- They then set-up a personal call to learn more about the project.



The screenshot shows a web browser window displaying the "EPMO Intake Form Quick Link" page. The page features the BalladHealth logo at the top center. Below the logo, the title "EPMO Intake Form Quick Link" is prominently displayed. The form itself is a white box with a light gray border, containing four main input fields: "Requestors Name:", "Project Name:", "Briefly describe your project:", and "Contact Information (email)". Each field is represented by a white rectangular input box. Below these fields, there is a checkbox labeled "Send me a copy of my responses". At the bottom of the form is a dark gray "Submit" button. The footer of the form includes the text "Powered by smartsheet" and two links: "Privacy Notice" and "Report Abuse". The browser's address bar shows the URL "https://app.smartsh...", and the browser's taskbar at the bottom lists several open applications: "Teds Careers", "Axiom", "CEOC SharePoint", "EPMO Home", and "EPMO SharePoint".

Project Intake

- 30-minute Microsoft Teams meeting with the Business Stakeholder, EPMO Coordinator, and EPMO Leadership
- Purpose:
 - I. Learn about the project
 - II. Estimate project hours
 - III. Determine fit for EPMO through scoring criteria (0-100)
 - i. Strategic Plan (MAP)
 - ii. State Agreement (COPA)
 - iii. ROI
 - iv. Funding Needs
 - v. Direct Patient Care or Safety Related
 - vi. System Wide or Multi-Facility
 - vii. Problem Statement Defined
 - viii. Business Owner Identified and Engaged
 - ix. Executive Sponsor Assigned

The screenshot shows a web browser window displaying the 'BalladHealth EPMO Intake Form'. The browser's address bar shows 'https://app.smar...'. The page header includes the BalladHealth logo and the title 'EPMO Intake Form'. The form is divided into two main sections: 'Project Information' and 'Scoring Criteria'. The 'Project Information' section contains several required fields: 'Project Name *', 'Requestor/Business Owner *', 'Intake Coordinator *', 'Request Date *', 'Project Start Date *', and 'Project End Date *'. Each date field has a calendar icon. The 'Scoring Criteria' section includes three items: 'COPA/CA Implication *' with radio buttons for 'Yes' and 'No', 'System MAP Implication *' with radio buttons for 'Yes' and 'No', and 'Return On Investment (ROI) *'.

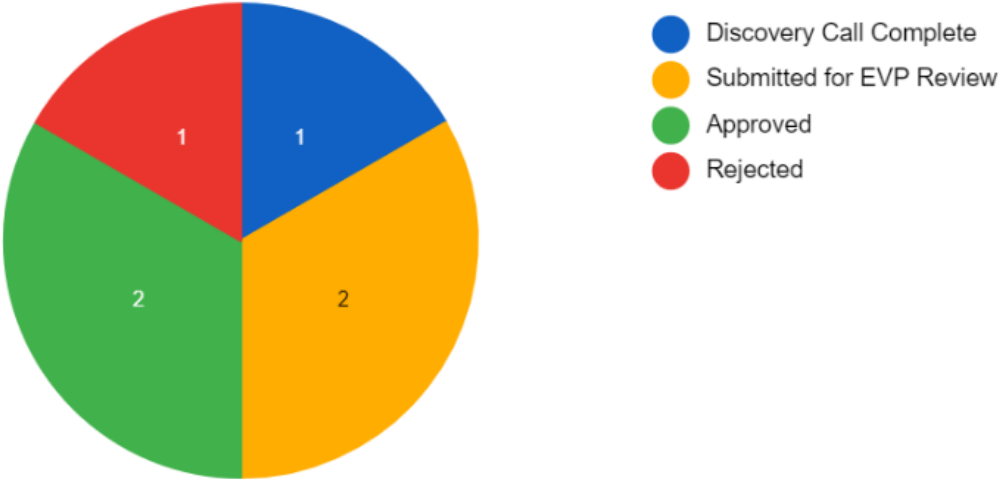
3) Lack of transparency of project intake status.

Ballad Health "Pizza Tracker"

Ballad Health EPMO Project Intake Status Report



EPMO Project Intake Status



EPMO Project Queue Stats

Number of Project in Queue

4

Projects Pending Discovery Call

0

Average Request Age (Days)

59

Estimated Weekly Project Hours

16

Primary Column

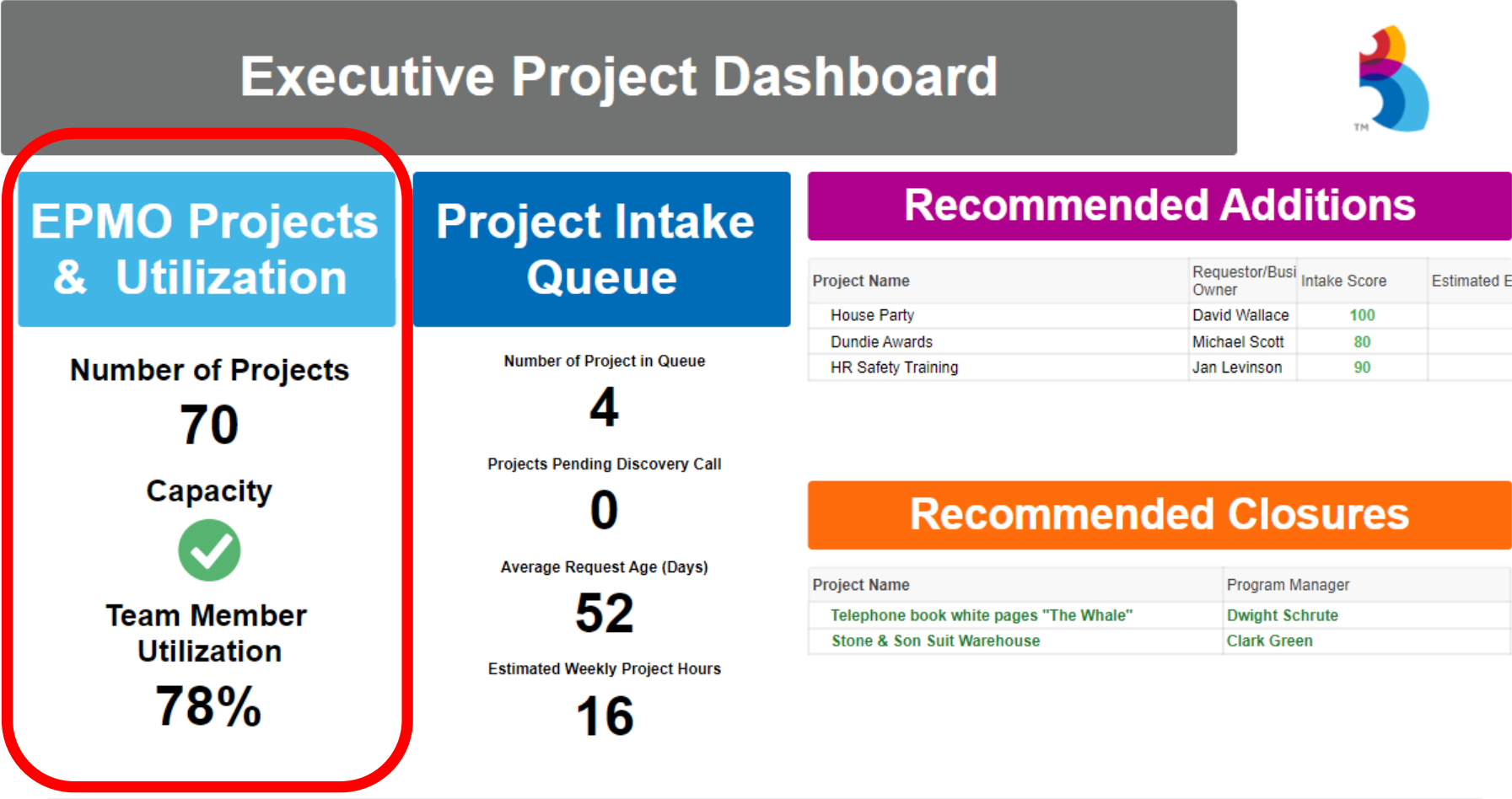
Project Intake Queue

EPMO Project Intake Complete

Project Name	Requestor/Business Owner	Intake Status	Intake Status:	Intake Score	Progress Notes
House Party	David Wallace	Approved	●	100	Andy Bernard will Lead
Regional Manager Office Renovation	Dwight Schrute	Rejected	●	15	No Funding
Dundie Awards	Michael Scott	Submitted for EVP Review	●	80	Pending Budget
HR Safety Training	Jan Levinson	Approved	●	90	Toby will Lead
Office Olympics	Jim Halpert	Discovery Call Complete	●	60	Timeline required
Shareholder Report Form	Ryan Howard	Submitted for EVP Review	●	100	EVPs Concerned about report.

4) Static, out-of-date, and time-consuming project reports.

Executive Project Dashboard - Stats



Project Portfolio List

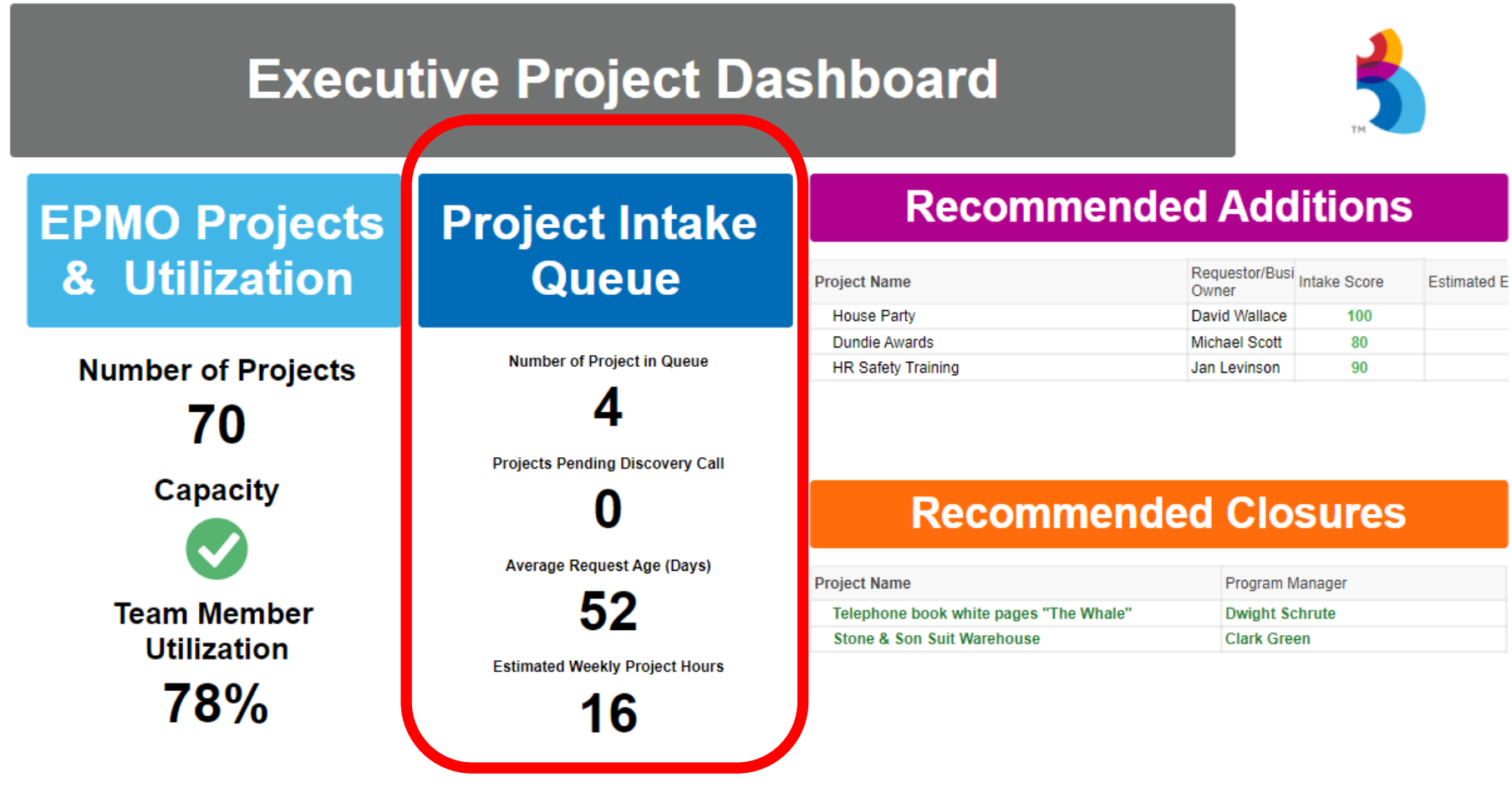
BalladHealth

File EPMO Team Utilization ☆

📄 1 Sheet
📊 4 Columns
🔍 1 Filter
👤 Group
Σ 3 Summaries

	Primary	Program Manager	Project Status	Grand Total Monthly
	▼ Total	Count 75	Sum	1142.83333
1	Confidential List of each Project with Hyperlinks	Ballad EPMO Team	Active	
2		Brittany Otter	Active	40.00
3		Diamond Smith	Active	10.00
4		Brittany Otter	Active	8.00
5		Brittany Otter	Active	14.00
6		Brittany Otter	Active	24
7		Courtney Briggs	Active	10.00
8		Courtney Briggs	Active	2.00
9		Courtney Briggs	Active	55.00
10		Courtney Briggs	Active	16.00
11		Courtney Briggs	Active	6.00
12		Courtney Briggs	Active	2.00
13		Courtney Briggs	Active	8.00
14		Courtney Briggs	Active	6.00
15		Courtney Briggs	Active	2.00
16		Courtney Briggs	Active	0.00
17		Diamond Smith	Active	8.00
18		Diamond Smith	Active	14.00

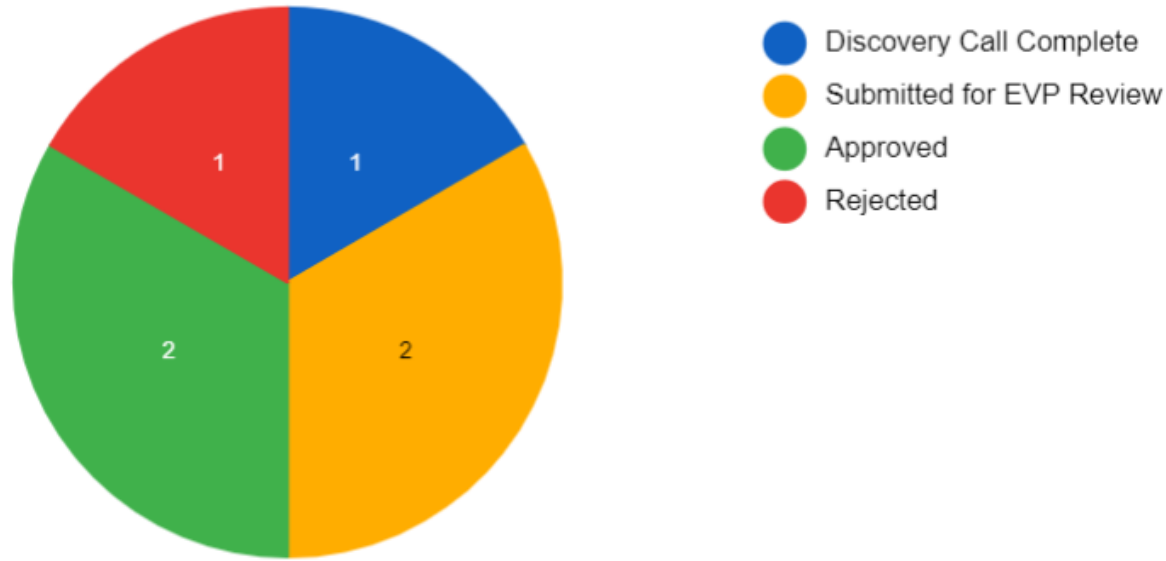
Interactive Drill Down



Ballad Health EPMO Project Intake Status Report



EPMO Project Intake Status



EPMO Project Queue Stats

Number of Project in Queue

4

Projects Pending Discovery Call

0

Average Request Age (Days)

52

Estimated Weekly Project Hours

16

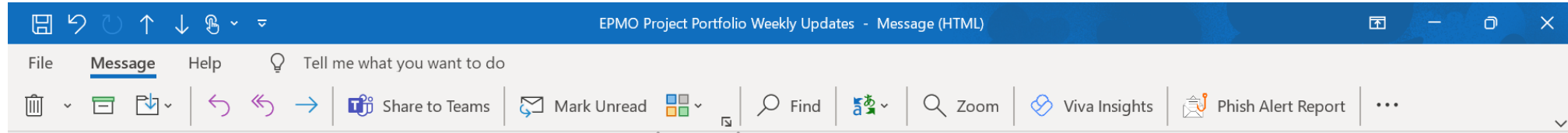
Primary Column

Project Intake Queue


EPMO Project Intake Complete

Project Name	Requestor/Business Owner	Intake Status	Intake Status:	Intake Score	Progress Notes
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Office Olympics	Jim Halper	Discovery Call Complete	●	60	Timeline required
Shareholder Report Form	Ryan Howard	Submitted for EVP Review	●	100	EVPs Concerned about report.

Automated Email Weekly Status Reports




EPMO Project Portfolio Weekly Updates



 Isaac Mitchell via Smartsheet <automation@app.smartsheet.com>
 To: Mitchell, Isaac

 Reply
  Reply All
  Forward
 


Mon 3/27/2023 9:04 AM

 If there are problems with how this message is displayed, click here to view it in a web browser.

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Caution: This email originated from outside Ballad Health. DO NOT click links, open attachments, or reply to the email unless you recognize and/or validate the sender, are expecting the email, and are confident the sender and content are safe.



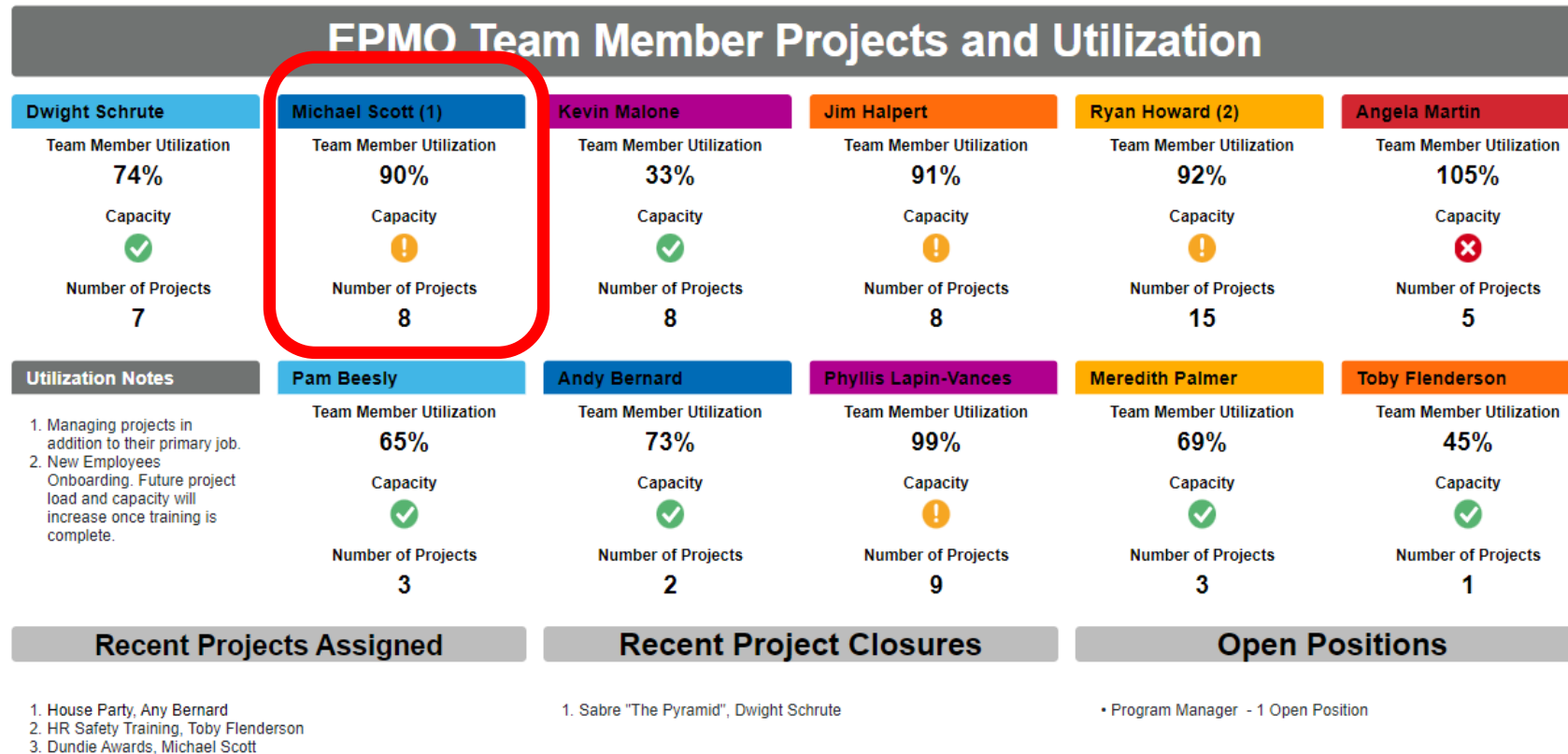
 [EPMO Project Status](#)

Message: EPMO Project Status Dashboard: <https://app.smartsheet.com/b/publish?EQBCT=f84deae6e635400dbd1edf15c6f6c9a1>

Project	Program Manager	Business Owner	Executive Sponsor	Project Status	Latest Comment	Recommend Closing?	Barrier Removal / Needs from Leadership
1	Ballad EPMO Team			Active	Confidential		
3	Brittany Otter	Isaac Mitchell	Isaac Mitchell < isaac.mitchell@balladhealth.org >	Active	Confidential		
4	Diamond Smith	Rebecca Beck, Dwight Owens, Dr. Mark Patterson	Eric Deaton	Active			
5	Brittany Otter	Chase Wilson	Chase Wilson	Active			

5) No way to determine resource capacity and workload.

Start High Level and Drill Down to Information Needs



Program Managers Project List with Hyperlinks

The screenshot shows a spreadsheet titled "Isaac Mitchell's Active Projects". The interface includes a BalladHealth logo, a "File" menu, and various toolbars for grid view, sheet management, filters, and sorting. The data table below lists six projects, all managed by Isaac Mitchell. The "HRO Journey" project is highlighted with a red box.

	Project Name	Program Manager	Program Name	Project Status
1	AVP Duties	Isaac Mitchell	None	Active
2	HRO Journey	Isaac Mitchell	HRO	Active
3	Project Manager In-Training Program	Isaac Mitchell	EPMO	Active
4	Innovation Project	Isaac Mitchell	Innovation	Active
5	Top 100 Dashboard	Isaac Mitchell	ACME Consulting	Active
6	Strategic Consulting Project	Isaac Mitchell	ABC Consulting	Active

Executive Project Dashboard - Contacts

EPMO Team Members

- Isaac Mitchell, AVP EPMO & OE, isaac.mitchell@balladhealth.org
- Amy Whitson, Program Coordinator, amy.whitson@balladhealth.org
- Brittany Otter, Program Manager, Brittany.Otter@balladhealth.org
- Sarah Lilly, Program Manager, Sarah.Lilly@balladhealth.org
- Terri Hamby, Program Manager (Niswonger Children's), Terri.Hamby@balladhealth.org
- Victoria Noel, Program Manager (Behavioral Health), Victoria.Noel@balladhealth.org
- Ron Moore, Program Manager (Innovation), ron.moore@balladhealth.org
- Tasha Kyker, Certified Program Manager, Tasha.Kyker@balladhealth.org
- Courtney Briggs, Program Manager, Courtney.Briggs2@balladhealth.org
- Diamond Smith, Program Manager, Diamond.Smith@balladhealth.org
- Megan Parks, Program Manager, megan.parks@balladhealth.org



Request EPMO Project Support

The image is a screenshot of a web page titled "EPMO Intake Form Quick Link". At the top, there is the BalladHealth logo and the text "EPMO Intake Form Quick Link". Below this, there is a form with several input fields. The first field is labeled "Requestors Name:" and has a single-line text input box. The second field is labeled "Project Name:" and also has a single-line text input box. The third field is labeled "Briefly describe your project:" and has a larger, multi-line text input box. The fourth field is labeled "Contact Information (email)" and has a single-line text input box. The form is set against a light grey background with a white border.

6) Limited transparency and variation of project progress and needs.

Project Dashboard



Ballad Health EPMO Project - HRO Journey

Go-Live Date: TBD

Executive Sponsor: Dr. Clay Runnels / Eric Deaton

Business Owner: Dr. Amit Vashist / Tom Tull

Project Manager: Isaac Mitchell / Brittany Otter

Project Health



Project Status

% Complete 5%
Start Date 09/01/22
End Date 06/30/25



EPMO Project Progress Report

Focus Area	% Complete
1) Initiate	100%
2) Plan	79%
3) Execute	6%
4) Monitor	0%
5) Close	0%
Implementation Planning	79%
Workforce Safety (2/2023)	0%
CoDesign (5/2023)	0%
Leaders Skills Training (8/2023)	0%
Universal Skills Training for Leaders (8/2023)	0%
Universal Skills Train The Trainer (9-10/2023)	0%
Med Staff Train the Trainer (9-10/2023)	0%
Universal Skills Training (10/2023)	0%

EPMO Action Items

Primary	Assigned To	Due Date	Status
Review HRO Charter	Isaac Mitchell		In Progress
Sign off on Charter OKRs	Amit Vashist	11/17/22	In Progress
Conduct inventory of Ballad's current HRO processes/structures/standard work. Leader standard work/competencies. Staff/Medical Staff behavior expectations. HRO structures Tiered huddles, Just Culture implementation, Leader Rounding, etc.	Tom Tull	12/09/22	In Progress
Align MAP and HRO plan	Tom Tull	12/23/22	In Progress
Review Systemwide Master Schedule of Key Projects	Isaac Mitchell	12/06/22	Not Started
Safety Management System Design Session to Develop Level 1 & 2 Action Plan	Debbie Dover		Not Started
Add tier huddle topic to Thurs agenda	Isaac Mitchell		Not Started

EPMO Meeting Minutes

Document Name	Meeting Date
EPMO - HRO Journey - 20220922	09/22/22
Messaging and Theme of Ballad's H	11/17/22

Project Dashboard

EPMO At Risk Report			
Task Name	Assigned To	Project Status	End Date
Intentionally budget training dollars into next year's training budget?		●	
Define Train The Trainers (200 staff / 80 leaders)		●	
Recruit Trainers: Volunteer and Assigned		●	

EPMO Project Documents			
Primary	Date Released	Version	Release Status
Ballad Health FY23-24 MAP (HRO Slide)	10/03/22	1	●
Proposed HRO Work Plan 9-1-22	10/06/22	1	●
Ballad HRO Steering Slides	11/12/22	1	●
Ballad Health Strategic Consulting Engagement Project	11/17/22	1	●
PG_Metrics_White_Paper_Rev2	11/18/22	1	●
Safety and Reliability Culture Transformation Indicators	11/18/22	1	●
HRO Description - Self Evaluation - Session 1 handout	11/30/22	1	●
Safety Together Universal Skills Quick Start Guide	12/01/22	1	●
HRO Retreat Presentation	12/27/22	2	●

EPMO Project Team Contact List						
Name	Department	Title	Email	Work Phone	Cell Phone	Notes
Isaac Mitchell	EPMO	AVP, EPMO and OE	Confidential			
Brittany Otter	EPMO	EPMO Project Coordinator				
Dr. Clay Runnels, M.D.	Administration	EVP, Chief Physician Executive				
Eric Deaton	Administration	EVP, Chief Operating Officer				
Dr. Amit Vashist, M.D.	Administration	SVP, Chief Clinical Officer				
Tom Tull	Marketing and Public Relations	VP, Chief Experience Officer				
Lisa Carter	Administration	Regional President, South				
Chad Couch	Administration	Regional President, North				
Debbie Dover	HR	SVP, Talent Engagement & CHRO				
Taylor Hamilton	Marketing and Public Relations	SVP, Chief Consumer Officer				
Marvin Eichorn	Administration	EVP, Chief Administrative Officer				
Morgan May	Nursing Administration	VP, Regional Chief Nursing Officer				

Integrative Drill Down Project Dashboard



Ballad Health EPMO Project - HRO Journey

Go-Live Date: TBD
Executive Sponsor: Dr. Clay Runnels / Eric Deaton
Business Owner: Dr. Amit Vashist / Tom Tull
Project Manager: Isaac Mitchell / Brittany Otter

Project Health



Project Status

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Start Date 09/01/22
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Messaging and Theme of Ballad's H	11/17/22

Project Plan Drive almost all Information in the PMIS

	Project Status	Task Name	Task Type	% Complete	Duration	Start Date	End Date	Predecessors	Assigned To	Aug 28
1	●	Project	Project	5%	738d	09/01/22	06/30/25			S M T W T F
2		1) Initiate	Phase	100%	8d	09/22/22	10/03/22			
3		Complete Discovery Call		100%	1d	09/22/22	09/22/22		Isaac Mitchell	
4		Complete Project Intake Form		100%	8d	09/22/22	10/03/22		Isaac Mitchell	
5		2) Plan	Phase	79%	34d	09/15/22	11/01/22			
6		Implementation Planning	Group	79%	34d	09/15/22	11/01/22			
7		Establish Standing Meeting Cadence		100%	22d	10/03/22	11/01/22		Isaac Mitchell	
8		Create Project Plan		75%	22d	10/03/22	11/01/22		Isaac Mitchell	
9		Assemble Steering Team (See below)		50%	12d	09/15/22	09/30/22		Tom Tull	
10		Workforce Safety (2/2023)	Group	0%	120d	02/02/23	07/19/23			
11		Work with client implementation team to identify current state (existing HRO tools, rounding methodology, tiered huddles, Fair and Just, Balanced messaging, behavior expectations, etc.) to develop starting point for Design session US and LS draft bundles		0%	120d	02/02/23	07/19/23		Engagement Lead	
12		Schedule meeting with client Marketing, Communications, and Education teams to begin discussions around branding, messaging, and education planning.		0%					Consultant	
13		CoDesign (5/2023)	Group	0%		05/01/23				
14		CoDesign Focus Groups completion	Milestone	0%		05/01/23				
15		Introduce the Leader Skills in Virtual Standing Monthly Sr. Leadership Meeting		0%						

7) Inconsistent on-boarding plan and variation between project manager practice.

Project Manager in Training Program (Job Skills Matrix)

BalladHealth Search...

File Automation Forms EPMO Job Skills Matrix Share

Grid View Filter Arial 10 B I U G Σ \$ % .00

SOP Owner	Job Skill	Program Coordinator	Program Manager (Enterprise)	Project Manager / OE Specialist	Program Manager (Service Line)	Program Manager - Certified	EPMO Director	Self Rating	Job Skill Rating
	Project Management								
	Manage 1-3 projects	Preferred							
	Manage 5+ projects		Required	Required		Required			
	Manage Service Line Portfolio				Required				
	Manage EPMO Portfolio						Required		
	Stakeholder Engagement								
	Vendors	Required	Required	Required	Required	Required	Required		
	Team Member	Required	Required	Required	Required	Required	Required		
	Managers & Directors	Required	Required	Required	Required	Required	Required		
	Executives & Physicians	Required	Required	Required	Required	Required	Required		
	Essential Job Duties								
Brittany Otter	Manages Discovery Calls / Complete Intake	Required			Required		Required	0 - Beginner	0 - Beginner
Sarah Lilly	Manages departmental intranet page (SharePoint), website, and documents repository	Required					Required	1 - Novice	1 - Novice
Isaac Mitchell	Create and distribute project reports, minutes, and other documents	Required	Required	Required	Required	Required	Required	2 - Intermediate	2 - Intermediate
	Updates Smartsheet workspaces, dashboards, reports, and sheets.	Required	Required	Required	Required	Required	Required	3 - Advanced	3 - Advanced
Isaac Mitchell	EPMO Portfolio Workspace	"	"	"	"	"	"		
Brittany Otter	Intake Workspace	"	"	"	"	"	"		
Sarah Lilly	Project Workspace	"	"	"	"	"	"		
Sarah Lilly	Program Template	"	"	"	"	"	"		
Brittany Otter	Schedules meetings, calendars, and other team events	Required	Preferred	Preferred	Preferred	Preferred	Preferred		
Brittany Otter	Order offices supplies	Required							
Sarah Lilly	Corporal Clean	Required							
Brittany Otter	Completes work orders	Required							
Courtney Briggs	CEOC Management		Required	Required	Required	Required	Required		
Sarah Lilly	CEOC Hospital Operations Assessment Form	Required							
Sarah Lilly	Create Visio documents	Required	Required	Required	Required	Required	Required		

Standard Operating Procedures and Brand Standards

EPMO Smartsheet Project Workflow

Isaac B. Mitchell, FACHE, PMP, LSSBB

AVP, Enterprise Program Management Office and Operational Excellence

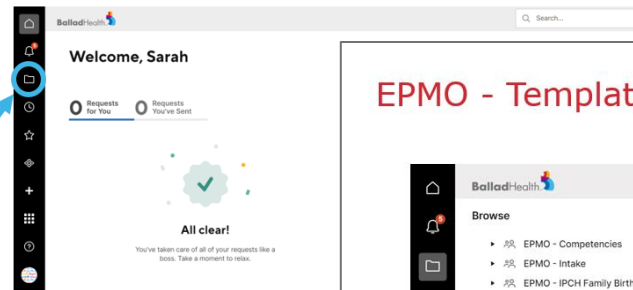
Mobile 865-228-7429

Email Isaac.Mitchell@balladhealth.org

March 31, 2023

Smartsheet Home Page

1. Log-In to Smartsheet
2. See the Home Page to the right
3. Click the "folder icon" on the left side of the page

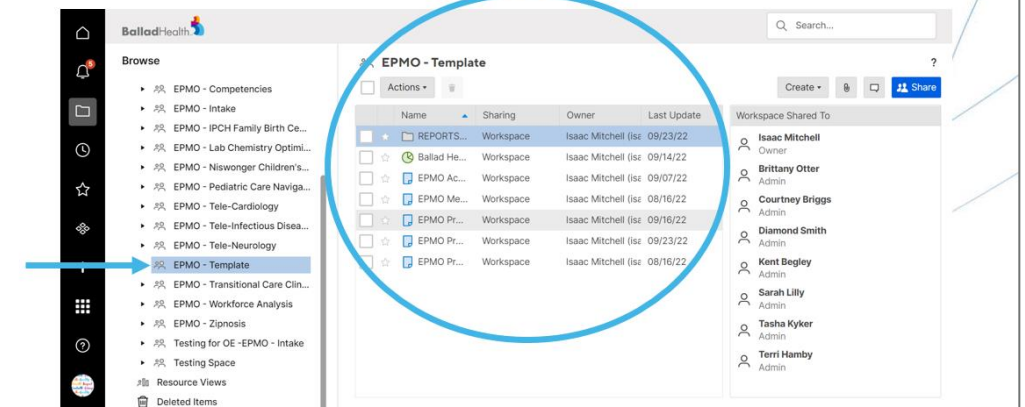


3

March 31, 2023

Presentation Title

EPMO - Template



4

March 31, 2023

Presentation Title

8) Continuous improvement and PMIS enhancements.

Continuous Improvement and Smartsheet Enhancements

- The EPMO team meets quarterly to review improvement ideas.
- Team Member ideas are review and discussed by the entire team.
- Once consensus is built we assign ownership, implement, test, and review.
- Upcoming Enhancements:
 1. Project Charter
 2. Intake Form Automations
 3. Project Closures
 4. EPMO Archive and Lessons Learned

The screenshot shows a web browser window displaying the 'EPMO - Smartsheet Enhancements' form. The form is titled 'BalladHealth EPMO - Smartsheet Enhancements' and contains the following fields:

- Date Added:** A date picker field.
- Name:** A text input field.
- Idea:** A text input field.
- Related Smartsheet:** A text input field.
- Status:** A dropdown menu with the placeholder text 'Select or enter value'.
- Implementation Owner:** A text input field.
- Notes:** A text input field.

At the bottom of the form, there is a checkbox labeled 'Send me a copy of my responses' and a 'Submit' button. The footer of the form indicates it is 'Powered by smartsheet' and includes links for 'Privacy Notice' and 'Report Abuse'.

Quarterly Review, Assignments, User Stories, Sign-off

BalladHealth Search...

File Automation Forms EPMO - Smartsheet Enhancements ★ Share

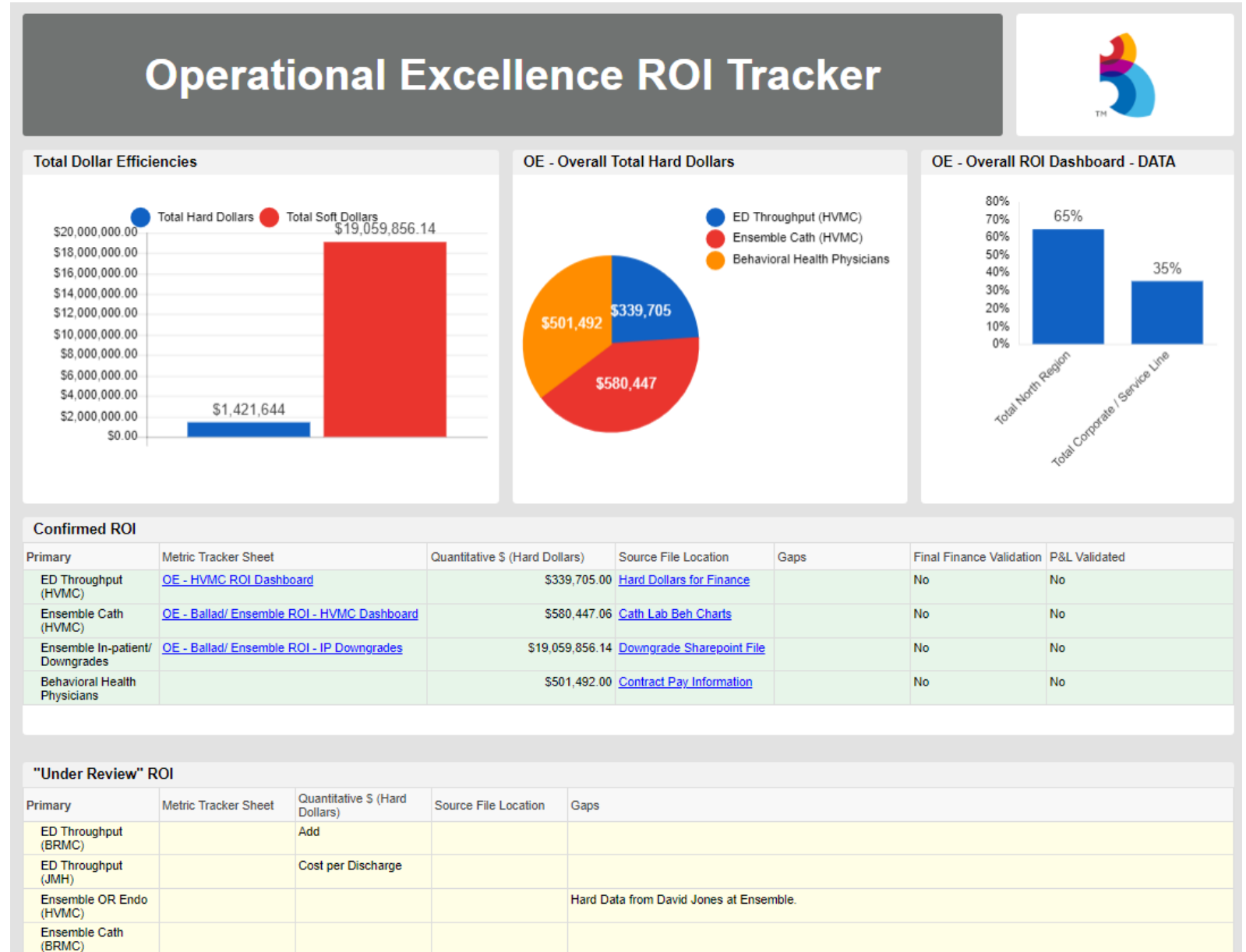
Grid View Filter Arial 10 B I U A ≡ ≡ ↶ ↷ ↶ ↷ ⋮

	Date Added	Name	Idea	Related Smartsheet	Status	Implementation Owner
1	09/26/22	Isaac Mitchell	Capture Action Items in a column in the project plan and in automatically populate the dashboard through a report instead of a separate action item sheet	EPMO Project Plan (Template)	Rejected	
2	09/30/22	Tasha Kyker	Determine need to change where At Risk Report is pulling from (ex: Action items)	EPMO AT Risk Report	Approved	Sarah Lilly
3	10/10/22	Courtney Briggs	Add 'Latest Comment' to columns and remove/hide the comment/notes section	EPMO Action Item (Template)	In-Review	
4	10/18/22	Courtney Briggs	Add 'Latest Comment' to EPMO Project Staus Update sheet to link comments to the columns and this will flow into program dashboards	EPMO Project Status	Approved	
5	10/24/22	Tasha Kyker	"Hide" or "Archive" Projects that have closed from active status update document instead of just strikethrough	EPMO Project Status	Complete	
6	12/01/22	Brittany Otter	Add an inactive automation workflow that triggers when rows are added/changed and alerts the contact in the "assigned to" column. (This can then be activated when appropriate.)	EPMO Project Plan (Template)	Complete	Brittany Otter
7	12/01/22	Courtney Briggs	Create a Portfolio dashboard	N/A	In-Review	
8	12/02/22	Sarah Lilly	Start Date and End Date weekdays only or all days	EPMO Project Plan (Template)	Approved	Sarah Lilly
9	12/02/22	Brittany Otter	Update slide 2 wording to clarify that section (slides 3-5) are for unlicensed users. Update slide 6 wording to clarify that section (slides 7-9) are for licensed users. Add a slide with snippet (see png attachment) of the email that populates for licensed users.	EPMO Project Documents - Smartsheet User Guide PowerPoint	Rejected	
10	12/02/22	Tasha Kyker	change layout/enlarge font on EPMO Intake Dashboard -- font is so small it is hard to read the details/extract contact information	EPMO Intake Dashboard	Complete	

9) Showing Value of Project Management and Operational Excellence

ROI Tracker

- Showing value of your department helps you grow in Bull Markets and survive in Bear Markets.
- Review with CFO and EVPs monthly.
- **Tip:** Don't calculate your ROI. Partner with your Finance Department to select KPIs and perform the financial analysis.



Q&A

What is one thing you will change and act on as a result of this presentation and our time together?

Contact



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www.LeanBook.Club



www.LeanCoffee.Club