

Roundtable 55 Transcript

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PROJECT MANAGEMENT

At this 03.23.23 Roundtable 55, NOREX Members discussed leadership buy-in to form an infrastructure PM team; applications in use to track project deliverables and progress; tools utilized for project management; scheduling time for projects daily and across a calendar year; pros and cons of using Microsoft Project Online; combining traditional project management methods (Waterfall) with the Agile methodology (Scrum); working with Agile Development Teams when the business is Waterfall process; platform to work with multiple IT stakeholders who use Jira and ServiceNow; and allocating time for the unexpected work driven by business needs.

EXECUTIVE SUMMARY

[Discussing buy-in from leadership to form an infrastructure PM team](#), a Member with a small IT group finds it difficult to have formal project management. Thus, milestones are never hit, and deliverables are not always delivered on time or accurately. For the past year and a half, he has been pushing leadership to hire a formal project management staff and leadership is still not sold on the idea. A Director, Infrastructure and Support offered if the business does not care if milestones are missed, then it is not really a problem you should be concerned with. You are presenting a solution to something they see as a place that money goes to die. If what you are delivering is substandard and you are having issues with the outcome of projects, that is what to focus on. Go to leadership and ask if they want the projects to be more successful. If so, then we need this in order to deliver the success you are requesting. A CIO shared a link in the chat to a formula equation for change. He stated in order to get change, you must have vision, plus skills, plus incentive, plus resources, plus an action plan. That is the formula for change. If you continue to get false starts, gradual changes, and missed timelines that is likely a lack of incentive to get to the change. If you are having a problem, you can reference the equation and 99% of the time the issue is presented. For example, the formula may show that you do not have the right skills, therefore there is anxiety about the change.

[On the topic of applications used to track project deliverables and progress](#), a Specialist, IT Projects shared her organization is a multi-tool shop. Their PMO is using Microsoft Project, both desktop and online. They are making a small shift to Azure DevOps because their App / Dev, analysts, and infrastructure team are heavily using it. With the Azure DevOps, they are still struggling to connect the dots, especially on Waterfall projects. So, they are looking at weekly reporting, connecting this to Power BI for progress updates. They have an IT change advisory group that meets weekly, and they are delivered updates on challenges and the progress made. Then they can look at it from a percentage, graph, Gantt, or any other type of dashboarding standpoint. Another Member stated they are Jira and are moving to have all projects run through Jira and sprints full time. The variability and the availability of what you can do with dashboards, tracking, and having eyes on all the disparate pieces really has made Jira very successful for them. The nice piece about Jira is everybody can have different Jira boards and still pull in all of their cards onto others to keep track of where they are at. An IT Business Analyst said her previous company had started using Aha!. It is a software that helped to consolidate both the Waterfall projects and Agile into one management tool and provide a roadmap for everything. While she did not get very deep into using it, she suggested it is definitely worth consideration.

Additional headline topics:

- [Combining Waterfall PM methods](#) with elements of Agile.
- [Time scheduling](#) – across daily project and calendar years.

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NOREX IT Roundtable 55 Transcript
Project Management
March 23, 2023

Moderator: Good morning, everybody. I'll be your moderator this morning for our discussion around project management. I'm excited to have this conversation and look forward to having some good discussion.

Scott's got a question about forming an infrastructure project management team. He has a small IT staff with projects scheduled out about five years. He wants to create or form a dedicated PM team and to split the projects from operations. Anyone able to give him some tips or advice on getting buy-in from the PM team? Scott, do you have anything else to add to that?

TOPIC: Infrastructure PM team

Scott S.: I just had a question. We have a small team, and it's difficult for us to have formal project management with such a small team. We don't have a dedicated staff for that. Our milestones are never hit, deliverables are not always delivered on time accurately. It's come to the point where I'm trying to get buy-in from leadership to carve out or hire a formal project management staff. It's been a long, ongoing process. It's been about a year and a half, and they're still not completely sold. I'm looking for ways to push this along.

Moderator: Go ahead, Nick.

Nick S.: My first question is, you're saying you're missing milestones and things are getting delayed. Does the business care? If they don't care, it's not really a problem. You're presenting a solution to something that they don't care about. For them it's just a place that money is going to go and die.

I've come from two different extremes. I came from my previous job, which was government contractor, and everything was dates. If you're missing dates, why are you missing dates? And it's like that was first and foremost what they wanted to know, dates and budget. Where I am now, we're okay with shifting priorities as long as we are tracking the project and we know where it's at and what it's at. If dates shift, the business seems to be okay with that.

To me it becomes a point of is this the hill you want to die on? If they're not giving you grief for missing dates or for unclear scope or whatever. To me it's not a problem unless what you're delivering is substandard and you're having issues with the outcome of the project. That's the part that I would approach it at. Say hey, do you want the projects to be more successful? I need this so what we view as success is what you're actually looking for. If they don't care about timelines and they don't care about that stuff, neither should you. If they just want what they asked for, that's the part that I think I would focus on.

Nick S.: <https://www.emerios.com/blog/overcoming-the-resistance-to-change-in-2019#:~:text=The%20formula%20for%20change%20is,V%20x%20F%20%3E%20R>)

Niki S.: To establish an actual PMO / PM Team, leadership HAS to be on board to authorize the resources and budget. But to Nick's point, the company and business units involved in the projects have to care about the timelines and roadmaps. And that is a challenge. If leadership is a stop gap in the process it will be a constant challenge.

Scott S.: Excellent. Thank you. I think we need to get some more clarity from the leadership team.

Shrish K.: The other way to look at it is you could actually do a root cause analysis of why your projects are getting delayed. In that root cause analysis, you can actually present this option. There are multiple ways to present it, but you could also present an option saying that the support team actually does not have time to do this because most of the time that is being spent you can present the time sheets, present the split of time that's available between supporting versus projects, because you need dedicated time for that as well.

Also present the other analysis. Once you are able to do it, showcase it to them. Just adding on to what Nick said. If that's not cutting ice with them, that's not a priority with them. And I think then that becomes really the way of doing business, saying that we will keep on doing projects and I agree to that. We'll keep on doing projects when we get time. That's the approach that they want to take then actually just write it down, send us minutes of meeting, and made everybody agrees to that so that tomorrow they shouldn't come back and say well, they're not making progress. Well, we didn't do it because you agreed on this approach. I think over a period of time, once they see the benefit and agree on that, it's a very different conversation altogether.

Scott S.: Thanks for the conversation. I just met a few other admins and leaders in the manufacturing space and lack of leadership buy-in seems to be a trend in this industry.

Jared N.: 👍

Jill K.: 👍

Nick S.: It also comes down to the resource loading thing. I've come from both places. I'm working in operations, helping support. My last job I was frontline operations as an admin as well as doing project management or project work. It becomes a resource loading question, and that's the other thing that you have to make sure you're tracking accurately is how much of my time is dedicated to projects or operational support. Your resources are finite, so if operational support is faltering because now, they're pushing for the latest hot button project to be completed, you need to be able to bring that back to them and say we're failing over here because you're now asking for this over here. I either need a resource to dedicate to this side or I need an additional resource over here so we can make sure we're keeping everything afloat and we're not stealing from Peter to pay Paul. That's a lot of times what ends up happening when you have those split resources.

Bubba M.: Sounds like you may look at the formula for change and it will help find the problem.

Moderator: Bubba, you put something in the chat. Did you want to say anything?

Bubba M.: There's a formula equation for change. Maybe you guys have not seen it or not thought of it the way that I look at it.

Basically in order to get change, you have vision, plus skills, plus incentive, plus resources, plus an action plan. That's really the formula for change. If you continue to get false starts or gradual changes, what we're talking about here, we're missing the timelines. That's probably a lack of incentive to get to the change. You can Google the formula and probably come up with the picture that I'm talking about. I'll try to find a link real quick for that, if I can find it. I've always found this to be very helpful for me. Here we go. There's a link. I'll put it in the chat.

Moderator: Okay, very good. Thank you.

Bubba M.: You can always back into the equation, and honestly, about 99% of the time it'll tell you where your problem lies, what you're missing in the formula to get the change that you're looking for.

Moderator: Great. Is there a document associated with that?

Bubba M.: I just put the link in the chat. <https://www.linkedin.com/pulse/equation-change-quick-read-nelson-javier-meija/>

Moderator: Oh, yeah, I see.

Bubba M.: Like I say, it's not perfect. If you're having a problem, a lot of times you go back to the silly equation and boom, it'll jump off the plate at you. Oh, wait! That's true. We don't have the right skills therefore there's anxiety about the change, and that's in the formula.

Jared N.: We have been having issues with leadership buy-in. ROI based discussions have helped but be conscience on what costs they care about. For example, ours don't care as much about labor costs saved and we have to approach it differently.

Cheryl L.: I was just going to ask you, Scott, what's preventing you from just going ahead and doing and trying it? See what happens. Instead of asking for permission, just pull the trigger. It might just be best to just go ahead and prove that this is the right course of action.

Jim J.: #forgivenessoverpermission 😊 Sometimes that is necessary!

Scott S.: Yeah. I want to do that. We don't have anybody available. We have like three people on our whole team, and we barely keep operations going, so it's difficult in general to add staff. It took me three years to get the third person on our team.

Nick S.: Scott, sometimes the right answer is to let things burn, unfortunately. You may be doing too good a job and hiding the pain points. 👍

Cheryl L.: Wow, okay.

TOPIC: Applications used to track project deliverables & progress

Moderator: Dawson has a question. I don't know if Dawson is on, but I believe Cheryl is with the same company. Are you able to share what applications you're using to track project deliverables and progress?

Cheryl L.: We use Jira and do tickets through the Jira system to practice and to track all of our work. I'm guessing he's looking for other options in seeing how other companies track a variety of different things. I guess one of the things is tracking contracts, tracking when we have audits, and that sort of stuff.

Dawn L.: A previous project I worked on used DevOps. Great tool.

Niki S.: We are a multi-tool shop. We do have a PMO, and our PMO is using Microsoft Project, both the desktop and the online. We are making a little bit of a shift to Azure DevOps because our App / Dev and analysts and our infrastructure team are heavily using those. It's a combination. We're new

in the Azure DevOps space from a project management standpoint, and some of us are still struggling with how to connect the dots, especially on Waterfall projects.

But what we have been doing is looking at weekly reporting, connecting that to Power BI for progress updates. We have an IT change advisory group that meets weekly and gets updates on projects. We can give those updates on what our challenges are, what our progress is, and then we can look at it from a percentage and graph and Gantt, any other type of dashboarding standpoint. We also do the milestones. When we use the project, we definitely mark those items, the deliverables, as milestones. We are shifting a little bit more to a sprint-based functionality, because that seems to work with our teams a little bit better. It's just kind of a moving target. But we're using a hodgepodge of tools too. Really depends on the project and depends on what we need to deliver. It's not one succinct solution.

Moderator: Okay, thanks Niki. Buzz?

Buzz W.: Good morning, everyone. We're Jira. We've been Agile probably for about the last 5-7 years, somewhere in there. Starting off, of course, with the developers. But we will move full time into all projects now are run through Jira and sprints. Any infrastructure projects, any work that comes in and out. Even our auditors are now using Jira to do their audits with sprints, which, if you haven't done that, it really changes the complexity of an audit and makes it much easier and more aware.

The variability and the availability of what you can do with Jira as far as dashboards, tracking, and keeping an eye on all the disparate pieces really has made it very successful for us. We tried all of the other ones out of the box that came out, and Jira really made a difference for us as far as moving forward to manage different projects. Doesn't matter where it is. I think that's the nice piece about Jira is everybody can have different Jira boards and you can still pull in all of their cards onto yours to keep track of where they're at. It is a very versatile tool, and they keep making great improvements to it all the time. Thank you.

Shrish K.: I echo the sentiments shared earlier. We are a multi-tool shop. We have Jira, we have Project, there are some teams that use Trello, there are some teams that use Asana. A different thing that we are trying these days actually working on identifying a PPM tool that will basically integrate all of these, because the teams are very resistant to change.

Some people like Trello and they don't want to move away from that. We are also looking at different PPM tools that we'll be able to directly integrate with these, and then you can get an enterprise view of all the projects, how they are progressing, and things like that. That's something that we are looking into. I'll be glad to share more details later. I think that's a separate discussion topic in itself. We haven't finalized yet, though on that.

Judy A.: My previous company had just recently begun using Aha!. It helped consolidate both the Waterfall projects and Agile into one management tool and give us a roadmap for everything. I didn't get very far into using before leaving that company, but might be worth looking at.

Moderator: Okay, all right. Judy, you had put a comment in the chat. Do you care to expand on that at all?

Judy A.: Sure. I had recently left a company where we had just started using Aha!. It's a software that creates roadmaps and helps manage both Waterfall side and Azure side. I didn't get very deep into using it, so I can't super vouch for it. But I know our director who brought it on board absolutely loved it. She had used it at her previous company, so it might be worth looking into, just to have another thing on your list.

Buzz W.: One other great feature of Jira is its OOTB ability to connect to ServiceNow and create Jira cards directly from ServiceNow requests. We have started using FigJam instead of Visio for visuals.

TOPIC: Project Management Tools

Moderator: Okay, thank you. Anyone else have any comment before we move on to the next question? Okay. What tools are people using for project management? The next question is, if you have PM tools, are they enterprise-wide or just for certain departments like IT? I know Hesther is not on. Does anybody have any comments on this question?

Sandy B.: We've been using Monday.com for seven months now. It's been pretty transformative at our institution. The reason is that it allows a lot of people to collaborate on one project. We can easily sprint up their many templates. We've been able to set up an entire project management environment easily in one workspace with decision, loss, risk registers, project retrospectives, lessons learned. We just did one of those for the first time. We set up a template that we can duplicate for new projects easily.

One of the things I'm most excited about is that it is starting to grow as our functional users get involved with our projects and they're wanting their own workspaces. We're also using it for process improvement and repeatable processes. In higher ed we have a lot of offices that have to do the same projects, like federal recording, graduations, whatever. If you do the same things year after year, there's a huge list of things there to do every year. Pretty prescriptive. We built out a calendar of events within Monday.com. With some items we can manage those projects within that board. We can link back to bigger projects like graduation. Then the whole thing can be archived, duplicated, and used again the next year. Not just IT project management, which is where we started. We have a business partner model, with some of our key users. I'm also able to work with these folks in my business partner goals and use the same tool for managing your internal projects and process. It's really been transformative for us.

Jeff C.: Love Monday.com! Very nice tool. Also recommend Airtable.com as well.

Buzz W.: Our tools are enterprise wise. We are also an E5 MS customer and are heavily using Power BI and Power Automate to create dashboards and automate manual PM tasks.

Shrish K.: Different teams / department use different tools. IT team uses MS Project / Jira but the business teams use Asana, Trello, MS Planner.

Niki S.: ADO is PMO and IT teams only. MS Project is IT, PMO and few select business unit staff. We are in the process of developing a rollout / training on Project for Web for our business unit users that need more functionality than MS Planner offers. We do NOT have an enterprise-wide solution.

Jeff C.: Very user-friendly and easy to collaborate with vendors and third parties.

Shrish K.: We are looking for a PPM tool that will integrate all these project tools but have not zeroed in on a tool.

Trenice C.: We use Monday.com as well, mainly in our IT PMO office and now moving out to a few other departments.

TOPIC: Time scheduling across calendar years and daily projects

Moderator: Thank you. Anyone else have a comment in reference to enterprise or just certain departments for PM tools? How are you scheduling time to work on projects across the calendar year? Also, how are you blocking time to work on projects daily?

Cheryl L.: Again, this goes back to the project that he's working on, which is year-long updates that we need to check on to make sure that all the certificates are happening and the right time they're getting recertified. It's like an over expanding a year project. I think that's what he's asking about.

Buzz W.: Not to sound like Jira is the end all be all to world peace, hunger, and the common cold. But when you start breaking things down into sprints it becomes much easier to manage time and effectiveness. We run all the projects as sprints, and you start off with this is the end goal that we need to do by this date, and you start breaking it down into the two week chunks and then everybody knows what they're doing every day.

We have scrum masters and Agile boards, and we meet. It's very conducive for virtual environments. We're basically reviewing a board, right? It's saying, Buzz, where are you at on this, and what do you need help for? Escalations are much, much faster, much more effective. It just keeps things moving instead of when the old project management style is here's the date we need to make in June. Then everything's great until about two weeks before the end of June. It's like I didn't have anything done, and what happened, and why didn't you tell me. Well, I sent you this email.

All of that goes away when you start doing sprints, get away from Waterfall, start doing sprints. You're going to find your accounting's better, your budgeting's better, your resource management's better. I mean, that is the next evolution of project management, to get into two weeks sprints regardless of what you're doing, and that's that. If I stress one thing, I think that's it. It's like they always think of sprints as far as developing code. And yes, that's where it started. But that is just the tip of the iceberg as far as the effectiveness that you can get in delivery by going to a sprint and an Agile methodology. Jira was built for it so it works really, really well. And it's cheap.

Cheryl L.: Do you have any projects that are extend past like two weeks? And what do you use or recommend for projects that spanned past two weeks for it to actually be delivered?

Buzz W.: I have projects that sometimes go a year because of the size of it. If it goes more than two weeks, then we didn't break it down the right way. We've got to make sure we get those chunks broken down in the right size pieces so that it gets done within two weeks.

The two weeks is the max, right? You can sometimes have one week, like this all has to be done in this week. How are we going to break it down by days? We all have the knee jerks. We just found this out, we've got to get this fixed. Okay, but it helps you prioritize, too, because now you've got all of your stuff labeled out as to what needs to be done. When you have those conversations with leadership and say you want this done? Great. Here's what I've got on the plate. Can you please go talk to this person and this person and let them know that they're going to be delayed because yours is more important? And what happens too with that, it's a two-edged sword. Sometimes they go well, I don't know that I really want to go talk to that person. Let me go see if I can maybe rearrange my schedule a little bit. It brings a whole paradigm of reality into this too, as far as the sense of urgency.

Cheryl L.: I'm guessing then you do like planning sessions every two weeks to talk about what's been delivered and what needs to be delivered next?

Buzz W.: Yes. We call it backlog grooming. We meet every two weeks, and in fact, it was today before this. We go through, are these still the priorities? Has something popped up? Then we also have the process setup for emergency backlog grooming. Something just came up, right? If tomorrow something came up, I can't wait two weeks to say let's make this a priority. We have a process of place to have emergency backlog grooming to say, okay, this just came in. How are we going to do it? How are we going to move the resources around, etc.?

Cheryl L.: Great, cool. Thanks.

Jeff C.: Agile methodology has changed the productivity in our projects and how PMs run the jobs. dev.azure.com/

Kristina Z.: We will block time to work on projects daily for our stakeholders by grabbing blocks and labeling it "CALENDAR TIME: and then project name, test plan, etc."

Bubba M.: Well, maybe I've been doing this so long that a lot of the terms and things that we say now are really the way we've done a lot of this stuff forever. People want to give Agile all the credit and Waterfall a bad name. But if you had done your Waterfall projects into not just milestones but progress pebbles, which is what I call the smaller steps, then all along you were doing the same thing. Progress pebbles are in us and sprints.

DevOps is really using a lot of the Agile, the lean manufacturing principles, and some of the other tools that help us do the same things. I guess I get a little frustrated with the industry thinking that we have this new shining star we go chase. It's like guys, it's really the same thing we've been doing forever. Managing in a way that maybe makes it more popular now is, is what I look at.

Buzz W.: I think the difference between the Agile methodology. I couldn't agree more. Lean's been around since Toyota had tiny cars. The difference is, I think, in project management. And you're spot on right. It's nothing different. It wasn't the rigor wasn't within project management. It wasn't like you must have pebbles. That was the difference.

Bubba M.: Yeah, probably where you were you were. It depended on that, right? I grew up with Ross Perot. That was my first job. But yeah, we had rigor.

Buzz W.: Yeah. It depends on where you were when PM came in. And so I think that's the big difference is like they named it differently. It's like the company that went out of business to somebody bought them, and it's hey, isn't this just like that other stuff? But they figured out a better way to do it. I think that's the way it is. But you're right.

Cheryl L.: Jeff Sutherland did a really good job with marketing Agile and Scrum, and I think that's why it's made it as popular as it has. It is definitely the buzzword, but you're right.

Bubba M.: The finished product has made DevOps very popular.

Buzz W.: Everything can be fixed by this.

Bubba M.: We're just pontificating there.

Moderator: Thanks, guys. Roberta, do you have something to add?

Roberta T.: Yes, I do. Good afternoon, everyone. So, with over 80 different major development projects that are in place at any given time right now, whether it's hotels, casinos, or restaurants, the prioritization of the projects and scheduling the time on it had to be managed at all different levels. That meant that our senior executives had to recognize that during the year, all 240 projects were not going to get done at once.

Trying to find a balance in terms of prioritization of those large enterprise projects versus the small one-off, Agile sprint projects. We had to find a balance for it, and so that meant prioritizing. We've developed line of business councils so that we could work with the business as well as the technology team to come together for each of the work streams to help prioritize the work. There are only so many hours that we have to develop all of these projects and to get their input on prioritizing them, because there are way more projects than we have resources available to get them complete. We've gathered their input on what are your priorities for this year, what you want to pilot, what technology initiatives would you like to see implemented? Then prioritize those and set out a sequence in terms of scheduling the time to work on those projects. We're finding that's working out a lot better for us, because doing so many of the small one-off projects was very difficult to feel that there was progress being made. We're trying to find a balance there, and that's worked pretty well.

TOPIC: Microsoft Project Online

Moderator: All right, thanks Roberta. Great discussions about Agile and Waterfall, and, in fact, we've got a follow up question here in a few slides being maybe a little more in depth on that. Kristina would like to know the pros and cons of using MS Project Online. Those that are using it, please share your thoughts on project management information system, pros and cons.

Kristina Z.: We set up our PMO probably three years ago, and we're using Microsoft Teams. As part of that Microsoft Planner is a very simple tool. It's not as sophisticated as like Smartsheet or some of those other ones out there. The maturity of our PMO is we have quite the spectrum. Planner right now serves our needs for where we're at. However, last year we did need to look at something a little bit more sophisticated, Microsoft Project Online. Not the desktop version, but the online one. One of the requirements in our needs was to have the can't type feature. The planner doesn't necessarily do all that. But the Gantt within Microsoft Online is something that has really been beneficial.

I was wondering if this group, if any of you are using those tools? Our PMO is me and another project manager. We've been dabbling in tutorials and just looking. I think it's rather newer, and Microsoft's probably still working out some kinks with the bells and whistles. I would just be curious from this group if any of you are using it, and would love to either hear now or chat offline as far as some of the wins you've seen, or things beyond what we've noticed with it. Hopefully that helps just provide context with my question.

Buzz W.: Kristina, we looked at it in the early days, Planner, Microsoft Project Manager, etc. It's my understanding it's much better now. There's a lot more features and functionality. I still don't think there's feature parity between it and Jira. It still can't do some of the things that Jira can do. When we looked at it because of the complexity, were actually doing that, Jira and I can't remember the other one. We're looking at to try and make a decision. Jira won out for us. I do know a lot of people that use Planner and Project Manager. Cost from Project Manager makes it difficult to make it enterprise-wide. It's one of those like Visio that they like to give you a little extra push on. That was one of the big pieces that helped us in a decision.

Kristina Z.: Thank you for sharing that Buzz. I should mention that our IT team does use Jira. That is something we use enterprise-wide for marketing requests. When we stood up the PMO we found

what we're looking for with our initiating, planning, executing, etc., we felt like it better fit what we're trying to accomplish in Planner. We work closely with our IT team. They're like our number one customer. I know there's like Kanban boards and other opportunities. I did do a project in Jira several years ago, so that's a good reminder of Jira. If there's something we want to maybe transfer over. Thank you for sharing.

Buzz W.: Yeah. One other thing, too. Besides the Kanban boards they do produce all the Gantt charts, and a really good feature is they have a connector that goes from ServiceNow. So, someone uses ServiceNow and they create a request in ServiceNow, it can automatically go and create a Jira card for you and then report back to ServiceNow and say here's where it's at. This is the Jira card number. We found that to be a really good feature.

Kristina Z.: Okay, great. Thank you.

Moderator: Anyone else care to share their experience with Microsoft Project Online? If you want to reach out to Kristina later, contact NOREX and they can connect you.

Kristina Z.: Could I just do like a unofficial poll in the chat? Could everyone just chat what they're using? I'm just curious if it is Jira, Smartsheet, Monday.com. Thank you.

Benjamin G.: Wrike.

Jim J.: Monday.

Buzz W.: Jira.

Judy A.: MS Project & Jira.

Jodie H.: DevOps.

Roberta T.: We are using Smartsheet, Jira, and Asana.

Denise S.: Planview Agile Place and PPM Pro.

Peter G.: Asana.

Nick S.: Jira for Technology and MS Planner for other teams.

Josh O.: Planview (PPM Pro, AgilePlace).

Dawn L.: Jira and DevOps.

Trenice C.: Monday.

Shrish K.: Jira / MS Project Desktop / Online / Asana / Trello.

Mary O.: Workfront.

Steve G.: Smartsheet.

Sandy B.: Monday.com. We also have some users still on Basecamp.

Sarah L.: MS Project.

Greg G.: Asana.

Jared N.: MS suite and Zoho.

Jeff C.: We use Monday.com, Airtable.com, DevOps, Smartsheet.

Buzz W.: We use OneNote and create a Teams Channel for each project where all communication resides about the effort.

Jared N.: 👍

Tanya S.: My previous org used MS project for 10+ years and loved it. Moved to Project Online a few years ago. It did not have same capabilities as the desktop but liked that it was able to link projects for a more portfolio view. Now using Smartsheet at current org and wish daily to have MS Project back. OneNote over Google Docs.

TOPIC: Project Management Tool of Choice

Moderator: Sure, yeah. Very good. Well, while you are responding to that query from Kristina, I'm going to move on to the next question, which is posed by Peter. What's the tool of choice for managing projects? He's specifically asking Google Docs or OneNote, and he asks what are those with more formal experience training in this arena doing?

Peter G.: For context, we have started using Asana over the past month or so. I'm coming from a shop that did everything in OneNote. We're very heavily involved with Google in my current organization, and we have just a lot of different things going around. I'm just trying to formalize some processes here. I think this is something that is a constant question. I know we already have this unofficial poll going in the chat, so I'm not sure we need to keep spending much more time on this.

TOPIC: Combining Waterfall PM methods with elements of Agile

Moderator: Okay. How do you combine traditional project management methods such as Waterfall with elements of the Agile methodology? I know Buzz, Niki, and others have talked about sprints. Does anyone have anything else in reference to this specific question?

Bubba M.: You can probably figure out my opinion quickly on this. I see some of the things of Agile go back to stuff that we did. But, as I believe Buzz said, the more rigor around it because the daily standup meetings is what we always did in Waterfall. Now they call them a scrum meeting. Same thing, different flavor. Maybe it's hearing things different ways that people start to take a hold of some of these things. If you broke your Waterfall down into very doable chunks, that's really a sprint. If you do a daily standup meeting, that's really a scrum meeting, and you keep your backlog groomed well that's making sure you manage your tasks, your assumptions, your risk, and all those things. They really are more similar than I think a lot of people give them credit for. Maybe that's going to be the topic of the next book I'll write. I don't know. Buzz, you want to write it with me, Buddy?

Buzz W.: I'd love to. For as much as you know, I'd at least want to be able to help you with the forward or say read this book.

Bubba M.: You're a good man. Thank you.

Bubba M.: That's all it is. You want to have your name in the same book. A Buzz and Bubba book. That'd be pretty good.

Buzz W.: B and B. There you go.

Moderator: Anyone else have any comments on this? I don't know if the history of Waterfall and Agile if that was driven by software development and the advent of object orientated analysis and design. Just a question for thought. Cheryl?

Cheryl L.: I think one of the techniques you can use is obviously in Waterfall you've got everything mapped out. You can just take that guide and input it and add it into the sprints. Sprints are mapped out as well. You just have to line those up. I know there's some different techniques, but as far as deliverables are concerned, especially if you're collaborating with the department that is using Waterfall versus a department that's using Agile, there is going to be a lot of that collaboration on making sure the timelines line up. I think that is the most important aspect when you're using both Scrum and Waterfall at a specific organization.

Moderator: Thanks, Cheryl. Jared?

Jared N.: I came to this company that was very Waterfall, and like you said, so many similarities. But the key thing that allowed me to break it down is that even in the Agile process we're talking about phases. We had definition, implementation, validation, conclusion. I was like, cool, we still have those. We're still going to move through them. But just zoom in a little bit and we're going to break it down into our bi-weekly meetings. We're going to break it down into getting our scrums together and all that, and it just took what sounded really scary to someone that didn't know what it was and said it's the same thing. Just a little layer deeper.

Sandy B.: Hi there. We're in the second year of a pretty big project working with software developers and several key functional offices at the institution. Because we're on an academic calendar I feel like we're going to use a hybrid model most of the time. We have some definite deliverables that have to be released at a certain time. A semester schedule of classes, a new registration system by the registration date. It's released to the end users at a specific time, like all students. We have to do that in a Waterfall method.

As some others have mentioned, we break down a lot of that work within sprints for getting it done. We also allow for emerging priorities, because this a big project, and we really weren't sure of some of the things that we're going to have to change on the back end systems as a result of the overarching project. We have become more adaptable in shifting our priorities within a large project and being more flexible around emerging priorities, which is one of the things that you want to be able to do in Agile is not being locked in. Yet we do have those Waterfall deliverables that have to happen at a certain time.

Moderator: Okay, good. Shrish, do you want to comment?

Shrish K.: Sure. One of the things that we're actually also trying, and we definitely go a lot of hybrid. Actually, most of our projects are in the software development space. The initiation part is predominantly based on Waterfall, but I think once we get into development it's purely an Agile-based framework. We're an insurance broker. I think we are moving more towards a spiral methodology than anything. It's more of a Waterfall but we'll be getting more into a spiral model where the

decisions are based more on risk-based outcomes than anything else. And our business understands the risk-based approach much better on an insurance side. We are actually moving more towards the spiral than a very traditional Waterfall, hybrid, or pure Agile.

Moderator: You mentioned it was risk-based. Does that mean you create a risk matrix to begin with?

Shrish K.: Yes, we do, because that's how the business understands it very well. We typically analyze the risk for each and every spiral development that we do. Based on that we get them in the outcomes and then we finalize the plan the network backwards from there.

Moderator: Okay, thanks. Roberta?

Roberta T.: We have a lot of large projects that tend to require us to use the initial Waterfall method. Once the initial release is done, we move into an Agile methodology with sprints to do the smaller releases and development. That's worked well for us. While we're not combining them at the same time, I think our teams are very flexible to be able to move from doing the initial large development into the Agile methodology.

Jeff C.: It's like what Roberta had mentioned. Waterfall = Phases and Agile = smaller jobs / work.

TOPIC: Working with Agile teams when business is Waterfall

Moderator: Can others give suggestions on working with Agile development teams when the business is a Waterfall process? The development teams are Agile, but the business is still in the Waterfall process. Anyone have a situation like that?

Sandy B.: I'd like to address that. We've had some pretty big deliverables that we have to look at in a Waterfall process, because we have to do the development, then we have to test, and then we have to release on a certain date or time because of our academic calendar. The first phase is project as we were requirements gathering, we came up with about 150 action items and some milestones. We have a small development team. They really adapted to the sprint methodology for breaking that work up, prioritizing the work.

One of the things that that helped us do is in any time-boxed work effort see who was doing the work and to allow us to adjust to make sure that it was manageable for the development phase. Then we planned in the user acceptance testing. It helped us also get the time of our functional users because they also got adapted to this schedule.

We have kept the sprint approach on our large projects, even if the deliverables are Waterfall, because it allowed these large work teams or sometimes big amounts of work with small work teams to really divvy that work up in a manner rather than being overwhelmed. How am I going to do 110 things in the next month or six months or whatever? Breaking it up into sprints has really allowed the work to flow forward and the staff to stay less stressed and overwhelmed.

TOPIC: Jira versus ServiceNow

Moderator: Okay, thanks. Is anyone working with multiple IT stakeholders who use Jira and ServiceNow? If yes, what platform have you chosen? I know Jira has been mentioned, and in fact, I think Buzz has specifically mentioned it. Anyone who's using Jira and also familiar with ServiceNow want to comment?

Bubba M.: We use them both here. We use ServiceNow for our main platform, and we use Jira obviously to track our project progress with our deliverables and stuff. ServiceNow seems to work really fine for us.

Moderator: And so, you said you've used both Jira and ServiceNow, is that correct?

Bubba M.: Yes.

Moderator: Do you care to share the pros and cons of each?

Bubba M.: Really, it's probably just the division of labor. We did not like the way that Jira did its ticketing. It did not fit the way we work, but ServiceNow had a good package that helped us put in a ticketing process with some workflows around that, and the reporting coming out of it that my team liked. It was really just our requirements versus the product itself and selecting what was better for our instance.

Roberta T.: We also use both Jira and ServiceNow, but we tend to use Jira for our internal development teams to log tickets. We use ServiceNow for all of our customer-facing issues, like our hotels, our casinos, our restaurants. If the staff has issues with any of their systems, they log them with ServiceNow.

Niki S.: We allow the single business unit that is working in Jira to operate in that platform, and same for teams using ADO. We are hoping with implementation of IntegrationHub we can connect both tools to ServiceNow and gain more transparency into total workloads. Our IT and PMO teams both follow ITIL. It can be hard to translate and explain to business units how it impacts them from a process standpoint, but we are evolving that communication flow.

TOPIC: ITIL

Moderator: Thank you for that. Buzz, you've got a question. Does your company follow ITIL?

Buzz W.: I was just wondering. If you talk project management, you'd talk about anything in technology most people, like ten years ago was like well, you have to be ITIL certified. You need to know all of the different nuances that go forth. I was just wondering how many companies out there are still doing ITIL as their primary source of truth when it comes to standards, operating procedures, and things of that nature.

Bubba M.: Buzz, of course you're getting my opinions a lot of stuff. Now we are old school, and we still use it a lot. While I don't have anybody who's up to date on any of the certifications, we do a lot of the same processes with the service catalog and all of the different things, the artifacts that you're going to find out of the ITIL process. It seems that it fits an infrastructure space really well, which obviously that's what it was designed for, right?

Buzz W.: Yeah, thanks. I had a follow-up question. There's 4 out now. Every day is moving to ITIL 4, at least that's what they want you to do. My question is, how many people that use ITIL are considering moving to 4? But when I'm asked, I say I'm not. The squeeze isn't worth the juice. It just isn't that much different.

Bubba M.: Exactly what I was going to say. That juice ain't worth the squeeze, man.

Nick S.: We look at these, from our perspective at least, as guiding principles but not something that we want to adhere to strictly. Best practices work great on paper, but when you put them into actual practice, they're not the best. We look to them for when we can apply them, and we just pick and choose the pieces that work in the situation that we're using them in. We're doing the same thing for security frameworks. We're looking at NIST, and we only pick the parts that seem to be applicable to us because we're not beholden to any organization to say you need to be this certification, so we don't. I don't think we have any interest in doing that. Unless there becomes some exterior or external requirement that forces that, we just won't bother. It creates a whole bunch of extra work that you have to do that might not actually be useful depending on your situations.

Bubba M.: Nick, I agree 100%. It's the best practice. I've always wondered who's the guy that got to decide they were best. There's a word that we use, CAPDAN. Common as possible, different as necessary. I think that's a better way of looking at some of these things. To be fair, I use the term better practice rather than best practice, and that's a Bubba thing. I think the term best is the end of the road. By using the term better, you're always looking to improve what the last person said, you're going to say, let's do ABC. I say, man, that's a great idea. But if we also did D, E, and F, we're going to get a better result out of that. Personally, the term better practice has always been what we are trying to achieve in this industry. Otherwise, we could write one great piece of code, be done, and sit on our laurels for the rest of our life.

Moderator: That's a great comment. One can always improve. And you reference software. There is no such thing as 100% foolproof software. It can always get better. There's always some bug lurking there that one needs to ferret out.

Bubba M.: Exactly.

TOPIC: Balancing unexpected/unplanned work with planned/strategic projects

Moderator: Yeah, very good. I'm going to move on to some of the Member-voted questions. How does your team allocate adequate time for the unexpected or unplanned work that's driven by business needs and balance that with the planned or strategic projects?

Nick S.: Those are generally conversations I have with the stakeholders on either side. I have a lot of that happening right now where I have competing priorities and finite resources that have to do the execution on both sides. It comes down to a matter of urgent versus important. Urgent isn't always important, and it can wait. But the important stuff, that's the stuff that you need to take care of properly and get it done right. It's one of those things. You can do it right, or you can do it again.

The way I allocate it is find the stakeholders and say I have these two competing things. The business needs to make a decision and say which one of these is more important, because problem A that we didn't think about is happening. What's the fallout? Problem B is, this is planned work, strategic work. What are the cost of doing one and not the other, and which one ends up costing the business more in the long run? Once you have that decision, that chooses for you right away is, where do you lose the most money by putting it off, and that's the one you attack first. Or what's the most detrimental to the business and that's the one you attack. But you have to have the stakeholders involved. That's not a decision most people can make in a vacuum.

Moderator: Thank you. Shrish?

Shrish K.: Just adding on to what Nick said, we actually have a rule of thumb. Whenever we are allocating people working on projects, typically it's either 70 or 80% where people's time are both

working on projects, and then the remaining 20-30% is on the unexpected unplanned work that's purely driven by the business needs. At any point of time, when the business comes back and says this something that I want you to do if it goes beyond this 20-30% allocated, and this is approved by the business.

We get on to a discussion with the business and say well, I can do more, but it's going to affect this project. Now what do you want to do? Do you want to get the project impacted or do you think this is more important? If they say business, the unplanned need is more important, then you mark it as a thing saying that the schedule is impacted because of a business decision and then move on to that. But if not, we keep continuing on that. That's an approach that we have been using. It's been successful.

Kristina Z.: We bring it back to prioritization meeting, twice a month on Wednesday in the morning with executives. If it is smaller in scope, we assess with dev and / or team and push post launch of the project.

Cheryl L.: We schedule time in each sprint to handle unexpected requested. After a few weeks, you generally know how much time will need to be devoted to that.

Roberta T.: In working for a hospitality company, our tendency is to allocate too much time and a lot more time to the unexpected and unplanned work because of ad hoc requests from the business teams. And so one of the things that our company started doing was to establish a centralized work intake committee. It's an intake review board that documents all of the unplanned work as well as planned work. Any new projects that need to be done, whether it's an ad hoc business request, they're all centralized into an intake review board. Then they're all assigned project codes, whether they use internal or external resources to determine how to allocate that time to work on it and find that balance between those strategic projects and then the ad hoc projects.

Buzz W.: Can I ask a little bit of a follow-up twist on this? It might sound foolish, given the world we live in today. But does business ever have the ability to trump risk? And if so, what type of approval process is needed for that? A lot of times the business says well, I need to do this. And you're saying, yeah, you can. But we might as well just give everybody keys, right?

Roberta T.: Is that a general question or is that for me?

Buzz W.: For the general population on the call, how do you handle that when business says here it is, and it's a very risky priority? Who has the final say? How far up the chain does it have to go before someone says okay, we'll do this. But this is what's going to happen, and please have a blue ink party where you're signing in blue ink saying you're going to accept it. That's my general question.

Paula B.: We can help you with that, Buzz!

Moderator: Fabulous question, Buzz! I apologize, we're at the top of the hour now. I guess my recommendation to you, Buzz, is if you really want to brainstorm with a few other people, reach out to your NOREX rep. That could be a good topic for a deep dive. Something that's been recently introduced this year is a deep dive where there's a particular topic for a small group of people who really want to get deep down in the weeds. I apologize for cutting you short there, Buzz, but that would be my recommendation. Thank you for your participation. Have a great week. We look forward to having all of you join us on future Roundtables.

End of discussion

Products / Vendors / Technologies shared in this Roundtable 55:

Agile
Asana
Azure
Change equation formula
DevOps
Gantt
ITIL
Jira
Monday.com
MS Project
PM team
PMO
Power BI
Project Management
Project management tool
Project Manager
Scrum
ServiceNow
Smartsheet
Sprints
Visio
Waterfall