

45. Fewell, Hannan & Iliff: PMBOK® 6_The Agile Effect

0:00:01 Kendall Lott: Hey, PM listeners. Today's episode is, once again, the round table format, focusing on PMBOK® 6 released in September of 2017. Today's focus specifically is on Agile, and its inclusion in this guide. The PMBOK® has an Agile Practice Guide that was written with the Agile Alliance. We want to look at the role of Agile in PMBOK®, and how it was integrated and grafted and incorporated into PM core approaches. And luckily today, we have as one of our round table guests, a key contributor to the guide. So, let's get to it.

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0:00:34 Announcer: This is PM Point of View, the podcast that looks at project management from all the angles. Here's your host, Kendall Lott.

0:00:41 KL: New to our panel, author, speaker and coach in innovative Agile is Jesse Fewell. He was on the Agile Practice Guide Core Committee, representing the PM side of the house, if I understand correctly. You can read his bio in our show notes. But have we got the right guy or what? This is the guy that helped write this thing. So Jesse, tell us what you're up to now. And what did they get wrong in your bio?

0:01:03 Jesse Fewell: Well, I'm immediately in the process of trying not to let my ego get the better part of me after that intro. I'm a project manager by training and background. And today, I help people, organizations across the world try to implement and adapt and evolve Agile practices into their core operating models. So, used to do it, now I help other people do it.

0:01:28 KL: Well, so that makes you an expert for sure. If you are able to do it, now you're telling others how to do it. Returning for our second round table, I have guest Randy Iliff, a large project PM. I assume that's not referring to girth, but only about the size of the budgets, right?

[chuckle]

0:01:42 KL: And a founding member of INCOSE, the International Council on Systems Engineering. So we've got a systems engineer talking with us again today. He's one of the authors of the recently published "Integrating Program Management and Systems Engineering." This is some of the cutting edge technical management information we all could use as PMs. So Randy, anything new to tell us? What did I miss?

0:02:03 Randy Iliff: Well, Kendall, since we're recording this shortly after Thanksgiving, the large project's PM piece may be a little bit larger than it was before, but you're correct. It's large in terms of the scale, the complexity, or basically just the number of terms in the great simultaneous equation of design and construction. So, glad to be back.

0:02:21 KL: Yeah. Design and construction, obviously a different kind of take than a lot of us end up having sometimes, so it's going to be important. Rounding out the table, guest extraordinaire, Mike Hannan. Author of "The CIO's Guide to Breakthrough Project Portfolio Performance." Mike

consults on blending Agile, Lean, and the Theory of Constraints methodologies for C-level types, and specifically C-level types that want to see increased portfolio throughput. You're killing me with the alliteration there, Mike. How are you doing, post-Thanksgiving?

0:02:51 Mike Hannan: [chuckle] I would say I've probably added a bit of girth myself.

0:02:53 KL: Are we still excited about Kanban, Lean, and Theory of Constraints?

0:02:57 MH: Yeah, in fact I was on a call this morning where another organization managed to blend standard project management practice, Agile and Lean practice, and some critical chain, which is from the Theory of Constraints, all in a very harmonious method with just about one hour of explanation. So, it also tends to be quite intuitive once we start to pay attention. And that's my lead into this sixth edition. Boy, did they get a lot right trying to blend standard project management practice with Agile and Lean.

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0:03:33 KL: If you had to pick what they got right most, what would you highlight, that our PM listeners need to hear and can go to the practice guide and see?

0:03:40 MH: I would summarize it by saying they got the basics right. A lot of times you hear Agile practitioners say that planning is a useless exercise because everything changes later anyway. But it said, no, well we can still do some good high level planning and iterate as we go. And even distinguishing between project types that might be more predictive in nature versus those that could benefit from some incremental iterative approaches, even offering up a progression for how, when to apply which. So, that was quite... Some of those basics, I thought, were quite useful.

0:04:15 MH: Another key one, you hear a lot of debate, "We're not doing projects anymore anyway, projects are dead, that's waterfall talk. We should just have products that live on forever and have continuous value incremented on to them." And I think that's a little bit... That could be an interesting place to arrive at, at some point, and I think in some cases, software might just get there. But lots of other types of projects, the value delivery point only happens at the end of the project. So we still do need project management, I think more than ever. But certainly, the value delivery approach is here and when to apply which, to achieve those goals, I think a lot was gotten right in these two documents.

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0:05:05 KL: Yeah, one of the things I had noticed in the guide that was very interesting to me, and I'm going to turn this back over to you then, Jesse, was that it lays out a discussion for the common Agile practice, but almost immediately begins to describe how this is almost the beginning of really opening the door to any number of other practices. And then hybrids of these various practices saying, pick what you need when you need to, balancing Agile and PM, but then also opening into Lean, and Crystal, and Kanban, and other questions. I spent nearly half an hour just looking at Scrumban. Who knew, right? So, can you give us a quick brief about the committee, the nature of what your assignment was?

0:05:44 JF: Well, it was well under way and they were starting to get some feedback saying, "Hey,

where's Agile?" "Ain't no Agile in this draft," or, "Well, we better make sure that we have some." And so they started reaching out to the Agile Alliance and said, "Hey, would you be interested in collaborating together on some kind of a document that would promote Agile methods to the audience that needs it most, arguably project managers." And so then what happened was volunteers within the PMI reached out to some volunteers within the Agile Alliance, and then we started a team. We started working together on what do we need to say? What do rank-and-file project managers need to hear? Or what are they asking? And we worked in sprints, as it were, kind of iterating on the product and started leaking intermediate chapters out to blogs in order to get feedback on some of those. And man, did people have something to say about the hybrid, the word that you mentioned earlier. And then we wrapped up in time of their very firm, fixed, hard deadline, we were able to meet, in order to meet publication and have it align with the PMBOK guide.

0:06:53 JF: And man, there were some ups and downs, there were some backs and forths. Some people love it, some people hate it. I've got mixed reviews. But the process was very much intended to be Agile in spirit. The people, we have representatives from the PMI and representatives from the Agile Alliance, were a cross-functional collaborative team, buzzwords. And then the product itself is one that is very much self-effacing, in the fact that this is iteration one. There's a call to action in the document saying, "Hey, if you like it, great. If you don't, we'd love to hear from you." And already, there's talk about when are we going to schedule the next version of this thing, based on even broader customer feedback.

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0:07:42 KL: So what was the biggest intellectual challenge that you had to face, that you knew you had to get in here? As you sat down with the Agile Alliance, the other half at the table there that you were going to have to negotiate and come to consensus with, in terms of what we would include in this guide, what was the biggest piece that you saw as change that had to be incorporated? That everyone agreed to at that table?

0:08:03 JF: Well, I think what is lost on many project managers listening to this podcast, is that we are the Darth Vader of the Agile movement. We are the Death Star, the Evil Empire. We're the inspiration and motivation for everything Agile because of baggage.

0:08:19 KL: Who's the we?

0:08:20 JF: Yeah, so we as project managers are the reason that Agile methods came into being, because we're bureaucratic. We're focused more on process than the actual outputs. We're rule followers. We care more about how things are done than what's actually gotten done. And that's the stereotype. And so the first major hurdle was where we have these two different religious camps coming together, trying to seek project management truth and wisdom. And we had to kind of settle down a little bit. We had to kind of work through, is this thing a project PMI standard, or is it merely a PMI guide? And we learned that there are about four different levels of standard versus guide definitions in the Project Management Institute.

[chuckle]

0:09:05 JF: And I hear the chuckles of experience in the background. So the first major thing was to get aligned on the fact that we're all working to help projects be successful, and once we got

there, it didn't take long. But I think that was the first major hurdle to overcome, is that everybody wants the same thing, and that's project success.

0:09:27 KL: Yeah, and it's very interesting that this did lay the groundwork for that, and they added the extra book on it. I got to chapter seven thinking, when I saw the title "Call to Action," it was, "Okay, now go out and do these things." And it was, "No, let us know now how we have to iterate on this." So I thought that was very interesting...

0:09:46 RI: It also walks the talk of the whole reflection and continuous improvement theme, that's a basic premise of the Agile methodology. So it would be ironic to leave that out.

0:09:56 JF: I'll tell you ironic, how about, the first draft we forgot to mention the Agile Manifesto. What! ?

[laughter]

0:10:01 JF: And so that created no shortage of self-effacing failure vows, like, "We didn't actually, we talked about..." So, there were plenty of mistakes that we made along the way, and we had a good team around us in order to help minimize just how many of those saw the light of day.

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0:10:25 RI: I know that with the system engineering book that we collaborated from the outside INCOSE with PMI, the challenge was finding common language for concepts that are universal. Because every organization that's ever faced a development task has, if successful, encountered something that looks a little bit like program management, and something that looks a little bit like Agile, and something that looks a little bit like system engineering or quality or whatever. And it's almost like recognizing that you are speaking a common language in terms of the concepts and constructs, but using different words. And getting past, almost the branding as we were discussing in the pre-show, of what one organization labels a concept versus another one. And then you realize that, hey, dog and "perro" are the same thing. Who knew? Now we don't have to invent a dog, let's move on. But those are big epiphanies for organizations, to realize that bodies of methods exist and are accessible just by switching from one comfortable nomenclature to another, or over time blending the nomenclatures to serve both.

0:11:23 JF: Yeah, that's a huge point. Arguably, there is nothing new under the sun, and all we're doing is we're taking proven management techniques from the beginning of history and making them more fit for current context and fit for current cultures.

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0:11:46 JF: There were two terminology issues at play. One was technical project management, the things that like, do we call them stories, do we call them features. Well, we can't call them stories because that's a specific kind of feature. Well, but nobody knows what you're talking about when you say feature.

[chuckle]

0:12:02 JF: Then, the other terminology problem was IT, which is, we can't even call them features. We need to call them something else. Are they work packages? Are they deliverables? You can't call them work packages, that has baggage. There's connotation there about what that means. So, there was a significant effort to make this also not an IT document, and that it's really a project management document about how to approach projects that aren't necessarily about writing brand new custom software applications, but rather taking something big and breaking it down into small bite-size pieces. That's universal.

0:12:39 RI: Well, doesn't that go back all the way to the manifesto, as far as the something that's a little bit of a challenge? Because I think of Agile, I immediately associate it with the solution to challenges that became inescapable within software, that exists in all project effort, but had their first really critical demand to be overcome within the software community. And none of the hardware specific methodologies. You know, the great Soviet Union planned everything in advance and then imposed the schedule methodology, failed. Earlier, we were talking a little bit about the military analogs, but there is very much the old-school "plan everything out, have a perfect plan and then go implement it," which might work if you're making a million and one of something and you're the guy making the next one after that. But this "design everything from scratch" model completely fails, with the idea of almost a supernaturally competent PM at the beginning will make everything work well. There are no people who can look that far into the future around that many curves that haven't been defined.

0:13:36 RI: So by any name, you end up with the ability to digitize that oddly shaped function into smaller chunks. They can call it Stage-Gate in the product development community, or you can call it the development review cycles, preliminary system requirements, all those kinds of things right out of the NASA procurement, or anything else. But it's the "how fine do you slice it" is a function of "how fast is it changing." And just really quickly, I think the favorite comment I had when I looked through the Agile Guide, is 2.4.1, which is "beware of taking things away". I would recommend that every PM on this podcast goes and highlights that page of the document in the appendix, because it really reinforces the idea that Agile and so many of the other bodies and methods that we rely on, are systems of interacting elements. You can't have one element work without the corresponding element, or elements, doing their thing and background on it. Jesse, I know your team was part of that, but I just really wanted to respect and acknowledge that caution. Too many things that go out as great ideas are partially understood, and then become examples of why that idea isn't a good one to use.

[music]

0:14:50 JF: There's an author by the name of Jurgen Appelo Management 3.0, and he coined the phrase "a mean set," and he said that there are some systems, there are some approaches, that are an irreducibly interconnected set of things and ideas. The Agile mindset is one of those as well. I'm of a different take. I believe that people shouldn't be asking whether they should be Agile. They should ask how much Agile they should use. And so that goes into the whole bimodal conversation presenting what amounts to a false choice of either doing it one way or doing it another way, when in reality, hybrid, ooh dirty word, "hybrid" is a word that gives us permission to customize and blend. But your point's well taken. I mean, it's... Are you're going to mix beer and lemonade and hope that it actually tastes good, when really there is some risk around mixing and matching the wrong things together. But that doesn't mean that we need to handcuff ourselves to the false choice of all or nothing.

0:15:55 RI: Right. And to pick up on that just really quickly, Jesse, there's a marvelous power in this distinction between something I know how to do and I simply need to get it done, that's anchored in the past. And the subset of tasks in any development effort that requires something new, either a decision to be made, exploration, adjustment to internal or external variants that can't be predicted in advance. Those are two fundamentally different classes of tasks. If you think of those as matter and anti-matter, like a physicist, there's only so many ways you can combine those things productively and not get a big kaboom out of it. So the first thing you do is, you distinguish that. And then, I think that so many of these practices derive their power from a small set of very fundamental logic, and then after the power becomes potentially available, they derive their efficiency then from bodies of practices and methods.

0:16:46 RI: So I see this Agile guide, and to some extent the PMBOK, as more about the mechanisms by which you do this for efficiency, and in some cases, it's almost assumed that the logic is understood or bought-in by people. And when you tailor, it's essential you retain the logic and simply react to a different reality than the one the standard process you were handed is adjusted to. It all comes down to how well does the process match and reflect the needs of the underlying task and reality? All plans are models. Agile is a model that happens to suit the moving dynamic nature of certain types of work really well. But it's built and it works because of that characteristic of being able to follow the moving map.

0:17:26 KL: You called these "defined and predictive" in an email earlier, and I thought that was very interesting. Your two types of tasks, you said it boils down to that. And so we need a practice that allows us to do that blending as needed.

0:17:37 RI: And to Jesse's comment about matrix. The matrix is not at the level of this team, this group, this person. The matrix is at the level of a subatomic thing that's going on. Even this conversation we're having relies on the fixed and prior accumulation of a body of knowledge, so that the words and sounds recreate meanings in people's minds. But hopefully we're introducing absolutely new concepts and a dynamic unpredictable interaction, by having some cool people on the phone together with a good moderator.

[chuckle]

0:18:05 RI: So that everything happens that way. So any mesh topology that breaks things down in VGA resolution, if you will, is going to give you a really crummy image. As we move into the artificial intelligence world, where it is no longer overwhelming to examine a task with a million simultaneous active elements and interactions, you'll see the true power of this distinction. Then everything will be dealt with it, by its formal nature, in a complex matrix, continuously changing throughout the life of the program.

0:18:32 KL: You said by this distinction, meaning what distinction?

0:18:35 RI: The distinction of, is this something I know how to do and it's just a question of getting action to take place, or is there something new? In the last call, we discussed this logic of there being a lift component to a development project, where you're going from one status of what can be done for a constituent body to another. So going from iPhone 6 to a 7 is a technological lift in design in that sense. But you also have to deliver them to stores, which is a whole bunch of

execution by dates and delivery and lining stuff up. So if you have the vertical lift of how high a difference from past practice do I want to accomplish, that's a warning sign of the amount of new and difficulty and non-deterministic tasking that'll be present in the work.

0:19:18 RI: Then, how far or how long do I have to do this? How much execution is there? How many interactions and dependencies that are CASCADE dependencies do I deal with? What does the dependency network look and feel like in the PM sense? Those two dimensions, there's a critical path for the definition of what "done" looks like, just as there's a critical path for the definition of "getting done executed" as its definition becomes visible. The combination of the two gives you a trajectory up into whatever orbit you want to reach. That's another way of visualizing it for folks on the podcast, but it's very useful to think of that. Some projects slide about 70 feet sideways then come to a thud, they're real easy. It's the ones that have to reach orbit and synchronize with something else, that two other parties that don't like each other are launching, that are tricky.

[music]

0:20:07 KL: Hey Mike, do you want to get in here and speak to this bi-modalism a bit? Because I remember you responding to it. It has some management challenges associated with it that I think you wanted to speak to earlier. You had anticipated this being both a scope and schedule problem, as I remember.

0:20:21 MH: Depending on how you use that term "bimodal," I think it's actually a very dangerous piece of advice.

0:20:26 JF: Breach it, breach it, go!

[chuckle]

0:20:28 MH: Yeah, yeah, okay. So, this notion that when you compare the terms "hybrid" and "bimodal," the way a lot of leading analysts and people define it, tend to say, "Well, hybrid means you're going to blend two things that really don't go well together, like maybe beer and lemonade," although I actually know people who like that blend. Whereas bimodal says, "Well, they're separate, but sometimes need to co-exist, especially as organizations are making the transformation." Right? So you might have some sort of Agile community, or Agile hub, or center of excellence, or something that's promulgating Agile practices. And then, still, let's say, traditional practice in place elsewhere. And so let's not actually pretend we're going to try and blend the two, let's just have them bimodal. If you know bimodal distribution, if you're a stats geek like me, it looks kind of like a camel back, so two separate worlds that don't connect much. And I think that's very dangerous thinking, because again, what we're talking about here is something that could be universally good, should be universally good. And I give all the credit in the world to Jesse and the others who contributed to this current document, they really... It's clear they tried to show how the two worlds really are just one world.

[music]

0:21:51 RI: I go along with the fear that you're both reacting to, but I'm concerned that it's from a misstatement. My comment is that, everything is simultaneously things that can be anchored to the past, and things that are being defined in that moment. To me, the bimodal is closer, but as an

engineer, I would hang that task onto either the analog or the digital bus of my card and never both, and I would make controlled switches between them. But my point wasn't that one shouldn't embrace Agile, my point was that if Agile is an attribute of the nature of the task you're working, your processes that you select to manage that task must have an Agile component. And we all live in dynamic Agile environments, so any process that lacks that attribute is fatal. So, just to be clear on what I'm trying to present and communicate... as a communication. I'm just saying that you can always, at all times, if you have independent mechanisms, just like that circuit card would deliver a separate analog and digital bus signal, independently managed to a common goal, you can feed each of these task types exactly what it needs to succeed, and not poison it with the alternate. There's a problem with these...

0:22:58 MH: Yeah, fair enough...

[overlapping conversation]

0:23:00 RI: If you get the recipe wrong, you poison the other task.

0:23:03 KL: That sounds like Jesse's...

0:23:04 RI: A fixed process in design fails, brainstorming in production isn't very efficient, but you'll eventually ship a wheel.

0:23:11 KL: So that sounds like, Jesse's "not whether but how much". The question is, at each point, which one? So, overall, it's how much are you using at any time. How much of the Agile...

0:23:18 MH: Kendall, I'd go further and say that we answered the question "why" sufficiently. Because to say Agile is good therefore we just need to decide how much of it we want, well, why is it good? Under what circumstances is it good? Again, I thought the sixth edition and the Agile Practice Guide did a pretty good job of addressing some of that. In fact, I think the only gap, for me, that I saw, that I'd love the next edition to fill, is to talk about things like the value of time and speed and how to measure it. Not just promoting continuous value delivery, but promoting fast value delivery. And how do we know when pausing to do a retrospective and get input and do some rework might actually be more valuable, versus when it might not be?

0:24:09 JF: Right.

0:24:10 MH: Do we even have the tools to make that decision? And given that such tools aren't all that prevalent, but the common sense sure is, hopefully, we can figure this out. A great example comes to mind, where a client really wanted to get some software in before Memorial Day. They had a... They're a seasonal business, very busy summers. The change is necessary. The resources and attention and focus in the organization over the summer were a lot harder to come by, and so putting in some IT changes before that made a lot of sense for their business. But the value lost if they couldn't do it by Memorial Day, was in the many millions of dollars. And they didn't know their schedule, they were kind of just doing increments or sprints as they went, feeling like they were progressing toward something good. Product donor was happy, changes were being incorporated on the fly, the team was moving pretty fast, and it was a pretty cohesive team. But the question was, if we could throw, say, another \$50,000 worth of resources at this to accelerate the schedule and make sure we deliver by Memorial Day, will that \$50,000 pay off? In this case it

would pay off by a factor of 20.

0:25:28 MH: And they were suddenly realizing they were dangerously setting themselves up to miss the Memorial Day deployment date, because they'd never bothered to actually assess their full critical path, and they were just iterating as they go. And so I think there's real lessons there, that there's a lot of goodness in some of the continuous value deliveries, some of the blending Lean and Agile approaches. This notion of let's have a sense of urgency, let's do something continuous and ensure that what we're delivering is valuable. But there's also larger level questions about time and money. And things like, does having a sprint deadline next Friday actually help instill a sense of urgency in the team? If so, under what conditions? If not, why not?

[overlapping conversation]

0:26:12 MH: What might we do to promote faster execution so that we can have faster delivery? And when the business is sensitive to the time value of money, which all businesses are, and military missions and every other organizational mission I can think of, always somewhat sensitive to time and not highly sensitive to time. Why don't we figure the value of time, and measure it and execute according to it?

[music]

0:26:42 JF: What comes to mind is Don Reinertsen's work in product flow on the sweet spot between transactional cost versus holding cost. And that doing lots of incremental delivery may not make sense when you're doing a Super Bowl commercial, where you've got a very fixed date, and you've got one big bang opportunity to make the right impression. But you're going to be evolving and iterating on that Super Bowl commercial before that big bang fixed date. Which is a different kind of project than when you have a pacemaker, which has to go through FDA regulatory approvals, and it's got only one feature. And I'd much rather slip the date on that project. And so you're absolutely correct about, where's the bias from the business perspective? And what that goes back to, I think, is what Randy was talking about, which is, everything is a blend. Everything has both a combination of defined, fixed best practice kinds of activities, as well as amorphous, unknown exploration activities.

0:27:43 JF: And what it comes down to is that the two communities have some a priori assumptions about the nature of the universe. And many rank-and-file project managers have an a priori assumption that if you just plan yourself into oblivion, you will prevent all mistakes. And the Agile people believe that if you just move forward, you will eventually navigate around all mistakes. And of course, both of those universal assertions are simply not true. And that's why when we went to the practice guide, we wanted to focus it more on a practitioner level of, if you're having this problem, consider this approach. If you're running into this roadblock, consider this technique. You may want to experiment with this and this, if this and this is happening. Because at the practitioner level, the kind of existential nuance about the degree to which every project has some defined elements versus some unknown and empirically unmeasurable elements, that's usually beyond the scope of a rank-and-file project manager's ability to assess, let alone to purview.

0:28:51 JF: So, that's why there was an effort to, like you guys were saying, just to break it down into a simple matrix. And there's actually a chapter on suitability factors and tailoring considerations, which is, when you're running into something like this, try this technique, as

opposed to falling into the trap of saying that, "I can either plan everything into perfection, or I can just iterate everything into perfection."

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0:29:21 RI: What this really goes back to is the point of trying to match the nature of the real world in which the activity is taking place, and to the extent that all of these bodies of practices have elements that are useful.

0:29:31 JF: Yeah.

0:29:35 RI: It's like the formulary in a hospital, it's not the vials in the backroom that are there that make people feel good... Well, there's some in there that'll make you feel good but there's a problem legally with just handing those out.

[chuckle]

0:29:45 RI: But the idea here is that it is the skill of the physician that reads your cough versus mine and grabs a different medicine based on a different underlying understanding of the physiology of the patient, the environment in which it's working, and the definition of "good." These are all things that you'll find throughout the PMBOK and the Agile Guide is being responsive to the market. But there's a nature of each development task. Some of these things move in very, very unpredictable patterns, and they have to be digitized almost minute by minute in order to follow. I've been in a test example or test cases where the things were changing that rapidly. And in other cases, things are going to be moving in a particular direction for a long period of time, unless acted on by some external force, and you can kind of let those run on autopilot. So the "monitor everything continuously" instincts that some people have encountered from one environment, may be exactly the wrong thing to do in a different environment. The "wait and see what it does in two months" instincts that work perfectly for some person in one place may fail in another.

0:30:46 RI: And Mike, to your comment about how people generally fail at this, the trick is an Agile person can find a circumstance in which Agile is spectacularly successful, and they can tout it as an example. An Agile hater, if you want to just use the simplistic modern version of that phrase, can find an example where nothing's changing, there's no value to Agile, and imposing it would just be a dead cost. So, it doesn't matter. Not one medicine is good and the other one is bad, it's the medicines are all fine if the patient needs that medicine, in the right dose with skilled care, it can save him, but otherwise it can be particularly dangerous for people. And it is this harmful effect of mis-medicating that I think creates the greatest opportunity for what the new PMBOK and Agile Guide represent, is a chance to get some of the misunderstanding out, and some of the conversations improved, and to give these methods a chance to show what they're really capable of doing in the right circumstance.

0:31:41 KL: So we're going to come right back to that, with a question around the individual, their leadership role, and how the organization has to try and diagnose those types of requirements, to be able to predict how they're going to impose some sort of management technique to produce those products. But first, our first advertisement spot. And it's an advertisement for the PM Point of View Podcast.

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0:32:06 KL: So, this is our 30 seconds where we get to highlight somebody or something that's supporting something in the project management world. And in this case, it's this podcast. The podcast gets you the great project management information and free PDUs that you want. And we want to expand that listener base, and that's where you come in, listener. If each one of you just tells one other PM about the wonders of the smart education and free PDUs you get off this podcast, we could rapidly double our listenership, and have a shot at sponsorship from organizations that, well, that care about project management. And sponsorship means more discussions, and that means more experts and more chances to tell your PM stories. So don't hoard this free to you resource, tell a friend to check us out on iTunes or on TuneIn. And if you have an Alexa haunting your abode, you can actually just say, "Alexa, play PM Point of View Podcast." Now, how exciting is that? So, with that, we'll go back to our panel.

[music]

0:33:08 KL: It's clear that we should know the type of product we're after, to know what type of project management or a management approach we should take. But how do we diagnose that? And then, what will organizations need to be able to do that diagnosis? When I look at this practice guide, it will not cover all of the organizational change requirements, that's written in another guide. But it does talk about doing the evaluation of organization to understand how it sees its product development and its project management. So, I wanted to cover that a little bit, to give our PM listeners a point of maybe jumping off to be able to say, "Well, how would I address this in my organization?" So Jesse, just coming from where you are, as someone who is the author of this, or one of the contributing authors of this, how did you see the ability of an organization to evaluate what level of hybridism it needs?

0:33:58 JF: Well, there's a couple of aspects to it. The first is, is to address a project on its own basis. I think one of the temptations of a project manager is to have a, particularly PMO manager, is to define what the corporate project management approach is going to be. So shall it be written, so shall it be done, from here until the end of time. And the first principle is, well, what if your project doesn't fit that paradigm? What if your project is something that you had not foreseen during your PMO chartering activity? What if it's bigger than anything you've done before? And so look at a project within its own context, and start talking about, should we be granting this project some process waivers? Should we be granting a little bit more discretion to its leadership as well as its contributors? So, that's the first thing.

0:34:55 JF: But then there's also an entire section dedicated to the organizational considerations for project Agility. What kind of things do we need to look at from an organizational perspective to make a given project successful? This is not the same as achieving organizational Agility, which is a hot new thing everyone wants to be the... Every C-level executive wants their Agile transformation to be part of their legacy and organization, and there are a lot of transformations happening around the world today. But you don't need to do that. You don't need to transform the entire organization to deliver just a single project. But there are some things that you can do. Take a look at the culture. What is the stakeholder bias? Is it bias for a date? Is it bias for speed? Is it bias for cost? Take a look at the role of the PMO, and how it can be leveraged rather than laid off. Take a look at coordination, dependencies across different projects. Some projects, especially if they have different methodologies. And so these are just checklists of things for you to talk about and evaluate and

assess, without having to do a whole scale organizational transformation to everything being Agile. And I think that was the most important thing that we wanted to do, was to define, what are the parameters, what's in bounds and out of bounds, in scope or out of scope, for this guide. And that was how we tried to craft some basic boundaries.

[music]

0:36:31 KL: How will people be able to evaluate whether, then, the specific project... Or rather, how much or what approach should be best used for specific projects? I think the ability to diagnose the requirements before you have the requirements, almost, makes this sound like we're speaking consultant speak here.

0:36:50 RI: The first one would be to understand the culture, as Jesse was saying, of the organization you come with, because that'll put a filter on top of everything that you and everyone else that you're going to deal with sees. So if you're a dominantly manufacturing culture, you can expect the repetitive subset of tasks to be heavily emphasized, and there to be almost a denial or a grudging acceptance of cost of goods sold of the investments, you need to make in answering new questions when designing things. If on the other hand the organization is a pure design house, you can expect the problems to exist in the design for manufacturability, and the discipline, and the standards compliance, and things like that. So you just need to know where the blind spots are from the organization. But the task itself, or the range of tasks that you're designing a process model for an organization to be effective at, can be analyzed. You can look at what you've done in the past and you can say, "Have these been derivative line extension kind of products? Have these been completely disruptive things?" You'll find that the model that is tuned to be very efficient for delivering 5% or 10% different articles, year after year after year from the same core product, is completely unsuitable for being the engine by which you would bring great new things into being.

0:37:58 RI: People get comfortable in that "I'm almost all repetitive except I change the color of the taillight once in a while," and they're not really doing development. They're doing a stretch of a kind of a different manufacturing approach. If they're in the pure design, they're not doing the whole. So by whatever terminology we give this, bimodal or hybrid with all of its baggage, it's the simultaneous excellence at being good at both doing repetitive things, where "done" is already defined in advance, continuous process improvement works, the entire body of Lean and Six Sigma is right there on the shelf, waiting for you to fix any issues. That stuff getting done well. And the completely different, the orthogonally different, set of things where you're inventing something, you're seeing the world for the first time differently. You're thinking of stakeholders that have never been served before by the constituency. You're doing things that are unprecedented versus things that have absolute precedent, and unless you have a reason to change it, just need to be executed. But it's that nature of the task. How big a leap is it? How long does it run? How much is understood? What's the continuity and the players? Those will all give you a sense of just how much new you're going to encounter. The more new, the more Agile edge you need to be.

[music]

0:39:15 KL: How can they evaluate that against any kind of baseline though? Again, those make sense, I think, to a lot of us listening, but how would we practice that? Is that an opportunity for someone to step in with some sort of structured diagnosis for that?

0:39:28 RI: I can give everybody on the call a 15-second activity that'll help them get a sense of this. If you take two colors of markers, and you take the task list, or ideally a network diagram, and you color in all of the tasks that if you had somebody to do it, they could just simply go do it. All of the information exists to execute right...It's all in the Agile Guide framework here. But if you say, "I could do this right now based on the information that exists," those are one color. And the other is, "I need information, I'm waiting for something, there's a condition that has to be met, somebody has to invent." And then, just the ratios of those two. Step back and look at the color of that mix and that will give you a sense, just like black and white pixels will give you different shades of gray on the screen.

0:40:11 JF: There's another tool that's included in the Agile Practice Guide. It's called the Agile Suitability Filter Tool. And there are nine dimensions of project attributes to take a look at. Everything from the size of the team, to how much stakeholder buy-in, to project criticality. Are we talking about losing lots of money, or just a little bit of money, or maybe even losing several lives, depending on how well this project is run. And then, so you make a qualitative assessment, on a scale of one to ten, for each of these dimensions. And then you take a look on a radar chart, just how Agile should this project be? Or just how predictive should it be? And that's one way to assess whether you should start having conversations around it. And what's going to happen, I think this is to Randy's point, is that most of the time, you're going to see somewhere in the middle. You're going to see that "we have no buy-in, but we do have a central decision-maker," "we have a need for aggressive delivery, but it's also very expensive and with a lot of financial criticality to it." And so at that point, you're going to have to start tailoring techniques that contain the risk of a given dimension, but also leverage some efficiencies in another dimension. So...

0:41:36 RI: So, you just used the word "risk," and that's a really key one here. Because the risk of getting your stakeholders to agree on something is itself a really significant programmatic risk that's often ignored until you get to test it, in many programs. I like getting that out of the way as early as you can and having people comment on stuff as it's developed.

[music]

0:42:00 MH: Jesse mentioned the Agile Suitability Filter as one tool that's really helpful. That is Appendix X, as in X-ray, Three, in the Agile Practice Guide. Check it out. In addition, I found in the Agile Practice Guide all of Section Three really useful... And Section Three is called "Life Cycle Selection," it's all about getting at this question. So if all you did was download your free copy, if you're a PMI member, of the Agile Practice Guide and read Section Three and Appendix X Three, you will get most of the answers to that question.

0:42:37 S?: Yep.

0:42:37 RI: There's a really shortened version of this that the systems engineering community uses when they're mentoring or bringing people in. And they talk about it being to identify all of the stakeholders throughout the entire life cycle of the project, and to flatten that time continuum down into a single simultaneous equation that can be analyzed in the moment. And there's a real elegance to that logic of grab the entire future from all of the viewpoints, including disposal and everything else that's part of bringing us an item or software into existence, and say, "Now, at the beginning, is when all of these tradeoffs can be made most efficiently. Now, at the beginning, is when I can design a product to either be a recyclable loved item or a nightmare for the environment." And it's

that recognition that everything happens in the now, but the project scales out into the future, or actually into the past, and these methods have to coincide. And I think that makes for a fascinating discussion as well. That's the hard part in reality for people to come to grips with, because some of that is just not knowable until you're underway, and hence the value of Agile and other methods like it.

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0:43:50 KL: It sounds a lot like something that has to happen for larger organizations. I'm wondering if the sheer size of the organization is going to drive the ability to make some of these decisions, or is it a function of just the expertise in the practitioner?

0:44:02 RI: Well, Jessie, you warned very, I think, wisely against the tendency for the organization to try and get the one perfect build to print document, just like they would in the factory for a brake or something like that. It doesn't work that way. The logic is what should be universally understood and immediately available to people, with enough standard templates that they can apply it quickly to routine and commonly encountered circumstances, or have a good basis to build or diverge from. But just process compliance without understanding has caused more harm than any other management error I've seen in my entire career.

0:44:36 JF: Yeah. When you start talking about, is our organization one that is conducive to innovation, to exploration, to disruption, or is it one that's more conducive to incumbent behaviors and preserving the status quo. At that point, you're asking the project manager to start exerting some soft skills. And this is a completely different conversation about the role of a project manager..

0:45:06 RI: Yep.

0:45:06 JF: In a modern environment, regardless of whether they're Agile or not. And that is that there's a growing expectation requirement that any project manager in any context has got to start growing some soft skills. That you're going to have to start talking to the head of compliance about some waivers. You're going to have to start talking, to getting all of those stakeholders into a room and let them duke out what the priorities are. You're going to have to start helping to ensure that there's a vision statement that guides self-organizing teams that have a little bit of discretion, because without that vision statement, they're going to go off the rails. So when you talk about the organization, many times it's about silos, and it's about aversion to change. And it's about people just wanting to stick to their own thing and not play outside of their comfort zone. And now we're going into not simply organizational change, but how a project manager can navigate the organizational status quo to get a project out the door.

0:46:09 RI: You summed up almost exactly what some of the findings were from the research that MIT did for PMI in the INCOSE world, is that very often it is a PM or a system engineering or a PM in other dimensions disconnect. But once you solve that, then you still have the disconnect between the PM and the organization that gives that PM the charter to go execute. So the PM can be as Agile literate and desirous of going out and creating the greatest new product in the world, but if he or she operates in a structure that measures success by "how much did you sell this hour," they're going to fail. So that organizational system, and particularly its system of value measurement, is design considered an investment, or is it considered a cost to goods sold. That by itself, that simple question of how does an organization view it, will tell you an amazing amount of how they value

the development subset versus the execution subset of tasking.

[music]

0:47:06 KL: I want to take this then to another question related to the individual and how they have to navigate the organization. I noticed in the practice guide, there's actually grafted another set of practices in here, which was around something I think from the '80s, which is the servant leadership concept. And I know Mike has talked a lot about trust in teams, in some of his writing, in some of his discussions. What made you guys include that? It's very early in the practice guide that you discuss that. And can you talk a little bit about that in our last few minutes here, the role of servant leadership and what you really meant by that. Because that's a pretty broad topic. But why does that play so importantly in how you want the ability to let more Agility to play out?

0:47:49 JF: To many people, the concept of servant leadership is part and parcel of the Agile mindset. It is a non-negotiable core element of what it means to build high performing innovative teams. That innovation does not happen when you're following orders. Innovation by definition is coloring outside the lines, disrupting the status quo rather than refining and perfecting the status quo. And the original founders of the Agile movement were all working on this problem independently before they came together to form the Agile Manifesto. And one of the maladies that was identified with the way work is always done is, "This is the way work is always done, and I've been doing it for 20 years, and I know best. And I worked very hard to get promoted to the position of telling everybody what to do." And that gets in the way of creativity. And so the questions you have to ask, and this is in all the New York Times bestsellers like "Creativity, Inc." or Dan Pink's work, and that's, do you want rule followers or do you want innovators? Do you want people that are creative, or people that are just doers?

0:49:02 JF: And so this servant leadership is emphasizing the need to create the environment for creativity. Create the environment for innovation. Rather than just telling people, "Go forth and succeed," what are you going to do as a leader? How will you role model the right behaviors? How will you reinforce the behaviors that you want to keep? And now what we're looking at is not so much the project manager as a coordinator, but the project manager as an enabler of coordination. And there's a difference. An enabler of self-coordination, an enabler of collaboration, is somebody that gets everybody into the room and then let's them hash out some of the details, rather than telling everybody what to do over half a dozen emails.

0:49:52 KL: I was just talking to someone in organizational design, that'll come out on one of our next podcasts, so podcast listeners listen up to organizational change management, coming to a podcast near you. But one of the interesting things was the nature of rules, it's not about rules versus no rules, it's that what do the rules do? So, are the rules to constrain, manage, and inform? Or are they to actually lead people to allow their collaboration? In other words, do the rules protect the ability to trust each other as opposed to focus on the nature of the verbs, the things that are going on? The do.

0:50:25 RI: Earlier, Kendall, I used the term "orthogonal," when I was referring to this idea of tasks that are defined and anchored in the past versus things you want to do differently or leave room for. I did that very specifically because they are the opposite of each other. In one case, zero variance is your goal, and in the other case, variance is your only source of adding value to the process you're operating in. The vision I have is that, each task in each moment, in each subset of every action

that's taking place, can be served based on its fundamental nature of "is this something I can repeat?" Instant access to the part, to the supplier or whatever, no time lost. Is this something that needs to be done? Create an environment in which that work can take place. Equip a team, enable it with direction, give it freedom, give it resources, and have a probabilistic assessment of when that'll come back in for the project. But in one case, you're working with hard numbers, and in the other case, you're not. And that requires a different type of PM comfort zone. I'm really happy to see the PMBOK® Guide in Agile, helping to broaden the PM community into a group of folks who are comfortable with that level of continuing change, and not just expecting it to be fixed, execute, and go get another one.

[music]

0:51:41 RI: Maybe a quick thought here, 50 years ago the models we were talking about were effective and they were correct because the world was not changing very rapidly. What worked at General Motors or Ford River Rouge in the '20s and '30s made sense for the time. It isn't that those methods or those people were crazy, it's just the circumstances have changed out from under them. So I think there's an awful lot of just freedom for people to try on new ideas by saying that you're not wrong, you're just in a different place than you were before. Try a different method and see if it fits.

0:52:13 KL: Wow, that takes a lot of the judgement off. That literally felt good to hear you say that.
[chuckle]

0:52:18 RI: Well, and it should. Because we talked about reinventing common sense, but the common sense that fits an environment changes completely. My dad was born in 1921, and his model of success was to personally memorize and accumulate as much knowledge as he could. The man was a walking encyclopedia. I mean, literally, at 90, if you needed the name of a river in Northern Tibet or China for a New York Times crossword puzzle, you could tell him how many letters, and he'd sometimes ask you what dialect if there were two words that would fit. But in today's world...

[chuckle]

0:52:48 RI: That is useless because all of that information is available. Now it is the ability to know what information, in what structure, will become valuable and how do I manage that, and a certain amount of telling the difference between good advice and bad advice since it's all out there for you. But now, it's completely flipped. And it doesn't make one right or wrong, it means that you have to be adaptive to the moment. And that, I think, is the central core of everything that's been really essential as a takeaway in this call, is that there's a body of methods here. They're extremely effective. They have unprecedented effectiveness for a particular type of tasks that are very valuable in the economy right now, but they don't cure everything. No medicine that advertises it cures everything belongs on anything except the back of a wagon with "Snake Oil" over the sign.

0:53:31 KL: Mike, any thoughts around this?

0:53:32 MH: Yeah, I think for folks, the listeners that might still be struggling, even after you read the Agile Practice Guide and some of the suitability guidance there. If you're still struggling for, well, isn't there a single universal approach here? Isn't there just one or two? Couldn't I just do a

couple things that'll work, no matter what? Especially I'm not sure where I fall. And I would say the very first thing is to get some kind of sense of the work at hand, even if it's just overall project sizing, break it down into tasks that people who are doing the work recognize as work they've got to do, that's meaningful to them, and then help them do as much single task focus as possible. One task at a time, through to completion, before picking up the next one. More and more studies keep coming out showing that the productivity gains here are sometimes a multiplier effect. They're not just 30% faster or 40% faster, but in some cases, five or six times faster. And...

0:54:33 RI: Well, the engineering proof is obvious. It's switching overhead, anyone with a network background can describe it mathematically...

0:54:37 MH: Yeah, but switching overhead is crazy. And there are... Some of the best Agile teams I've worked with have done away with sprints altogether.

0:54:46 KL: No kidding.

0:54:46 MH: Because the sprint end date interrupted their task flow. And so...

0:54:50 RI: The sprint has a function within the model. Somebody who truly understands the logic can substitute another way of accomplishing the function of sprint, or move it to a time that fits. Somebody who's...

0:55:00 MH: That's right. So they...

0:55:01 RI: Following a process will have a stopwatch, and say, "Let's start."

0:55:04 MH: So they applied an Agile mindset to actually improving the practices that Agile professes that we all undertake, and they achieved better flow, better productivity, ironically more Agility. And they even broke the batch further from, let's say, a two-week sprint, down to something much more continuous flow oriented. So, I think the key thing here is, things like that are universal best practice, understanding the total work at hand is going to serve you well no matter what. Obviously, there's lots of books and books and books been written on all the different complexities and tips and tricks and things to manage your way through them. But if you're looking for just a few things that can improve performance dramatically, I'd say start with figuring out how to empower the people who are doing the work to stay focused.

[music]

0:55:58 RI: For anyone who has an engineering background, the parallels between digitizing a waveform and Agile are very striking. You need a faster sample than the rate of change to have any confidence that what you're seeing is a representation of reality. Sampling faster than things are changing doesn't buy you any new information, it just drives up the cost and irritates everybody on the team. So to whatever extent you can go borrow this logic of digitization or sampling intervals from your organization, it's exactly the same logic, just applied in a different field. And there's a lot of common sense that's cut and paste portable between the two.

0:56:33 JF: That's a great analogy. I wanted to applaud Mike for encouraging people to be Agile with their Agile...

[chuckle]

0:56:39 JF: Because a lot of people want to copy paste Agile, and that whole "one size fits all" trap that we fell into with our old approaches, now we're applying to new approaches as well. But to follow up on the notion that if you're still struggling with this, as a rank-and-file project manager, and you've never tried Agile before and now you're being told that you have to, and now the project PMI people are saying that you really ought to know this, just try something. Just try something. Find some place where there's a contained degree of risk, where you kind of know where the boundaries are, and play within that playpen, a little bit by breaking down some tasks a little bit smaller, trying something, and then taking that data and that feedback and that measurement and reassessing, re-baselining even.

0:57:32 RI: Yep.

0:57:32 JF: Just try. Because you're going to make mistakes as you learn a new thing. And that's another thing, is that there's no preventing mistakes, there's only quarantining the risk into a smaller and smaller bullpen. And play within that kind of limited risk field, and then you'll get a little bit more of a comfort level. So, start assessing, where should I use which techniques based on the nature of the work that we're doing.

0:57:58 RI: That's great advice of using this model of continuous planning or re-planning. I mean, we all have time phased planning logic in some form. We all know that we ought to be re-planning what's left in the project to get the estimates, to complete the forecast, to complete _____ to numbers. In a sense, you're just doing that at a greater level of depth, and more often for the tasks in front of you. So the concepts of rolling wave and incremental and everything else, should be familiar to you as a PM. And I think you'll find it's a lot more comfortable once you get your feet wet than you may have thought. The terminology is a little scary, but the logic should feel very familiar once you're in it. If it doesn't feel familiar, that's probably a warning sign that you're following process out of compliance with the nature of the task itself. It ought to feel easier.

[music]

0:58:46 KL: Well, I have to be the guy who's not very "Agilistic" with the stopwatch here, the time piece here. So, as your podcaster, I can't be very Agile. So, this probably should have been called the "Agilistic Conversion Show," so if anyone listening hadn't been converted, they realize now they have to read both the guides, hand-in-hand, and they have to wait for the next one to come out as one big volume. But yes, so now that we're all converts, it's going to be fantastic. And we're going to all have the fervor of the recently converted, no doubt. And I like this idea of making your Agile, agile. But thanks to the great Agility firepower that all of you brought to our listeners today. Guys, you're fantastic, and I think we can go on with different parts of this. So to wrap this up, how can they follow you for more information? So Randy, tell us how they can get ahold of you.

0:59:30 RI: Yeah, the easiest way for me is via LinkedIn. That's my primary social media. So, it's just Randall Iliff, I-L-I-F-F, at LinkedIn, and you'll find me very easily. A lot of resources. Be happy to help any way I can.

0:59:42 KL: Excellent. Mike? How can they get ahold of you?

0:59:43 MH: Check out my website FortezzaConsulting.com. It's Fortezza, two Zs like pizza.

0:59:49 KL: They can follow your blogs there. And Jesse, new to our panel here, how can our listeners follow up with your work and continue to follow your ideas?

0:59:57 JF: My name is Jesse Fewell, J-E-S-S-E F-E-W-E-L-L. And that's my website, dot com, and that's my Twitter handle, and you can see what I'm up to. It's also my YouTube handle. You can see what I'm up to there.

1:00:11 KL: My goodness, you've got YouTube about this stuff too?

1:00:13 MH: And Jesse's got some good videos. Everyone should check them out.

1:00:16 KL: Okay. Well, thank you all. Check out our Facebook page, PM Point of View, where you'll find this episode as well as other episodes and the transcripts of all the hour-long episodes. Send us guest topics and sponsorship ideas you may have. Help other PMs find us by rating us on iTunes. Check out the Project Management Podcast Network, for other great PM related podcasts. And for PMPs who want a PDU from listening to this, go to the CCR System and use code "C046," the Washington DC Chapter, and the title "PMPOV0045 PMBOK® 6 The Agile Effect." And make sure you flag "technical project management" in the talent triangle. This has been a Final Milestone Production, sponsored by M Powered Strategies. And as always, I'm your host, Kendall Lott. And until next time, keep it in scope and get it done.

1:01:03 S2: Our theme music was composed by Molly Flannery, used with permission. Additional original music by Gary Fieldman, Rich Greenblatt, Lionel Lyles, and Hiroaki Honshuku. Post-production performed at M Powered Strategies.