

Society of PM Professionals Day – January 22, 2003
“Project Management Methodologies”
Workshop #2 Results

1. (a) What aspects of the methodologies that were reviewed today stood out for you as especially important and useful?

- i. Introduction to agile (chaos explained)
- ii. Practicality, accessibility
- iii. Basis in lessons learned
- iv. The flexibility, usefulness for different projects
- v. Scalability
- vi. Director of PMs talking to sponsor and steering committee (ICBC)
- vii. Template examples
- viii. Inclusion of best and recent samples of completed template forms

(b) Describe specific examples of how a particular aspect or aspects would have helped you in a past project management situation.

- i. Access to samples
- ii. Knowing limitations of approach (agile)
- iii. Knowing minimum deliverable requirements
- iv. Having sponsor and steering committee know their role
- v. Documenting / estimating demand for user time (impacts)
- vi. Having corporate methodology allows stakeholders to know what comes next

2. (a) What are common themes / similarities between the different methodologies that were reviewed today?

Bates / ICBC / Westech project management methodologies:

All are:

- i. Staged / gated
- ii. PMBOK-compliant
- iii. Have streamlined documentation
- iv. Use defined processes with tools & techniques (MS-Office-based)
- v. Are Intranet-enabled (or soon will be)
- vi. Flexible

(b) What are the outstanding differences?

- i. Bates is generic; others are customized to specific needs
- ii. ICBC's is simplified to essential elements (5 out of 23 mandatory)
- iii. Westech tailored to PMs working with external customers

3. (a) In what environments and situations would Agile Methodologies work best – considering organizational structure, culture, management style, communication style, degree of formality, flexibility, type of business, etc. ?

- i. Organizational structure
 - Smaller, technology-based
 - Internal and consultant resources
 - Budget-focused
 - Time is critical
- ii. Culture
 - Forward thinking
 - More risk acceptance
 - Professional, mature
- iii. Management Style
 - Flexible, more trust, less hands-on
 - Less controlling but middle ground
 - Less traditional
 - Milestone-based, not task-bound
- iv. Communication -- facilitative, status-oriented, big picture
- v. Formality – low
- vi. Flexibility – high
- vii. Type of business – software development

(b) What are the top three reasons Agile Methodologies would or wouldn't work in your environment?

- i. Agile would work because it:
 - Demands customer buy-in and participation
 - Supports evolving requirements that are acknowledged and accepted
 - Has time and budget constraints
- ii. Agile wouldn't work because it:
 - The existing teams can't communicate well enough
 - The existing environment is too formal
 - The existing teams are too geographically dispersed, and there is too little interaction

4. What are the essential features of a methodology?

- i. Defined requirements – agreed upon with customer
- ii. Instructions – how to use the methodology as well as what to deliver
- iii. Flexibility – identification of a “common minimum” with a drive for efficiency (market)
- iv. Consistency across projects – to avoid reinvention of the wheel, and ensure management oversight
- v. Control of changes – allowing revisiting and redefining requirements

5. (a) How would you “sell” Agile Methodologies to company management?

- i. Identify both tangible and intangible benefits:
 - \$
 - time
 - morale
 - productivity
- ii. Provide testimonials with statistics (if possible)
- iii. Discuss workability of existing processes (with statistics)
- iv. Since there is a higher perceived risk, suggest approach be to pilot carefully, probably with earlier risk mitigation
- v. Link back to corporate culture: does *it* need to change?
- vi. Explain alignment with business strategy
- vii. Focus on education of executives

(b) Choose one of the other methodologies you’ve seen reviewed today: how would you sell it to company management?

Focus on ‘Essential Set’ (Westech):
Similarly to selling Agile Methodologies, except:

- i. Perceived risk is less
- ii. Less education of executives required
- iii. Identify as more traditional but flexible

6. Consider project management methodologies you are using and/or have used in the past.

(a) What characteristics (e.g., guidelines, templates, approaches, etc.) did you find most important and useful, and in what situations?

- i. Flexibility
- ii. Existence of a central repository
- iii. Gate reviews
- iv. Templates
- v. Best practices
- vi. Samples (documents, case studies)

(b) Have you used methodologies that were deficient in some way: lacking certain guidelines, missing templates, too rigid, unclear, etc., and if so, what specific problems did this cause?

Deficient methodologies resulted in:

- i. Executive support for projects not being there
- ii. A corporate culture not supportive of project needs
- iii. Insufficient awareness
- iv. Lack of accessibility to methodology (read/write, Web, LAN)
- v. Lack of PM knowledge to put the methodology into context
- vi. Team members not having at least a minimum level of training