Five techniques to maximize your hybridized delivery model

IT Business Management
As organizations have adjusted to an evolving businesses environment, the way projects are delivered has changed. Over the last several years, we’ve seen a dramatic shift towards Agile product delivery in response to a more competitive, faster-paced marketplace. But most businesses have learned that Agile is not the answer for every project, and the majority continue to run simultaneous Agile and Waterfall project delivery programs.

Today, a combined approach has emerged that effectively doubles the tool kit project managers have at their disposal. Hybrid delivery combines components of Agile and Waterfall methodologies and allows PMs to select the most appropriate elements of each for the project at hand.

This gives organizations more flexibility in their approach and the result is improved outcomes on all levels.

The key is in understanding how the Hybrid delivery model works, and fine-tuning it in ways that assist the organization in reaching its goals. Following these five best practices can help your business reach its full potential under the Hybrid model.
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Todays projects require compromise, adjustment and flexibility

Most organizations today are executing both Waterfall and Agile projects, and often in the same department. This is wise. The more approaches to development at your disposal, the better the chance of success. But this isn’t what’s typically referred to as a “Hybrid” approach. Hybrid more often refers to using both Waterfall and Agile elements within the same project, and that can materialize in a number of different ways.

Many consider a project management approach that invariably combines traditional Waterfall planning with Scrum execution to be Hybrid. While that definition is correct, it’s not a recommended technique. The main benefit of a Hybrid approach is the ability to tailor every project based on the needs of the particular situation.

There are very few projects today where a cookie cutter Waterfall or Agile methodology will equip the project with the best chance of success. Every project’s going to need a degree of compromise, and all will benefit from adjustments that improve the process. That’s where a Hybrid methodology shines.

Strict Waterfall and Agile give way to Hybrid approaches

You may have a highly-controlled, highly-structured project that requires a strong paper trail and a degree of certainty over what’s being delivered. Regulatory projects are a prime example. In this instance, a very rigid, structured, and inflexible approach like Waterfall is appropriate. Projects that are repeated over and over again are another example. You just follow the same process.

But even with these projects, organizations must strive to be as effective and efficient as possible. That’s harder to achieve with a Waterfall approach. Additionally, during Waterfall project delivery, it’s likely there will be some uncertainty, crisis or unforeseen roadblocks that require creative problem solving. In both instances, introducing Agile elements to a Waterfall project can significantly boost the outcome. A PM with a firm grasp of Agile concepts can use them to quickly address problems in a Waterfall project.

There are also circumstances where a predominantly Agile project can benefit by adding Waterfall structure. A project might require more executive visibility, formal documentation, and tracking than you would find in a typical Agile approach. Here, a Waterfall governance model sitting atop the Agile project might fit the bill perfectly.

In short, the ability to define projects as either Waterfall or Agile is diminishing. Unique projects require unique approaches, and that means combining Waterfall and Agile elements to create the right mix for each individual initiative.
Hybrid: The LEGO® approach to project development

The Hybrid approach to project development can be compared to building a LEGO model. You start with a fixed set of hundreds of building blocks for every project. How those blocks are put together changes with each model, but every time you add a piece, you consider whether or not it's the best fit for the particular situation. By bringing the most appropriate elements of Waterfall and Agile together, you no longer have to force fit those that aren’t serving the needs of the project.

This results in a custom process for each project that varies from a standard model—sometimes minimally, sometimes substantially. There will be similarities, which will reflect the natural alignment between projects, but there will also be significant differences that reflect the need for diverse elements. Even slight changes can make the difference between project success and failure.

Once the organization can see the benefits of combining these methodologies, embracing the new form of project delivery often becomes a business imperative. But as with LEGOs, expertise comes with practice. The ability to recognize when to use elements of one methodology over another is a skill that’s learned over time. Organizations looking to fully incorporate the Hybrid approach can speed the process by promoting the following best practices.
Five best practices for embracing a Hybrid approach to delivery

1. Promote PM skill development
Many organizations still struggle with the idea that today’s PMs are more than simple task masters. We’ve moved well beyond that. At the macro level, the focus is no longer on delivering projects on time, on scope, or on budget. Those things are net positives, but projects can achieve all of them and still fail to move the business needle. PMs must put away their Hall Monitor badges and start thinking in terms of delivering projects in ways that benefit the business—they must be seen as owners of business success.

In this environment, PMs with the greatest ability to deliver successful projects are those that are experts in both Waterfall and Agile delivery methods—those that can operate and shift between the two with equal levels of comfort. That’s a rare skill set, but one that becomes more important each day. This dual expertise will help PMs take a customized approach to each project, designing it with elements of multiple different delivery systems based on which will better ensure success at the business level.

Organizations should therefore place real focus on the skill development of their PMs. Waterfall experts must master Agile, and vice-versa. And a key attribute for the job will be flexibility. It will be increasingly important to adjust and adapt their approach as the project progresses.

2. Rethink how projects are defined and planned
Once we acknowledge that the best possible outcome for the business is probably not derived from a one-size-fits-all approach to every project, we need to redefine project success and then rethink planning in ways that ensure that success.

When the definition of project success is shifted from on-time and on-budget, to positive impact on the business, the PM approach shifts with it. Consider this analogy: If you go the grocery store with the primary focus of finishing your shopping in under ten minutes and spending less that ten dollars, you’ll get home with bag of items that may or may not combine to produce a successful dinner (outcome). However, if you change the primary focus of the project to cooking a successful meal, your methodology at the store changes from speed and budget to ingredients, and the potential for a positive outcome (dinner) improves substantially.

A PM that understands they’re an integral part of the team responsible for business success over everything else, and has the ability to pull elements from multiple methodologies, is free to plan projects more creatively and flexibly in terms of how different components could and should be incorporated.

“At the macro level, the focus is no longer on delivering projects on time, on scope, or on budget.”
With Hybrid projects, up-front, customized project planning becomes more important. Now, projects will need to be more carefully analyzed to identify the delivery element best suited for each area based on the specific requirements of the project.

That is not to say that up-front planning will result in a static plan. While taking a waterfall approach may make sense in the early planning stages, six months in, things may look different and adjustments may be required. Project planning must continue to include the same key attribute required in portfolio and organizational planning: Adaptability.

3. Promote organizational flexibility
While the original plan will act as a blueprint for the project, its propensity to change regularly means flexibility will be required across the organization. PMOs and governance functions must also be prepared to allow for considerable variations from standard processes.

To thrive in this environment, governance and control functions must shift away from prescribing the path that must be taken and instead define the boundaries within which projects can be executed.

The PMO will continue to govern those boundaries, but PMs will have the freedom to move around within them in whatever ways are required to help ensure the business outcome. Organizations must recognize that the project management role requires decision-making authority and independence, and they must remove any barriers that prevent that.

4. Communicate business drivers and new expectations
In this environment, organizations must ensure project teams and project managers have a clear understanding of business drivers. That knowledge will provide the context for more effective decision-making.

If a PM doesn’t know what’s important to the business, they can’t make intelligent decisions, no matter how well they understand Waterfall and Agile. PMs and teams armed with an understanding of how the project is expected to impact the organization at the business level make better decisions during the development process.
The organization’s expectations will also change with regard to teams and PM performance, and those changes must be clearly expressed. Many PMs and development teams have been working in specific ways for years and more often than not, every project was largely the same. Those days are ending. Project managers can’t just repeat what they did before; teams can’t be run on autopilot.

PMs are increasingly judged by their ability to deliver something to the customer that has the best chance of achieving that customer’s business goals. How they get there will be less important, as long as it’s done within the confines of accepted risk and compliance.

In fact, delivery methodologies will soon be irrelevant. Projects will be executed as a business unit in a microcosm that lacks a set way of doing things. PMs will be expected to have the skills to manage the project in whatever way necessary to achieve successful outcomes. They’ll be expected to understand their projects, recognize all associated challenges and identify the right solutions to overcome them. They’ll need to creatively figure out the best approach as they go.

5. Ensure an executive attitude adjustment
A key challenge in the adoption of a Hybrid environment occurs at the executive level. When projects are exclusively Waterfall or Agile, leaders can rest assured that all necessary safeguards are in place. They know projects will be executed with appropriate levels of control, governance and oversight. For many, this is more important than executing projects as quickly and efficiently as possible.

But in order to succeed and thrive in the coming business paradigm, this won’t be an option. Businesses won’t survive if every project takes days, weeks, or months longer that it could have due to the process being forced upon it. The result will be inferior solutions that reach the market later than their competitor’s.

Businesses must strive to deliver the best possible outcome to as many people as possible in the shortest time possible. That cannot be achieved without a flexible, Hybrid approach designed to address a project’s specific needs, features, schedules, and complexities.

Executives, just like PMs and teams, are going to have to adapt to each new situation, embrace the customized, Hybrid approach, and learn to switch between Waterfall and Agile based on real-time business needs.
The impact on people

As new opportunities arise, and businesses race to take advantage of them, Hybrid project delivery will grow increasingly common due to the speed and flexibility it enables. But there will be an impact on PMs, development teams and other contributors along the value production chain.

Work for project team members will be less predictable. The way they work will evolve with each new project and they’ll regularly need to consider better ways of achieving desired outcomes.

Many team members working on projects in the technology arena already have experience with both delivery models. They typically prefer to work in a more Agile way because of the increased flexibility. Not going through the same motions time after time, but actually using brain power to find the best possible approach, makes the work more rewarding, more challenging, and more interesting.

Some PMs thrive on consistency and will avoid accepting responsibility for business outcomes, particularly when the stakes are high. They’ll likely find niches of less significant, less important, maintenance-oriented projects, but projects that need to be done, nonetheless. Most PMs, however, will welcome the freedom and the opportunity to make their jobs much more significant, meaningful and quite a bit more fun.

For more information on the adoption of a Hybrid delivery model, please visit the IT Business Management webpage and community.