

Integrated Bimodal – The best of Agile and “traditional” Project Management

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Overview

There is so much written about the inability for Agile and traditional Project Management to work together in an integrated fashion. We not only refute that statement but provide a framework for an integrated approach.

This paper proposes a Framework which clearly shows the common elements (despite often differing terminology) and how they fit together. It proposes not only the logical map but also identifies some of the more cultural components which will need to change.

Author

Martin Vaughan is a Director and Senior Consultant with Core Consulting Group (CCG). He has spent his career working with Projects, scoping them, planning them, delivering them and governing them at a program and Portfolio level. Having seen the frustrations and lack of value from small and large IT/Systems projects, he can share learnings in a pragmatic and “doable” way.

Introduction

Much has been written about Agile approaches and “traditional” Project Management and their inability to co-exist, including a white paper we published (Ref1) “When Project Management meets Agile”. This was based on a 2014 Client Breakfast Forum with the same title, where invited panellists debated the issue.

It reminded us of earlier times in the world of Project Management, where debates were often had on whether PRINCE2 was any better than PMBOK. Over time we developed a simple and pragmatic approach with our view of best practice a blend of the two, taking the best of each.

Gartner have proposed a BiModal model (Ref2), splitting the organisation into two distinct parts:

- Slow mode 1 for traditional IT services with a known outcome
- Fast mode 2 for agility and speed, especially where the outcome was uncertain



Like many others, we don't agree with this overly simplistic model. It doesn't take into account business' need to work together, efficiently and effectively to deliver value. Splitting an organisation only provides complexity, risks conflict

and doesn't recognise that many project initiatives require a blend of both modes.

"Generally in life, wherever there are polar opposite opinions, the truth often lies somewhere in between"

Author's opinion

In terms of Agile and “traditional” Project management, once again we consider best practice as a blend of the two, a sum of both which provides more benefit than the individual components.

Foundations

There is no need to reinvent the wheel, the foundations for the integrated model already exist.



Project Management has been around for years, it is well defined through the PMBOK (Ref3) and OGC's best practice suite (Ref4) including PRINCE2, Managing Successful Programs (MSP) and Management of Portfolios (MoP). There are many tools supporting Project and Portfolio Management such as MS Project Server/Online, Daptiv and EPMLive.

Similarly, Agile has matured and is seen as an effective approach to Software and Systems development. It is well defined through the Scaled Agile Framework (SAFe) (Ref5) and other like approaches. There are a growing number of tools which

support Agile such as Jira, Rally, TFS and others.

Similarities and differences

There are more similarities than differences between “traditional” Project Management and Agile Project Management when done well, these include:

- Value – both approaches should focus on delivering value (Benefits) to the business. Regardless of delivery approach objectives and vision must be shared
- Leadership – both approaches should focus the person leading the effort, on providing leadership rather than administration and following process
- Planning – both approaches involve breaking down Project scope into manageable packages of work then planning accordingly to deliver based on priority.
- Project teams – both approaches use teams of people with subject matter expertise



The differences we have seen between Agile and “traditional” Project Management include:

- Cultural – The need for certainty (in plans, estimates and controls) versus the need for innovation and ability to adapt quickly
- Corporate constraints – Including funding (Business Case) approval and Procurement approval policies
- Planning/delivery approach - While Agile fixes time/cost for a package of work (a Sprint) allowing scope/quality to be the variable, “traditional” Project management does the opposite, fixing scope/quality allowing time/cost to be the variable. This fundamentally changes controls and reporting.
- Portfolio Reporting needs - The desire to fit projects into neatly defined stages and checkpoints, particularly within a single reporting tool versus Agile’s reporting on burn down and value
- Conflicting objectives – The conflict between speed/cost versus scope/quality as noted above and how that manifests in team behaviour
- Terminology – For techniques, artefacts, roles & responsibilities
- Tools – The (currently anyway) alignment of tools to either “traditional” Project Management or Agile

The differences noted above are partly addressed through the framework as outlined, careful configuration of tools and a program of education. The remainder must be addressed through a focused Change Program with all project stakeholders.

Our recommended approach

Refer to Appendix 1 for our proposed Framework.

Key aspects to the integrated model are mapping of information and common understanding of terminology, avoiding duplication:

1. A required Business Change (known as **EPIC** in Agile), driven by Business Strategy and the related Business Benefit(s), maps to a **Project** (or if very large to a **Program** of Projects with each Project then typically mapping to a **Capability**) via an approved Business Case.
2. One or more **Enablers** in Agile, maps to a Project **Work Package**. There may be one or more **Deliverables** within a Work Package and several Work Packages to cover all enablers.
3. A **Sprint** in Agile is typically short (eg 2 weeks) and rolls up to an **Increment** (typically 8-10 weeks) then to a **Release**. We map an increment to a **Work Package** and assume that the Release process maps to a separate Work Package. This mapping may vary so customise to suit.
4. The Product Capability and Feature lists in Agile will not necessarily map to a Project, at least not until User Stories are tied to Increments and/or Sprints and hence to Projects.
5. Increments and Sprints can provide features to more than one project. This can be handled either through duplication in project plans (sometimes joint sprint teams) or by introducing the concept of "Primary Project" (generally the one which funds it most) with delivery to the

"secondary projects" via inter project dependencies

6. Agile needs different tools, specifically Kanban style tools for managing the User Stories Backlog as well as Burn Down charts for reporting.
7. If Value Reporting is adopted, specific integrated reporting tools will be needed as well as an agreed scoring system and a way of tying back to Benefits, typically quoted in Business Cases
8. Schedules in the Project, for Agile work packages, will just show a summary task at the Increment level with Sprints as Tasks, with details held within the Agile tool, carefully verified in terms of tying scope back to Releases and key reporting Milestones (eg Capability achieved)
9. Any "Stage" type of attribute against a project, in an Enterprise project status reporting system, will need to be adapted to cater to "Agile delivery", noting they would probably share earlier initiation and funding approval stages
10. Similarly, any Governance stage gates will need to be adapted

Further to the above, a change program will need to be implemented to achieve:

- Balance and clarity between the often conflicting need for speed versus quality and completeness of scope
- Acceptance of more uncertain and unpredictable outcomes in the early stages of projects, especially highly innovative ones or those involving exploration and research
- Changes to Funding, Governance and Reporting processes to suit
- A priority on leadership by Project Managers, over administration and

reporting together with a collaborative working relationship with Sprint leads (Scrum masters)

6. Pilot if possible on a couple of projects, learn and adapt
7. Full rollout focusing on Change Management

Where to from here



Assuming there is already an existing Agile tool/process and a Project Management tool/process:

1. Starting with our proposed Framework, validate the logic mapping in your own organisation. We find that terminology, especially people's interpretation of it, is often the cause of uncertainty and confusion. Agree terminology and let it form the basis of your own Framework
2. Determine where Enabler information will be kept, either in the Agile tool or the Project Management tool (ideally not both). We recommend the Project Management tool.
3. Agree the integration keys between the Business Change/EPIC list and the Project and/or Program list.
4. Agree the integration keys between Project Work packages and either Releases or Sprints.
5. Update tools and processes including reporting, reflecting agreed terminology and new data fields, communicate the changes

The final word

We haven't tried to reinvent the wheel, just make sense of two valid and proven approaches to delivering projects. We have provided a pragmatic framework to integrate them and gain the best of each.

We welcome the chance to discuss and share ideas, perhaps there is a better way. We certainly don't want to debate that one approach is better than another. We want to learn from industry experience.

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References:

1. Ryall, A. (2014). When Project Management meets Agile <http://coreconsulting.com.au/when-project-management-meets-agile-3/>
2. Gartner IT Glossary <http://www.gartner.com/it-glossary/bimodal>
3. Project Management Body of Knowledge (PMBOK) published by the Project Management Institute (PMI) <https://www.pmi.org/pmbok-guide-standards>
4. Office of Government Commerce (OGC), UK Government range of best management practices including PRINCE2, MSP, MoR, ITIL, MoP, MoV, P3O, P3M3 <https://www.gov.uk/government/publications/best-management-practice-portfolio/about-the-office-of-government-commerce>
5. Scaled Agile Framework (SAFe) <http://www.scaledagileframework.com/>

Appendix 1 – Proposed Framework

