



September 13-14, 2022

Agile, Waterfall, Hybrid... Oh My!

Delivering in a Multi-Methodology Environment

Joe Perzel | Program Manager
Surescripts LLC





Surescripts: Agile, Waterfall, Hybrid... Oh My!

Delivering in a Multi-Methodology Environment

Joe Perzel, PMP

September 13, 2022

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Agile, Waterfall, Iterative, Oh My!

Agenda

- Background: Introduction, Assumptions & Definitions
- My Beliefs and Principals
- Hints and Best Practices
- Final Thoughts

My Background

Some of the Larger, More Complex Projects

- The multi-year, enterprise-wide effort to plan, research, design, create a Cloud-based hot back-up site for cyber resiliency for a healthcare software company
- The 18-month roll-out of Office 365 across the enterprise, including the redesign and rewrite of the corporate Intranet site for a healthcare software company
- The program management of a 2-year rewrite of a custom Sales and Marketing automation system for a global reinsurance company
- The development of a PMO office and corresponding policies, processes and artifacts for a Higher Ed organization
- The design and implementation of a data center move for a Fortune 500 company to an out of state location requiring no business hours downtime
- The Planning, RFP creation, product selection, deployment/support of a 3-year ITIL and monitoring operations system for a company requiring 99.98% uptime
- The package selection, customization and deployment of all infrastructure, back-office and on-site systems for a 20-location, Fortune 500 distribution business

My Background

Some of my presentations include:

- The Dark Arts of Project Management: Influence and Politics
- How to be a Chameleon: a Key to Enterprise Project Success
- Ten Simple Ways to Screw-up a Good Project
- There are No Politics in Project Management
- How to Train your Dragon: a Project Sponsor Primer
- Project Stakeholders: Dealing with Sleeping Giants to Saboteurs
- Managing Change and Surviving to Talk about it
- The Art of Selling and Salesmanship: Tools Everyone Needs to Utilize
- Situational Leadership: Up, Down and All-around
- A "Surefire" way to Ensure Schedule Performance!
- Managing Innovation in a Project Management World
- Joeisms: Leadership Concepts and Other Sage Words of Advice



✓ This should tell you a couple of things...

- I find titles market & attract attention which leads to project success
- I can be irreverent, sarcastic and love debates; so comments and other opinions are appreciated
- I focus on the soft skills in the project world

Company Background

- 22-year-old not-for-profit Healthcare technology/software company
- Approximately 650 employees
- PMO has a dozen people supporting projects, program, portfolios
- PMO reports up through IT department, runs projects across enterprise-wide
- Converted to Clarizen late in 2017 from MS Project
- Clarizen added more rigor and better information around intake, prioritization, resource planning and enterprise reporting
- Have been running Agile – both Scrum and Kanban – for over 10 years

Goals for Today

- Offer suggestions, hints and best-practices around project managing a multi-methodology environment including:
 - ❑ How to handle the full life-cycle: intake through lessons learned
 - ❑ The many situations which project leaders need to navigate
 - ❑ The key times for proving the exceptional leadership
- ✓ ... by presenting content, engaging in a dialogue, supporting my points with present-day and real-world examples



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Beliefs and Principals

My Beliefs

- Some folks, teams, departments, companies only believe in Waterfall
- Some folks, teams, departments, companies only believe in Agile
- One size doesn't fit all, all the time - Each has its Pros/Cons
- Not everyone believes the previous Assumption
- Multiple Methodologies can co-exist



My Beliefs

- Projects cause "Change" throughout an Enterprise – even within the project team itself
- You are the "professional" on the project, so it is up to you to recognize and set in motion a plan for success, so you need to...
 - ✓ Understand the various options
 - ✓ Be open and flexible
 - ✓ Be aware
 - ✓ Be good at Negotiations, Sales and Influence



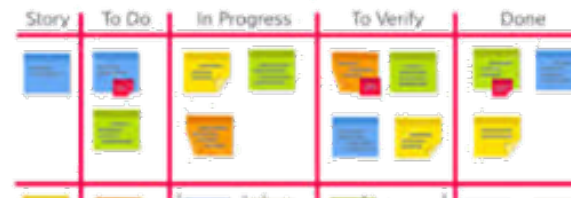
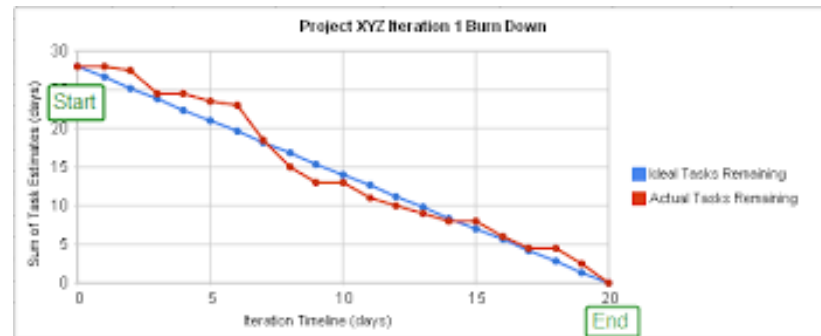
My Principals

- Your SDLC Methodology is not the destination
- In order to be successful, you need to know how to ...
 - ✓ Think agile the verb, as well as Agile the noun
 - ✓ Pick the right methodology and the right tool(s)
 - ✓ Define Goals, Scope, Assumptions, Risks/Issues
 - ✓ Build a plan that integrates all methodologies
 - ✓ Know your dependencies, hand-offs and resource needs
 - ✓ Execute on your plan, flexing to handle the different styles
 - ✓ Communicate and report project activities
- Be a Project Leader, not a project coordinator
 - ✓ Lead your leaders



My Principals: Intake to Lessons Learned

- Intake
- Ideate
- Design
- Execute
- Test
- Rollout, Pilot, Early Adoption
- Handoff to Support
- Retrospective, Lessons Learned



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Hints and Best Practices

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- Hints and Best Practices
- Options
- Points of Intersection
- Enablement
- Communication Musts
- Organizational Change Management
- Exceptional Leadership



One Size Doesn't Fit All

- Know your options, their pros/cons
 - ✓ Agile Scum
 - ✓ Agile Kanban
 - ✓ Lean Agile
 - ✓ Scaled Agile
 - ✓ Extreme Programming (XP)
 - ✓ Waterfall
 - ✓ Feature Driven
 - ✓ Iterative
 - ✓ Rapid Application Development (RAD)
 - ✓ ...

It is not the strongest species that survive, nor the most intelligent, but the most responsive to change.

-Charles Darwin

DevelopGoodHabits.com



Points of intersection

- Ideation to Design
- Design to Execution
- Execution to Security
- Execution to End-User Testing
- Execution to Product Management, Sales, Marketing, Finance
- End-User Testing to Pilot
- End-User Testing/Pilot/Early Adopter to Operational Support
- Between Project Teams



Task Integration

<div>Common</div> <div>Resourcing</div> <div>Add Related</div> <div>Actions</div> <div>Utilities</div>											
Add ▾		Insert ▾		Mark As ▾		Email ▾		Delete		Link Unlink	
										Cut Copy Paste	
										Indent Outdent	
										Expand Collapse	
										Follow Favorite	
<input type="checkbox"/>	ID	JIRA Key	Name	✓	Start Date	Due Date	% Complete	Work	Duration		Resources
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	T-347139		<input type="checkbox"/> Project Initiation	✓	10/18/21	10/22/21	100	3.25 h	5 d		
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	T-357601	RTB-3697	<input type="checkbox"/> Line Architecture Resiliency - Caching	▶	10/18/21	10/18/21	50	8 h	1 d		Team 27
	T-356202	EPA-1571	<input type="checkbox"/> EPA: HTTP Resiliency (2022 Objective)	▶	10/18/21	10/18/21	0	8 h	1 d		Team 15

Enablement

- Enabling staff can be great for performance
 - ✓ Better “ownership” of results
 - ✓ Avoids micromanagement pitfalls
 - ✓ Happier staff
- Watch out for
 - ✓ Silos
 - ✓ Missed handoffs
 - ✓ Over-reaching
 - ✓ Duplicating work or gaps
 - ✓ Communication needs



Communication Musts

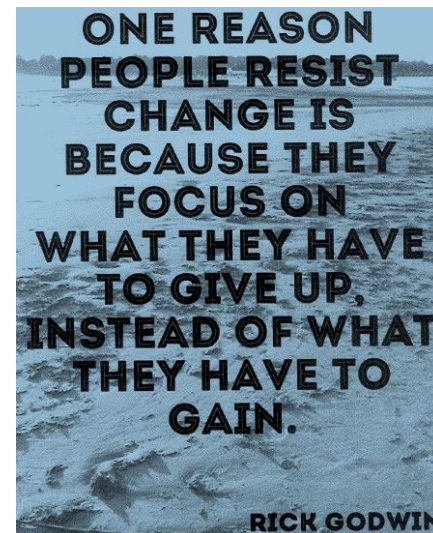
- Talk “their” language
- Details, Details, Details
- What’s in it for them
- Ears and Mouth
- Organizational Change Management plan

**The biggest
communication problem
is we do not listen to
understand.
We listen to reply.**

When you talk,
you are only
repeating what
you already know.
rishikajain.com
But if you listen,
you may learn
something new.

Organizational Change Management

- Understand the value of Organizational (Culture) Change management
 - ✓ When applied to the business
 - ✓ What about when applied to the development staff
- Apply the same principals
 - ✓ Start before kick-off and maintain until lessons-learned / Retrospective
 - ✓ Build Trust
 - ✓ Use Influence, Sales/Negotiations
 - ✓ “Reality” varies
 - ✓ Remember what’s in it for each individual or group
 - ✓ Adapt the message: using multiple communication styles and methods
- Sales, Negotiations and Influence will be required



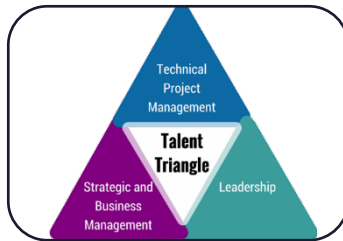
Exceptional Leadership



With
Sponsorship



Executive
Management



With PMO



At Kick-off



When Politics
arise

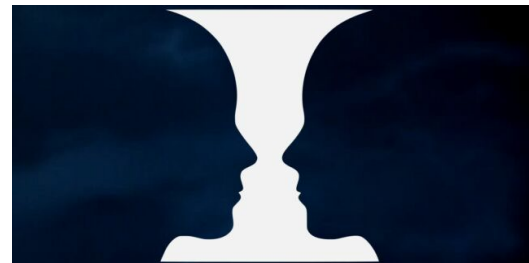
Individual's Reality

Wikipedia says..... Reality:

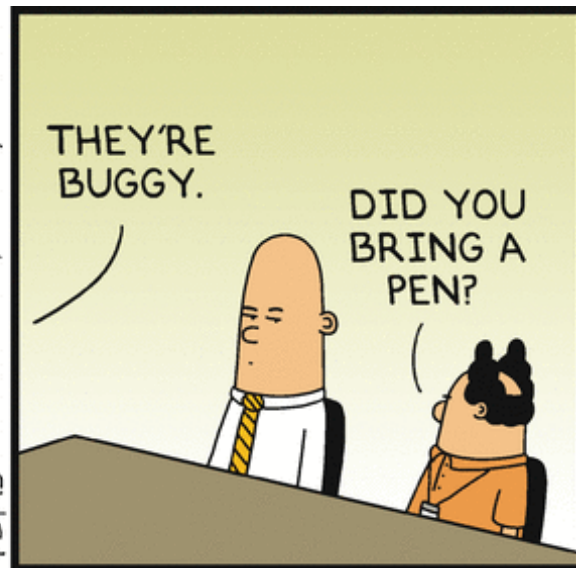
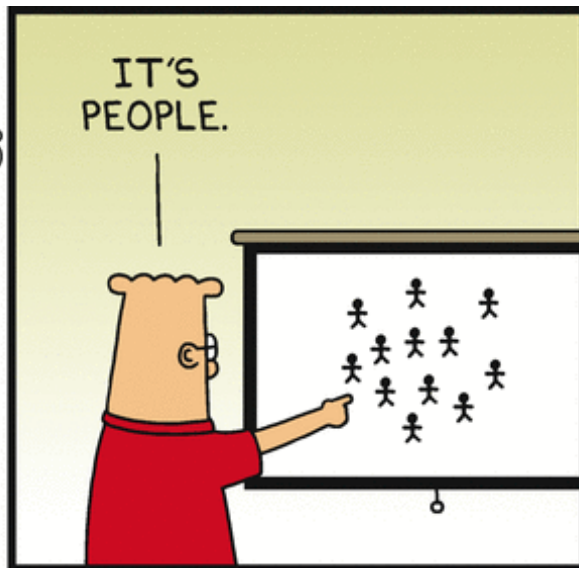
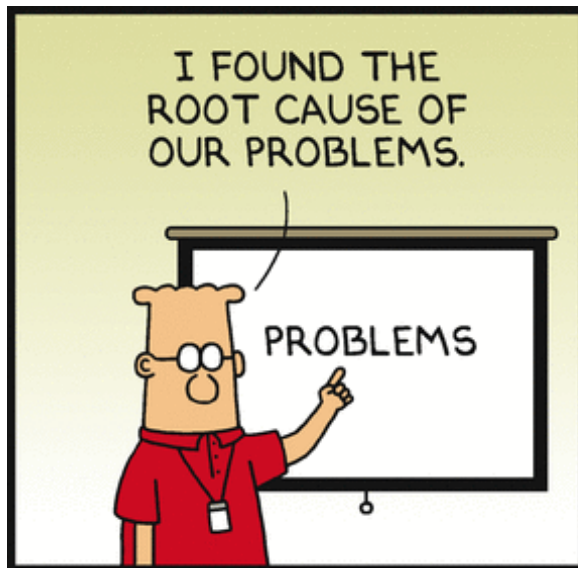
- the state of things as they actually exist, rather than as they may appear or might be imagined

Joe's Definition:

- The state of things that each individual believe actually exist
- Reasons why there might be alternative realities – different...
 - ✓ Sets of information known/experiences by different people or groups
 - ✓ Personality types
 - ✓ Goals/desires
 - ✓ Communication and/or learning skills



Root Cause of Problems

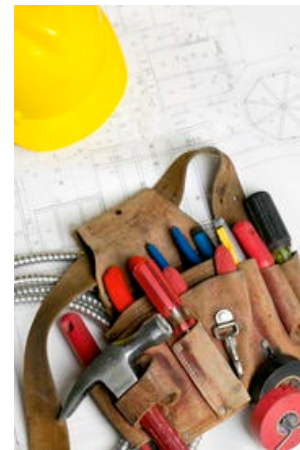


Summary

- Multi-Methodology environments do work
- Organizational Change Management helps because Reality is relative
- Flex your People skills: not everyone thinks and acts the same
- Sell early ♦ Sell often ♦ Sell everyone
- Help them own the idea, otherwise remind them what's in it for them

If you only remember 3 things...

- Your job is to deliver a quality outcome
- Wear a tool-belt, not walk around with just a hammer
- Be an exceptional leader



Summary

You have an abundance of tools, techniques and methods to use – pick wisely basis the situation, the person/group and the desired outcome because...





Questions, Evaluations & 1 Lesson Learned



Email Joe to offer feedback or request a full copy of any presentation

The Dark Arts of Project Management Series

- ✓ The Dark Arts of Project Management: Influence and Politics
- ✓ How to be a Chameleon: a Key to Enterprise Project Success
- ✓ Project Stakeholders: Dealing with Sleeping Giants to Saboteurs
- ✓ Situational Leadership: Up, Doan and All Around
- ✓ Leading Strategic Initiatives: Managing Innovation Through Culture Change
- ✓ There are no Politics in business
- ✓ How to Train Your Dragon: a Project Sponsor Primer
- ✓ Yes, And... Advanced Negotiations in a Project World
- ✓ Everyone is in Sales: Successful Tools & Techniques for Project Leaders
- ✓ Selling the Value of the PMO and Project Management
- ✓ Agile, Waterfall, Iterative – Oh My!: Select, Integrate, Deliver in a Multi-Methodology Environment
- ✓ A “Surefire” way to Ensure Schedule Performance!
- ✓ Managing Change and Surviving to Talk about it
- ✓ Managing Innovation in a Project Management World
- ✓ Joeisms: Leadership Concepts and Other Sage Words of Advice

Project Management Essentials

- ✓ Project Management for the Beginner – the minimum you need to know to thrive
- ✓ Top Ten Ways to Screw-up a Good Project
- ✓ Q&A: Improve Project Success Through Better Listening
- ✓ Building your Essential PM Soft skills

Professional Association

- ✓ Strategic Planning for Organizational Success
- ✓ The Basics of Sales and Selling: Everyone’s Job
- ✓ Setting Up a Sponsorship Program
- ✓ Best Practices in Volunteer Recruitment and Engagement
- ✓ Successful Career Networking Groups: an Easy Key to Chapter Growth
- ✓ Pulling-off a Great PDD or Chapter Meeting Program: Organizing, Attracting and Marketing

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JOE PERZEL
Speaker | Presenter | Workshop Leader

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COLLABORATE. INSPIRE. GROW.

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Thank you!

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Addendum

Definitions

- **Project Manager:** the person responsible for accomplishing the stated project objectives. (on time, on budget and with everyone smiling – jp)
- **Project Management:** the discipline of planning, organizing, motivating, and controlling resources to achieve specific goals
- **Program Management:** the application of knowledge, skills, tools, & techniques to a group of related projects
- **Portfolio Management:** the centralized management of one or more portfolios to achieve strategic objectives
- **PMO:** a group within a business, agency or enterprise that defines and maintains standards for project management within the organization. The PMO strives to standardize and introduce economies of repetition in the execution of projects
 - ✓ enterprise PMO
 - ✓ organizational (departmental) PMO
 - ✓ special purpose PMO

Definitions

- **Waterfall:** a sequential (non-iterative) design process, used in software development processes, in which progress is seen as flowing steadily downwards through the phases of conception, initiation, analysis, design, construction, testing, production/implementation and maintenance
- **Phase/Activity/Task:** various levels of a schedule/plan
- **Pilot/Proof of Concept:** period when our teams work with a customer(s) to determine if a feature is feasible, and what it should be
- **Early Adaptors:** period when internal teams prepare to support a product before General Availability
- **Adapting:** to change (something) so that it functions better or is better suited for a purpose
- **Disruptive Innovation:** causing a major change in a company and/or market place (think the first social media apps, creating the bridal registry)
- **Incremental Innovation:** causing a minor change in a company and/or market place (think converting bridal registry to all digital)

Definitions

- **Agile Scrum:** iterative and incremental agile software development framework for managing product development. It defines "a flexible, holistic product development strategy where a development team works as a unit to reach a common goal", and enables teams to self-organize by encouraging close online collaboration of all team members
- **Agile Kanban:** method for managing knowledge work which balances demands for work with the available capacity for new work. Work items are visualized to give participants a view of progress and process, from task definition to customer delivery. Team members "pull" work as capacity permits, rather than work being "pushed" into the process when requested
- **Epic:** a large user story in software development and product management.
- **User Story:** informal, natural language description of one or more features of a software system. User stories are often written from the perspective of an end user or user of a system

Definitions

- **Scrum Master:** resource who is accountable for removing impediments to the ability of the team to deliver the product goals and deliverables. The Scrum Master acts as a buffer between the team and any distracting influences. The Scrum Master helps to facilitate key sessions, and encourages the team to improve
- **Stand-up:** a short, focused, timely meeting where all team members disseminate information – often held daily
- **Story points:** effort level assigned to the work to complete a Story
- **T-shirt sizing:** ballpark estimating of the size of effort to accomplish something
- **Empathy:** the feeling that you understand and share another person's emotions; the ability to share someone else's feelings
- **Slack time:** the built-in time in your project where you have excess capacity or duration
- **Crashing a Project Plan:** optimizing the project tasks for quickest delivery
- **Dependency:** required predecessor/successor

Definitions

- **SDLC:** System Development Life Cycle
- **RAID:** Risk, Assumptions, Issues and Decisions
- **Triple Constraint:** Price/Pace/Perfection – cost/time/requirements or features
- **Table Stakes:** the minimum rigor required to handle the mechanics for a project
- **POC:** Proof of Concept
- **SME:** Subject Matter Expert
- **OBE:** Overtaken by Events: forced to be changed because of something that has suddenly and unexpectedly happened
- **ROI:** Return on Investment
- **CBA:** Cost Benefit Analysis
- **ABC:** Always Be Closing
- **QNC:** Qualify-Negotiate-Close (a “sales” term)
- **TLA:** Three Letter Acronym, something the world has too many of these days

Definitions

- Joe's Definitions of the Multiple Types of Project Managers:
 - Project Coordinator: great at mechanics of the project
 - Technical Project Lead: focuses on managing the technical team
 - Application Project Manager: handles projects under \$500k and 10 people
 - Enterprise Project Manager: handles projects over \$1M and 20 people

Polls

- **What is your primary role now**
 - PMO Manager
 - Program Manager
 - Portfolio Manager
 - Project Manager
 - Product Manager/Scrum Master
 - Staff Manager
 - Other
- **What Industry do you work in?**
 - For-Profit
 - Government
 - Non-Profit
 - Education
- **Which methodologies does your shop utilize now? (check all that apply)**
 - Agile
 - Waterfall
 - Iterative
 - RAD
 - Lean
 - Other
- **Who has worked in an environment with multiple methodologies?**
 - Yes, Now
 - Yes, in past
 - No
- **Who believes Agile and Waterfall can co-exist, without becoming Wagile – a bastardized methodology that is neither?**
 - Yes
 - No
 - Unsure