

Hybrid PROJECT MANAGEMENT: CREATING A PROCESS THAT WORKS FOR YOU

Sometimes a single methodology will not work for your project, scope, deadline, team, or stakeholders. In fact, there are so many factors you have to take into consideration when selecting a process that it might just feel better to create something custom. That's where the new, informal project management method many call "Hybrid" comes in.

THE
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What it comes down to is that innovative technologies, new business models, and project types are forcing project leaders to get smart about how to produce projects. And that means drawing on previous experience and adapting it to a place that helps you work smarter and faster.

Hybrid requires you to have a solid understanding of formalized methods, tools, and even templates that are used in multiple formalized methodologies. When you have that foundational understanding, you can make smart decisions about which pieces will work best for your projects.

At TeamGantt, we call Hybrid "Complete" because it forces you to think about a project from end-to-end to discover better ways to complete the work on time, on budget, and on target.

It's all about crafting your own process.

Key points:

- There's a lot to consider with formalized processes like Waterfall and Scrum and whether or not they will work for your projects. Only you can decide whether they will work for you or not.
- Many large organizations that invest in Agile transformation fail or find it hard to implement. So there's a trend in organizations to combine methods rather than pledge allegiance to PMI or the Scrum Alliance.
- Creating your own Hybrid process requires you to examine your project as well as the people involved in order to make good decisions.
- Making mistakes in Hybrid is common. Remember to make space and time for analyzing how things are going so you can adjust and get better.
- There are no rights or wrongs in Hybrid—it's all about doing what will work best for you.

HOW TO CRAFT YOUR OWN HYBRID METHOD

So you want to build your own process? That's exciting—have some fun with it!

Just know and accept that no process works for all projects, and you might not get it right the first time around. You have to learn and adapt when exploring and creating your own Hybrid method.

These 5 steps can help you make sound decisions as you plan a new project approach:

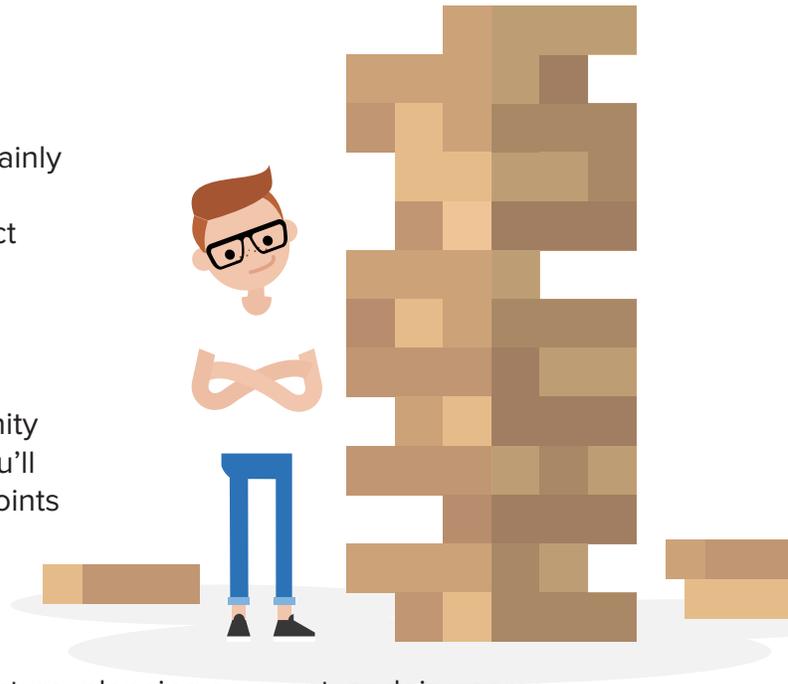
- **Examine:** Understand the project and its people so you can determine what methods will work best for your project.
- **Plan:** Work with your team to create a plan everyone agrees on. Discuss and revise the plan until everyone is fully bought in and accountable for their activities.
- **Confirm:** Once the plan is ready, confirm it with your team and stakeholders. Be sure to let them know it might change and you're ready to adapt as needed. This will reduce headaches and stress if the process needs to shift.
- **Review:** Determine checkpoints throughout your process to talk about how things are working. You'll essentially want to do retrospectives with your team and stakeholders to ensure you're addressing issues and making changes when and where necessary.
- **Adjust:** Make any changes you agreed to, update your plan, and communicate the change and its impacts to everyone involved.

Most of these steps are pretty straightforward. But let's dig deeper into the project and people factors you'll want to examine closely to determine which Hybrid process works best for you.

EXAMINING YOUR PROJECT

No two projects are the same, and there's certainly no one-size-fits-all approach to running them. That's why it's important to evaluate key project details to determine what will work best for you and your team.

Sometimes you'll have all of the details, and sometimes you won't. But this is your opportunity to ask questions and truly understand what you'll be taking on. And when you do it with these points in mind, you'll be closer to finding the right process solution.



The project type:

- If you're building a physical item or structure, planning an event, or doing something that requires a more stepped-out workflow, Waterfall (or more traditional) is probably your best bet.
- If you're working on software or a website that can be continually modified, you're likely interested in Agile methods.
- Either way, be sure to consider your key project tasks and milestones to determine how they can best be planned or accomplished.

The project size/scope:

- If it's a really large undertaking and has a defined deadline—or if development is just a part of the larger project—you'll want to use a more traditional approach.
- Agile methods work really well on smaller, more iterative projects like prototypes, maintenance, or even updates to existing products.
- If you're unsure of the scope, consider more Agile-like methods so you can adapt to the needs of your stakeholders or project.
- Don't have a scope at all? Sketch out rough time estimates for key tasks, then have a discussion with your team about how the project could work.

The project budget:

- If your budget is small or finite, you need to keep activities constrained. That could mean fewer meetings, defined requirements up-front, or even a smaller team if you can pull it off.
- With a big project budget, you'll probably want to break it down and plan things out more.

The project timeline:

- Longer projects give you more flexibility to experiment with process.
- Got a strict deadline? Make careful decisions about reviews and feedback because, when those delays happen, you'll either have to squeeze more work in or extend the deadline.

- Sometimes, when a timeline is tight, it's easier to stack tasks and deliverables to get work done quickly. Just be sure to confirm that with the folks who will be doing the work first.
- If other projects will impact your work, you'll want to think about your approach and how those other projects might impact your work.
- Maybe you're working on a product that can be released as a version one and improved upon. If that's the case, Agile will work well for you.

UNDERSTANDING THE PEOPLE

While project details are very important, it's just as important to evaluate and consult with the people you'll be working with. After all, your team and stakeholders can absolutely make or break your process.

So figure out what will work best for everyone involved, and craft a process that's tailored to them. It'll make you more successful!

Your team:

- What's the experience level of individuals?
- Can your team self-organize and make progress without you checking in often? If so, Agile methods will work for you.
- Are they trained in any methods, or do they have specific preferences? There are a ton of Agile trainings out there, and any expert will tell you that a whole team should be trained—not just the project manager. Agile is a way of thinking and needs to be learned.
- Are there experienced collaborators who will work well together? Or do they work in siloed teams, making it more difficult to communicate or collaborate? The answers to these questions will affect how you plan meetings, brainstorm, team deliverable reviews, presentation prepwork, and other steps that will impact your process and overall timeline.
- Are team members dedicated to the project? If not, how stretched will they be across projects?
- How does your team perceive and value the job of the project manager?
 - If they see you as a babysitter or admin, they won't be able to self-organize and will require a true taskmaster. (If you're in that position, you might want to re-evaluate your role.)
 - If they're looking for a facilitator to help remove blockers, then Agile may be a great fit.

Your stakeholders:

- Are your stakeholders internal (coworkers) or external (clients)? Often, the way you handle meetings, reviews, and feedback will vary depending on the relationship you have with these folks. Make sure you're considering politics and the steps you must take to show respect, build trust, and make smart decisions together.

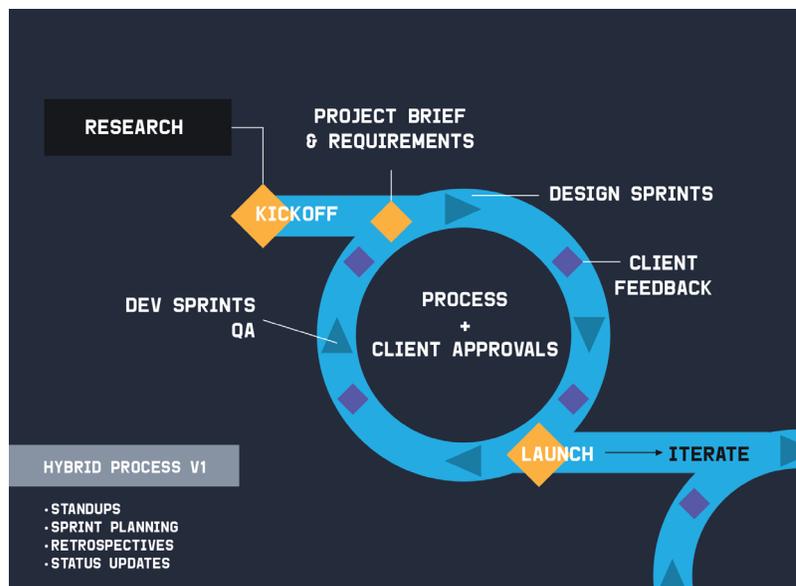
- How many stakeholders are there? You may have a main point of contact, but how many people will be involved in feedback and revisions? And who has the power to approve (or kill) your work?
 - This point is critical. Be sure to identify who you'll be working with and define their level of engagement on the project so you can be sure they'll be there when you need them.
- How much do your stakeholders know about your work or even the project's subject matter? Consider how much time you'll need to devote to hand-holding, and keep in mind your stakeholders likely don't care about your process. Unless you educate them—and get them truly engaged and on your side—they can (and will) do whatever they want, when they want, throughout the process.
 - If you have good stakeholders who have time to be regularly engaged in your project, try Agile approaches. This works especially well when your stakeholders are internal or part of your organization.
 - If you know your stakeholders won't engage, lean on more traditional, stepped-out approaches so you can formalize critical decisions and milestones that build up to approvals.
 - If you're working with clients or external stakeholders, be sure to talk about process to gauge just how much they'll be involved. And be clear about your process when you've got it set because they have the potential to break it.
- No matter what you do, you'll want to plan for unintentional errors and unplanned change, rework, and meetings. It's just the way it is sometimes!

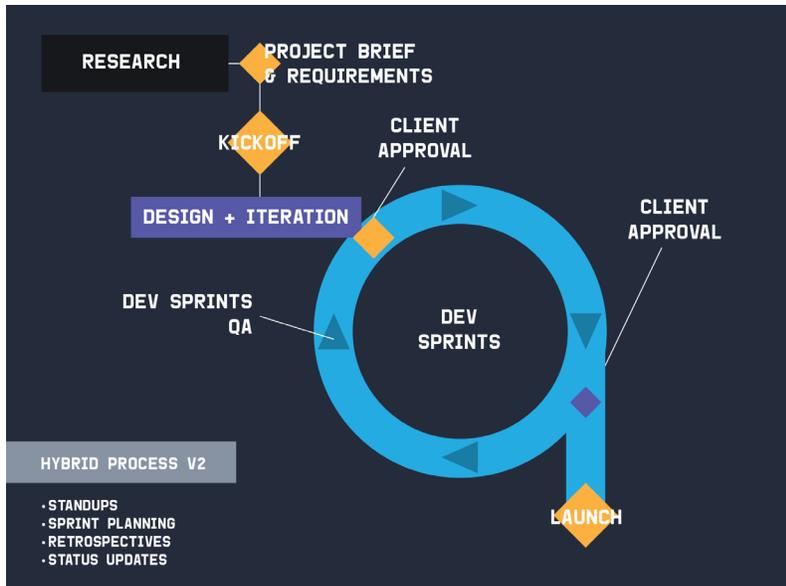
HYBRID PROCESS EXAMPLES

We've mentioned that there's no single way to run a Hybrid process, so there's no single process diagram to describe it. But when you're just starting to figure things out, examples help.

Check out the diagrams below, which both demonstrate Hybrid approaches to designing and coding websites, often used in the digital agency space.

In this example, the Waterfall portion of the project happens in the very beginning, with research leading to a kickoff meeting. It's nearly impossible to do research in an Agile way, especially when it includes stakeholder and user interviews. But the design and development work in this example uses an Agile approach, with sprints and Scrum ceremonies. Notice there's also a plan to launch and continue to iterate.





In this example, there are more Waterfall components to accommodate for stakeholder feedback as it relates to visual design. But after key decisions have been made, the work is then developed in sprints, leading up to a launch.

WHEN TO USE HYBRID

There's no stopping you from structuring your process in a way that works for you. Sometimes teams create Hybrid processes because they want to try something new or different. In other cases, something's simply not working with a formalized method, so they hack it. You can (and should) experiment at your will.

But you might also be wondering when a Hybrid approach can work best for you. Here are a few examples of when a Hybrid process works well:

- You work with innovative teams and technology and must adapt to changing needs.
- You know you'll hit points in a project that require time for presentations that lead to feedback, revisions/iteration, and eventual approval.
- Your team is knowledgeable about different methods and can draw from previous experience to help craft a combined method that makes sense for your project and its people.
- Your team can collaborate and work on tasks concurrently, but also requires a level of management to keep details together and tasks on track.
- You work with paying clients but want to try Agile methods.

INDUSTRIES THAT USE HYBRID

There's no data on who's using informal methods. But when you think about it, this is about breaking away from the formalities of traditional or Agile methods. Many teams in a variety of organizations are hacking methods, including:

- Software development
- Product and service companies
- Digital agencies
- Marketing
- Distribution
- Manufacturing
- Design and engineering
- And more

HYBRID WORKS BEST FOR TEAMS WHO:

- Have educated individuals who understand the ins and outs of process and how their team or organization succeeds
- Are open to working together to plan and execute projects and committed to investing in the process and making it better
- Are open to flexibility and change and can be honest with themselves about when something's not working
- Want to innovate, not only in their work, but also in it how it happens
- Benefit from project leadership and look to one person (typically a project manager) to create plans, schedule work, and facilitate sprints and meetings

ADVANTAGES OF HYBRID PROJECT MANAGEMENT:

- **Holistic approach:** With Hybrid models, you've got to tailor your process to all of the project details, not just the scope. Taking a well-rounded approach means you're deeply engaged in the project and truly in command of the details.
- **Focus on improvement:** The best way to improve is to make note of issues, discuss them, and commit to getting better. The Hybrid approach pretty much forces you to do that.
- **Best of both worlds:** Agile isn't better than Waterfall, and vice versa. Established methods have go-to practices that just work. With Hybrid models, you pick what works best for you. Or you use those great ideas to modify it and create your own. Even better!
- **Ability to adapt:** People hate change, but with Hybrid models, you have to be adaptable. It takes practice, but when you commit to it, it makes change easier. And that can impact teams and even individuals in and out of work.

THINGS TO CONSIDER WITH HYBRID PROJECT MANAGEMENT:

- **Practical experience:** If you don't have practical experience with the models you're combining, it can affect your outcomes. Be sure to study up on principles and practices so you can gain the confidence you need to know you're doing the right thing.

- **Stakeholder understanding:** If you're going off script and your stakeholder is used to something different, make sure you provide the proper level of education and discussion about your process, their involvement, and any other relevant expectations that need to be put in place.
- **Flexibility:** You've got to commit to being flexible—as individuals, as a team, and as partners. If your team and stakeholders aren't bought into setting a plan with the possibility it might change, you're not ready to test new ideas.
- **Communications:** Establishing new ways of working together as a successful team requires constant, clear communication. You'll need to develop a good system for expected communications, reporting, and meetings to keep everyone engaged in the details.

CRAFT THE HYBRID PROCESS THAT'S RIGHT FOR YOU WITH TEAMGANTT

You need a long-term project plan view, but also a Kanban board to manage your sprints. Add a gantt to that list for a visual plan view, and you're golden!

TeamGantt is the perfect solution for your Hybrid plans because it's got all of those needs covered and more. In fact, lots of customers run Hybrid projects and use TeamGantt to keep the details straight.

Here are just a few ways TeamGantt can make managing projects a breeze for you:

- **Plan faster.** Get up and running quickly, and share online plan drafts with your team to get quick buy-in and longer-term accountability.
- **Manage sprints.** By using our new boards feature or the TeamGantt Power-up for Trello, you can manage user stories or tasks within sprints.
- **Untangle project complexity.** With TeamGantt, you can view and share gantt charts with ease and ensure everyone has a full-picture view of your projects.
- **Make change easy.** Update your gantt chart in real time by simply dragging and dropping tasks that need to be rescheduled.
- **Easy team collaboration.** TeamGantt is your one-stop project hub for your team and stakeholders. You can schedule and track tasks, share documents, post notes and comments, plan and review team availability, and even estimate and track time all in one place.
- **Review progress in one click.** Check in on the task level to make sure things are moving along or to let someone know a task is coming due. Or generate overall project health and time reports to keep a constant finger on the pulse of your projects.