**EM 564 Project Management**

**Team Research Project Proposal and Plan**

**Team Name:** Halfway There – Livin’ on a Prayer

**Team Members:** Edgar Luna, Nelson Abaga, Jennifer Davis, Merissa Ford, David Kelly

**Project Title:** Hybrid Project Management: What’s it all About?

**Knowledge of Subject:**

* *Describe what you know about the topic?*Team members have experience with several online project management and collaboration systems, including [Daptiv](https://project-management.com/daptiv/) (by ChangePoint), [SharePoint](https://www.microsoft.com/en-us/microsoft-365/sharepoint/collaboration) (Microsoft), [BaseCamp](https://basecamp.com/) (Basecamp), [Salesforce](https://www.salesforce.com/) (Salesforce Inc.). Additionally, team is aware of a few online portals for contractors seeking and employers posting projects, which may also incorporate some project management functionality, including [Upwork](https://www.upwork.com/), [ZipRecruiter](https://www.ziprecruiter.com/), [Indeed](https://www.indeed.com/), and other job boards (e.g., those listed at <https://www.thebalancesmb.com/best-sites-to-find-gig-jobs-4150364>).
* *What is the interest for selecting the topic?*   
  Businesses aim to maximize efficiency, have smooth transition between systems, cut costs and time to complete projects, and learn how to select/combine an approach to what client needs are integral for the deployment of a system approach. One group member’s company transitioned from waterfall to hybrid with agile, then to a purer agile approach. Some teams still use waterfall and some use hybrid or even various combinations. Side-effects of “pure agile” use are limited sets of documentation which can be troublesome for maintenance. Another team member’s current employer is considering changing project management systems; learning more about them may help them make suggestions.
* *What do you want or expect to learn about the topic?*
  + What exactly is “hybrid” project management and how is it implemented?
  + What is a good balance (% agile vs waterfall) and what is the cost (time, money, team members) of each?
  + What are the pros and cons of utilizing a hybrid model?
  + What kind of projects require this model? [case studies?]
  + How to smoothly transition employees and faculty between systems efficiently?

**Project Description:**

* *Define the topic.*  
  Hybrid project management is a theory that combines planning strategies from the traditional project management environment (waterfall) with the agile (adaptive) methodologies. The hybrid approach integrates the various diverse methods into an acceptable framework.   
  Hybrid project management combines ideas from agile (aka adaptive) and traditional approaches to managing, such as waterfall (aka predictive; [Clayton, 2021](https://onlinepmcourses.com/hybrid-project-management/)) (see Figure 4 in [Archer and Kaufman, 2013](https://www.pmi.org/learning/library/outcomes-hybrid-approach-waterfall-environment-5839)). Specifically, this methodology acknowledges that no one approach works for all projects ([Tolbert, 2020](https://ntserver1.wsulibs.wsu.edu:2171/lib/wsu/reader.action?docID=6362838&ppg=21), p. 2).
* *What industries or who is involved in this topic?* 
  + Manufacturers
  + Marketing agencies
  + Smaller lean-driven industries
  + Software and app development
  + Government (contractors)
  + Start-ups
  + Projects that rely on weather patterns and changing supply chains
* *How does the topic impact businesses/organizations?* 
  + Helps align different team goals with stakeholders; informs teams regarding how to treat deliverables (i.e., pieces of end product).
  + The agile method breaks project work into manageable tasks of work, allowing completion before moving to next steps (efficiency).
  + Waterfall component provides overall structure of the project.
  + The combination accelerates project timetables to get the project done faster without straining any one resource.
  + A drawback is that some teams move at an agile pace while others are slower; emphasizes need for constant communication between.
  + Leadership has to communicate with the teams to keep on pace with goals.
* *When and why did the topic become important?*   
  Waterfall tenants, also known as predictive or planned project management, were first published in 1956, and later ridiculed in the 1970’s ([Clayton, 2021](https://onlinepmcourses.com/hybrid-project-management/)). The agile manifesto was published in 2001. PMI recognized agile in 2017 ([Clayton, 2021](https://onlinepmcourses.com/hybrid-project-management/)), but its underlying concepts have been around since the 1950’s. With a rise in technological advancements and a market full of competitors, companies needed a faster way of bringing deliverables to fruition. For example, in the software development realm, industry leaders found they needed an innovative approach to project development and management to speed time to market, prevent product failures, and manage risk. Businesses needed a faster way to respond to ever-changing client requirements.
* *Why do you think people should know about the topic?*A hybrid approach to managing long projects (e.g., for government clients) allows risk management, by increasing interaction with customers and subject matter experts, during an aggressive timeline to delivery ([Archer and Kaufman, 2013](https://www.pmi.org/learning/library/outcomes-hybrid-approach-waterfall-environment-5839)). Letting go of waterfall can be a risky endeavor by not knowing what will replace it. Agile might be too aggressive and leave holes in company practices. The hybrid model can help companies do both and meet their business objectives and do it in less risky manner, allowing for an approach to maximize benefits of both agile and waterfall management systems, whilst navigating around the possible shortcomings in a single system approach.
* How does this topic affect the world?   
  More and more processes run on software (banking/trading, commerce/inventory management, education, research, healthcare, governments, etc.) that there are start-ups and businesses constantly developing and improving software and cloud applications. These projects now tend to follow an agile or hybrid management methodology. International business and humanitarian projects are characterized by constantly changing variables. The hybrid method pairs the best of the Waterfall and Agile methods and gives the project manager the flexibility they will need to adjust for all of these changes and still create a path to completion.

**Roles and Responsibilities:**

Project manager: David Kelly

* Runs meetings.
* Has executive decision and tiebreaker authority in case of indecisiveness.
* Alerts group to evolving needs for project, e.g., to fill gaps in research.
* Follows-up on missing deliverables prior to deadlines.
* Communicates with instructor on behalf of the group (e.g., finds answers to group member questions).

*Roles/activities of other team members:*

Coordinator (project timeline guru; sends reminders, informs project manager): Edgar Luna

Compiler (organizes team member submissions/suggestions to complete working drafts): Jennifer Davis

Graphic/topographical designer(s) (improves look/feel): Merissa Ford

Proofreader (copyedits/finalizes document, submits on behalf of team): Nelson Abaga

Researcher (gathers info on assigned topic; posts to group area in Canvas): All

Developmental feedback on drafts: All

Presenter(s): All

**Project Approach:**

* Meetings
  + Occur synchronously at least once per week (in-class).
  + Asynchronous communication accomplished via email and group discussion board throughout the week, as needed.
* Document control
  + Drafts are to be housed in group area on Canvas or exchanged via email string (1 group member does not have Canvas access yet).
  + Drafts will be labelled numerically for version control and uploaded as attachments to appropriate group Discussion board.
* Issues
  + Group members’ availability and access to tools (Library search, Microsoft Office or Google docs) must be considered when planning deadlines/deliverables.
  + Group members should have a back-up plan to access internet, in case of outages.
  + In case of emergency, project manager should be alerted, who will alert rest of team so they can plan accordingly to meet deadlines.
* Decisions
  + Anyone can propose ideas or group actions.
  + Team consensus is required to adopt (minimum 3 out of 5 must agree); project manager is tie breaker.
  + Responses may be collected live during a Zoom group meeting (fastest), via email string, or discussion board post (slowest).

**Research Sources:**   
Research will begin on the PMI website and via online database searches using WSU library’s online SearchIT tool to find journal articles. Sources identified via preliminary searches include:

Websites:

* <https://www.pmi.org/learning/library/outcomes-hybrid-approach-waterfall-environment-5839>
* <https://www.pmi.org/learning/library/consistent-approach-provides-high-performance-9889>
* <https://www.toptal.com/project-managers/agile/hybrid-project-management-a-middle-ground-between-agile-and-waterfall>
* <https://www.proprofsproject.com/blog/hybrid-vs-agile-project-management/>
* <https://onlinepmcourses.com/hybrid-project-management/>
* <https://www.teamgantt.com/waterfall-agile-guide/hybrid-approach>
* <https://agilemanifesto.org/>

Journal article:

* <https://doi.org/10.1287/opre.2019.1977>

eBooks:

* <https://ntserver1.wsulibs.wsu.edu:2171/lib/wsu/reader.action?docID=6362838&ppg=21>
* <https://ntserver1.wsulibs.wsu.edu:2171/lib/wsu/detail.action?docID=5747804>

**Major Objectives/Goals/Outcomes:**

* **Proposal**

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| Due Date | Deliverable | Person(s) Responsible |
| 5/15 by 11:59pm | Team members complete gathering ideas for proposal, post to group discussion board on Canvas and alert compiler | All - Brainstorm  Jennifer – Post to discussion board |
| 5/16 by 11:59pm | Compiler completes full draft, including Academic Integrity Statement, then posts to group Discussion | Jennifer |
| 5/17 by 11:59pm | Meet as group after class or provide feedback on draft via group discussion board | All – Give feedback  Jennifer – Post to discussion board |
| 5/18 by 11:59pm | Graphic designer adjusts appearance and formatting of draft. Sends to team when finished. | Merissa |
| 5/19 by 11:59pm | Group meeting after class for final review and approval. | All |
| 5/19 by 11:59pm | Proofreader completes final pass with any needed updates and submits final draft. Posts a finalized copy to group discussion for project reference. | Nelson |

* **Presentation and quiz questions**

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| Due Date | Deliverable | Person(s) Responsible |
| 5/26 by 5:15pm | Graphic designer suggests 2 or 3 PPT master slide designs/themes for group to vote on at meeting. During meeting, team members discuss and develop basic outline to PPT (e.g., 5 subtopics or 4 subtopics plus example case set of 4) and choose topic for which they will create 4-5 slides with narration script (~ 5 mins) and 1 quiz question slide set. | Merissa – Provide slide options  All – Make decision on slides |
| 5/28 by 11:59pm | The PPT skeleton in selected design will be uploaded to group Discussion with title slide, TOC, and titled placeholder slides for adding content (e.g., named for individual who will create them). | Merissa |
| 6/5 by 11:59pm | Team members will complete first draft of their 4-5 slides (using unique or innovative approaches as applicable) with narration script and 1 quiz question slide set (question on 1st slide, answer with short explanation plus why important to topic on 2nd; T/F, fill in the blank, multiple choice, multiple answer—can easily be answered via chat) and post to the group discussion board. | All |
| 6/13 by 5:15 pm | Team members update their slides, create source citations, and post finalized versions to group Discussion | All |
| 6/14 by 11:59pm | Compiler will integrate all slides into a complete PPT draft, including References and Academic Integrity Statement and post to group Discussion for group review. | Jennifer |
| 6/16 by 11:59pm | Team practices presentation at meeting and provides any last-minute feedback to proofreader to incorporate prior to next meeting | All |
| 6/21 by 5:00pm | Finalized PPT draft will be posted to group Discussion. The individual who will run the slides during the presentation will download and have ready. | All |
| 6/23 by 5:15pm | The proofreader will submit the full, finalized PPT no later than the date of the team presentation | Nelson |

* **Lessons Learned**

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| Due Date | Deliverable | Person(s) Responsible |
| 6/21 by 7:45pm | Team works on/completes Lessons Learned during meeting | All |
| 6/22 by 11:59pm | Compiler will draft during the conversation and post to group discussion for team review by 6/22 midnight.  Answer questions:  - "What went well?" and "What did not?"  - Low-cost way to celebrate.  - Academic Integrity Statement. | Jennifer – Compile  All – Discuss lessons and questions |
| 6/30 by 11:59pm | Proofreader will do final review and submit, as well as post the finalized document to the group Discussion so group members can obtain a copy. | Nelson |

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**Academic Integrity Statement**

*We commit ourselves to Washington State University's high standards to uphold academic honesty and scholarly values as established by the WSU's Standards of Conduct. We affirm that we have not given or received any unauthorized assistance on this assignment/examination, that the work product presented here is the work of the author(s) [all team members listed], and that all materials from other sources (including books, articles, Internet, or other media), whether quoted or paraphrased, have been properly cited.*

Nelson Abaga, Jennifer Davis, Merissa Ford, David Kelly, Edgar Luna

(Typing our names above serves as our signatures.)