

ProjectSummit*BAWorld Chicago 2011 Roundtable Discussions

Best Exit Strategy for Project going South

- Be transparent – weekly PM reporting status on leadership team
- Break tough problems into manageable pieces
- Don't be afraid to chop off dead links and utopia projects that doesn't make sense
- Transparency up the food chain
- Understanding what is going on politically – may limit success
- Risks Lists
- Make Sponsors take change
- Ending Project may cause career issues
- Patience is needed to determine viable option
- Communicate to Stakeholders
- Present benefit issues, impacts, and let Sponsor make decision
- Prep decision makers
- Present the facts
- Use facts, not optimism

Why are PMO's closing up?

- No clear value proposition
- Education is key so a PMO is valued and not looked at as overhead
- Resistance to exposing info / losing control
- Lack of management support
- Need a charter to establish PMO
- Difference of opinion
- PMO can support with a light set of processes
- PMO success and growth tends to be by word of mouth
- Need to share best practice
- Keep small – PMO's have failed in the past
- Start small, build maturity
- Tools don't solve problem
- PMO's NOT closing up!
- PMO's need a good value proposition
- Lack of executive buy-in (long term)
- Seen as overhead (cuttable costs)
- Insufficient results during (limited) launch period
- Too pricey to initiate - too little proof of success
- Political implications: insufficient constituency

Is Strategic PM achievable?

- Engaging Project Managers upfront in goal settings
- PM office must be involved in upfront / Decision making process
- Involvement upfront to use PM skills to guide decisions
- PM carry projects from strategy sessions to close
- Align with Business objects
- PM tasks can be applied at the strategic level, but it may not be called “project management”
- It isn't clear that “SPM” has a clear definition. If strategy development is done differently year over year, it should be run as a project – not as part of the business operations
- To have vision and the business plan in mind to be a strategic PM
- Some technical background is necessary
- PM needs to be consultative
- PM may needs to come from “the business”
- Strategic includes 3 perspectives: 1) The Role 2) The Practice 3) Portfolio

How can a PM impact the bottom line?

- Keep an eye on people impacts
- Get proof for progress
- The lessons learned capture to a celebration at the end of the project
- Effective Resource Management can provide a portfolio view allowing better prioritization
- Creating a robust charter can enable better project delivery
- End to end Project Management
- Close detail / attention to budget and resources
- Keeping track of CV and SV will help with tracking to the bottom line
- Watch budget for vendor contracts
- Look for redundant process
- Push back if too many active projects proposed unless there's a hard deadline. Need to do your best so don't spread yourself too thin
- The people can impact the bottom line, if they are overworked the impact will be felt on the bottom line
- Analyzing the risks and being more efficient
- Collecting the data and measuring that data for future use
- Use better “lessons learned” after a project is completed
- Status reporting to project sponsor is critical but may not always help if the project sponsor doesn't come through

- Good requirements automatically help in managing the bottom line
- Work at the front and identify the projects requirements
- Make sure people are happy

Outsourcing the BA Role

- Remain open to the concept
- Market the BA value to the Organization
- Possible but difficult to outsource BA Role
- Offshoring the BA would be most effective if the offshore resource was onsite ...which would be counterproductive
- If had on-shore off-shore BA it might work but company loses savings
- BA need to tout value to management to insure job security
- Many companies are doing this by buying in BA Consultants

What Hurts You – Barriers Holding You Back From Being the Very Best

- Management direction/political environment
- More documentation/process no extra timelines, budgets, resources
- Too much process, paper work coming out of the PMO, which is slowing projects down, creating busy work with no positive impact
- Various personalities, conflicts, issues can slow projects down and add frustration and inefficiency
- Senior leadership – not supporting the people or the project – “just get it done!”
- Interpersonal relationships could be barriers
- The structure of the organization
- Not enough time to do the work properly
- Try to automate processes to reduce the amount of paperwork/documentation
- Learn how to deal with executives/senior management
- Too many meetings and emails
- Slower pace of the BA on the project
- Soft skills
- Constant changes from all areas within the organization

Adopting Agile – Best Practices

- Early Feedback –business engaged
- Can use after production is live for enhancements
- Focus on smaller, concise areas
- More frequent releases

- Project Scope doesn't change, delivery does
- Test case driven- behaviour oriented testing
- Lower costs of early revisions to requirements
- Lower Customer rejection
- Potentially smaller projects (can decrease time to delivery) (more bang for buck)
- Improve team communication (agile)
- More business Feedback
- Collaboration
- Quicker to production
- Delivery of functional software / solutions
- Focus on priority features for the business
- Leaner documentation
- Use of models vs narrative documentation

Career Path for the BA

- A Business Architecture is a possible career path (Business Architecture guild certification)
- Lead BA / SR BA
- People in general don't believe that you need to be SME at all to be a successful BA. Some feel it can actually be a danger to have a BA that's a SME
- Consulting (small vs large; contract vs. permanent, travel vs local)
- Best practice
- Discovery Phase. Req – Func – Sys Agnostic
- Lead BA – entry level – senior - different levels within the organisation
- Switching to consulting brings variety but not necessarily stability
- Not Project Management – too technical in orientation - if forced to
- If you are considering a consulting path, take into account your style and personal needs when deciding which type (i.e. contractor or employee consultant)
- Do you need to be SME to be a BA

Tools for BA's

- There are tools available that will help manage standards for requirements
- Good tips on products
- Many of the best requirements or project management are created by testing companies
- Blueprint Rommana are good tools
- Blueprint integrate with QC
- Need for traceability
- Baselining is important, must keep changes up to date

- Useability
- HP Quality Centre is not good as req. mgmt. tool
- Investment in a tool will save money in the long run
- Understanding of what tools being available
- Validation that what we use is very similar to other companies

What are the core competencies for a BA?

- BA skill sets
- BA relations between Business&IT
- Communication
- Need to be a leader not manager
- ROI can benefit Prioritization
- Business Units must drive project discussions
- Teamplayer, deal with a variety of personalities
- Detail oriented
- Seeing big picture and level of details as needed
- Experience? How does this fit in BA role?
- Excellent written / oral communication skills with wide variety of Stakeholders
- Able to understand Business need and technical solution
- Psychologist
- Be able to use BA tools and – diagrams, models, use cases
- Know how technical to be with business partners
- Big picture understanding as well as details
- Organization – how to manage information and how to document
- Know your audience when communicating project info

How do we deal with difficult people?

- Bond with the person – build trust
- Good Cop / Bad Cop roles
- Don't be confrontational - adjust your style
- Sometimes it helps to let people think they had an idea
- Being positive usually works / Be bubbly / Happy all
- Timing is everything
- Use different communication styles for different people
- Take your ego out of it
- Make it about the business, not personal
- Get other person feel important and feel they are adding value to project
- Figure out non-verbal cues of person and approach when seem to be in better mood

- Kill them with kindness
- Leave important agenda items until the end of your meeting to avoid repetition
- Make issues transparent (call out elephant in the room)
- Cancel meeting if key stakeholder don't show up
- More frequent checkins
- Make sure you have the decision makers involved early and at regular intervals
- Play back the negative comments to the individual offline and discuss
- Try to understand where the person is coming from
- Give feedback to others
- To break up bad energy request for a 5 minute break
- Send out plan of attack, review and make deadlines
- Escalate to Management if necessary
- Develop a rapport – get to know them to understand the concerns
- Identify Key People

Agile vs. Waterfall – Mates or Foes?

- They're techniques – not competitors
- Each requires a fluent understanding of the “ground rules” and accepting
- Need senior buy - in
- Agile is a good methodology for projects where requirements are changing frequently
- Agile is good where requirements change often
- Combination approach can work well when the customer is demanding deliveries and short timeline
- It's like planning a game: as long as everyone follows the rules either will work
- Waterfall is the “starting” point – a baseline
- BA activities are often done ahead or outside of a sprint
- Agile and Waterfall are just 2 different techniques to accomplish delivering requirements
- Understanding key principles of both before making decision on agile vs. waterfall
- Project size may determine approach
- Agile and Waterfall work in collaboration depending on the organization
- The size of a project determines whether or not to implement agile methodology
- A structured Waterfall approach may not be relevant since most projects involve some level of iteration and / or implement development

Who creates the Business Case? BA or PM or sponsor?

- “Yes, and...” all 3 and several other as finance people, technical architects, ...usually not project level people.
- Creation of a BC is very different from management of a BC and implementation of a BC
- Often the wrong people – or at least people without the right information
- Answer is yes...: All together are responsible for the business case
- Bigger question is who manages the Business Case. Can be sponsor but can be IT if it is something like business infrastructure
- BA, PM or Sponsor tends to own the responsibility depending on the situation. Collective approach.
- Does not seem that we have one answer on who should create the business case
- Maybe the Stakeholders need to be more involved in creating the business case with the BA, PM or Sponsor
- BA vs PM roles

Evaluating your Certification - Was it worth it?

- Foundation of best practices to help your company
- Improves job searching / Hirability
- Company may be supportive of cert. but not always leverage the knowledge or best practices of their PM's or BA's
- Imparts best practices
- Yes - Some clients require certification for project work
- Yes, simply for manning best practice

Coping with organizational change

- Don't ask for permission – Just do it!
- With SMES = know the difference between input and feedback
- Take and audit of the Organization
- Take change – do Input not feedback
- Communicate with staff weekly
- If unstructured - Take initiative to design own future