LESSON 2

START THE PROJECT

- Identify and Engage Stakeholders
- Form the Team
- Build Shared Understanding
- Determine Project Approach

Version 3.2 | 2023 Release

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Learning Objectives

- Define and discuss stakeholders and the most effective ways to communicate with them.

- Explain the best ways to form a team.

- Describe how to build the most effective understanding of a project and how doing so relates to executing a project successfully.

- Explain how predictive and adaptive project life cycles work; explain what a hybrid development approach is.

  - Decide which kind of development approach or life cycle is best suited for work.

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Identify and Engage Stakeholders

TOPIC A

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Typical Project Stakeholders*

Can you categorize these stakeholders?

- *Which are typically project team members? Which are not?*
- *Which are typically active in project work?*

- End users
- Customers
- Employees
- Organization
- Managers

- Sponsors
- Business partners
- Suppliers and contractors
- Government
- Community

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Stakeholder and Communications Management
Overview

- Stakeholder register
- Stakeholder engagement plan
- Communications management plan
- Stakeholder engagement assessment matrix (SEAM)
- Assessment grids / matrices / models
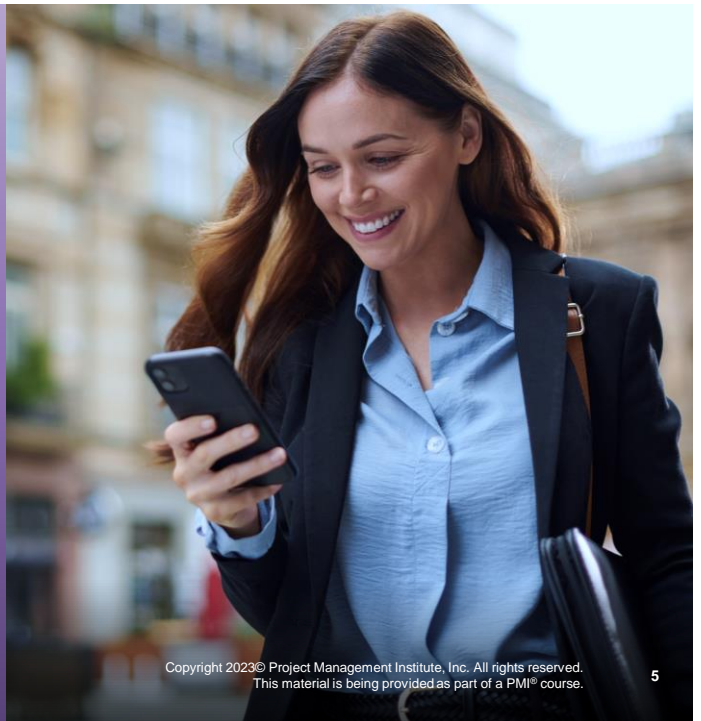
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Stakeholder Identification

Who are they?

- Check the **business case** and **benefits management plan** for names
- Later, check the **issue/impediments log**, **change log** or **requirements documents** to see who else is needed or named

What's their relationship to the project?

- Interest
- Involvement
- Interdependencies
- Influence
- Potential impact on project success

Identify and engage stakeholders early to avoid surprises later in the project!

Assess Stakeholders

Data Gathering
- Questionnaires and surveys
- Brainstorming

Data Analysis
- **Stakeholder analysis** — What are their "stakes" in the project? — i.e., interest, rights, ownership, knowledge, contribution
- Document analysis

Data Representation
- Two-dimensional (2D) grids
  - Power/interest
  - Power/influence
  - Impact/influence
- 3D grid — Stakeholder "cube"
- Salience model
- Directions of influence

Create the Stakeholder Register

- Capture and record important stakeholder information
- Factor in OPAs
- Update it! Describe the evolving relationship with stakeholders throughout the project

Contains the information necessary to execute the stakeholder engagement plan

- Refer to **stakeholder registers** from previous, similar projects for help
- Remember this is a public document, so ensure the information presented is appropriate

Stakeholder Register

	Name	Title	Internal / External	Project Role	Major Requirements	Expectations	Influence / Attitude
1	Eugene Lowe	CEO	Internal	Sponsor	Successful completion	On-time completion, successful partnerships	Champion
2	Oasestown Municipality		External	Government partner (liaison); funding contributor; owner of SLC site	Successful completion of facility and partnership;	Accountability	Supporter
3	Kara Black	Principal, Oases Architects	External	Partner, designer, specialist knowledge (conservation building)	Clear design brief, successful partnership	Fluid funding and communication, design autonomy	Champion
4	Josie Bynoe	Chair, BOD	Internal	Direct strategic local partnerships for Shawpe	Environmental sustainability of project work; "moral rights"	No damage to Oasestown conservation district or environs	Resistor
5	Helen Grey	Lead, business development	Internal	Product owner	High profile tenants, excellent community and conservation credentials	Organizational learning; leadership opportunity	Neutral
6	Hasan Persaud	VP of Business Development	Internal	Portfolio owner	Capacity for ongoing revenue	End-user in Phase 3	Neutral
7	Mandeep Chahal	VP of Finance	Internal	Budget controller	direct contact with funding partners	clear data	Neutral
8	Kei Leung	VP of Marketing	Internal	Marketing expert	elevation of brand	high quality tenants	Supporter
9	Tenants		External	Income source	bespoke spaces	high quality	Neutral
10	Contractors		External	Vendors - building	clear instructions, contract		Neutral
11	Oasestown local residents		External	Neighbors to project	Traffic and noise pollution management	no inconveniences	Resistor
12	Oasestown Community Partnership		External	Community group operating in Oasestown	none	a free space in the SLC	Champion

Know Your Stakeholders
Go Beyond Job Titles

|	
Power	Level of authority
Interest	Level of concern about project outcomes
Influence *aka* **attitude** *or* **impact**	• Ability to influence project outcomes or cause changes to planning or execution • Magnitude of potential contribution or disruption to project *Use a descriptive term — e.g., champion, supporter, neutral, detractor*

Tailor stakeholder assessments to suit project needs. The goal of this exercise is to facilitate your planning of effective communication with the stakeholders!

Stakeholder Mapping

Use two dimensions to map stakeholders:

- **Power** and **interest grid**
- **Power** and **influence grid**
- **Impact** and **influence grid**

Or use three dimensions – a **cube** – to refine the analysis further!
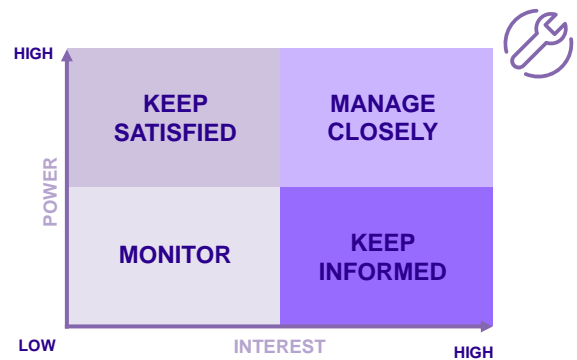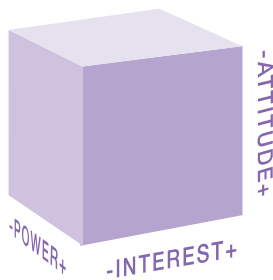
Method:

- Place each stakeholder on the grid (*do not use names*)
- Use the same quadrant labels, but change the axis labels

Directions of Influence

You should understand the social network of project stakeholders, specifically the direction of their influence on the project.

Upward	*Parent organization* — senior management (business, financial interests)
Downward	*In the project hierarchy* — team or specialists
Outward	*Have a "stake" in the project* — client, end-user, external
Sideward	*Friendly or competitive for resources* — project manager's peers, other organizational departments

Salience Model

*Focus on the **product owner** role. Are they familiar, interested and engaged enough with the project to make decisions and move the project forward?*
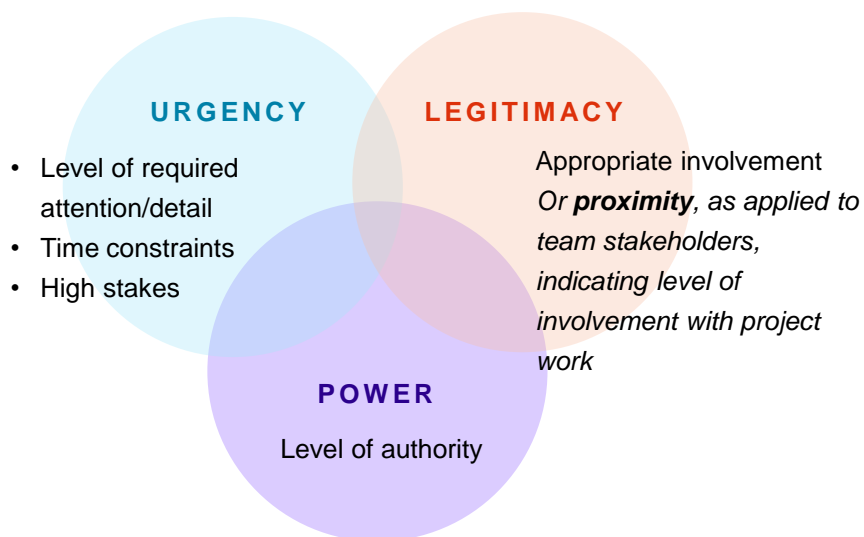
URGENCY

- Level of required attention/detail
- Time constraints
- High stakes

LEGITIMACY

Appropriate involvement
*Or **proximity**, as applied to team stakeholders, indicating level of involvement with project work*

POWER

Level of authority

Stakeholder Perceptions

- Must be holistically understood in customer-centric project management approaches
- Can be damaging to a project, whether they are negative or positive

Why do you think it's important to understand both positive and negative stakeholder perceptions of your project?

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Capture Stakeholder Feedback and Perceptions

- *Interpersonal skills*
- *Active listening*
- *Emotional intelligence*
- *Effective communication methods*

Key stakeholders
- Interview to understand **project requirements and vision** and **communication preferences**

All stakeholders
- Appropriate, regular project communications

Large and public groups
- Questionnaires/surveys
- Facilitated conversations/sessions — online or in person
- Digital media – email campaigns, websites, group chats
- Posters and advertising

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Plan to Communicate with Stakeholders
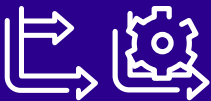
Stakeholder engagement plan identifies required management strategies to effectively engage stakeholders.

Team fulfills strategies via communications described in the **communications management plan**.

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Communication Requirements Analysis

- Leads to a clear articulation of the stakeholders' communications needs

- Enables effective choices about communication topics, frequency, models and technologies

- Output is a grid, questionnaire or survey that documents the communication and technology requirements for each stakeholder

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Communication: Methods and Technologies

Do you use any other communication methods or techniques on your projects?

Are there types your organization does not allow? Why?

Meetings/verbal
- Physical (face to face)
- Virtual (videoconferencing)
- Phone call

Digital/electronic media
- Websites and social media
- Instant/text messaging via phone or platform
- Email or fax

Physical
- Body language and gestures
- White boards

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Communication Methods
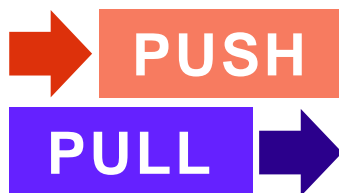
PUSH

PULL

Push — sender determines:
- Send an email
- Make a phone call

Pull — receiver determines:
- Post information on team board
- Store reference documents in electronic repository — e.g., SharePoint

Interactive

- Conversation (speaking on the phone, virtual, in-person)
- Messaging
- Workshops/collaboration
- Whiteboarding

Agile teams are colocated whenever possible so that they can be highly collaborative.

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Communication Challenges / Considerations

- Urgency of need for information

- Availability and reliability of technology

- Ease of use

- Project environment – e.g., language and formality

- Sensitivity and confidentiality of information

- Communications OPAs — e.g., social media protocols

- Data protection laws/regulations

- Accessibility requirements

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Communication Model*

Think of an example of a transmission. Depending on the method, what kinds of noise can play a part?

Cross-Cultural Communication Model
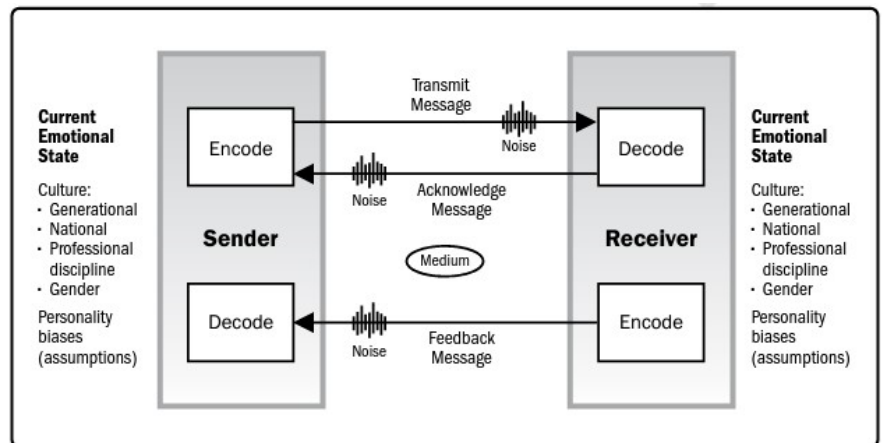
Stakeholder Engagement Strategy

- **Involve** stakeholders
- **Enable** appropriate management strategies
- **Create** and **maintain** relationships

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Example Stakeholder Engagement Assessment Matrix (SEAM)

Tailor labels for stakeholder levels of engagement to your context, team or organization.

Don't use names on the matrix – refer to stakeholders by number.

Stakeholder	Unaware	Resistant	Neutral	Supportive	Leading
1				D	C
2				C	D
3			C	D	
4			C	D	
5		C	D		
6				C	D

C – Current engagement level | **D –** Desired engagement level

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ECO Coverage

1.9 Collaborate with stakeholders

- Evaluate engagement needs for stakeholders (1.9.1)

2.4 Engage stakeholders

- Analyze stakeholders (power interest grid, influence, impact) (2.4.1)

- Categorize stakeholders (2.4.2)

- Develop, execute and validate a strategy for stakeholder engagement (2.4.4)

2.2 Manage communications

- Analyze communication needs of all stakeholders (2.2.1)

- Determine communication methods, channels, frequency and level of detail for all stakeholders (2.2.2)

Form the Team

TOPIC B

Create a Collaborative Team Culture

(?)

(Optional)

How do you think a collaborative team culture can be created in a hybrid approach? Give some examples!

Project manager:

- Builds team agreements, structures and processes that support a culture that enables individuals to work together and benefit from interactions
- Tailors a **resource management plan**

- The team assembles and self-organizes to support project requirements.

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Project Team Formation
Video

Tuckman's Ladder of Team Development

Dr. Bruce Tuckman
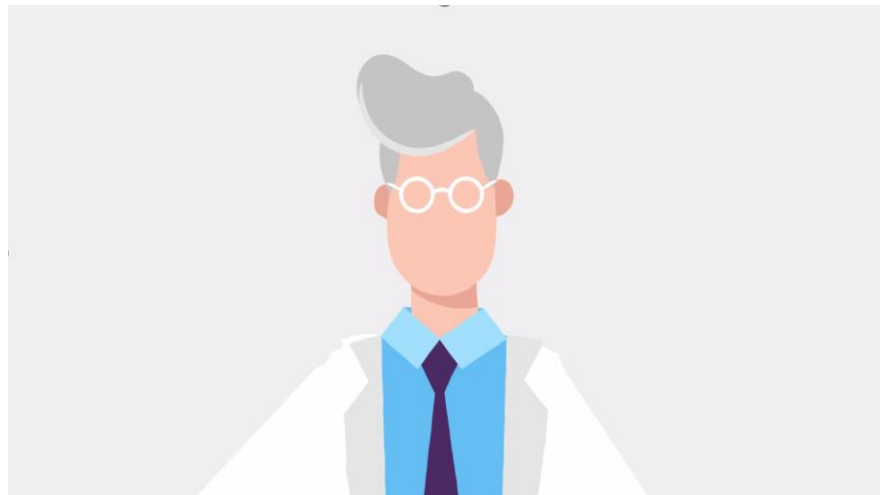
Project Team Formation
Key Concepts

Self-organizing team: A **cross-functional team** in which people fluidly assume leadership as needed to achieve the team's objectives.

Servant leadership: The practice of leading the team by focusing on understanding and addressing the needs and development of team members in order to enable the highest possible team performance.

These concepts can be applied in any kind of project team.

Project Manager Role in Adaptive Teams

Leadership and management models:

- **Centralized:** All team members practice leadership activities and accountability is usually assigned to one individual, such as the project manager or similar role (**team lead**).

- **Distributed:** One project team member (may shift) serves as facilitator to enable communication, collaboration and engagement on accountable tasks.

If a team is self-organizing, is a project manager needed?
- *If not, which of these models works best?*
- *If yes, what does that role look like?*

Hybrid Team Formation
Example

Centralized coordination by a project manager or team lead and self-organized project teams for portions of the work
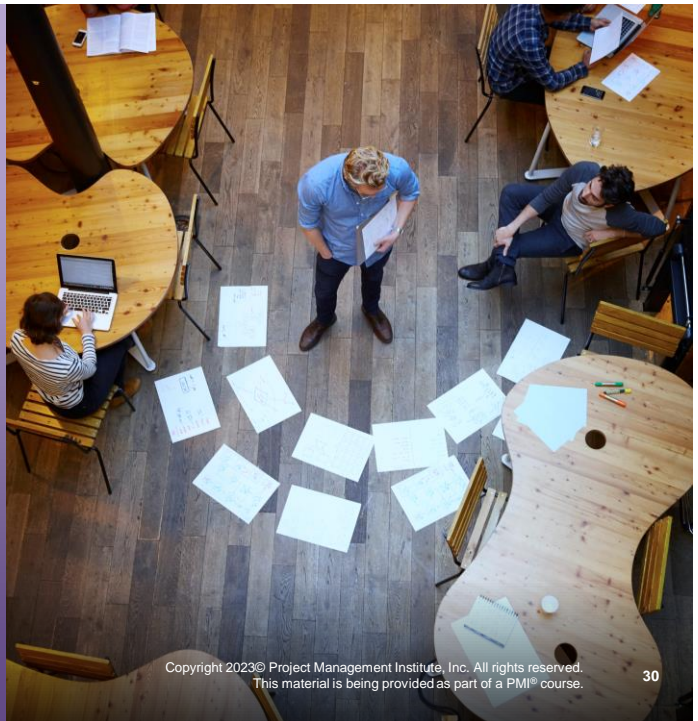
Project Team Composition

- Refers to team's makeup and how team members are brought together
- Varies based on organizational culture, location and scope
- Can be full-time or part-time members
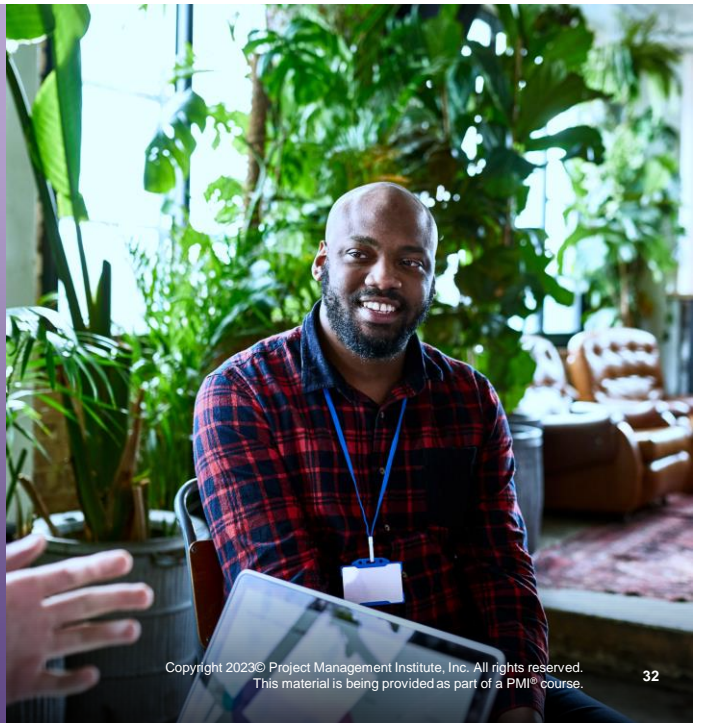- Includes varied knowledge and expertise — i.e., generalists and specialists

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Project Team Roles

- Project management staff
- Project work staff
- Supporting experts
- Business partners

Identify Project Resource Requirements
Guidelines

Provision team members, external contractors and suppliers and physical and intangible assets:

- Ensure relevant skill sets
- Avoid single points of failure — e.g., a single resource has a required skill
- Create **cross-functional teams**
- Use **generalizing specialists,** or **T-shaped** people, whenever possible to support other areas of the project
- Ensure appropriate physical resources and other requirements — e.g., equipment and access rights

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T-Shaped People and Self-Organizing Teams

- Provide individual value and versatility on project teams

- Lend flexibility to organizations

- Help avoid key resource shortages or work stoppages due to availability

- Train and coach team members to become T-shaped, combining **breadth** and **depth** of knowledge

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Diversity, Equity and Inclusion Standards

- Teams are global and diverse in culture, gender, physical ability, language and many other factors.

- The project environment optimizes the team's diversity and builds a climate of mutual trust.

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Experts and Expert Judgment

People from other areas of the organization

- Consultants
- Stakeholders
- Professional and technical associations
- Historical data
- Project manager

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Focus on Team Strengths

- Organize around team **strengths**
- Be aware of **weaknesses**
- Identify **threats** to team success and **opportunities** to improve team performance

🔧 SWOT analysis

Team Norms

- Together, **establish** expected team behaviors **at the beginning of the project**
- Enable teams to **handle challenges** later
- Include guidelines and techniques for:
    - Meetings
    - Communications
    - Conflict management
    - Shared values
    - Decision-making

- Align team values with the *PMI Code of Ethics and Professional Conduct*

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**PMI®
Code of Ethics
and Professional Conduct**

Can you remember the four values that drive ethical conduct for the project management profession?

RESPONSIBILITY

RESPECT

FAIRNESS

HONESTY

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Team Charter* and Ground Rules*

- A document – electronic or paper, or a poster of the ground rules
- Created together with the team
- Includes:
    - Shared values
    - Behavior guidelines
    - Guidelines for communications and use of tools
    - Decision-making guidelines
    - Performance expectations
    - Conflict-resolution measures
    - Meeting time, frequency, and channel
    - Other team agreements — e.g., shared hours, improvement activities

Team Charter Example

GROUND RULES

Team Communication

- **Effective communication** includes:
  - o Verbal
  - o Written
  - o Behavioral
  - o Physical (notice boards)
  - o Virtual

- Include communication expectations and details in the **team charter**

- Organize communications:
  - o Facilitate team and stakeholder collaboration Manage expectations
  - o Check regularly to make sure it's working!
  - o Plan and use **retrospectives** to discuss communications improvements

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Colocated, Virtual or Both?

What kind of team are you on?

Virtual Team*

- "Normal" in most workplaces
- Create opportunities for the organization:
    - Better skills at lower costs
    - Avoids relocation expenses
    - Work/life balance
- Rely on communication technology
- May have bonding challenges

Colocated Team*

- Interaction is easy
- Better bonding is facilitated
- Use of physical tools, collaboration and boards possible

Virtual Team Challenges

- Individual performance tracking
- Diversity - language, technological skill
- Solo working prohibits bonding
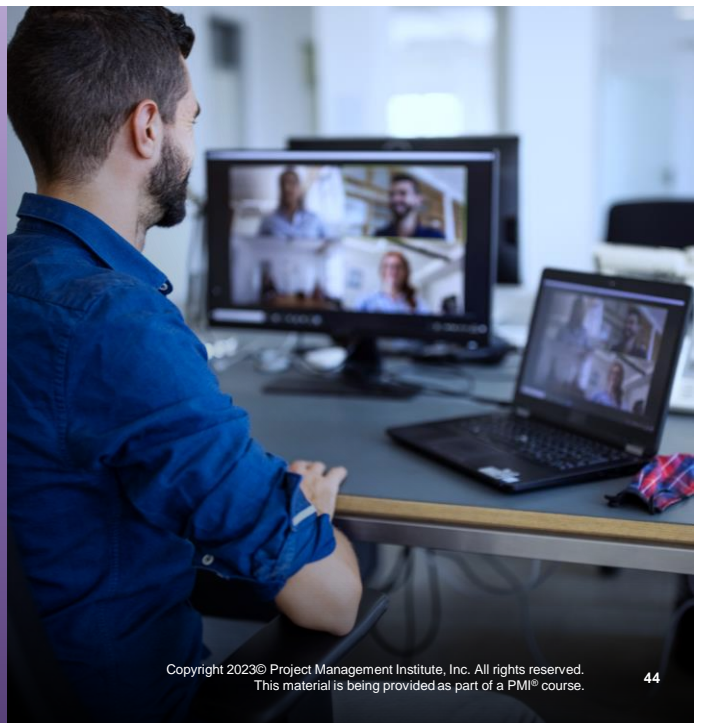
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Running Virtual Teams

- Check in with people individually as often as possible
- Conduct positive network-building activities

(?) What are your tips for creating a positive virtual team experience?
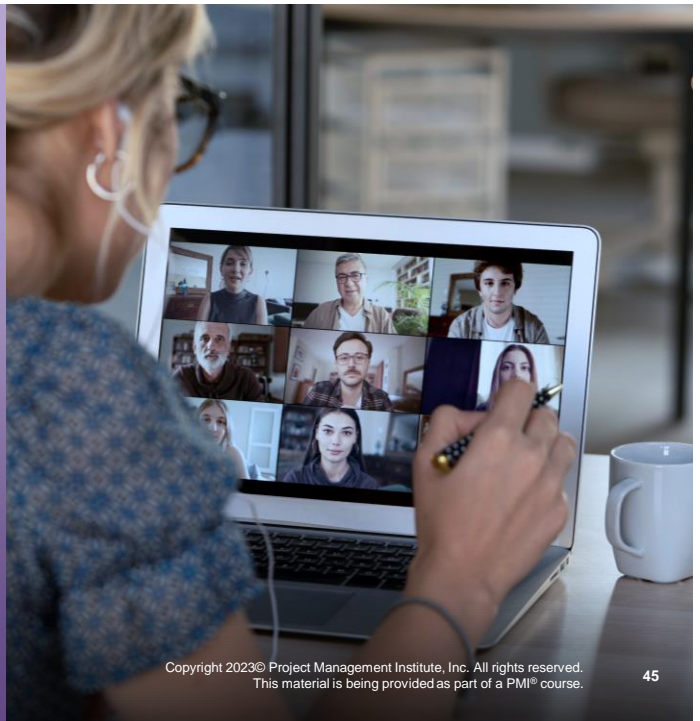
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Virtual Team Communication Technology

- Plan team communication and collaboration methods
- Consider working hours, geographical dispersion and security requirements
- Use appropriate tools:
  - Task boards
  - Messaging and chat
  - Calendars
  - Document storage
  - Knowledge repositories
  - Videoconferencing

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Address Virtual Team Member Needs

Facilitate and ensure collaboration as a priority

Address the basic needs of a virtual team, including:

- Cohesion
- Shared goals
- Clear purpose
- Clarity on roles and expectations
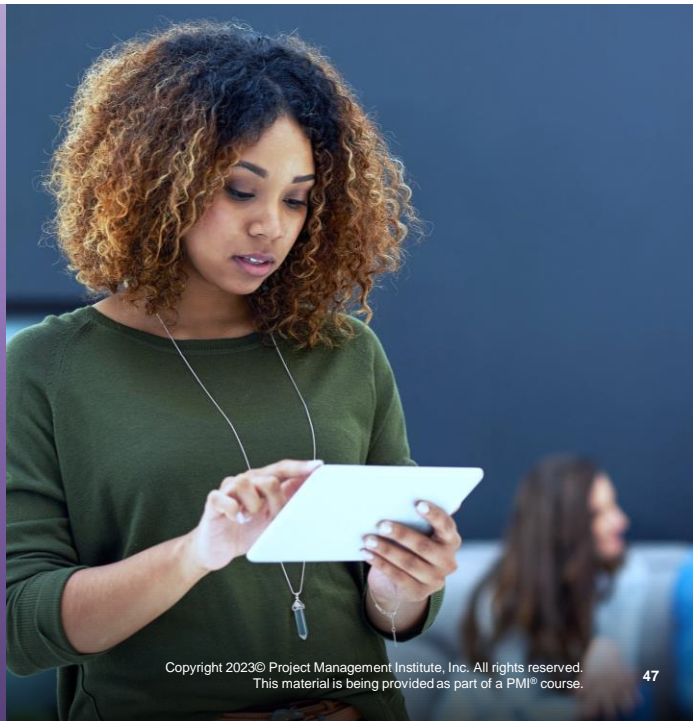
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ECO Coverage

1.4 Empower team members and stakeholders
- Organize around team strengths (1.4.1)

2.16 Ensure knowledge transfer for project continuity
- Discuss project responsibilities within team (2.16.1)
- Outline expectations for working environment (2.16.2)

1.11 Engage and support virtual teams
- Examine virtual team member needs (e.g., environment, geography, culture, global, etc.) (1.11.1)
- Investigate alternatives (e.g., communication tools, colocation) for virtual team member engagement (1.11.2)

Build Shared Understanding

TOPIC C

Seek Consensus for the Project Among the Team and Stakeholders

- Demonstrate leadership behaviors

- Focus on value

- Be a diligent, respectful and caring steward

- Navigate complexity

- Embrace adaptability and resiliency

Create artifacts:

- Project charter

- Project vision statement
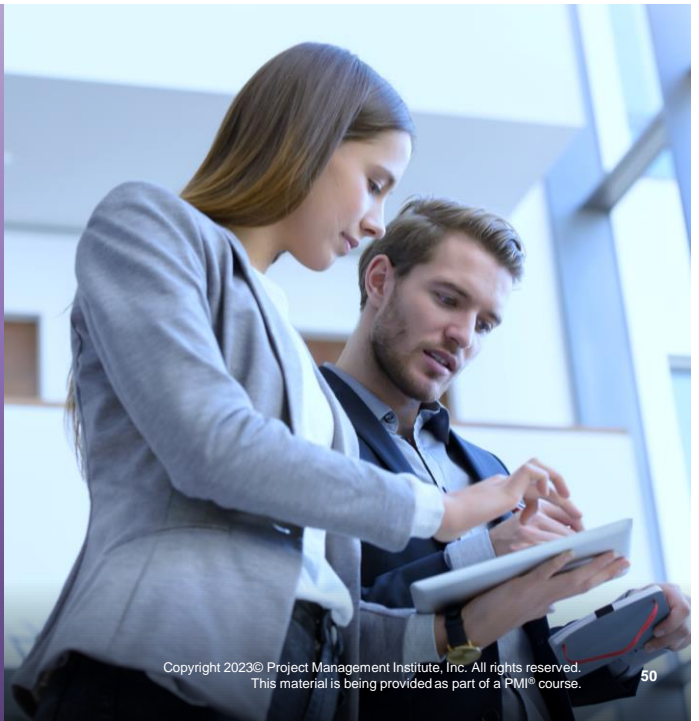
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Building a Shared Understanding
Guidelines

- **Share** the project agreements (vision statement and project charter) with stakeholders and the team
- **Agree or negotiate** to reach agreement and "buy-in":
    - Project agreements — stakeholders
    - Roles and responsibilities, priorities and assignments — team
- **Uphold** the agreements throughout the project

> *Use open and reliable communication methods and your leadership "power skills"*

Project Vision Statement

- Created by project sponsor or executive

- Includes a **clear vision of the desired objectives** and **alignment with the organization's strategic goals**

- Refer to it throughout the project to maintain alignment

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Holistic Understanding of the Project
Negotiation Goals

First, find out...

- The boundaries of negotiation for the project agreement
  - What, if anything, is eligible for discussion or troubleshooting
- The desired objectives of the project

Then:

- Apply critical thinking and business acumen
- Discover how the project fits in the organizational landscape and business objectives

How to Create a Holistic Understanding of the Project

- **Ask stakeholders** to elaborate and clarify their vision or inputs, including asking the sponsor to clarify the vision statement!
- Existing **agreements** may contain initial intentions for, or describe, a project:
    - Contracts with external parties
    - Memorandums of understanding (MOUs)
    - Service-level agreements (SLAs)
    - Letters of agreement or intent
    - Verbal agreements
    - Communication (especially emails) between key stakeholders
    - Statements of work (SOW)

Refer to Business Case and Business Needs

Business case:

- A documented economic feasibility study
- Establishes benefits of project work
- Provides a basis for authorization of further project activities

Business needs documents:

- Identifies high-level deliverables
- A prerequisite of a formal business case
- Describes requirements — what needs creating and/or performing

Negotiate and Agree on Project Success Criteria

- Interview **stakeholders**
- Gather **expert judgment** on technical success criteria
- Check:
    - Organizational (program, operations) **key performance indicators (KPIs)**
    - Lessons learned and historical data
    - Quality policy
    - User acceptance testing (UAT) requirements

- *Reporting and verification criteria for objectives*
- *Identification of deliverable and objective **acceptance criteria** for each*

- *A **definition of done (DoD)** may be specified for the project, in addition to iteration outputs*

Help Everyone Understand the Vision
Guidelines

- Use interpersonal and leadership "power skills" and open communication channels with stakeholders and team members

- Get creative with agile methods!

  - A **product box exercise** to internalize the vision from the customer's point of view and emphasize product/project value

    - **Example:** Here is why Oasestown residents will choose to spend their time and money at SLC (*followed by explanation of what it offers to customers*)

  - The **XP metaphor** technique explains a complex idea in simple, familiar terms, using common language and vocabulary

    - **Example:** SLC is the living room of Oasestown!

Got Agreement on the Project Agreements?

There is no single way to create a **project charter**, but every project needs to have one!
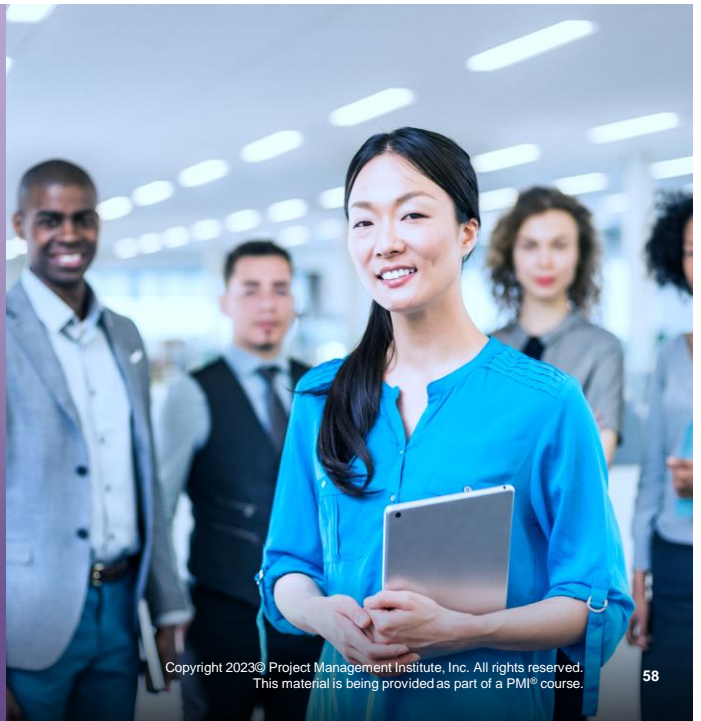
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Project Charter*

What it does and why it's important:

- Authorizes project

- Enables project manager to apply resources to project work

- Defines rationale and business need

- Verifies alignment with strategic goals

- Keeps everyone focused on a clear project vision

Usually created by project sponsor or project manager with executive/stakeholder approval. Sometimes a statement of work can serve as project charter.

Project Charter
Contents

What's included:

- **Names** - project sponsor, project manager, key stakeholders
- **Project description,** including preliminary requirements, measurable objectives
- **Business needs**, including financial goals or milestones
- Summary **schedule** and **milestones**
- **Assumptions**, **boundaries** and **constraints**, including overall risk, approval requirements and approved budget
- Information from the **business case**, including success and exit criteria

Project Charter: Example

PROJECT CHARTER

PROJECT NAME		PROJECT MANAGER	PROJECT SPONSOR
Shawpe Lifestyle Center (SLC)		Ang Fen	Eugene Lowe

EMAIL	PHONE	ORGANIZATIONAL UNIT	
ang.fen@shawpe.com	000.000.0000	Executive	

ESTIMATED COSTS	EXPECTED SAVINGS	EXPECTED START DATE	EXPECTED COMPLETION
$10 Million	$0	Jan 20XX	Dec 20XX+2

PROJECT OVERVIEW

PROBLEM OR ISSUE	Rehabilitate commercial property in downtown Oasestown
PURPOSE OF PROJECT	Establish a profitable commercial development and community partnership in Oasestown
BUSINESS CASE	Attached. Approved by E. Lowe and BOD at Oct 20XX meeting.
GOALS / METRICS	Building code and other local government compliance with historic district construction
EXPECTED DELIVERABLES	"Rehabilitate 128,000 sq metre indoor/outdoor space to meet municipality standards and compliance with National Heritage & Conservation Board (NHC) standards / Property management entity established with Oasestown partner / Secure 14-18 highly reputable commercial tenants"
RISK - CONSTRAINTS, ASSUMPTIONS	1. Site in historical conservation zone 4. Resistant key stakeholder 2. New vendors for specialist glasswork and masonry 5. Phase 3 financing dependent on success of 3. Physical retail market stability Phases 1 and 2"

PROJECT SCOPE

WITHIN SCOPE	1. Manage construction contractors and site development; 2. conduct marketing and advertising to secure 14-18 high-quality tenants to anchor commercial space; 3. Work with community partners to establish socially beneficial community spaces and programs 4. Manage project budget funded by external grant within compliance
OUTSIDE OF SCOPE	1. architectual work - interior and exterior - Oases Architects 2. building work - XYZ General Contractors, ZYX specialist contractors 3. External grant fund management

TENTATIVE SCHEDULE

KEY MILESTONE		START	FINISH
Form Project Team / Preliminary Review / Scope		00/00/0000	00/00/0000
Finalize Project Plan / Charter / Kick Off		00/00/0000	00/00/0000
Phase 1	Design and build interior	00/00/0000	00/00/0000
	Create contract with community groups	00/00/0000	00/00/0000
	Recruit 14-18 tenants	00/00/0000	00/00/0000
Phase 2	Design and build outdoor spaces	00/00/0000	00/00/0000
	Install community programs	00/00/0000	00/00/0000
	Secure $5M revenue in annual commercial rents	00/00/0000	00/00/0000
Phase 3	Finalize all construction	00/00/0000	00/00/0000
	Train SLC property management staff	00/00/0000	00/00/0000

Kickoff Meeting

Purpose

- Establishes project context

- Assists in team formation

- Aligns team and stakeholders with project vision

Organizational/Public
- Announce project initiation
- Share understanding of high-level vision, purpose and value
- Identify sponsor, key stakeholders and project manager
- Include high-level items from the project charter

Internal/Team – *held after agreements are finalized*

- Give project charter overview

- Clarify team member roles and responsibilities (may include the initial team charter)

- Present results of planning efforts

- Initiate product backlog

- Present product roadmap

ECO Coverage

1.2 Lead a team

- Set a clear vision and mission (1.2.1)

1.8 Negotiate project agreements

- Analyze the bounds of the negotiation for agreement (1.8.1)
- Assess priorities and determine ultimate objective(s) (1.8.2)
- Participate in agreement negotiations (1.8.4)
- Determine a negotiation strategy (1.8.5)

1.10 Build shared understanding

- Survey all necessary parties to reach consensus (1.10.2)
- Support outcome of parties' agreement (1.10.3)

1.12 Define team ground rules

- Communicate organizational principles with team and external stakeholders (1.12.1)
- Establish an environment that fosters adherence to ground rules (1.12.2)
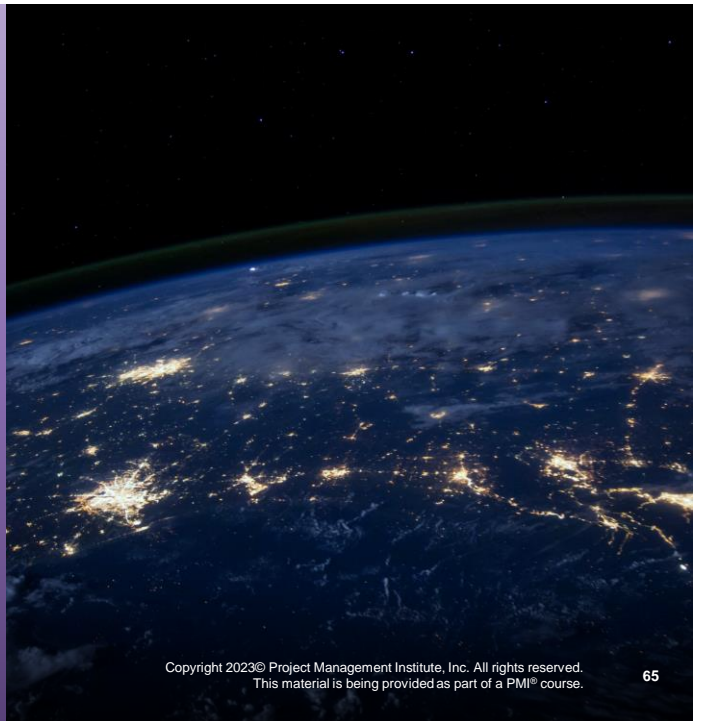
Project Approach

TOPIC D

First, Understand How and Why Approaches Differ

- Changing perceptions of value — e.g., sustainability, customer-centricity
- Dynamic and perpetual global change
- Increasing complexity and risk
- Need to innovate and be dynamic

Which project management frameworks do you use?

Do you have a preference?

Tailored Development Approaches

- Support **dynamic work environments**
- Discover **value delivery requirements** early
- Put stakeholders and the team in close collaboration

Advantages:

- Provide better feature or capability assessment — continuous improvement and quality
- Improve organizational tolerance for change

Servant leaders influence projects and encourage the organization to think differently.

Project Management Development Approaches

|	Characteristics	Certainty About Requirements	Change and Risk
	• Plan-driven • Linear sequence of activities, in phases • Phase completion governed by phase gates	High, from beginning	• Change possible, but controlled • Risks carefully studied and managed
	• Change-driven • Iterative or incremental • Timeboxed cadence (iterations/sprints) or continuous flow	Unclear or customer-driven, so needs further discovery	• Built on assumption of high degree of change • High tolerance of risk with guardrails for risk management
	Tailored development approach, combining these elements		

Project or Product?

A product is part of a project; products have their own **life cycles**.

Product management represents a **key integration point** within program and project management.

Product owners are responsible for maximizing the value of the product and accountable for the end product.
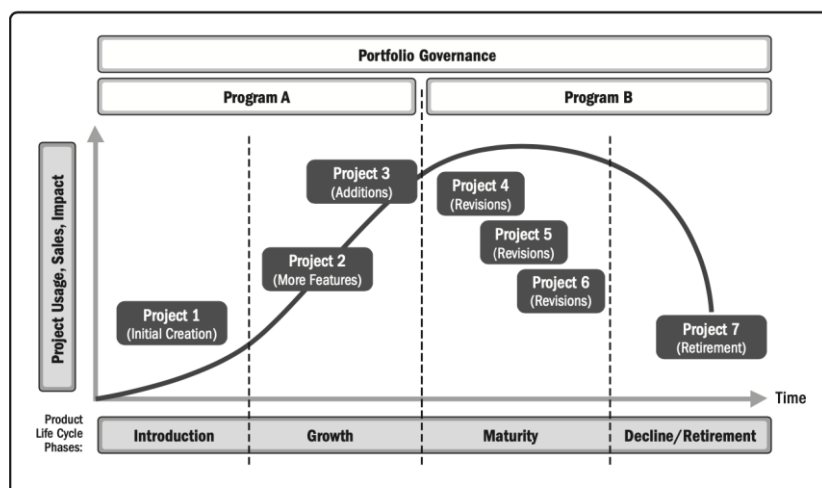
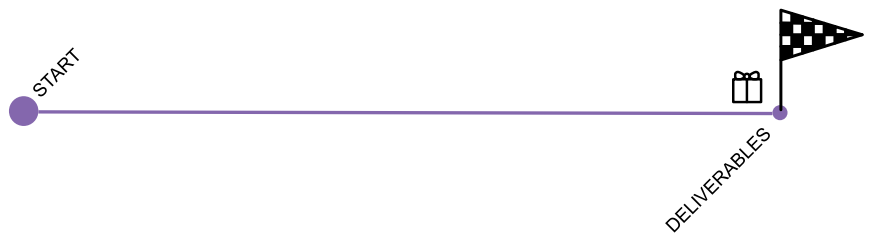*Can you explain why projects often have both a project manager and a product owner?*

Life Cycle and Development Approach

?

.

Which type of life cycle is depicted here?

START

DELIVERABLES

Predictive Life Cycle
Visual
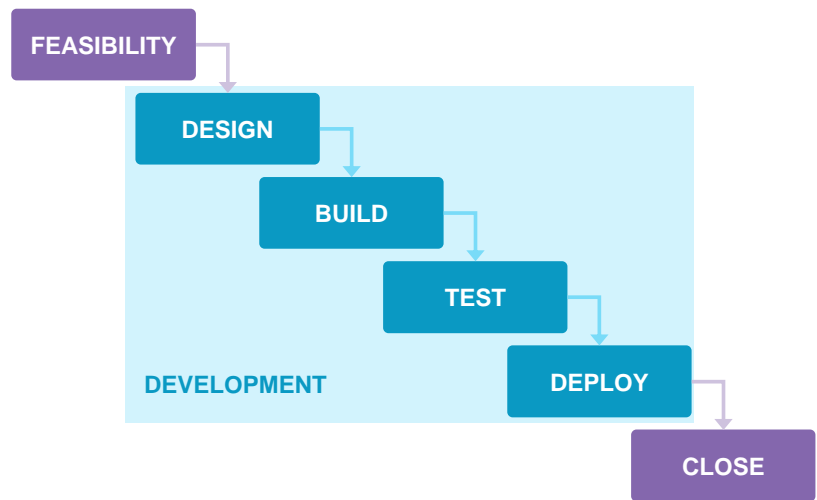
FEASIBILITY

DESIGN

BUILD

TEST

DEPLOY

DEVELOPMENT

CLOSE

Adaptive Life Cycle
Example

🖐️

Note the iterations on the graphic, then describe how this life cycle uses an incremental approach.
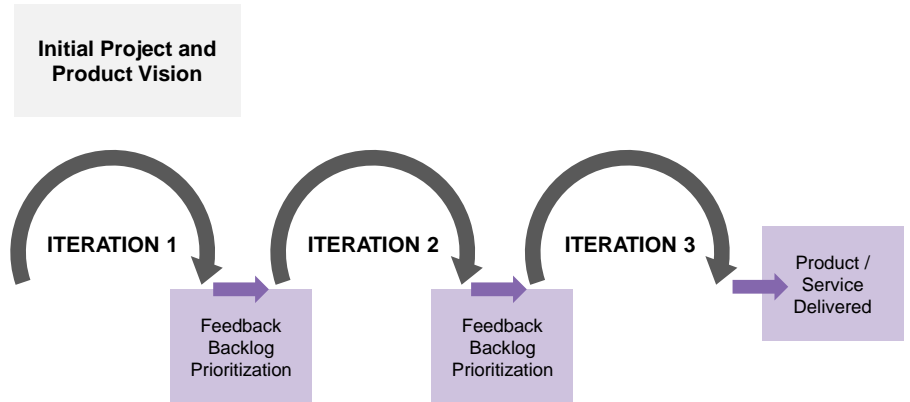
Initial Project and Product Vision

ITERATION 1

Feedback Backlog Prioritization

ITERATION 2

Feedback Backlog Prioritization

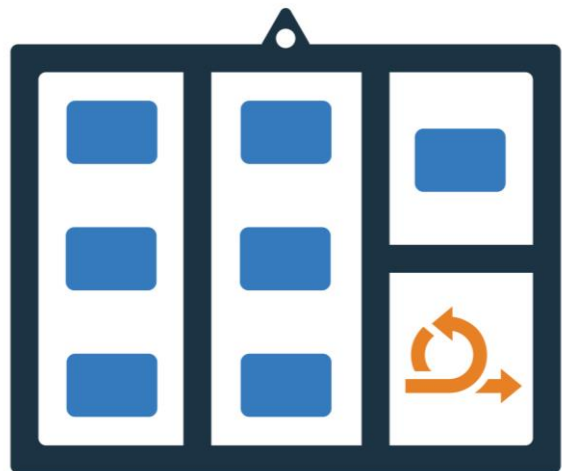**ITERATION 3**

Product / Service Delivered

Cadence

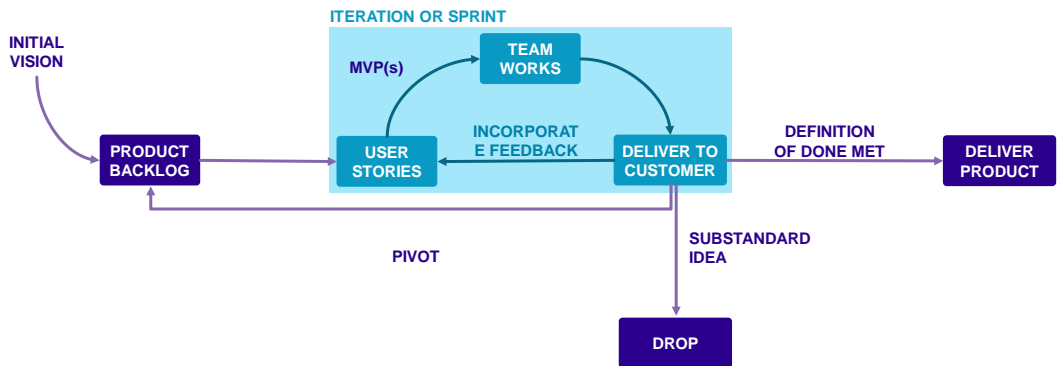Refers to the timing and frequency of delivery of project deliverables.

- **Single:** One delivery at the end of the project
- **Multiple:** Delivery separated into parts, not necessarily sequentially
- **Periodic:** Like multiple deliveries, but on a fixed schedule — e.g., monthly or bimonthly

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Adaptive Development Approaches

INITIAL VISION

PRODUCT BACKLOG

ITERATION OR SPRINT

MVP(s)

TEAM WORKS

USER STORIES

INCORPORATE FEEDBACK

DELIVER TO CUSTOMER

DEFINITION OF DONE MET

DELIVER PRODUCT

PIVOT

SUBSTANDARD IDEA

DROP

Cadence can be time-boxed with sprints/iterations or a continuous flow.

Development Approach and Life Cycle Terminology

Quiz

- Deliverable
- Development approach
- Phases
- Life cycle

Project professionals use a __**development approach**__ or method, which can be predictive, iterative, incremental, adaptive, or hybrid, to create and evolve a _**deliverable**_, which is a unique and verifiable product, result, or capability to perform a service.

A project passes through a series of logically related activities, called _**phases**_ from its start to its completion. This entire process is called a __**life cycle**__.

Acceptance of a _**deliverable**_ is required to complete a process, phase, or project.

Hybrid Life Cycle and Development Approach

- Accomplished by tailoring
- Combines adaptive and predictive life cycles and/or development approaches
- Useful when requirements are uncertain or risky
- Also useful when deliverables can be modularized, or when deliverables can be developed by different project teams
- Uses iterative and incremental development

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Hybrid Project Approaches: Examples

- Use agile or iterative practices within a predictive framework
- Use predictive artifacts or processes within an adaptive life cycle
- Business analysis techniques assist with requirements management
- New tools help identify complex elements in projects
- Organizational change management methods prepare for transitioning project outputs into the organization

What Can Be Tailored?

- Project life cycle
- Development life cycle components
- Way of working (WoW)
- Knowledge management
- Change management
- Project governance
- Benefits management

Development Approaches
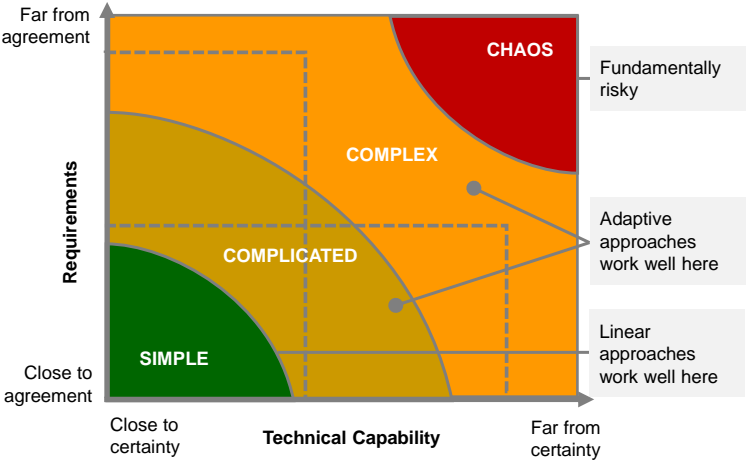
Guidance and Probing Questions

- Deliverable type and the **development approach** influence the **number and cadence** for project deliveries.
- The development approach and the desired delivery cadence determine the **project life cycle** and its **phases.**

- How much unplanned work?
- How does the team prefer to work?
- What cadence suits our work?
- What does the customer want? Is incremental value delivery even important to them?
- What's our schedule? Do we want a steadier, building approach or a faster pace?
- What's our risk appetite/threshold?
- Are sprints helpful?

Assess Complexity:

The Stacey Complexity Model

-Ralph D. Stacey

Far from agreement

Requirements

Close to agreement

Close to certainty

Technical Capability

Far from certainty

- CHAOS — Fundamentally risky
- COMPLEX
- COMPLICATED — Adaptive approaches work well here
- SIMPLE — Linear approaches work well here

Suitability Filter:

A Diagnostic Visual Based on Survey Data

Iterative and Incremental: Overview

Development Approaches

Predictive   Hybrid   Adaptive

Increasingly Iterative and Incremental
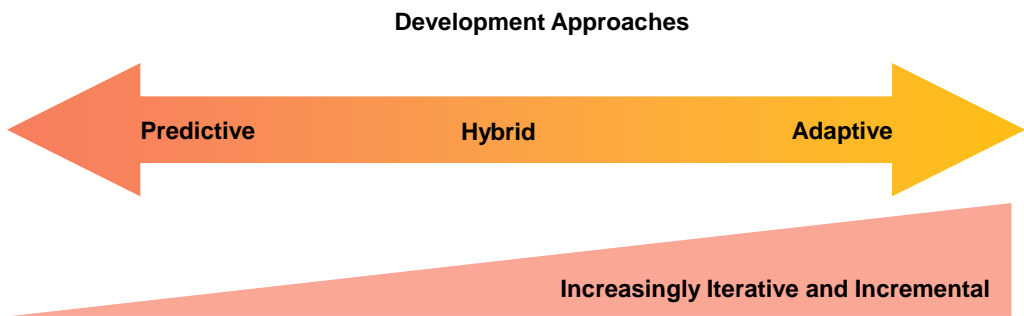
- Compatible with each other
- Used in hybrid and adaptive projects
- Break down development cycle to enable early value delivery

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Iterative Way of Working: Video

Scrum

- This is a commonly used agile framework that offers suggestions for how work can be organized to maximize value to the end user.

- Scrum is implemented at a product development team level.

- Roles include a **scrum master/senior scrum master** who facilitates ceremonies (meetings); iterations are called **sprints**.

Remember that Agile frameworks focus on influencing the entire organization, including leadership and company culture.

Scrum Ceremonies
Overview

- **Sprint planning**
  - Team collaborates with product owner to plan work for current sprint
  - Scrum master/senior scrum master facilitates

- **Daily scrum**
  - Short, daily meeting of team only
  - Team members describe work, ask for help, consider progress toward goal
  - **Not** a status meeting

- **Sprint review – can include Demo**
  - Held at end of sprint
  - Team, product owner and stakeholders attend, or customers review progress and give feedback to adapt product

- **Sprint retrospective**
  - Team identifies improvements to performance and collaboration

Agile Ceremonies

We've discussed the ceremonies over the last few slides. Do you use them in your organization? How effective do they seem to be to you?

- **Product strategy meeting** – product owner shares product vision

- **Daily standup or standup**
  - Team status meeting
  - 5 to 15 minutes, timeboxed
  - Not necessarily daily

- **Backlog refinement**
  - Product owner prioritizes items on backlog

- **Project retrospective**
  - Held at the end of a project to review work and processes
  - Like lessons learned

ECO Coverage

2.13 Determine appropriate project methodology/ methods and practices

- Assess project needs, complexity and magnitude (2.13.1)

- Recommend project execution strategy (e.g., contracting, financing) (2.13.2)

- Recommend a project methodology/approach (i.e., predictive, adaptive, hybrid) (2.13.3)

End of Lesson 2