What is an Effective Hybrid Project Manager?

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Complex Projects have been recognized as a major part of the project landscape for the past two decades and have given rise to several agile project management models since the Agile Manifesto was published in 2001. In 2017 Mark Mulally published the results of a survey (Mark Mulally, All is not the same in the World of Project Management, ProjectManagement.com, 3/27/17). He reported that less than 2% of the organizations he surveyed operated at CMMI Level 3 Maturity or greater.

If his conclusion came as a surprise to you, you probably wondered what the other 98% of the organizations were doing? They probably are using approaches that range from some informal "Do It Yourself" model to a carefully crafted and monitored adaptation of a commercial model defined by their organization and to be used on all projects. I know I did and I would like to share an answer with you. I am labelling my answer "Hybrid Project Management." In my opinion Hybrid Project Management is not new to the practice but it is new to the body of knowledge.

WHAT IS A HYBRID PROJECT?

The project landscape is shown in Figure 1. The complex project quadrants are the primary focus of this article.
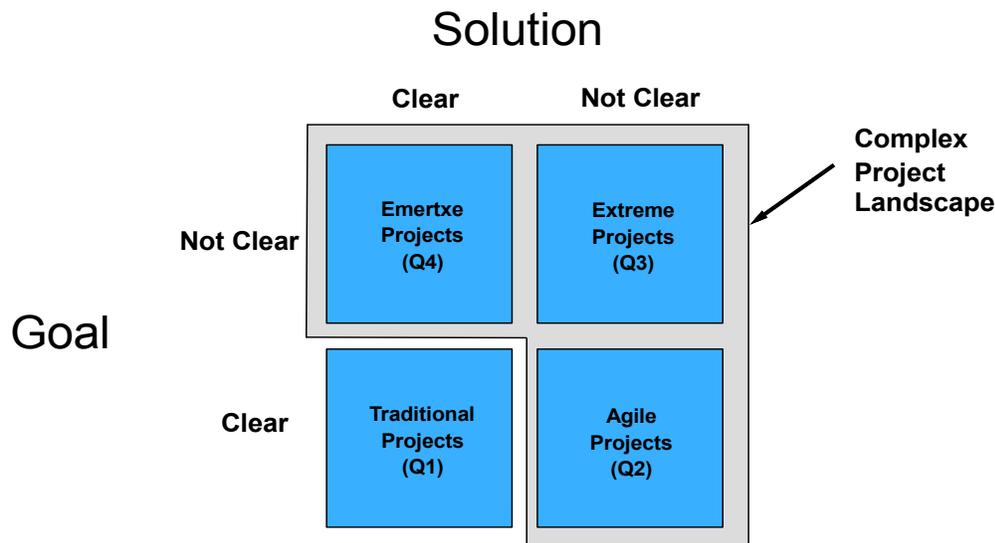

Figure 1: The Complex Project Landscape

The Hybrid PMLC Model applies primarily to the projects that fall in the complex project quadrants. Testimonial worldwide data suggests that over 80 % of all projects fall in the 3 quadrants that

define the complex project landscape. Many complex projects do not fit existing PMLC Models. The project managers know this and attempt to adapt or design project management approaches that do fit the specific situations and conditions of the project. Adaptations do not work very well and a complete design effort should be undertaken. These customized approaches are the Hybrid PMLC Models. You won't find them in the literature because they are unique to the needs of a specific project and often include organizational business processes. Few will be documented and if they are they are probably proprietary.

WHAT IS HYBRID PROJECT MANAGEMENT?

DEFINITION: Hybrid Project Management

Hybrid Project Management is a project management approach for a specific project based on:

> **the physical and behavioral characteristics of the project**
> **the organizational culture and environment of the project**
> **the dynamic conditions of the supply and demand markets**

that are used to custom design a project management approach specific to the needs of the project using an organization's vetted portfolio of tools, templates and processes.

This is intentionally phrased to be a robust statement of what constitutes Hybrid Project Management. It is not a model. Rather it is a framework that is used to design a model that aligns to the characteristics and environment of a specific project.

A Robust Hybrid PMLC Model

Figure 2 is a robust and high-level depiction of the Hybrid Project Management Life Cycle (PMLC) Framework. These three phases apply regardless of the model or approach you might envision for managing your project. This framework is more useful than Agile or Extreme Models in those situations where very little is known about the solution or the specifics of the goal. The framework will lead you through the uncharted waters of any unique project. There will be many situations where the commercially available models or those in use in your organization do not fit the project situation for any number of reasons. The Hybrid PMLC Framework has been designed for just those situations. Keep in mind that solution discovery is still the focus of these Hybrid Models. Each iteration in a Hybrid Model must address not only task completion for newly defined functions and features, but also further solution definition through function and feature discovery.
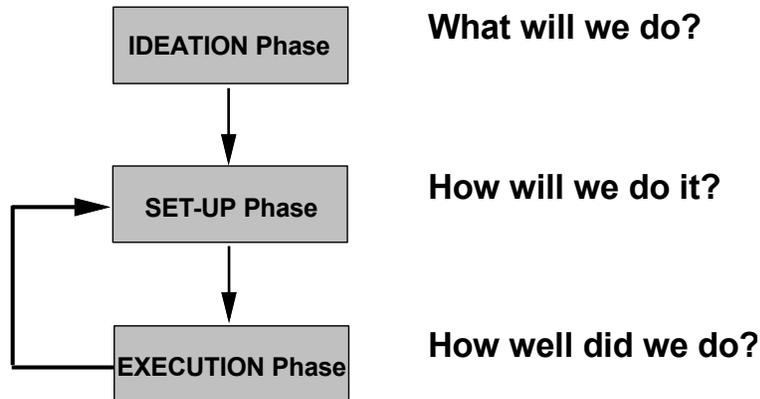
Figure 2: A Robust Hybrid Project Management Model

Ideation Phase

The Ideation Phase of the Hybrid PMLC Model is a high-level activity because not much is known about the solution. For the Hybrid PMLC Model, the Ideation activities merely set the boundaries and the high-level parameters that will be the foundation on which you proceed to learn and discover. The Ideation Phase answers the following questions:

1. What business situation is being addressed by this project?
2. What does the business need to do?
3. What are you proposing to do?
4. How will you do it?
5. How will you know you did it?

Set-up Phase

At this point in the Hybrid PMLC Model, planning is done in general for the entire project and in detail for the first or next iteration. That planning is based on:

➢ any changes to the project or its performance
➢ the current environment in which the project is being conducted
➢ competitor changes, emerging technologies, new products/services, shifts in demand

High-level planning might be part of the Ideation Phase. Based on the known functionality and features that will be built in the coming cycle, a detailed plan is developed. This plan utilizes all of the vetted tools, templates, and processes defined by the organization.

Execution Phase

The Execution Phase will often include establishing team operating rules, the decision-making process, conflict management, team meetings, and a problem-solving approach.
During project execution there will be some oversight monitoring and controlling functions pertaining to the current iteration. A cumulative history of project performance metrics should also be maintained. These metrics should inform the project team about the rate at which convergence to an acceptable solution is occurring. Frequency of changes, severity of change, and similar metrics can help. As part of that control function, the team collects whatever learning and discovery took place and records it. All change requests go are also retained for later processing.
At the close of the project lessons learned, validation of success criteria, installation of deliverables and a post-project audit will occur.

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WHAT IS A HYBRID PROJECT MANAGER?

For the purposes of this article there are two types of hybrid project managers:

> ➢ Occasional Project Managers (OPM)
> ➢ Career Project Managers (CPM)

The Occasional Project Manager

The first type of project manager is the Occasional Project Manager (OPM), sometimes referred to as the incidental or accidental PM. For the OPM, project management is a tool in their toolkit. Their primary avocation is to a functional business area or line of business. They are seldom members of PMI or any other project management professional society. They have no interest in having the PMP designation added to their name.

      The typical OPM will have limited capacity to create a unique management approach and may only be able to adapt existing models. If they choose to use or adapt an existing PMLC Model they will be using a model developed by others and endorsed by their organization. If they cannot follow the recipe for any reason, they may not be able to do their job or be forced to fit their project into the existing project management process that may place it in harm's way.

The Career Project Manager

The second type of project manager is the Career Project Manager (CPM). They are usually members of a professional society like Project Management Institute and have earned professional certification like the PMP. Project management is their avocation. They are always interested in improving the processes they use and their practice of those processes. Hundreds of books and thousands of articles have been written about their challenges and adventures. This is the type of project manager that practices Hybrid Project Management based on defined processes and practices.

      A CPM is not limited to pre-existing project management recipes, even ones they may have created themselves from a previous project. When faced with project anomalies that don't fit existing models, they either adapt an existing model or create a new one to align with the characteristics of the project. The CPM does not rely on any specific approach but generally follow their own preferences.

What Does a Hybrid Project Manager Want?

A HPM wants to use a "path unencumbered by fixed processes" and under their complete control. They avoid non-value-added work and by nature are "lean practitioners"" whether they know it or not. However, without some structured guidance their "lean practices" might unknowingly put them and their business unit in harm's way. Their project management processes are not fixed but are adapted by them to the nature of the project at hand. Convention and established practices are of little importance. What is important is to complete their project to the satisfaction of the project sponsor, usually management. Ideally their project management environment is characterized by the following 12 general parameters:

> ➢ A Portfolio of Intuitive Tools, Templates and Processes
> ➢ Minimal Documentation and Reporting
> ➢ Minimal Non-value Added Work and Waste Avoidance
> ➢ A Lean Systems Perspective
> ➢ Flexibility and Adaptability of Tools, Templates and Processes to Meet Project Needs
> ➢ A Working Knowledge of Traditional, Agile and Extreme Project Management Processes
> ➢ Available Coaches, Consultants and Mentors as Required and When Requested
> ➢ A Supportive PSO not a Compliance Monitoring PMO
> ➢ Meaningful Stakeholder Involvement

> ➢ A Collaborative Engagement with Subject Matter Experts
> ➢ A Partnership with the Business Analyst
> ➢ Risk Assessment and Mitigation Strategies

What Does a Hybrid Project Manager Want?

A HPMgr wants to use a "path unencumbered by fixed processes" and under their complete control. They avoid nonvalue-added work and by nature are "lean practitioners"" whether they know it or not. However, without some structured guidance their "lean practices" might unknowingly put them and their business unit in harm's way. Their project management processes are not fixed but are adapted by them to the nature of the project at hand. Convention and established practices are of little importance. What is important is to complete their project to the satisfaction of the project sponsor, usually management. Ideally their project management environment is characterized by the following 12 general parameters:

A Portfolio of Intuitive Tools, Templates and Processes

The OPM isn't interested in attending rigorous project management training in order to use the tools, templates, and processes maintained by the PMO. Rather they would just like to pick up the appropriate item and use it. That means the OPM portfolio of tools, templates, and processes must be streamlined versions of those used by the CPM or alternatives scaled by the PMO for use by the OPM.

Minimal Documentation and Reporting

The HPM isn't interested in filing and updating any detailed performance or status reports. They are close enough to the project to have an implicit understanding of progress and performance and determine future courses of action. Face-to-face reporting to their manager is appropriate though. Documentation by the HPM may be as simple as a one-page executive summary and a basic report out describing the project as "on-time and on-budget" and if not, the very basic reasons why not. This is usually all the project sponsor desires. As noted previously, the project sponsor is often a busy member of management who only wants a quick update — "a basic thumbs-up or thumbs-down."

Minimal Nonvalue-Added Work and Waste Avoidance

Nonvalue-added activities consume resources but don't directly contribute to the value of the project or product as determined by the project sponsor or the customer. In the context of this series waste is defined as:

> ➢ Anything that doesn't add value to the project
> ➢ Anything that doesn't help create conformance to the customer's specifications
> ➢ Anything the customer wouldn't be willing to pay for
> ➢ Anything you can remove from the project that does not negatively impact the desired end result

A Lean Systems Perspective

A systems approach to the identification and elimination of waste and non-value added activities through continuous improvement in all products and services is critical to the HPM. This is

founded on employee involvement/development, standardization, problem solving, and a team based culture focused on customer orientation.

Flexibility and Adaptability of Tools, Templates and Processes to Meet Project Needs

The portfolio of tools, templates and processes is very personal to the HPM. They should look to the portfolio provided by the PMO and adapt it to their project needs. Other than the PMO they may have included in their portfolio others from their own experiences.

An Operational Understanding of Traditional, Agile and Extreme Project Management Processes

Complex projects dominate the landscape and require agile and extreme PM processes for their successful completion. Complex projects cannot be managed using traditional processes. Without guidance from the PMO the OPM may unknowingly place their project in harm's way by trying to force fit traditional PM processes into complex projects.

Available Coaches, Consultants and Mentors as Required and When Requested

The HPM is not expected to be a hero but rather a project manager who recognizes the contribution that others can make to the success of their efforts. They must be willing to involve others to advise and consult as needed. The HPM remains in charge however.

A Supportive PSO not a Compliance Monitoring PMO

If the Project Support Office (PSO) does not create an environment where their support services are freely offered and truly supportive they will discourage the HPM from ever reaching out for help. The OPM can always use the help. The CPM can always use the consulting support.

Meaningful Stakeholder and Client Involvement

Engagement of stakeholders is one of the most important, yet often one of the most overlooked concepts that plague the HPM. Stakeholders can positively or negatively affect the HPM's project. Stakeholders who can positively impact the HPM's project, who have been engaged in the process, contribute to the project's success. Stakeholders who can impact the HPMgr's project, but have not been engaged, represent not only a missed opportunity but also a potential obstacle to implementation. Engagement of stakeholders goes beyond identification and inclusion. It extends into the concept of meaningful collaboration.

A Collaborative Engagement with Subject Matter Experts

The concept of collaboration is largely ignored in many of the leading project management texts. This methodology of "including others in the conversation" is key to the success of the HPM's project. Because the HPM is not a traditional project manager and may not even have the words "project manager" in his or her title; he or she will often have a part-time or limited project team. The team may only be available under certain conditions and at certain times. Therefore, the OPM may need to rely heavily on Subject Matter Experts (SMEs) to help guide his or her decision-making process. Collaboration with these SMEs, gives the HPM an extended reach, source of knowledge, and influence in the management of the project.

A Partnership with the Business Analyst

There are two distinct parts to every project. The process which the HPM provides and manages and the product which the process is designed to deliver. There will be situations where the HPM has sufficient product knowledge to perform the functions otherwise assigned to

a BA and those opportunities should not be overlooked. A second pair of eyes will always benefit the HPM's decision making.

Risk Assessment and Mitigation Strategies

Risk assessment and mitigation may be accomplished by the HPM through the use of tools, templates and processes discussed above. By engaging the project team, involving stakeholders, and engaging SMEs, the HPM has the best chance of mitigating undesirable risk and leveraging desirable risk. Again, the concept of "not going it alone" is key.

What is a Project Support Office (PSO)?

Naming it the PSO instead of the PMO sends a significant message. The PMO is often characterized as a monitoring and standards compliance function. It may have support roles but they take a second seat to the monitoring and compliance roles. The PSO on the other hand sends the message that it is first a support unit. The organization may also have a PMO but include within it a PSO to support the needs of the Hybrid Project Manager (HPM).

The PSO has a significant role to play across all three Phases in response to the needs of the HPM community. An HPM wants to manage their projects using a "path unencumbered by fixed processes" and under their complete control. They avoid nonvalue-added work and by nature are "lean practitioners"" whether they know it or not. However, without some structured guidance their "lean practices" might unknowingly put them and their business unit in harm's way. Their project management processes are not fixed but are adapted by them to the nature of the project at hand. Convention and established practices are of little importance. What is important is to complete their project to the satisfaction of the project sponsor, usually their direct management. Ideally their project management expects the PSO to support their 12 general parameters. Here is how the 12 general parameters are distributed across the three Phases of the Hybrid Project management Framework and what the support expectations should include.

Across all Phases

A Portfolio of Intuitive Tools, Templates and Processes

This portfolio is one of the Unique Value Propositions (UVP) included in the Hybrid Project Management Framework and the PSO is its steward. It should anticipate the needs of the HPM and inventory a broad selection to meet those needs. Part of its responsibility will be to encourage submissions by the HPM community for evaluation and inclusion in the portfolio.

Available Coaches, Consultants and Mentors as Required and When Requested

The HPM is not a professional or credentialed project manager. Most of their project management skills are the result of on the job experiences. So when an unusual situation arises they have to reach out to find a solution and that means having that resource available to them and known. The PSO needs to provide access to that information. That could simply be an online directory that lists skills and competencies, who has that and how to contact them for help.

A Supportive PSO not a Compliance Monitoring PMO
The PSO is a reactive service not a proactive management service. The HPM goes to them when they need them not when the PSO needs something from them. The PSO puts out a menu of support and waits for needs to arise.

A Collaborative Engagement with Subject Matter Experts
The PSO support services must take the HPM from whatever level of expertise they might possess and help them solve their problems.

A Partnership with the Business Analyst
The Business Analyst assigned to the HPM's business unit will be a frequent partner with the HPM and be the first professional the HPM reaches out to for help.

IDEATION Phase

Meaningful Stakeholder and Client Involvement
The first opportunity to establish meaningful client involvement in the project is during the IDEATION Phase where the high-level project definition is developed. That begins with the Brainstorming Session. The PSO can facilitate that session and begin the process of building a collaborative relationship between the client and the developer teams.

SET-UP Phase

Minimal Nonvalue-Added Work and Waste Avoidance
The HPM is only interested in completing his project to the satisfaction of his manager, who may be reporting beyond the requests of the sponsor would be an example of nonvalue-added work. The PSO might offer some useful reports for the sponsor such as a Primitive Earned Value Analysis that reports tasks planned versus tasks completed.

A Lean Systems Perspective
The PSO might suggest systems for use by the HPM but must keep them lean if they expect the HPM to use them.

Flexibility and Adaptability of Tools, Templates and Processes to Meet Project Needs
Any tool, template or process contributed by the PSO must have flexible and adaptive properties to facilitate the HPM use of them.

An Operational Understanding of Traditional, Agile and Extreme Project Management Processes
Lean versions of any PMLC model promoted by the PSO must be available to the HPM. Short papers or one day workshops might help in that regard.

EXECUTION Phase

Minimal Documentation and Reporting
The HPM is only interested in those tasks that directly relate to achieving the project objectives. So the PSO needs to offer tools, templates and processes that directly serve that end.

Risk Assessment and Mitigation Strategies
The HPM may have very limited skills and experiences with risk management and probably needs the PSO to provide some leadership on risk management. The more complex the project the more likely that risk will be present and must be managed. The simpler the risk management process the more likely the HPM will include it in their project plan. They are not likely to appoint one of their team members as risk manager. The PSO should consider appointing one of their staff to this position.

Putting It All Together
The data would lead one to the conclusion that the HPM is the dominant player in the project management community. Yet the body of project management knowledge assumes that standard PMLC models are in common use. Mark Mulally [Mark Mulally, *All is not the same in the World of Project Management*, ProjectManagement.com, 3/27/17] would disagree. His research concluded that less than 2% of organizations are currently at a (CMMI) Maturity Level 3 or higher, where there is a consistent process that is consistently adhered to. Assuming his estimate is reasonable the project management community needs to establish the processes and practices that support the HPMgr. This article is a start to meeting those needs.