

# RefineM

## Project Approach and Tools Customization

NK Shrivastava, PMP, RMP, ACP, CSP, SPC4  
CEO/Enterprise Agile Coach - RefineM

# Agenda

1. Introduction
2. Approach Customization – Agile, Waterfall, Hybrid
3. Case Study – Customization in Practice
4. Tools Customization
5. Quiz – winner will get \$10 Amazon gift card
6. Summary / Q&A

# RefineM's Virtual Lunch & Learn

This is a monthly webinar delivered during the lunch hour in the first week (Wednesdays) of every month.

**From next month it will be on first Thursdays.**

It's designed to help you learn while you eat lunch, providing a relaxed environment to enhance your experience.

The monthly webinars will cover a variety of Project Management / Agile topics.

# Your Expectations

What are your expectations from this webinar?

Go to [menti.com](https://www.menti.com) to answer



Helping organizations  
turn their project  
management capability  
into a *competitive  
advantage*

## NK Shrivastava PMP, RMP, ACP, CSP, SPC4

- CEO/Enterprise Agile Coach since Dec 2011
  - Agile Transformation/Coaching/Adoption
  - Project Management/Process Improvement Consulting
  - Project Management and Agile Training
    - ✓ PMP Exam Prep - <https://refinem.com/pmp-exam-prep-course-public/>
    - ✓ PMI-ACP Exam Prep - <https://refinem.com/pmi-acp-exam-prep-course-public/>
    - ✓ Agile Leadership - <https://refinem.com/agile-leadership-course/>
    - ✓ Self-Paced Online Training - <https://refinem.com/self-paced-online-trainings/>
  - Products for Project and Agile Professionals
    - ✓ Essential Gear for Project Managers - [RefineM.com/products/essential-gear-for-project-managers/](https://RefineM.com/products/essential-gear-for-project-managers/)
    - ✓ PMP Exam Simulator - [RefineM.com/pmp-exam-prep-practice-test/](https://RefineM.com/pmp-exam-prep-practice-test/)
    - ✓ Agility Assessment Tool - [Agility.RefineM.com/](https://Agility.RefineM.com/)
    - ✓ Videos – PMP and Agile - <https://vimeo.com/search?q=RefineM>
- 20+ years of successful Agile & Project leadership
  - ✓ Successfully led hundreds of projects of all sizes using Waterfall and/or Agile
  - ✓ Recovered many projects, saved millions of dollars
  - ✓ Implemented numerous process improvements
  - ✓ Coached/mentored hundreds of PMs and executives
  - ✓ Board member of SWMO PMI Chapter (2008-2014)

# What's New at RefineM

Upcoming Free Webinar	Date
Ace Your Daily Standups: Utilizing Best Practices	Apr 7

RefineM Products	Self-Paced Online Training
<u><a href="https://refinem.com/products/">Essential Gear for Project Managers</a></u> <a href="https://refinem.com/products/">RefineM.com/products/</a>	<u><a href="https://refinem.com/course/agile">Agile Fundamentals Self-Paced Course</a></u> <a href="https://refinem.com/course/agile">RefineM.com/course/agile</a>
<u><a href="https://examprep.refinem.com">PMP® Exam Prep Test Simulator</a></u> <a href="https://examprep.refinem.com">Examprep.RefineM.com</a>	<u><a href="https://refinem.com/course/project-management-fundamentals/">PM Fundamentals Self-Paced Course</a></u> <a href="https://refinem.com/course/project-management-fundamentals/">Refinem.com/course/project-management-fundamentals/</a>
<u><a href="https://agility.refinem.com">Agility Assessment</a></u> <a href="https://agility.refinem.com">Agility.RefineM.com</a>	<u><a href="https://vimeo.com/ondemand/refinembusreq">Agile BusReqs Self-Paced Course</a></u> <a href="https://vimeo.com/ondemand/refinembusreq">https://vimeo.com/ondemand/refinembusreq</a>
<u><a href="https://vimeo.com/ondemand/refinempdus">PDU Bundle</a></u> <a href="https://vimeo.com/ondemand/refinempdus">https://vimeo.com/ondemand/refinempdus</a>	<u><a href="https://udemy.com/course/backlog-grooming-for-agile-requirements/">Backlog Grooming Self-Paced Course</a></u> <a href="https://udemy.com/course/backlog-grooming-for-agile-requirements/">Udemy.com/course/backlog-grooming-for-agile-requirements/</a>

# Survey Question

**How much customization does your organization practice?**

- A. No customization**
- B. Light customization**
- C. Significant customization**

**Answer on Menti.com**

Contact@RefineM.com

RefineM 7





# Project Approach and Tools Customization

Refine**M**







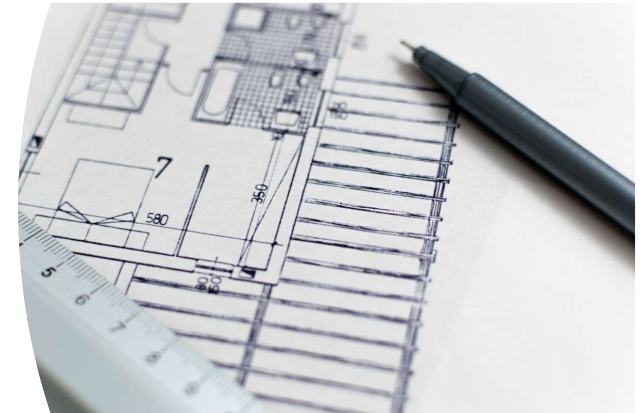
# Project Approach Customization

Refine**M**



# Waterfall Considerations - Planning

1. Baselines –scope, schedule, cost, other
2. Subsidiary plans – mainly scope, requirements, schedule, cost, quality, HR, communications, risk, procurement and stakeholder management and process improvement plan
3. Life cycle selected for the project
4. Details of tailoring decisions – project management processes selected, level of implementation for each selected process, tools and techniques to be used and description of how selected processes will be used to manage the specific project
5. Description of how work will be executed to accomplish project objectives
6. Change management plan
7. Description of how integrity of the baselines will be maintained
8. Key management reviews for contents, and timing to address open issues and pending decisions
9. Configuration management?
10. Anything else?



Contact@RefineM.com

RefineM

10



# Waterfall Considerations - Phases

What phases are in the project?

1. What are go/no-go criteria?
2. When are these assessed?
3. How to transition between phases?



Contact@RefineM.com

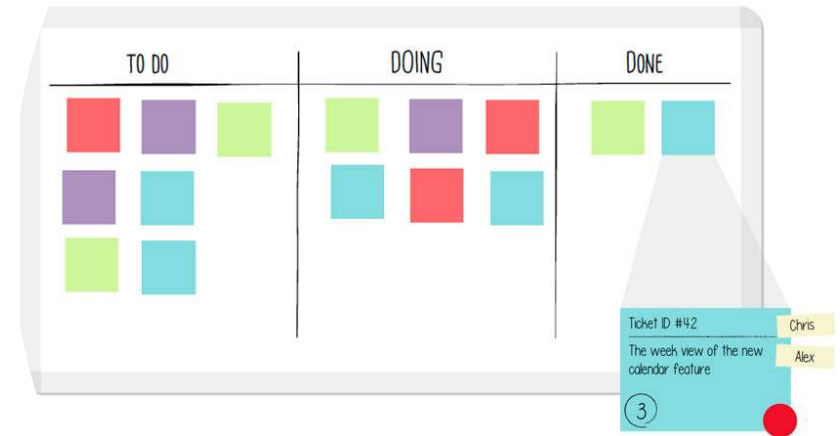
RefineM



# Agile Considerations - Flavors

What flavor(s) of Agile will your project follow?

- a. Scrum
- b. XP
- c. Lean
- d. Kanban
- e. Other
- f. Multiple



[This Photo](#) by Unknown Author is licensed under [CC BY-NC-ND](#)

Contact@RefineM.com

RefineM



# Agile Considerations - Practices

What practices will you follow and how will they differ from standard?

- a. Frequency & length of iterations
- b. Frequency & length of planning
- c. Frequency & duration of standups
- d. Frequency & duration of reviews
- e. Frequency & duration of retros
- f. Roles/Responsibilities
- g. Estimation and planning approach
- h. And more



[This Photo](#) by Unknown Author is licensed under [CC BY-NC-ND](#)

Contact@RefineM.com

RefineM



# Agile Considerations - Scaling

## How will Agile grow?

1. Frameworks
  - a. SAFe
  - b. Less
  - c. DA
2. Team structure
3. Governance



[This Photo](#) by Unknown Author is licensed under [CC BY-SA-NC](#)

Contact@RefineM.com

RefineM



# Hybrid Considerations

Initiation and Planning (Waterfall)

Execution and Monitoring (Agile)

Closing (Waterfall)



1. Which parts are Waterfall and why?
2. Which parts are Agile and why?
3. What are the transition points?

Contact@RefineM.com

RefineM

15





## Customization in Practice – Case Study

Refine**M**





# Case Study – Deciding the project approach

1. An environmental consulting company in Canada.
2. Hired us for PM Fundamentals training
3. Discussion on course customization, a need for reviewing the current process was identified
4. Further discovery led to training on both Waterfall and Agile coverage
5. During the training, a day was spent on defining the right project approach (the hybrid approach)



Contact@RefineM.com

# Case Study – As-Is Process

Current Process															
Activity	Setup Project	Determine Contract Type	Assign Lead (project director) & PM	Internal kickoff	Project Plan	External kickoff	Template creation/style guides	Task Delegation in Wrike	Technical work (analysis, engagement, reporting)	Internal Review/ QA/QC	Client review	Finalization	Closing (Team incentive)		
	A	A	A	A	A	A	A	A	A	A	A	A	A	A	A
Who does it?	Leadership Project Directors	Leadership Team	Leadership Team	Project Directors, Project Managers	PD or PM	Client PM	Technical Team	PM	All	Director, PM	Director	Director, PM, Admin	Admin		
Exit Criteria	Leaders Registered	Project Setup	Lead and PM assigned	Kickoff done	Project Plan completed	Kickoff done	Templates available/ finalized	Tasks assigned	Final Drafts (pdf/ website/ workshop...)	Review completed/ defects Identified	Client feedback	Client approval	project delivery & follow-up conversation with client		
Tools Used	Dropbox, Google	NA - contextual			Spreadsheet / Online PM Tool	PowerPoint	Adobe, MS Office	Online PM Tool	Various & Many				Online PM Tool		
Pain Point	Getting all steps done at once; Who does it	Billing conversations			Updating Plans Consistently			Identifying all Milestones at Outset	Delegation	Communication	Lack of resources at clients' end	Clarity on turnaround expectations for client review	No formal process/lessons learned		

Contact@RefineM.com

RefineM



# Case Study – New Hybrid Process



Contact@RefineM.com

RefineM





# Tools Customization

Refine**M**



# Adapting Free Tools

1. Templates available free online for Word, Excel, etc. for a variety of project management needs
2. Free platforms on limited basis like Asana, Trello, Basecamp, Wrike
3. Building free templates based on project management needs



Contact@RefineM.com

RefineM



# Purchasing a Tool with Customization Options

1. Microsoft Project Online is highly customizable including Gantt Chart, views, reports, and fields
2. Wrike and other platforms also offer similar customization options
3. Most Agile tools (JIRA, Kanbanize etc.) offer several customization options.



Contact@RefineM.com

RefineM





# Survey Question

**How might you customize your project approach or tools after hearing this presentation?**

**Go to [menti.com](https://www.menti.com) to answer**

Contact@RefineM.com

RefineM

24





# Quiz

Go to [menti.com](https://www.menti.com) to answer

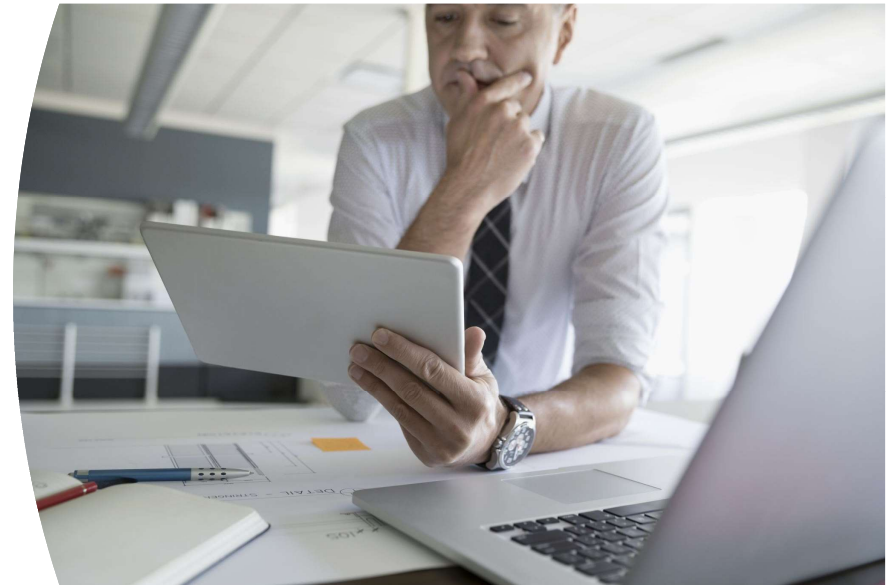


**Winner gets free access (100% discount)  
to one of RefineM's products of their choice**

1. Essential Gear for Project Managers (\$89)
2. PMP Exam Prep Simulator – 3 months (\$100)
3. Agility Assessment – 3 months (\$99)
4. PDU Bundle (\$39)
5. Self-Paced Online Course (\$100)
  1. Agile Fundamentals, or
  2. Project Management Fundamentals

# Conclusion

1. Organizations need their project management approach to work for them
2. Both approaches and tools are increasingly being customized
3. Look for small or large ways to overhaul your approach and tools



Contact@RefineM.com

RefineM



# Next Lunch and Learn

## ***Ace Your Daily Standups: Utilizing Best Practices***

*How have daily standups changed, and how can you utilize proven best practices to make it a successful event for your teams?*

- ***Thursday, April 7, 2022, 12:00-1:00 PM EST***

**Register Today - Don't wait for the last Minute**

# Next PMP Training Course

## PMP® Exam Prep



**March 5-26, 2022 – Guaranteed to run!**  
**Four consecutive Saturdays Over the Web**  
**\$1,450 up to March 4, 2022**

<https://refinem.com/pmp-exam-prep-course-public/>

# How to Earn 1 PDU for this Webinar?

1. **Log in to [ccrs.pmi.org](https://ccrs.pmi.org) and Click on “Report PDUs” link.**
2. **Click “Courses and Training” and Input the following:**

<b>PDU Claim Code</b>	<b>39905BBUTC</b>
<b>Activity Name</b>	<i>“Project Approach and Tools Customization”</i>
<b>Provider</b>	“RefineM LLC”
<b>Date Started/Completed</b>	March 2, 2022
<b>Contact Person</b>	NK Shrivastava
<b>Contact Phone</b>	(417) 763-6762
<b>Contact Email</b>	<a href="mailto:Trainings@RefineM.com">Trainings@RefineM.com</a>
<b>PDUs</b>	1.00 Technical.
<b>3. Check “I agree this claim is accurate” box and then Submit.</b>	

**Please claim your PDU by end of March 2022.  
Claim code will be retired after that date.**

# Questions?

**NK Shrivastava, MBA, PMP, RMP, ACP, CSP, SPC4**

**CEO/Enterprise Agile Coach, RefineM**

Cary, NC

[nks@refinem.com](mailto:nks@refinem.com), [www.refinem.com](http://www.refinem.com)

<http://www.linkedin.com/in/nkshrivastava>

[@justrightpm](https://twitter.com/justrightpm)

# Training Opportunities from RefineM

Agile Courses	Over the Web
<a href="#"><u>Backlog Grooming for Agile Requirements</u></a>	Mar 25
<a href="#"><u>Business Requirements for Agile Projects</u></a>	Apr 8
<a href="#"><u>Agile Fundamentals</u></a>	Apr 12-13
<a href="#"><u>PMI-ACP® Exam Prep</u></a>	Apr 12-14
<a href="#"><u>Agile for Waterfall/Operational Work</u></a>	Apr 15

Project Management Courses	Online
<a href="#"><u>PMP® Exam Prep over Four Consecutive Saturdays</u></a>	Apr 2-23
<a href="#"><u>Project Management Fundamentals</u></a>	Apr 5-6
<a href="#"><u>Recipe to Deliver Projects Successfully</u></a>	Apr 1

Leadership Courses	Online
<a href="#"><u>Agile Leadership</u></a>	Apr 7
<a href="#"><u>Leadership Skills for Project Managers</u></a>	Apr 29