

Paper PD04

Clinical Project Management – Where Art, Science, and Craft Meet

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Introduction

Effective Clinical Project Management is a balancing act of, *Art*, encouraging creativity, *Science*, with universally accepted principles, and *Craft*, making connections through experiences.

Achieve this by utilizing cost-effective tools and applications that organizations can adopt to help Clinical Project Managers master the skills of Time Management & Prioritization, Organization and Effective Communication.

Key Topics

Cost effective Project Management tools to master the skills of:



Time Management & Prioritization

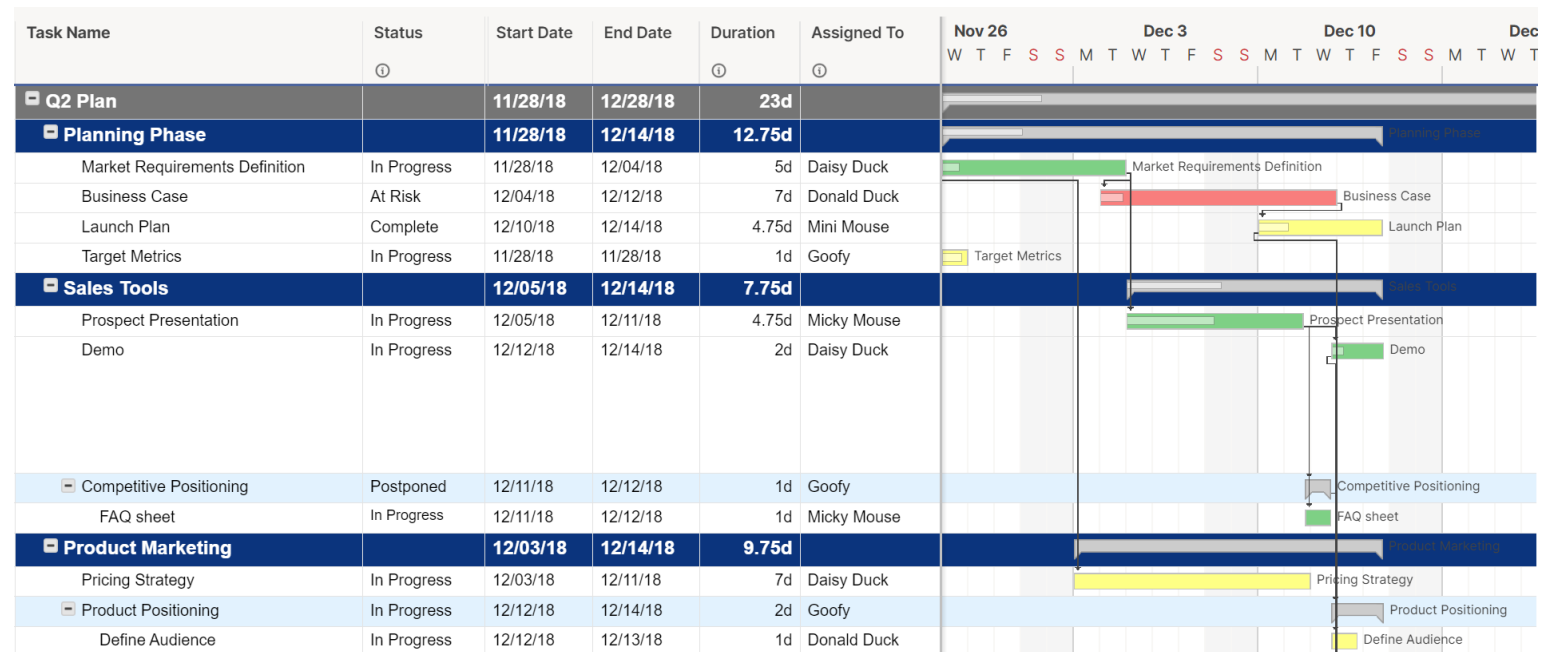
- To master the skill of Time Management & Prioritization you must:
 - Adhere to strict timelines
 - Efficiently allocate resources
 - Streamline workflows and set priorities



- Web-based platform
- Grid-like format
- Pre-built templates
- Helps develop, track, manage, and report on clinical trial information in **real-time**
- Improves collaboration and visibility

Using Smartsheet to Develop and Maintain Timelines

- Automated
 - Duration times using a start and end date for tasks
 - Notifications alerting the project team of upcoming dates, tasks and modifications in real time
 - Timeline visuals- Gantt chart

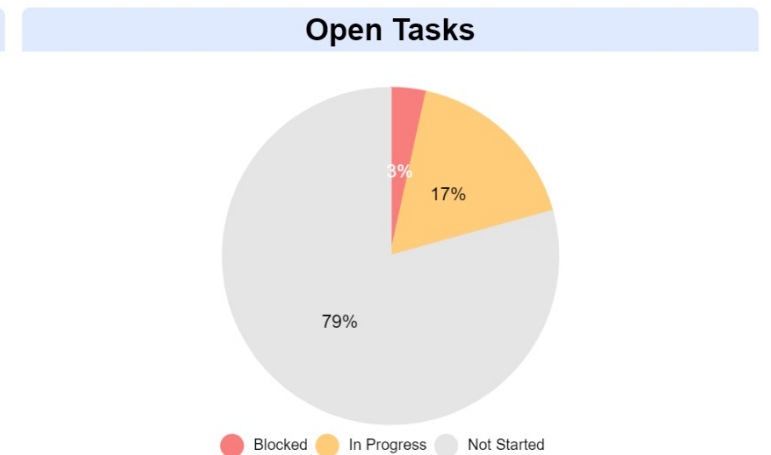
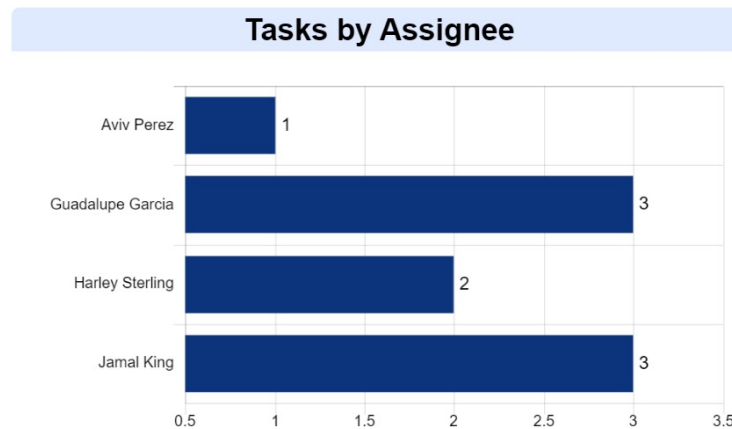


Using Smartsheet to Allocate Resources

- Assign tasks
- Manage team allocation
- Visualize project status and resource utilization
- Visualization of available resources

Project & Resource Overview

Simple Project & Resource Management



Using Smartsheet to Streamline Workflows

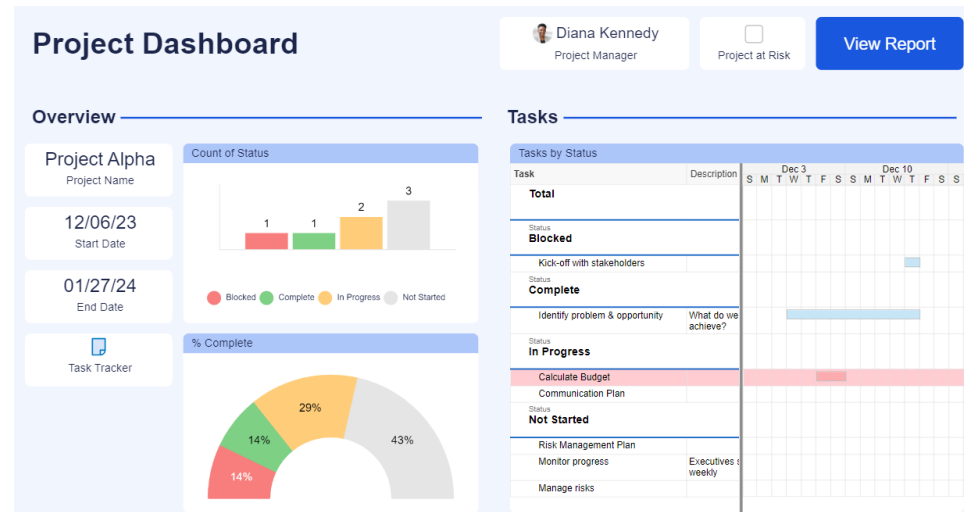
- Diverse range of pre-designed templates
 - To-Do List
 - Project Plan
 - Project Work Breakdown Structure
 - Task List sorted by Priority
 - Project Schedule Management
- Ranges from low to high complexity
- Auto-creation of visual dashboards

Summary Dashboard Task List by Priority



To-do List

Name	Notes	Priority	Modified	
Total				Count 5
Complete				Count 1
☒				
Purchase second monitor		Low	01/13/23 2:15 PM	
Complete				Count 4
☐				



Organization

- Essential for effective Clinical Project Management
- Ensures that team members understand their roles, tasks are executed in a coordinated manner, and deadlines are met
- Allows for the identification and mitigation of potential risks, promotes clear communication, and enhances overall project transparency
- Minimizes errors and maximizes the likelihood of project success



- Cloud based service hosted by Microsoft
- Used to store, organize, share, and access information from any device
 - Allows for seamless collaboration between team members
 - Simultaneous document viewing and editing, enhancing real-time collaboration
 - Extensive version control features
 - Adheres to all data security guidelines
 - Ability to manage who has access to specific folders

Seamless Collaboration & Version Control

- Allows for simultaneous viewing and editing
- Updates to any document are systematically tracked and archived in the document history
- Minimizes multiple document versions
- Eliminates circulating files via email for reviews and updates
- Promotes efficiency

Version history

Delete All Versions

No. ↓	Modified	Modified By	Size
66.0	1/10/2024 2:57 PM	☐ [REDACTED]	538.2 KB
65.0	1/10/2024 2:51 PM	☐ [REDACTED]	537.6 KB
64.0	1/10/2024 2:29 PM	☐ [REDACTED]	558.7 KB
63.0	1/10/2024 12:01 PM	☐ [REDACTED]	566.1 KB
62.0	1/10/2024 11:45 AM	☐ [REDACTED]	549.8 KB
61.0	1/10/2024 10:03 AM	☐ [REDACTED]	565.1 KB
60.0	1/10/2024 10:01 AM	☐ [REDACTED]	565.2 KB
59.0	1/10/2024 9:45 AM	☐ [REDACTED]	268.1 KB
58.0	1/10/2024 9:00 AM	☐ [REDACTED]	267.3 KB
57.0	1/10/2024 8:43 AM	☐ [REDACTED]	267.9 KB

Data Security

- Adheres to all data security guidelines, making it a secure place to store sensitive information
- With the extensive abilities in terms of managing access, you can manage who has access to specific folders ensuring the confidentiality and integrity of data

The screenshot displays a file management interface. At the top, a toolbar includes options like '+ New', 'Upload', 'Edit in grid view', 'Share', 'Copy link', 'Sync', 'Add shortcut to OneDrive', 'Download', 'Export to Excel', and 'Automate'. Below the toolbar, the breadcrumb path is 'Practice Areas > [Redacted] > Project Management'. A table lists folders with columns for 'Name', 'Modified', and 'Modified By'. A blue arrow labeled 'Shared Folders' points to the 'CVs' folder. Another blue arrow labeled 'Folder access manager' points to the 'Has access' section in the right-hand sidebar. The sidebar also shows 'Manage access' and 'Properties' sections.

Name	Modified	Modified By
Archive	July 29, 2021	[Redacted]
Clients	May 11, 2021	[Redacted]
CSG	June 16, 2021	[Redacted]
CVs	August 11, 2021	[Redacted]
Invoice Review	January 11	[Redacted]
Invoices	December 9, 2020	[Redacted]
JDs	June 4, 2021	[Redacted]



- Versatile organizational tool, offering a structured grid-like layout that facilitates the creation of:
 - Comprehensive task lists
 - Timelines
 - Budget statuses
 - Resource allocation charts
- Formula capabilities simplify budget tracking resource management, enabling managers to calculate costs, variances, and optimize resource allocation

Using Excel for Budget Tracking

- Able to list expenses, burn rates, and forecasting
- Formulas can calculate totals, variances, percentages, and create visual representations
- Allows for creation of spreadsheets that tracks exhausted amount vs. the budget remaining so you are always aware of the project's financial status
- Has the ability to analyze and format data from a simple data load using formulas

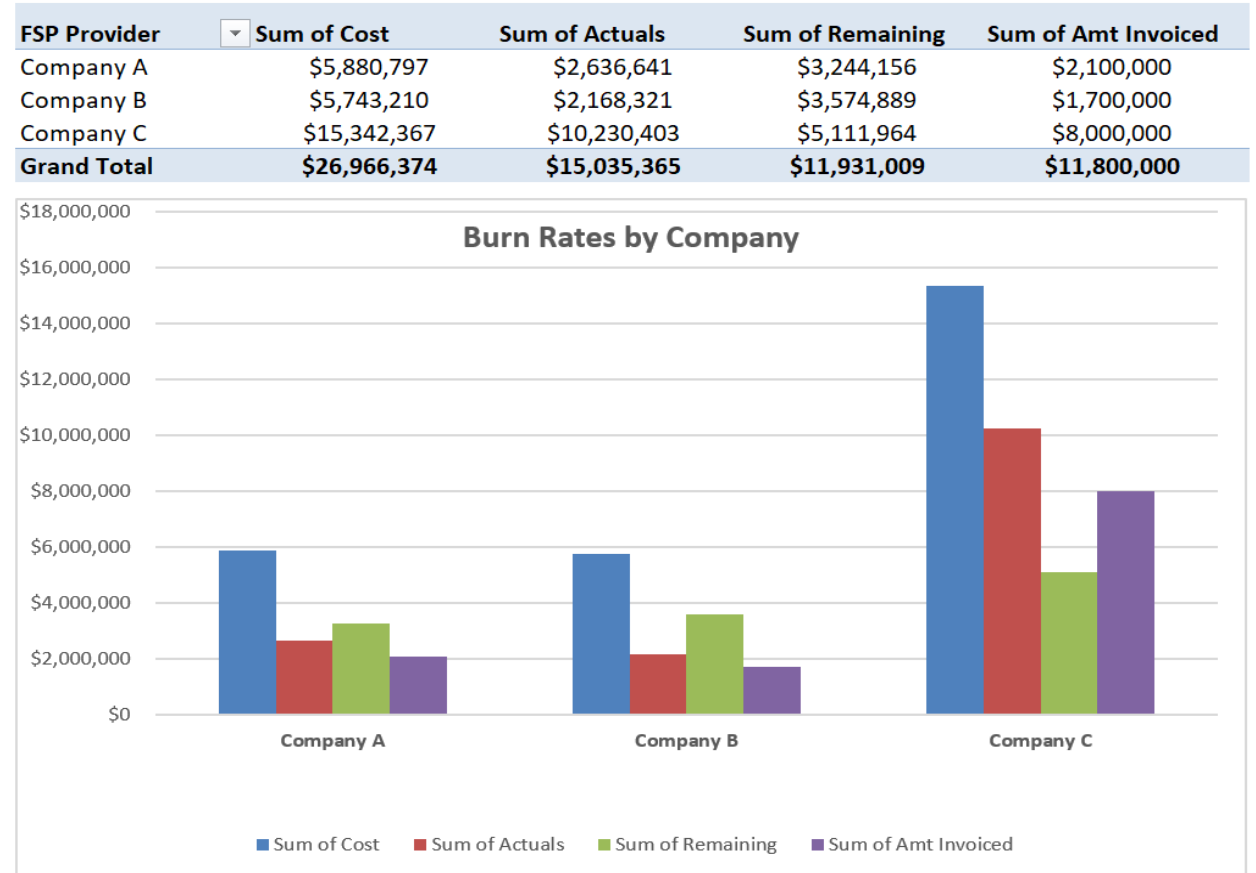
Budget Report							
Client	Project	PO #	PO Amount	Total Amount Spent	Amount Remaining	Percentage Remaining	Status
Client A	Project 1	PO 1	\$ 2,212,000.00	\$ 1,092,639.26	\$ 1,119,360.74	51%	Active
Client A	Project 2	PO 2	\$ 800,000.00	\$ 642,500.00	\$ 157,500.00	20%	Active
Client B	Project 1	PO 3	\$ 2,680,240.00	\$ 1,892,652.00	\$ 787,588.00	29%	Active
Client C	Project 1	PO 4	\$ 175,675.00	\$ 88,394.00	\$ 87,281.00	50%	Active
Client D	Project 1	PO 5	\$ 364,511.00	\$ 314,134.08	\$ 50,376.92	14%	Active
Client D	Project 2	PO 6	\$ 650,000.00	\$ 489,200.00	\$ 160,800.00	25%	Active
Client E	Project 1	PO 7	\$ 445,696.25	\$ 365,214.00	\$ 80,482.25	18%	Active
Client F	Project 1	PO 8	\$ 436,277.50	\$ 254,125.00	\$ 182,152.50	42%	Active
Client G	Project 1	PO 9	\$ 119,080.50	\$ 80,562.00	\$ 38,518.50	32%	Active
Client H	Project 1	PO 10	\$ 685,000.00	\$ 265,738.75	\$ 419,261.25	61%	Active

Using Excel for Resource Allocation

- Track resource usage by assigning budget, time, and personnel to tasks
- Allows for calculation of resource costs with its numerous built in formulas, helping in resource optimization

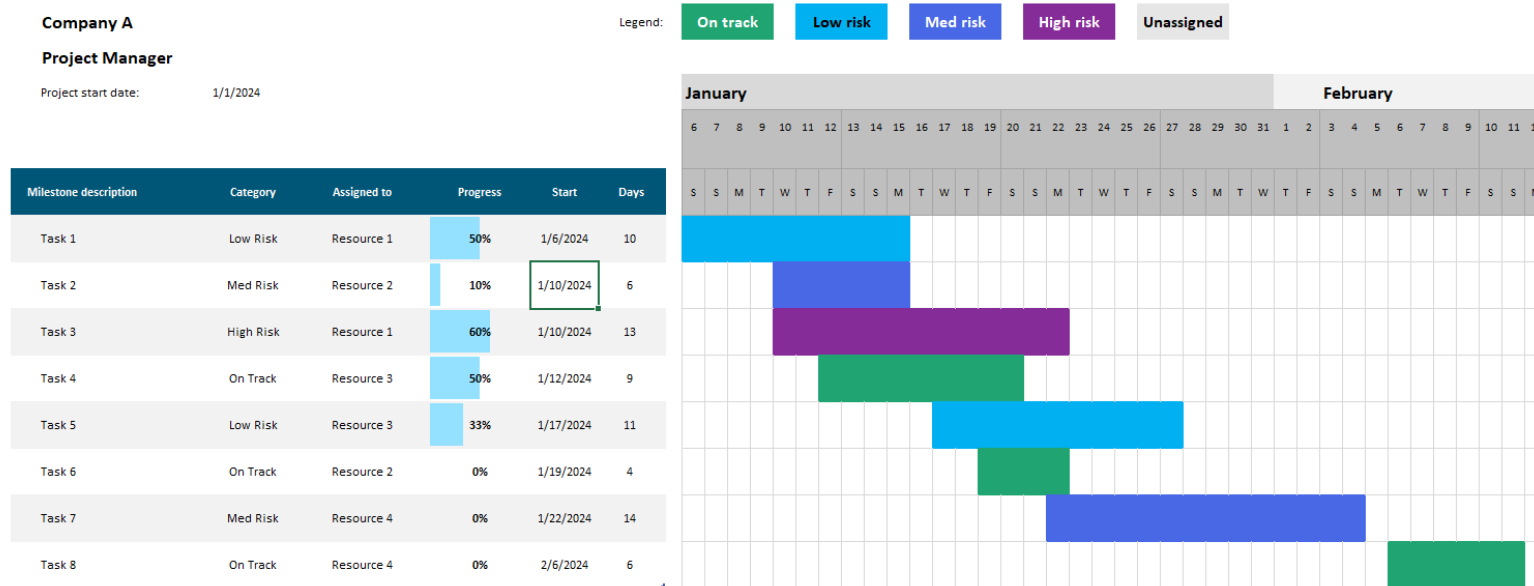
Using Excel for Reporting

- Generate project reports by summarizing key data
- Customize dashboards or use PivotTables to present project status, performance metrics, and other relevant metrics



Using Excel for Task Tracking

- Allows for creation of spreadsheets to list tasks, deadlines, and assignees
- The ability to utilize Gantt Charts and conditional formatting to highlight due dates or completion status and provides visual representation of the project status



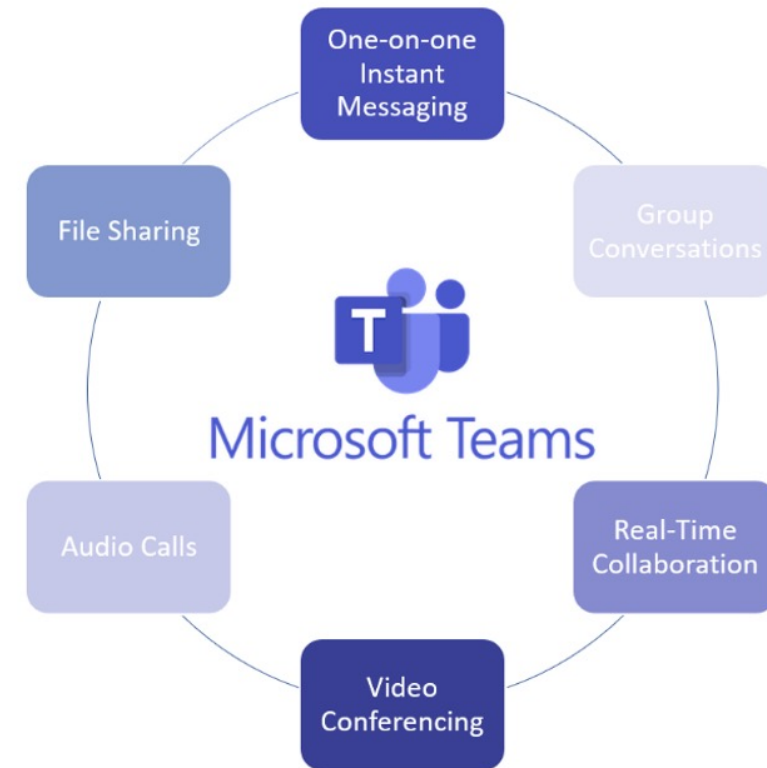
Effective Communication

- Promotes structure, clarity, and collaboration among team members
- Fosters a shared understanding of project goals, timelines, and expectations, aligning the team toward a common vision
- Helps convey roles and responsibilities, minimizing confusion and promoting accountability
- Promotes a positive team dynamic
- Encourages feedback
- Essential for risk mitigation



Microsoft Teams

- Teams is a multi-layered, cloud-based collaboration software
- Features include:
 - Instant messaging
 - Voice calling
 - Video conferencing
 - File sharing and much more
- Integration capabilities



Instant Messaging & Voice Calls

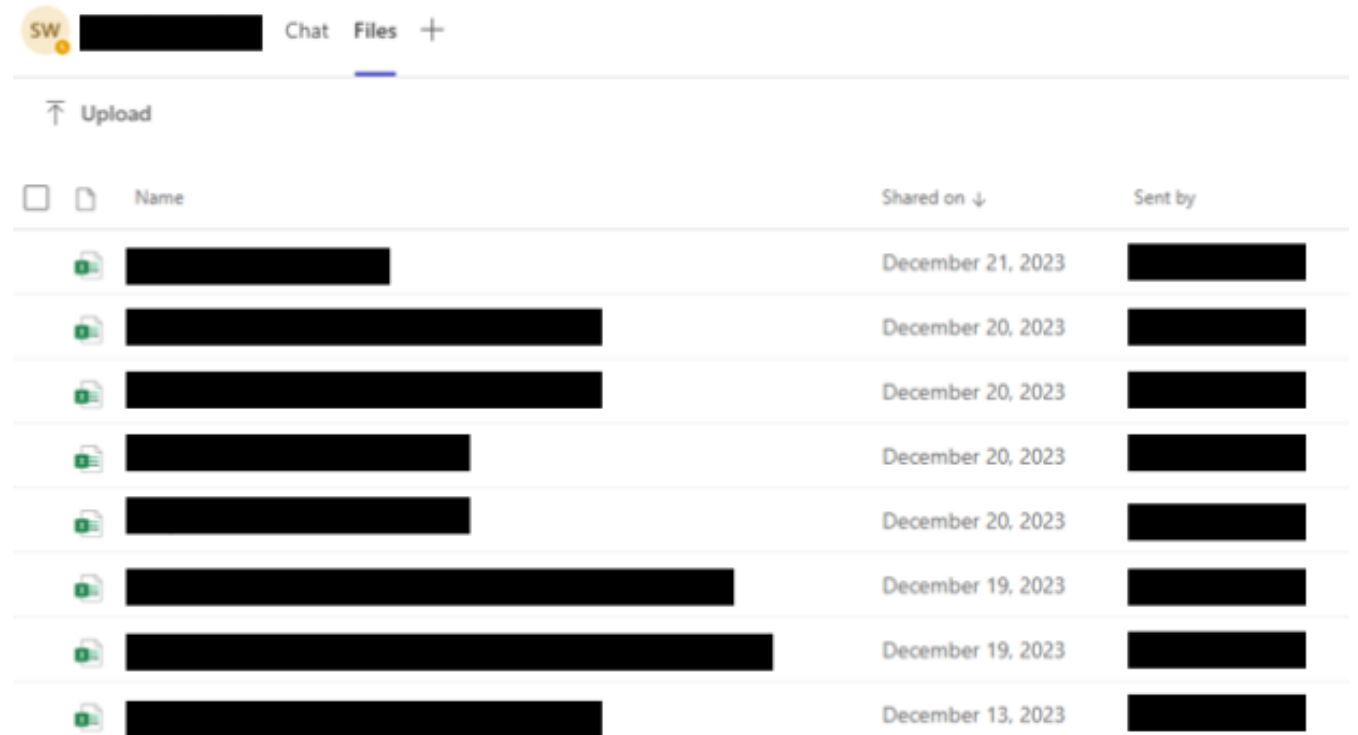
- One-on-one and group instant messaging
- Ability to assign group names to different groups and pin the most important conversations to the top of your chat window
- Instantly share files among team members
- Reply to certain chats to create a thread

Video Conferencing and Voice Calls

- In the growing world of remote work, "face to face" communication is essential
- Facilitates seamless communication among remote teams while still maintaining a sense of connection
- Enables face to face interactions, enhancing understanding and reducing miscommunication
- Allows for real time discussions and project updates, which promotes productivity and teamwork
- Ability to start a video or voice call directly from chat window

Integration and File Sharing

- Send meeting invites directly on Teams and have it automatically integrated into your Outlook calendar
- Scheduling assistant
- Integrates with other Microsoft applications like SharePoint and Excel, making file sharing and collaboration seamless



The screenshot shows a Microsoft Teams chat interface. At the top, there's a header bar with a profile icon (labeled 'SW'), a name, and tabs for 'Chat' and 'Files'. Below the header, there's an 'Upload' button. The main area displays a list of files with columns for 'Name', 'Shared on', and 'Sent by'. The file names are redacted with black bars. The 'Shared on' dates range from December 13, 2023, to December 21, 2023. The 'Sent by' column also shows redacted names.

☐		Name	Shared on ↓	Sent by
☒		[Redacted]	December 21, 2023	[Redacted]
☒		[Redacted]	December 20, 2023	[Redacted]
☒		[Redacted]	December 20, 2023	[Redacted]
☒		[Redacted]	December 20, 2023	[Redacted]
☒		[Redacted]	December 20, 2023	[Redacted]
☒		[Redacted]	December 19, 2023	[Redacted]
☒		[Redacted]	December 19, 2023	[Redacted]
☒		[Redacted]	December 13, 2023	[Redacted]

Conclusion



Clinical Project Management

Time Management

Ensures that tasks are completed within set timelines

Prioritization

Guides the team toward the most impactful activities, optimizing efforts and outcomes

Organization

Creates a structured framework for streamlined workflows, reducing the risk of oversights or errors

Effective Communication

Acts as the glue that binds these elements together, promoting collaboration and understanding

Questions?

Thank You



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