Can the 4Ps Coexist in an Agile Arena?

Develop a Winning Strategy for the Intersection of
Portfolio, Program, Project and Product Management

CALLING THE 4Ps IN REAL TIME

Significant change is occurring in operations, service delivery and technology throughout many organizations. There is an increasing emphasis on demonstrating the value of the investments, defining the Total Cost of Ownership (TCO) of applications and services, while driving efficiency through automation and streamlined processes.

Organizations are leveraging Scaled Agile, Kanban, Lean Portfolio Management, Scrum and other new practices to deliver both small and large efforts, while also considering traditional practices in the 4Ps (Portfolio, Program, Project and Product Management) to address gaps in management practices.

Yet as many Practitioners, Managers and Executives can attest, best practices within these domains do not sync well at times. There are common challenges and misconceptions that hinder the seamless integration of traditional 4Ps in an Agile operating model.

In order to help your organization effectively integrate the 4Ps in an Agile arena, imagine your organization is a successful soccer team and let's explore how Project, Portfolio, Program and Product Management play critical roles in orchestrating the Agile game plan.

Learn how the 4Ps can thrive and play well together on an Agile field and discover play-by-play analysis that will help your enterprise build a winning strategy.

 What does a winning team look like?

CAN THE 4Ps COEXIST IN THE AGILE ARENA?

Yes! Not only can the 4Ps coexist in an Agile arena, but they can help an organization thrive. Many of the challenges and roadblocks you might run into with Agile, scaling Agile or Scrum can be remediated by incorporating traditional practices.

Let's use the analogy of a soccer lineup at an Agile stadium to explore the intersection of good Project practices and Agility.

4Ps WORK TOGETHER LIKE A WINNING SOCCER TEAM

Portfolio Management
can be seen as the Team Owner, who allocates resources, leads the team and works with other team owners to advance the objectives of the enterprise.
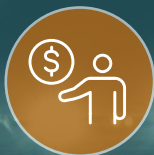
Program Management
can be seen as the Head Coach, who pulls the offense and defense together to operate as a comprehensive Program.

Delivering Value

Product Management
can be seen as the Star Player, who scores goals and delivers value with customers.

Project Management
can be seen as the Team Captain, who makes sure the ball progresses down the field.

WHY CONSIDER TRADITIONAL 4P PRACTICES IN A LARGE AGILE ENTERPRISE?

Why should organizations, including Public Sector and Commercial enterprises, still consider the 4Ps in their Agile enterprises?

The 4Ps can be leveraged within an Agile operating model to align initiatives with organizational strategic goals and objectives. They can also provide guidance and structure to address the following challenges:

COMPLEX AND INTERDEPENDENT PROJECTS

With multiple Projects happening concurrently in a large enterprise, coordination is required across multiple teams, departments or functions. It can be difficult to manage numerous Projects effectively without leveraging all available tools and methodologies.

LIMITED RESOURCES

Limited budget, technology and staff must be effectively allocated to adequately resource multiple Projects, Programs and Portfolios.

STAKEHOLDER ENGAGEMENT

Understanding your Stakeholders – including identification, engagement, expectations and concerns – is crucial to the success of any Project, Program or Portfolio.

REGULATORY AND COMPLIANCE REQUIREMENTS

Delivering value and ensuring compliance within an Agile framework can be challenging due to the complexity of regulatory requirements that must be met.

RESISTANCE TO CHANGE

Transformational changes in processes and technology will likely result in considerable resistance to change.

> "BY ALIGNING PORTFOLIO, PROJECT, PROGRAM AND PRODUCT MANAGEMENT GOALS WITH AN AGILE OPERATING MODEL, ENTERPRISES CAN MOVE QUICKLY AND EFFICIENTLY, LIKE A WELL-COORDINATED SOCCER TEAM."
>
> -Mason Chaudhry
> CTO, xScion

PORTFOLIO MANAGEMENT: TEAM OWNER

The Portfolio Manager plays a role similar to a Team Owner, responsible for assembling resources, setting priorities and consistently reprioritizing to drive success. For example, each season the team starts out with clear priorities, a plan for allocating resources and defined Agile teams that are going to achieve goals and carry the team to victory. However, once the action begins, unexpected events can unfold, leading to significant changes that must be navigated. In the face of unexpected challenges and opportunities, it becomes necessary to adapt by reshuffling and resetting priorities for high-value initiatives.

Agile Portfolio Management brings a variety of challenges, including prioritization, alignment, resource allocation, metrics and reporting, governance and organizational change. Organizations that effectively tackle these challenges will gain advantages such as enhanced flexibility, responsiveness and the ability to deliver value to customers with greater speed and effectiveness.

WINNING GAME:
GENERAL SERVICES ADMINISTRATION (GSA)

An example of how this works in the Public Sector is the GSA. The GSA is a large federal agency that provides products and services to agencies throughout the Federal government.

The GSA was an early adopter of Agile in the Federal government. It realized that due to its unique mission serving other Federal agencies, it must blend some things that traditionally worked well for it, especially regarding capacity and demand.

The GSA created its own culture of Portfolio Management, enabling it to adapt and deliver products and services that meet the evolving needs of the Federal government as they arise. The GSA leverages an Agile operating model and is an Agile organization, but it also recognizes the value of Portfolio Management. By incorporating successful practices from the past and blending them with Agile principles, the GSA effectively leverages a hybrid approach to drive its operations and deliver optimal outcomes.

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TIPS FOR EFFECTIVE PORTFOLIO MANAGEMENT

ESTABLISH A COMMON LANGUAGE AND FRAMEWORK

Establish a common language and framework for Portfolio Management to help bridge the gap between traditional and Agile approaches and to ensure all parties are on the same page.

IDENTIFY THE STRENGTHS AND WEAKNESSES OF EACH APPROACH

Understand the strengths and weaknesses of traditional and Agile Portfolio Management to effectively determine the most suitable approach for different initiatives or projects.

ALIGN THE PORTFOLIO WITH BUSINESS OBJECTIVES AND STRATEGY

Ensure that the Portfolio is aligned with business objectives and strategy to deliver value to the organization irrespective of the chosen approach, whether traditional or Agile Portfolio Management.

PRIORITIZE INITIATIVES BASED ON VALUE

Prioritize initiatives by evaluating their value to the organization and their alignment with business objectives.

ALLOCATE RESOURCES

Allocate resources based on capacity, demand and prioritizing the highest value initiatives.

FOSTER A CULTURE OF COLLABORATION AND CONTINUOUS IMPROVEMENT

Foster collaboration towards shared goals and facilitate continuous adaptation and improvement of the Portfolio Management approach over time.

SUPPORT ORGANIZATIONAL CHANGE

Take action to address changes in transformational processes and roles.

PROGRAM MANAGEMENT: TEAM COACH

When managing Programs and the large-scale delivery of Projects or Products, Program Management plays the role of the Team Coach who is coordinating the initiatives and managing the different plays. The Team Coach's job is to ensure that the various Projects in the Portfolio are organized and well-coordinated, provide guidance and make sure that there is a solid game plan in place.

Program Management principles have value even in an Agile Operating Model. Agile organizations may have multiple teams working on different initiatives, and Program Management helps to coordinate those initiatives to ensure they are aligned with the organization's goals and objectives. Use a prioritization framework to identify and prioritize the initiatives that are most critical to achieving the Portfolio's strategic objectives. The framework can include criteria such as strategic alignment, value, risk and feasibility.

WINNING GAME:
UNITED STATES DIGITAL SERVICE (USDS)

The USDS provides Information Technology consultation services to other Federal agencies. It delivers time-boxed, hands-on engagement for Programs like expanding the scope of the COVID vaccine search tool or simplifying Veteran-facing services on VA.gov. The USDS is a great example of collaboration with agencies to deliver a better government experience through the use of technology.

The USDS embeds small Program teams of technical experts into existing Programs and agencies. These teams balance Program Management with Agile methodologies to accelerate adoption of modern best practices. USDS Program Managers oversee the organization's large, cross-functional initiatives and work closely with teams to make sure that everyone is working toward the same goals. The USDS uses Agile methodologies and Program Management to deliver high-quality products and services.

TIPS FOR EFFECTIVE PROGRAM MANAGEMENT

DEFINE A CLEAR PROGRAM VISION

Set and articulate the objectives and align them with the organization's strategic goals.

USE AN ADAPTIVE GOVERNANCE FRAMEWORK

Define clear decision rights and accountability while making room for flexibility and adaptation.

FOCUS ON OUTCOMES, NOT OUTPUTS

Define and prioritize business-driven outcomes to drive success, rather than getting caught up in Platform delivery or narrow metrics.

SUPPORT AGILE TEAMS

Empower Agile teams with consistent structure, guidance and support to enhance performance and motivate the team.

PROJECT MANAGEMENT: TEAM CAPTAIN

As the Team Captain, Project Management can be effective in Agile methodology, but should be tailored to fit the unique needs and characteristics of Agile projects. By adopting an Agile mindset and using Agile-specific tools and techniques, Project Managers can help teams deliver successful projects in an iterative and flexible way.

Organizations might be moving away from Project Management, yet an Agile Project Manager is still a great role to drive large efforts. While organizations may still have Scrum Masters, Release Train Engineers and other roles, Agile Project Management provides the best of both worlds. You can take in certain practices in Project Management that have worked well for the enterprise and integrate with good, Agile operating principles.

WINNING GAME:
IBM

Project Management principles can be effective in Agile methodology. You might not need all the governance and gating that comes with traditional Project Management, but there are elements of Project Management that should flourish with a unique flavor for the Federal Reserve System that will ensure you have compliance and governance.

IBM is a good example, as it is well known as a forward thinking, early adopters and early builders of technology. IBM follows a very robust Agile operating model but realized its need for traditional Project Management practices. IBM has an Agile Lifecycle Manager (ALM) tool and Project Management practices built into its Agile Project Management philosophy.

IBM understands that it is a unique organization that benefits from its own blend of Agile and Project Management in building Products and providing services. IBM worked with its Practitioners to draw from Agile and Project Management to see what works well in its ecosystem.

TIPS FOR EFFECTIVE PROJECT MANAGEMENT

PRIORITIZE TASKS AND FEATURES BASED ON VALUE

Optimize Project value by prioritizing tasks and features based on their impact, using User Stories, Backlogs and Sprint Planning meetings in Agile Projects.

TRACK PROGRESS, ADJUST COURSE AND IDENTIFY ROADBLOCKS

Drive Agile Project success through continuous progress tracking, adaptive course adjustments and proactive identification of roadblocks using visualization tools like Burndown Charts and Agile Boards.

COMMUNICATE USING CLEAR AND OPEN CHANNELS

Promote Agile team collaboration through facilitated communication channels and activities led by Project Managers, including regular Stand-Up meetings, Retrospectives and other team-building activities.

MANAGE RISK AND ADAPT TO CHANGING CIRCUMSTANCES

Navigate uncertainty in Agile Projects by proactively managing risk and embracing adaptability, incorporating regular risk assessments and contingency planning.

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PRODUCT MANAGEMENT: STAR PLAYER

The Star Player is the one in the middle of the action, running down the field, executing the plays and scoring goals. That's the Product Management role. They represent the team and are responsible for the quality and success of the Product, making sure it meets customer needs and aligns with the organizational strategy.

Product Management is the closest discipline to Agile. There are several challenges within an Agile organization that Product Management can help solve. These challenges include enhancing customer satisfaction, effectively collecting and analyzing data, and sharing valuable insights derived from data in a manner that resonates with all Stakeholder groups.

In Agile delivery, with multiple teams collaborating on an Agile Release Train (ART), effective coordination between teams and other services becomes crucial to avoid derailment. Teams often myopically focus on their tasks and fail to see the big picture and how their efforts contribute to organizational goals and objectives, which can create conflict and delays.

WINNING GAME:
CENTERS FOR MEDICARE AND MEDICAID SERVICES (CMS)

CMS places a strong emphasis on customer centricity. Its Product Managers work closely with the end users to understand their needs and gather feedback. CMS uses customer data to inform Product decisions and prioritize features.

CMS is partnering with USDS to modernize the Medicare system. It created a new Cloud environment for claims processing which positions the Medicare system to scale and adapt rapidly as it changes its underlying business processes. The Medicare Payment System Modernization Project is a multi-year effort. It re-envisions the technology platform as well as the design and research processes. It is being delivered through Product Management practices.

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TIPS FOR EFFECTIVE PRODUCT MANAGEMENT

EMPHASIZE CUSTOMER-CENTRICITY

Put the customer at the center of the Product development process by prioritizing their needs and preferences, ensuring effective communication and guidance throughout Agile ceremonies.

USE AN ADAPTIVE PLANNING APPROACH

Optimize Agile planning with adaptive strategies, leveraging comprehensive data and insights from Product Management for informed adjustments and goal achievement.

PROMOTE TRANSPARENCY AND VISIBILITY

Boost visibility in Agile teams through real-time collaboration using collaboration tools and regular updates, inspired by Product-based organizations like Slack and Spotify.

USE DATA TO INFORM DECISION-MAKING

Enhance metric utilization in Agile environments by shifting focus to business value and Agility, leveraging the Star Player's decision-making ability and continuous learning.

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EFFECTIVELY MANAGE CHANGE AT THE JUNCTION OF THE 4Ps

Certain plays are required in any organization when you look at the 4Ps in an Agile operating model. Below are key plays to ensure that your ART, Scrum team, Project or Portfolio or Program team has the requisite elements of the 4Ps to be successful.

ESTABLISH A CLEAR CHANGE MANAGEMENT STRATEGY

Establishing a robust Change Management strategy is essential, particularly during technology transitions. Prioritizing people is paramount, with defined roles within the team and careful consideration of the necessary support for team success. A comprehensive strategy should articulate goals, objectives, expected people outcomes and address potential risks, encouraging a proactive approach rather than reactive responses to change within organizations.

COMMUNICATE EFFECTIVELY AND ENGAGE STAKEHOLDERS

Ensure initiative effectiveness by establishing a comprehensive communication strategy and plan. In Agile organizations, it is crucial to avoid fragmented communication approaches and instead, proactively consider various scenarios and Stakeholder groups. Identify the target audience, their interests, information needs, key messages and suitable communication channels. Embrace asynchronous channels and leverage collaborative tools available within your organization. Regularly solicit feedback from Stakeholders, utilizing tactics such as PI-level or Sprint demo reviews, and prioritize acting upon received feedback to drive continuous improvement.

USE DATA TO INFORM DECISION-MAKING

Decision-making based on data is still a common struggle for many individuals. Adopt a comprehensive data-driven approach by considering data at multiple levels, including organization, initiative, Program, Project or Product. Integrate these diverse perspectives to derive meaningful insights from the data and strategically pose relevant questions to enable informed, evidence-based decision making.

BUILD CAPACITY

Agile Programs often struggle with capacity. Proactively address capacity challenges in Agile Programs by identifying the critical skills and competencies required to deliver services and Products, including supporting skills. Ensure effective capacity planning by offering regular training, mentoring and coaching to empower teams and foster their ongoing growth and development.

CALLING THE 4Ps IN REAL TIME

Conclusion

To ensure that the 4Ps are being run effectively within an Agile Operating Model, Practitioners, Managers and Executives need to work collaboratively. First, they need to establish a clear understanding of the organization's strategic objectives and vision. They should then align their Portfolios, Programs, Projects and Products with those objectives and vision. Next, they need to establish governance processes that promote transparency, accountability and collaboration. This includes defining roles, responsibilities and decision-making authority at each level. Practitioners, Managers and Executives should also establish effective communication channels to keep everyone informed and engaged. Finally, they should embrace continuous learning and improvement, using data-driven metrics to track performance and identify opportunities for enhancement.

By working together, Practitioners, Managers and Executives can ensure that their enterprise's Agile Operating Model is being run effectively, delivering maximum value to customers and Stakeholders. Want your team to score? Check your playbook and scorecards to deliver.

About xScion
Turn Change Into Value®

xScion®

xScion is a technology consulting firm that helps organizations in highly regulated industries Turn Change Into Value® through Business Agility, Cloud Transformation and Change Management expertise. As a certified Woman-Owned Small Business with more than 20 years of experience supporting Regulatory Technology, xScion provides both domain experts and tailored solutions to help organizations navigate complex compliance and technology requirements efficiently in financial services, healthcare, nonprofits and public sector industries.

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