

Round Table Discussions – PROJECTWORLD*BAWORLD Vancouver 2011

Best Exit Strategies for Projects Going South

- include exit strategy in initial planning especially for technology vendors
- plan from the beginning to have gates which can result in exits
- requirements not taken/collected properly or not interpreted in the wrong way
- strategy change in business
- not required anymore
- build in checks – test markets before full implementation
- use closing phase as the exit
- have a close out strategy regardless of project's results
- infrastructure project – if requirements are misunderstood, the deliverable may not be what client wants and project can be cancelled
- shape gate process to assess the deliverables and funding is controlled
- lessons learned at every major milestone
- use of stage gates and funding by phase
- frame discussion about a cancelled project about value and reusability about what is achieved thus far
- stale gates / stakeholder management / strong communications
- sponsor own up to it
- benefits against goals
- having the right individual at the planning stage
- releasing funds through various stage gates ensures benefits are reviewed frequently and formally

Coping with Organizational Change

- use ambassador groups to facilitate change and sell change / engage early / frequent communication
- clear end goal mandate – well communicated – don't just broadcast – big announcements
- pro-active/embrace change/don't be afraid to move outside comfort zone
- address fears
- align yourself with strategic objective / get involved in the change / ownership
- change is constant – can be an opportunity for new career options
- champion change and don't be the recipient – be open – ask honest questions – look for opportunities to be involved in changes and help others who are reluctant
- mitigate feeling of loss for individuals within change
- be proactive and give examples of pros/cons/suggestions to manager / involve and engage staff
- understand the end goals – communicate and articulate future
- early engagement before solution is completely designed
- listen
- build good team around you – team spirit - communicate
- involve those who will be affected early - educate
- one person responsible throughout the project
- turn detractors into champions leading others that will be affected
- It's always discussed in a negative light "coping" – can we change that?
- inform / involve / evolve
- build relationships with new teams and new staff to handle change more graciously
- how to deal with change fatigue – maintain and sustain strategy - slow it and manage it
- celebrate people not change

Why are PMO's Closing Up?

- PMO results in too much structure reducing flexibility
- trouble demonstrating value – need more business metrics for showing value
- continuous marketing
- not enough time to establish – they need 3 – 5 years
- change name of PMO
- "star / gantt" chart
- PMOs not delivering value/information to the executive – needs executive buy-in
- PMOs tall order across the organization
- PMOs get the customer wrong – cater only to executive and not the PM

- too prescriptive, close for practical reasons / avoiding documentation
- reorganizational culture change
- PMO was replaced by community of practice for PMs to help PMs / re-branding a PMO / bi-weekly PM sharing meetings
- centralization / decentralization
- political changes
- value (perceived) or otherwise
- avoid pedantic attitude to using templates or methodology – be flexible
- who is the “customer”?, the PMs
- distinguish between program management and project management
- PMO should report to CEO
- PMO – focus on better, faster, easier
- get someone to market it – sharing trends, statistics, values
- use the customer’s language vs. PMBOK language
- PMO’s tend to have a life cycle and need to continuously prove their value
- smaller PMO’s are at less risk of getting cut because there is less cost savings
- PMO needs to provide benefit, not burden – talk about results not about process. No PMO jargon
- no ROI
- PMO not close enough to the business
- wrong model – cost containment vs. thru put
- benefits of having a PMO are not realistically evaluated

Tools for the BA

- a list of useful tool names to evaluate
- process modeling challenges
- agile requirements review – break it up and review by exception
- appetite is out there for better tooling
- no ideal tools for the requirements – QA or process model – production cycle
- try out provision which is a feature – rich tool for BA
- collaboration with criticism/comments on requirements on an intranet tool
- no “magic” tool
- challenge to manage change with regards to business process documentation
- big requirements document reviews are a thing of the past – smaller chunks
- some tools can constrain the BA and cause a longer/more difficult process
- there isn’t a consensus on BA tools other than Word + Visio / some have benefits, depends upon needs
- Blueworks – good for very simple process mapping and building collaboration
- research Blueworks tool – visual diagramming tool
- Many using basic office tools, visio, excel, word, due to costs, support, etc.
- Seems varied methods in different organizations to come up with same results.. none are perfect
- challenges of process modeling and requirements gathering tools
- agile review for requirements is useful – allows for manageable chunks
- tool often limits or delays the process
- EA / Pivotal / Sharepoint/EA is a good combination
- Balsamig – UI mock-ups
- Visio – use hyperlink to create interactive designs – UI mock-ups
- Enterprise Architecture – used by a number of companies – steep learning curve but comprehensive solution
- Caliber / Requisite Pro
- Prototypes that look too real can be detrimental
- Case complete / Irise / Pivotal tracker
- number of tools available in the market specifically for IT Bas
- knowledge/features of other tools available on the market

Who Creates the Business Case? PM, BA or Sponsor

- it depends upon organizational structure - business case is needed to evaluate project proposal and approval
- some Bas get involved in developing, but requires special knowledge
- collaboration will make business case stronger and is key
- bring in expert who understands business properly to help create a good business case
- the business case document needs input from all
- costing estimates and risk sections of the document are the most difficult
- collaborative – all parties be involved in early stages

- need to be business-focused – look at customers, understand the different components as trusted advisors
- combined – track the business outcome and business objective – get the buy-in from all directions
- look at long-term operation need
- the written business case is the mechanism for funding approval – reviewed by the team and all stakeholders
- ROI in business case – financial background a must – not all Bas are trained in this regard
- Joint venture – business case is not always maintained throughout project
- PM may be involved in developing business cases with sponsor – BAs tend not to be involved until business case is approved but perhaps should be – fundamental piece to initiate project
- Business case should be clear to the sponsor in order to get funding
- Expert opinion – BA is the one who should create the business cases – important to creation – PMs generally receive a charter and are business case agnostic

How to deal with difficult people

- send email summarizing decision you make for person that won't get back to you
- document / document / document – paper trails are your friend
- develop a relationship
- suggest a direction and go ahead if the person does not respond
- external – use some techniques to deal with difficult people – internal – talk with manager – escalate where possible
- accumulate / document failures of difficult people and talk to managers – when you have enough to talk about
- break the communication barrier with business lunch / coffee
- make meeting convenient for the difficult person – in person – understand concerns
- address the problem in person ASAP – tell them upfront
- validate their value and input to the team
- encourage phone or in-person dialogue
- explain to PM how work is affected
- difference between motivating paid vs. volunteer difficult people
- be aware of the power figures in the workplace
- teach people not to limit themselves

Is Strategic Project Management Achievable

- 3 -5 year planning service road maps – road maps to guide strategic directions – keep up to date
- Obtain understanding of SPM by senior/executive management: agreement
- need a better view into business road maps
- tie to continuous improvement
- buy in from leadership team
- it is achievable in a smaller organization yet the need is more in a larger one
- buy in by all – follow through by all – agreement
- what metrics and decisions are used to make it strategic. What defines a strategic project
- branding themes around strategic projects
- road maps – linking service level – reviewing with LOB – corporate level
- look at opposition to make projects by grouping smaller organization projects into bigger strategic
- senior leadership support and required resources
- need to cater to short-term tactical as well as longer-term strategic projects
- top-down project selection works better than bottom-up
- yes but follow-up seems to be key, and burdensome
- strategic projects should be cut off or reorganized if strategy changes
- project needs to be aligned constantly towards organizational strategic objectives and goals
- project team needs to have right attitude and work collaboratively
- look at processes to ensure projects stay strategically aligned over the life of the project
- strategic project management is basically project portfolio management – it should be strategic to the organization
- it presents unique challenges which should be broken down into goals and achieved through dedicated commitment
- must align with business strategic goals – can be achievable to a certain degree – could be constantly changing
- communication and collaboration between program areas
- on-going project – strategic review – how is this measured?
- PMI structure on portfolio management. Would this help portfolio steering committee – how does the PM align to the overall strategic direction
- Central portfolio for all projects

Adapting Agile – Best Practices?

- business case needs to drive prioritization and sequence of development
- when tools or structured approach is needed, it is OK to use it
- most projects can benefit from some elements of Agile through hybrid approach, depending on phases
- drawing a line between product owner and BA could be important
- collaboration is the key to success in agile environment
- care around sprint cycle for large projects – don't want to sprint all the time
- Designing slb a step ahead eg. W UX
- agile is not just a development method, it is a company culture
- scrum
- communication – face to face frequent meetings – norms established within team – no negative feedback – action items for issues
- it's OK to use tools for things like trading stories
- it's helpful to assign an owner to user story
- measurement of success is different than other more formal methodologies
- start with high level BR's prior to sprint O
- have scheduled communication hour each day
- start with a small project
- have high level foundation requirements before starting sprint O
- Resources – Vancouver Agile Day course

Evaluating your Certification – was it worth it?

- PMP is a chicken – egg situation
- certification is getting more and more necessary even to be considered for a job
- PMI yes – IIBA not yet. (job orders not calling for CBAP)
- PDUs? Despite being unsupervised, probably yes
- “sales” outsourcing requirement to demonstrate basic experience
- PMP certified is seen more and more as “required” rather than “preferred”
- lots of options for PMP exam prep
- PMBOK: bible of study
- certification may simply show commitment to your profession – may help you in the door but won't guarantee you an offer
- there are various guides and study groups out there for both the PMP and CBAP
- having certification can help when companies use “auto” screening
- depends upon career goals but doesn't guarantee raise, promotion or greater influence
- certified vs. getting a certificate by attending a course
- helps find a better job in a recognized field
- maintenance of certification should be planned in advance
- must know the terminology
- helpful in hiring process
- CBAP not yet as recognized
- Certification – how to get experience without a designation – maintenance takes effort

Outsourcing the BA role – can we do it?

- Needed on tough project, to drive decisions through
- Yes, but it depends on whether there are business experts who can work with them or not
- Offshoring – time difference that technology can't solve
- Yes, if paired with business experts
- Offshoring challenges: time differences, cultural differences, relationship building
- Not easy to do. It can be done as long as it's not the business experts (SME)
- Face to face sessions are invaluable if outsourcing has occurred. Bring everyone together on occasion to build rapport and trust
- Outsourced BA's might not have full context of what they are working on
- Off shony is mostly for dev roles
- BA off shony done for reviewing / editing docs
- So much people touch in BA role, it's tough to put distance between client (trust, etc.)
- Depends on the nature of the project
- Outside consultant can provide perspective to problems

- It can be done but should it?
- Significant Challenges (location, time zones, domain knowledge, culture)
- Stakeholder engagement and stakeholder selection is more important

Where is your BA practice going?

- Define roles well between S&T and Ops support
- Common that systems analysts are dealing with system requirement
- Going off templates and trying for consistent standard motivation
- Working to establish and standardize our business practice
- Need to have management own the practice
- BA standard templates, practices and roadways
- Increased visibility and availability at resources
- Lessons learned register
- BA specializing in a business area as a secondary BA
- Communication between BA's within an organization is an issue
- BA's who are primary's in one business area and secondary's in other business areas
- Key: BA needs to know intuitively what is it they need to discover for a given project
- Operational BA's & Project BA's
- Standardized templates – based on needs of audience
- Not so much a matter of templates, more on quality of content
- Change is happening in every aspect of BA application
- Content not structure
- Going upwards
- Define BA role
- Templates is good
- Need to build on training and transition to real practice

What hurts you? Barriers holding you back from being the very best

- Capacity planning
- Reasonable estimate
- Non dedicated resources (pulled many ways)
- Lack of business engagement/resources
- Inaccurate estimating (time and cost)
- Resource forecasting to ensure resources available when needed on high priority projects
- Use resource pooling – virtual FTE's to meet resourcing needs
- Transparency in assumptions – document assumptions for estimates so everyone is aware – work into risk register
- Resources in a matrix organization
- Too much documentation
- Lack of project priority planning
- Too much paperwork, too heavy process
- Resource conflict – prioritization of projects could help, capacity planning
- Poor estimates, use visibility as your standard – make all assumptions visible up front
- The executive sponsors need to defend the project at all times
- Capacity planning is critical for PM success
- Allow a healthy contingency on all your estimates
- Develop processes to delegate – so you can step away from the little things that fill your day
- Write resumes by other person so they can help “tout your horn”
- What is wanted on time, on budget
- Knowing too much (becoming the SME)
- Administrative overhead
- Experience is as valuable as education
- Delegate administrative duties to allow yourself to focus on higher priority work
- Processes and reports should help with PM not hinder or distract the PM from his job
- Using Risk register to track assumption or estimate
- Capacity planning, cannot be accurate because of resource contention

Agile VS Waterfall

- Agile requires a product owner to be successful

- Waterfall does not allow for good communication
- A blend of both approaches "iterative" works best
- Hybrid system may be best
- Agile great for significant changes mid-stream
- Product owner is key
- Estimating is key for sprints
- Most companies don't do pure Agile but settle somewhere between Agile and waterfall
- Agile means you can show progress much sooner
- Agile – good – to move quicker
- Agile – bad – incomplete / insufficient requirements
- Waterfall – good- know up front full requirement and documentation and testing
- Hybrid-model taking best of both methods
- Organization needs to imagine and understand the methodology
- Applying Agile techniques to a waterfall project at appropriate time improved final product
- Product owner is helpful to an agile project
- Combination of both works
- Waterfall methods work well for Infrastructure projects as it is well defined and known and without business user
- Agile requires strong business input
- Both can co-exist on the same project, if effectively managed
- Different applications have different needs, some needs more agile (customer facing) methods while other are more waterfall based
- Complimentary to each other, Agile is small waterfall within a project
- Agile development requires the proper work environment
- Agile is not necessarily more cost effective but it is time effective
- Can mix styles in project or project portfolio
- Different companies chose different flavors of Agile
- Agile requires commitment to the methodology at sponsor and lower levels
- Both are appropriate for different circumstances
- Agile requires a significant culture shift

Career Paths for the BA

- Some organizations have documented BA org hierarchy that is based on "sphere of influence"
- In a large organization like BC government there may be no career path in the organization but there may be many in others
- Enterprise Business Architecture might be a career path
- Levels of BA in an organization
- Using "sphere of influence" to help determine level of BA
- Have mentors
- Career development path so BA's can see what future options there are
- Having a competency matrix for each BA level can support the BA career path
- Levels seem common but not always clearly defined – need to establish matrix based on competency
- Management support for growth, the levels of influence or types of projects more motivating than dollar raises
- What to do or how to handle working more roles than just traditional BA
- A matrix of competencies which enables an understanding of what is available
- People are really happy being a BA
- Not all organizations have a similar setup to BC government, some employees would like to see a level structure (use a Matrix?)
- Levels and criteria to move up are good tools to help progression
- Once reached a "senior" position the progression is not clear and slower
- Decide where you want to go: project, line mgmt., customer mgmt., architecture
- Some organizations don't have growth or career paths for their BA's
- Division of PM to Senior Management
- No clear path – company by company
- Defined career path in each organization
- What is the path after senior BA?
- There are similar paths BA to PM
- Mentors are a valuable asset – not all companies have such a setup
- Project Management is a path to move forward along
- Certifications are important
- Generally not much room for growth or career progression in most industries
- Most BA's come to the job via various routes (roles are not clearly defined from one industry to the next)

