
The Project Management Office (PMO) And Continuous Performance Improvement (CPI) Commonly Used Terms

Assumptions: Things considered real, true, and certain for the purposes of planning.

Audit Plan: The document that describes the process issue to be measured, with what data source, how often, by whom, and the goal value.

CPI Consultant/Facilitator: Job title for the individual who works with clients in the development and facilitation of Value Stream initiatives and other performance improvement projects using Toyota Production System principles and lean processing tools. Works with clients in the pursuit of continuous improvement of work processes and uses CPI methods as an integrated strategy to achieve breakthrough results.

Charter:

Project Charter: A document that formally authorizes the existence of a project and provides the project manager with the authority to apply organizational resources to project activities.

CPI Event Charter: A document that describes the elements of a CPI workshop or event. It includes, but is not limited to, the following elements: 1) a clear definition of a team's mission, 2) a statement of team members' roles and responsibilities, 3) a description of the scope of the team's responsibility and authority, 4) project deadlines, 5) a list of metrics and targets, and 6) a list of deliverables (outcomes).

Communications planning: The process of determining what project information is to be communicated and by whom and who wants or needs that information.

Communication Plan: Document that describes how communication will be managed during the project.

Constraints: Limitations imposed on the solution related to business activities (budget limitations, people who can do certain work, etc). Anything that limits a system from achieving higher performance, or throughput. A bottleneck that severely limits an organization's ability to achieve higher performance relative to its purpose or goal.

Cycle time: The time that elapses from the beginning of a process to completion of that process. Cycle time is measured, not calculated.

Deliverable: Any unique and verifiable product, result or capability to perform a service that must be produced in order to complete a process, phase or project: the solution due to the customer at the end of the project.

Duration: Actual amount of time to complete the activity or the actual time on task; measured as elapsed work time.

Issue: A specific obstacle or concern that is currently hindering the progress of the project

Issue Log: Document for recording and monitoring resolution of specific obstacles or concerns that can hinder progress of the project

Lead: In Project Management, describes the partial overlapping of activities; essentially a head start for one activity, relative to the other in the relationship.

Lead time: The total of all cycle times within a value stream. The total of all cycle times equals lead time. Or, the total time a customer waits to receive a service or product after placing an order.

Management Guidance Team: A team of individuals who empowers and supports the workshop team and ensures cross-organizational issues are resolved to achieve workshop objectives and targets. Prepares those in target area for upcoming changes and ensures audits are conducted and standard work/reliable methods are followed.

Milestone: Significant point or event in the project; point in time of significant accomplishment in the project.

Pause to Plan: A term used at Seattle Children's, the practice of taking the time to appropriately plan a project and thereby avoiding scope creep, delays, budget overruns and waste as the project progresses.

Phase: A collection of logically related project activities, usually culminating in a major deliverable.

Plan-Do-Check-Act (PDCA): An iterative, four-step problem-solving process; a structured cycle of process change. To Plan means to prepare for and design the change; Do refers to implementing or trialing the change and observing what happens. During the Check phase, we analyze the results of the trial; during Act, we determine next steps based on the analysis, which naturally leads to the Plan step of a subsequent cycle.

Process Owner: The individual that has ongoing responsibility for managing the process to get optimal results. The Process Owners works closely with the CPI consultant, sponsor and management guidance team to ensure workshop targets are met and outcomes are sustained.

Project: Unique, non-routine endeavor requiring an investment decision that has defined and agreed upon objectives and a start and end date.

Project Phases:

CPI Event Project Phases: Stages of work leading to and following a CPI event.

Pre-Assessment – High level assessment of the proposed CPI effort to determine whether to proceed.

Assessment – Process of understanding the preliminary scope, boundaries and targets for the event and who needs to be involved. Where do we start working? What problem(s) are we working to solve?

Planning – Further refinement of scope, boundaries and targets for the event are based on baseline data that is collected during the both the assessment and planning phases. All aspects of the event are defined and the process owner, sponsor, management guidance team and consultant are fully prepared for the event.

Event – A Rapid Process Improvement Workshop (RPIW), Rapid Process Design (RPD), Focused Event (FE), Value Stream Mapping Event or Alignment Event where a team dedicates typically 2-5 full days to the improvement effort.

Follow-up – Completion of any outstanding “tail” activities after the workshop, implementation of the communication and audit plan including a 30 and 60 day follow-up report outs to the MGT, followed by a 90 day report out to the Center Directors Advisory Committee. Any other activities that ensure improvements are sustained.

Project Management Project Phases: Stages of work in a project lifecycle; logical division of project work contributing to efficient project implementation.

Initiation – Identifying the need for the project, the appropriate approach, and required vs. available resources; confirming organizational priority; and authorizing project or phase.

Planning – Developing a roadmap for the project by defining the scope, resources, requirements, tasks, and schedule, as well as risks, procurement strategy, and communications necessary to fulfill customer need.

Execution – Implementing tasks required to move the project toward the final product or objective.

Monitoring and Control – Coordinating tasks, resources, issues, risks, and communications to facilitate forward movement of the project according to the project plan; measuring and monitoring project progress so that adjustments and corrections can be made to keep the specific phase and project on track. Monitoring and controlling are typically done during all phases of the project.

Close – Reviewing lessons learned, paying invoices, closing contracts, transitioning project to operational support, and terminating all activities related to project.

Project Leader: Term used at Seattle Children's for any individual who is leading a project, regardless of their title or level of experience. Responsible for coordinating the schedule, cost, risks, communication, quality and scope to ensure the final product satisfies the project requirements.

Project Manager: Job title of an individual who has significant experience and (possibly) credentials in the field of project management. Responsible for coordinating the schedule, cost, risks, communication, quality and scope to ensure the final product satisfies the project requirements.

Project objectives: The definition of what the project will accomplish.

Resource Representative: A Subject Matter Expert (SME) who can provide immediate response to the team during a CPI Workshop.

Responsibility Assignment Matrix (RAM): A document ensuring that each component of the project's scope of work is assigned to a person or team.

Risk: An unknown; eventualities that could threaten the project; positive (opportunities) or negative (impacts).

Risk Plan: Document describing how risks will be managed on the project. It contains a list of project risks, probabilities of occurrence and corresponding risk responses.

Schedule: Key milestones and planned dates for performing scheduled activities.

Scope: In CPI, the definition of the starting and ending points (boundaries) of the process that is to be improved including what is included and excluded and any sub-processes that may be included. The scope dictates the type of event that is most appropriate for the CPI effort.

Scope: In project management, the sum of the products, services, and results to be provided as a project.

Scope creep: Changes that occur during a project that are neither recognized, evaluated, nor approved.

Sponsor:

CPI Event Sponsor: The person who authorizes, provides resources for and champions the CPI methodology and CPI workshop. The person who ensures that audits are conducted and standard work/reliable methods are followed.

Executive Sponsor: In project management, the individual who has ultimate authority on the project.

Project Sponsor: In project management, the person or group that provides the financial resources for the project.

Stakeholder: Persons or organizations that are actively involved in the project, or whose interests may be positively or negatively affected by execution of the project, or who can exert influence in project decisions.

Stoplight Chart: A simplified way of communicating a project's status to all stakeholders by indicating the color of a project's status as below:

Blue: The project is either proposed/awaiting approval or is on hold pending the resolution of organizational hurdles which are necessary to initiate the project.

Green: The project is proceeding as planned.

Yellow: The project has issues with scope, schedule, cost and/or quality. These issues have the potential of impacting the project's milestones and/or deliverables, but there is a strategy in place for corrective action.

Red: The project has issues with scope, schedule, cost and/or quality. Major adverse impacts are anticipated for the project's milestones and/or deliverables and an immediate strategy is not in place for corrective action.

Black: The project has been completed or cancelled.

Subject Matter Expert (SME): A person who knows a great deal about the subject, provides many important requirements and in certain situations may need to approve requirements. (see also Resource Representative).

Targets: Expected outcomes of the CPI workshop that are specific, measurable, attainable, relevant and time bound (SMART)

Task: Component of work performed during the course of the project (also called an activity).

Time boxing: The arbitrary selection of a deadline by leadership. While meant to be motivational for the project team and to stress the importance of task completion, the practice of time boxing can lead to challenges for the project since resources and the complexity of scope are often not fully assessed before the deadline has been set.