



PROJECT MANAGEMENT PROFESSIONAL (PMP)

Examination Preparatory Class

7TH Edition PMBOK



TAILORING

PMBOK 7th Edition

SECTION 3

1.1 STRUCTURE OF THE WORK PMBOK GUIDE

In addition to this introduction, this edition of the PMBOK Guide contains three sections:

Section 2 : Project Performance Domain

- This section identifies and describes eight project performance domains that form an integrated system to enable successful delivery of the project and intended outcomes.

Section 3: Tailoring

- This section describes what tailoring is and presents an overview of what to tailor and how to go about tailoring individual projects.

Section 4 : Models, Methods, and Artifacts

- This section presents a brief description of commonly used models, methods, and artifacts.

OVERVIEW

Tailoring is the deliberate *adaptation* of the project management approach, governance, and processes to make them more suitable for the given environment and the work at hand.

In a project environment, tailoring considers the development approach, processes, project life cycle, deliverables, and choice of people with whom to engage. The tailoring process is driven by the guiding project management principles in The Standard for Project Management, organizational values, and organizational culture.

Tailoring entails, the mindful selection and adjustment of multiple project factors, regardless of whether the label of “tailoring” is used.

OVERVIEW

Tailoring involves understanding the project context, goals, and operating environment. Projects operate in complex environments that need to balance potentially competing demands that include, but are not limited to:



Delivering as quickly as possible,



Minimizing project costs,



Optimizing the value delivered,



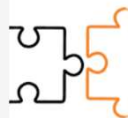
Creating high quality deliverables and outcomes,



Providing compliance with regulatory standards,



Satisfying diverse stakeholder expectations, and



Adapting to change.

OVERVIEW

These factors need to be understood, evaluated, and balanced to create a practical operating environment for the project

There may be situations that limit the degree to which project teams can tailor their approach, for example, when organizational policies mandate the use of a specific approach or a contract specifies a mandated approach.

WHAT TO TAILOR

Project aspects that can be tailored include:



Life cycle and development approach selection,



Processes,



Engagement,



Tools and



Methods and artifacts.

WHAT TO TAILOR – Life Cycle & Development Approach Selection

Deciding on a life cycle and the phases of the life cycle is an example of tailoring. Additional tailoring can be done when selecting the development and delivery approach for the project. Some large projects may use a combination of development and delivery approaches simultaneously.

For instance, building a new data center could involve (a) the use of predictive approaches for the physical building construction and finishing and (b) an iterative approach for understanding and establishing the computing capabilities required. Viewed from a project level, this combination of approaches represents a hybrid approach, but the construction team and the computing team may only experience a predictive or iterative development approach.

WHAT TO TAILOR – Process

Processes tailoring for the selected life cycle and development approach includes determining which portions or elements should be:

Added, to bring required rigor, coverage, or address unique product or operating environment conditions, etc (e.g. adding independent inspections for safety critical projects);

Modified, to better suit the project or project team requirements (e.g. modifying the format of project documents to accommodate project team members with vision limitations);

Removed, to reduce cost or effort since it is no longer required or is not economical for the value it adds (e.g. removing the creation of meeting minutes for a small, collocated project team with good communications);

WHAT TO TAILOR – Process

Processes tailoring for the selected life cycle and development approach includes determining which portions or elements should be:

Blended, to bring additional benefits or value by mixing or combining elements (e.g. adding appreciative inquiry methods from organizational management to the lessons learned meetings of predictive project management to help foster better collaboration); and

Aligned, to harmonize elements so there is consistent definition, understanding, and application (e.g. many disciplines have standards and practices associated with risk management that are sufficiently different from each other that would need to be aligned). For example, on multidisciplinary project teams, different disciplines may have specific elements, such as their own language, tools, and practices related to the same area of focus.

WHAT TO TAILOR – Engagement

Tailoring engagement for the people involved in the project includes:

People. This entails evaluating the skills and capabilities of the project leadership and the project team; then selecting who should be involved and in what capacities based on the project type and operating conditions. For example, on a challenging or time constrained project, assigning very experienced project team members is more logical than using inexperienced project team members.

Empowerment. Empowerment involves choosing which responsibilities and forms of local decision making should be deferred to the project team. Some environments and team member capabilities support high levels of empowerment. In other situations, less empowerment with more supervision and direction might be preferable.

Integration. Project teams can include contributors from contracted entities, channel partners, and other external entities in addition to staff from inside the sponsoring organization. Tailoring considers how to create one project team from a diverse collection of contributors to facilitate optimal project team performance and realization of project outcomes.

WHAT TO TAILOR – Tools

Tailoring engagement for the people involved in the project includes:

Selecting one tools (e.g. software or equipment the project team will use for the project is a form of tailoring. Often, the project team has the best insight into the most suitable tools for the situation, but those choices might need tempering based on the associated costs. Additionally, organizational leaders can impose constraints that the project team cannot change.

THE TAILORING PROCESS

As noted in Diagram below of The Standard for Project Management, projects exist in environments that may have an influence on them. Prior to tailoring, the project environment needs to be analyzed and understood. Tailoring typically begins by selecting a development and delivery approach, tailoring it for the organization, tailoring it for the project, and then implementing its ongoing improvement.

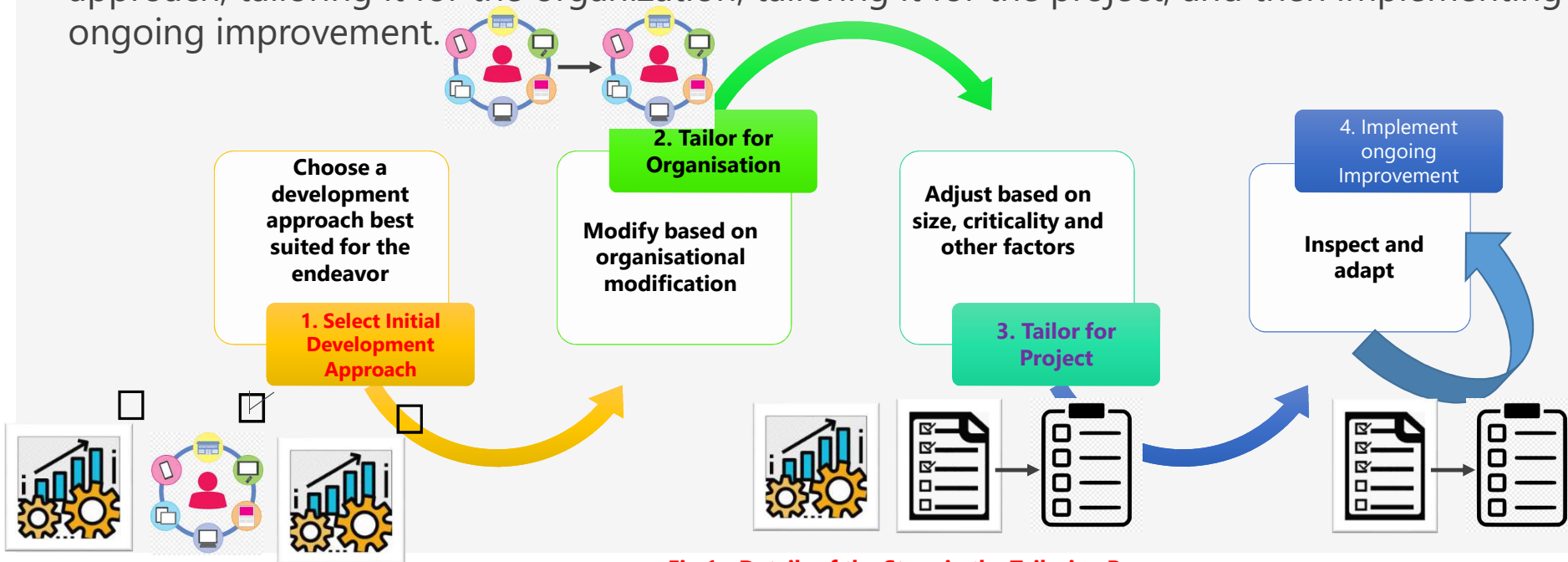


Fig 1 - Details of the Steps in the Tailoring Process

THE TAILORING PROCESS – Select Initial Development Approach

This step determines the development approach that will be used for the project. Project teams apply their knowledge of the product, delivery cadence, and awareness of the available options to select the most appropriate development for the situation. Selecting the initial approach is depicted in Figure 2.

A suitability filter tool helps project teams consider whether a project has characteristics that lend themselves toward a predictive, hybrid, or adaptive approach. The suitability filter is an informational tool that combines its assessment with other data and decision making activities so that the tailored approach is appropriate for each project. By evaluating criteria based on culture, project team, and project factors, a suitability filter generates a diagnostic visual that can be helpful in discussing and deciding on the initial approach.

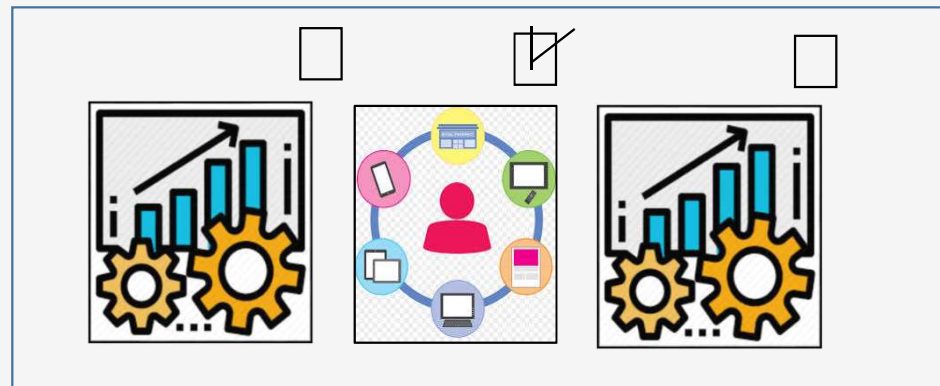


Fig 2 – Selecting the Initial Development Approach

THE TAILORING PROCESS – Tailor for The Organisation

While project teams own and improve their processes, organizations often require some level of approval and oversight. Many organizations have a project methodology, general management approach, or general development approach that is used as a starting point for their projects. These guides are intended to support such things as repeatable processes, consistent measures of the organization's project capabilities, and continuous improvement of those capabilities.

The tailoring process shown in Figure 3 uses factors such as project size, criticality, organizational maturity, and other considerations.

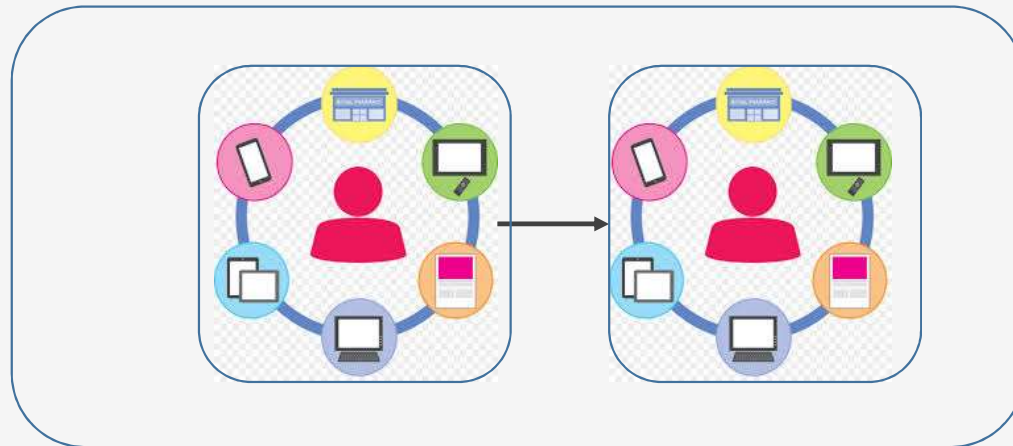


Fig 3 – Tailoring the Approach for the Organisation

THE TAILORING PROCESS – Tailor for The Organisation

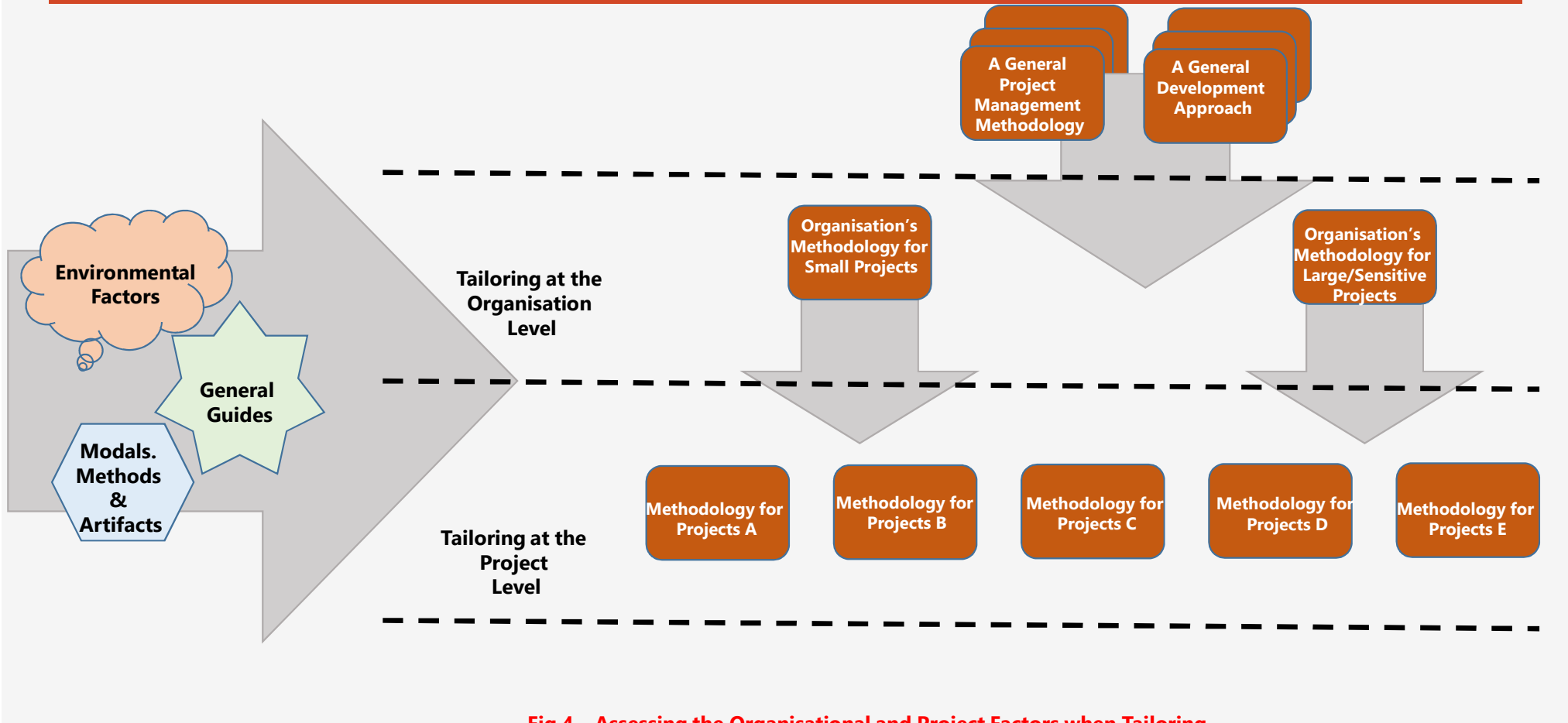


Fig 4 – Assessing the Organisational and Project Factors when Tailoring

THE TAILORING PROCESS – Tailor for The Organisation

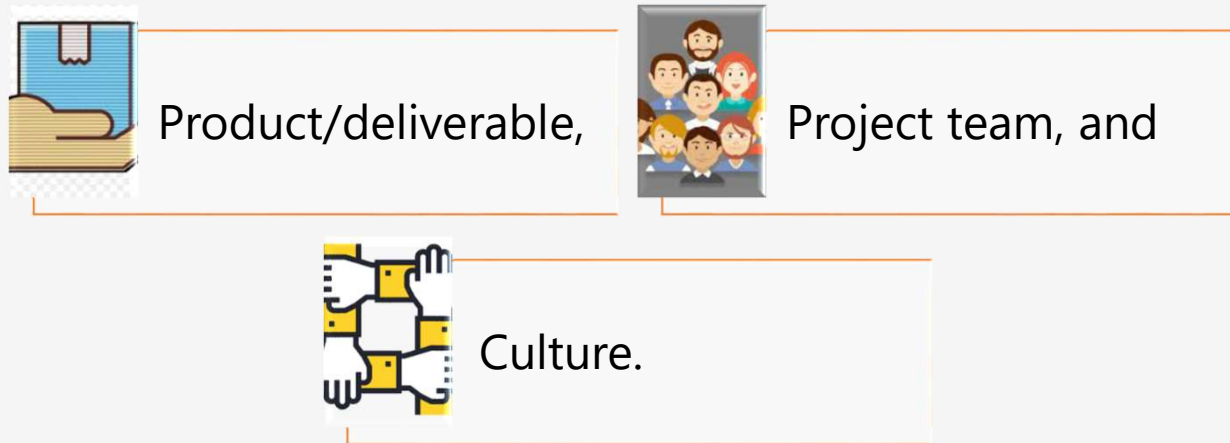
Organizations with a project management office (PMO) or value delivery office (VDO) may play a role in reviewing and approving tailored delivery approaches.

Tailoring that only impacts the project team (e.g. when they hold internal meetings, who works where, etc) requires less oversight than tailoring that impacts external groups (e.g. how and when other departments are engaged, etc). Therefore, internal project tailoring might be approved by the project manager while training changes that impact external groups may require approval by the PMO or VDO. The PMO or VDO can assist project teams as they tailor their approaches by providing ideas and solutions from other project teams.

A VDO may be found in organizations that use more adaptive delivery approaches. The VDO serves as an enabling role, rather than a management or oversight function. It focuses on coaching project teams; building adaptive skills and capabilities throughout the organization; and mentoring sponsors and product owners to be more effective in those roles.

THE TAILORING PROCESS – Tailor for The Project

Many attribute influence tailoring for the project. These include, but are not limited to:



The project team should ask questions about each attribute to help guide them in the tailoring process. Answers to these questions can help identify the need to tailor processes, delivery approach, life cycle, tools, methods, and artifacts.

THE TAILORING PROCESS – Tailor for The Project

PRODUCT/DELIVERABLE

Attributes associated with the product or deliverable include, but are not limited to:

Compliance/criticality. How much process well known and physical, for example, something easy to recognize and describe like a building? Or something intangible like software or the design of a new drug?

Industry market. What market does the project, product, or deliverable serve? Is that market highly regulated, fast moving, or slow to evolve? What about competitors and incumbents?

Technology. Is the technology stable and well established or rapidly evolving and at risk of obsolescence?

Time frame. Is the project time frame short as in weeks or months, or long as in several years?

Stability of requirements. How likely are there to be changes to core requirements?

Security. Are elements of the product business confidential or classified?

Incremental delivery. Is this something the project team can develop and get stakeholder feedback on incrementally, or something that is hard to evaluate until near completion?

THE TAILORING PROCESS – Tailor for The Project

PROJECT TEAM

Project team considerations include:

Project team size. How many full time and part time people will be working on the project?

Project team geography. Where are the team members predominantly located geographically? Will some or all of the team be remote or collocated

Organizational distribution. Where are the team's supporting groups and other stakeholder located?

Project team experience. Do the project team members have any experience in the industry, in the organization, or working with each other? Do they have the skills, tools, and technology required for the project under consideration?

Access to customer. Is it practical to get frequent and timely feedback from customers or customer representatives?

THE TAILORING PROCESS – Tailor for The Project

CULTURE

Evaluating the culture includes considerations regarding:

Buy-in. Is there acceptance, support, and enthusiasm for the proposed delivery approach?

Trust. Are there high levels of trust that the project team is capable of and committed to delivering the project outcomes?

Empowerment. Is the project team trusted, supported, and encouraged to own and develop its working environment, agreements, and decisions?

Organizational culture. Do the organizational values and culture align with the project approach? This includes empowering versus specifying and checking, trusting local decision making versus requesting external decision making, etc.

Through the evaluation of these attributes, tailoring decisions around engagement, process, and tools can be made for the project. These removals and additions are depicted in Figure 5 with an "X" for removals and dotted boxes for the addition of trial processes.

THE TAILORING PROCESS – Tailor for The Project

CULTURE

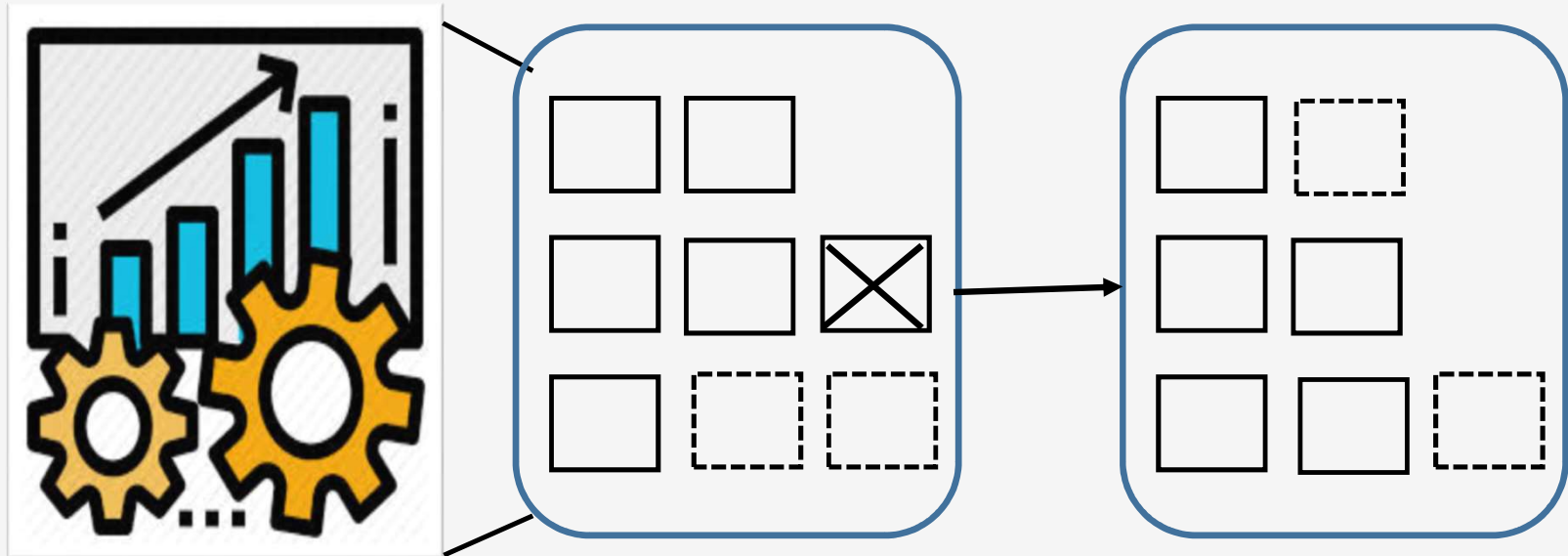


Fig 5 – Tailoring the Approach for the Project

THE TAILORING PROCESS – Tailor for The Project

IMPLEMENT ONGOING IMPROVEMENT

The process of tailoring is not a single, one-time exercise. During progressive elaboration, issues with how the project team is working, how the product or deliverable is evolving, and other learning will indicate where further tailoring could bring improvements. Review points, phase gates, and retrospectives all provide opportunities to inspect and adapt the process, development approach, and delivery frequency as necessary.

Keeping the project team engaged with improving its process can foster pride of ownership and demonstrate a commitment to implement ongoing improvements and quality.

The concept of adding, removing, and changing processes is shown in figure 6 below

THE TAILORING PROCESS – Tailor for The Project

IMPLEMENT ONGOING IMPROVEMENT

The concept of adding, removing, and changing processes is shown in figure 6 below

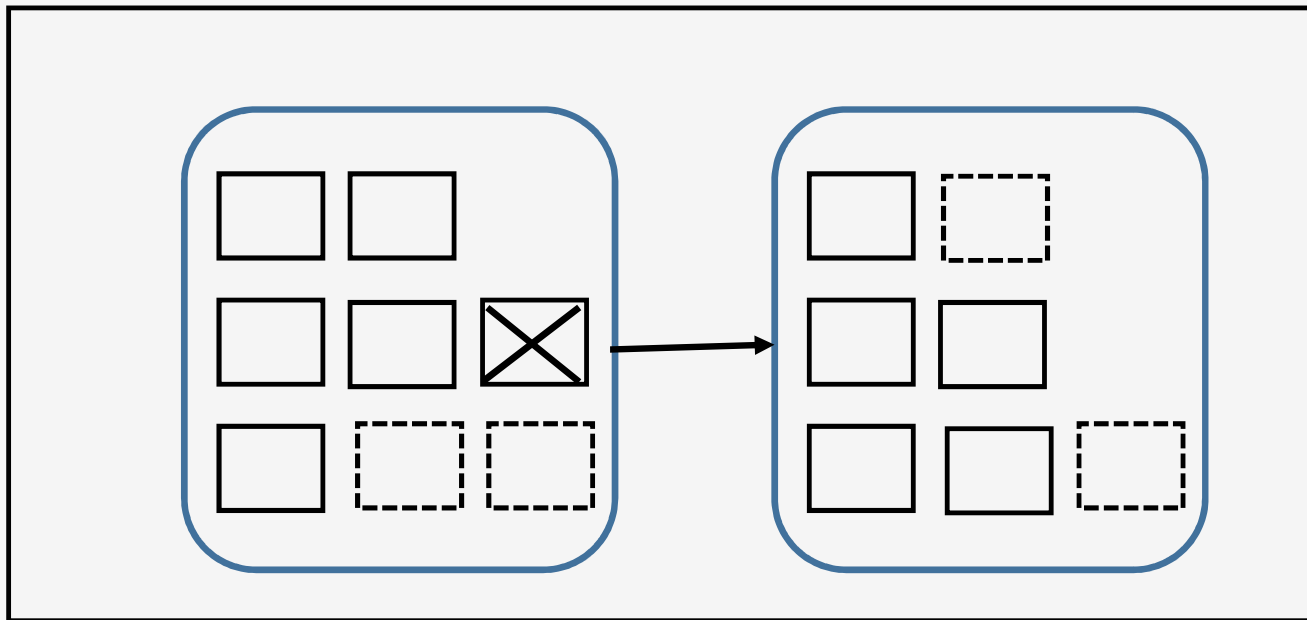


Fig 6 – Implement Ongoing Improvement

THE TAILORING PROCESS – Tailor for The Project

How organizations tailor can itself be tailored however, most organizations undertake some or all of the four steps described. They use elements of selecting an initial approach, tailoring for the organization, tailoring for the project, and implementing ongoing improvement as shown in figure 7

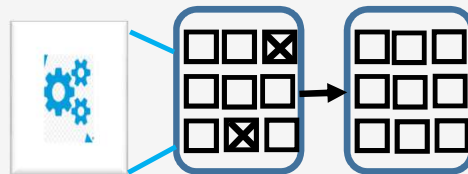
1. Select Approach



2. Tailor for the Organisation



3. Tailor for the Project



4. Implement Ongoing Improvement

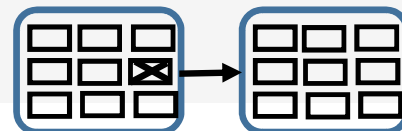


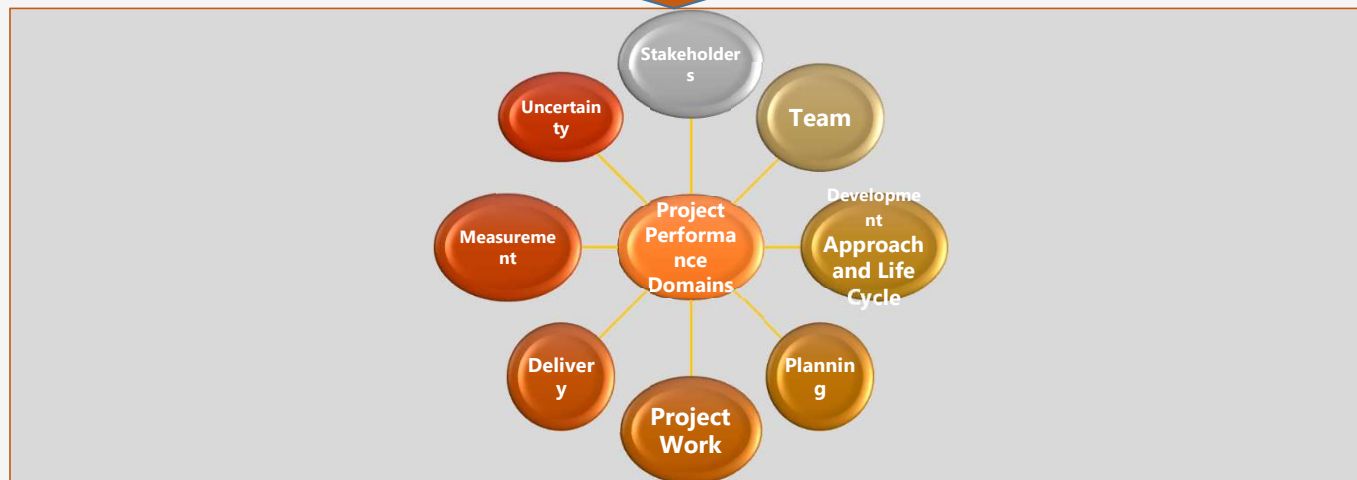
Fig 7– The Tailoring Process

THE TAILORING THE PERFORMANCE DOMAINS

The work associated with each performance domain can also be tailored, based on the uniqueness of the project. As shown in figure 8, the principles for project management provide guidance for the behavior of project practitioners as they tailor the performance domains to meet the unique needs of the project context and the environment.

THE TAILORING THE PERFORMANCE DOMAINS

Principles of Project Management			
Be a diligent, respectful and caring steward	Create a collaborative team environment	Effectively engage with stakeholders	Focus on value
Recognize, evaluate, and respond to system interactions	Demonstrate leadership behaviors	Tailor based on content	Build quality into processes and deliverables
Navigate complexity	Optimize risk responses	Embrace adaptability and resiliency	Enable change to achieve the envisioned future state



The Tailor to fit the project context

Fig 8 – Tailoring to fit the Project Context

THE TAILORING THE PERFORMANCE DOMAINS - STAKEHOLDERS

- * Is there a collaborative environment for stakeholders and suppliers?
- * Are the stakeholders internal or external to the organization, or both?
- * What technologies are most appropriate and cost effective for communicating to stakeholders? What communication technology is available?
- * Is one language used with stakeholders? Have allowances been made to adjust to stakeholders from diverse language groups?
- * How many stakeholders are there? How diverse is the culture within the stakeholder community?
- * What are the relationships within the stakeholder community? The more networks in which a stakeholder or stakeholder group participates, the more complex the networks of information and misinformation the stakeholder may receive.

THE TAILORING THE PERFORMANCE DOMAINS – PROJECT TEAM

-
- * What is the physical location of project team members? Is the project team collocated? Is the project team in the same geographical area? Is the project team distributed across multiple time zones?
-
- * Does the project team reflect diverse viewpoints and cultural perspectives?
-
- * How will project team members be identified for the project? Are project team members full time or part time on the project? Are there available contractors capable of performing the work?
-
- * Does the project team have an established culture? How will tailoring influenced by the existing culture, and how will the existing culture be influenced by tailoring?
-
- * How is project team development managed for the project? Are there organizational tools to manage project team development or will new ones need to be established?
-
- * Are there project team members who have special needs? Will the project team need special training to manage diversity?

THE TAILORING THE PERFORMANCE DOMAINS – DEVELOPMENT APPROACH & LIFE CYCLE

* Which development approach is appropriate for the product, service, or result? If adaptive, should the project be developed incrementally or iteratively? Is a hybrid approach best?

* What is an appropriate life cycle for this specific project? What phases should comprise the project life cycle?

* Does the organization have formal or informal audit and governance policies, procedures, and guidelines?

THE TAILORING THE PERFORMANCE DOMAINS – PROJECT WORK

- * What management processes are most effective based on the organizational culture, complexity, and other project factors?
- * How will knowledge be managed in the project to foster a collaborative working environment?
- * What information should be collected throughout and at the end of the project? How will the information be collected and managed? What technology is available to develop, record, transmit, retrieve, track, and store information and artifacts?
- * Will historical information and lessons learned be made available to future projects?
- * Does the organization have a formal management repository that a project team is required to use, and is it readily accessible?

THE TAILORING THE PERFORMANCE DOMAINS – DELIVERY

- * Does the organization have formal or informal requirements management systems?
- * Does the organization have existing formal or informal validation and control-related policies, procedures, and guidelines?
- * What quality and procedures exist in the organization? What quality tools, technique, and templates are used in the organization?
- * Are there any specific quality standards in the industry that need to be applied? Are there any specific governmental, legal, or regulatory constraints that need to be taken into consideration?
- * Are there areas of the project with unstable requirements? If so, what is the best approach for addressing the unstable requirements?
- * How does sustainability factor into the elements of project management or product development?

THE TAILORING THE PERFORMANCE DOMAINS – UNCERTAINTY

- * What is the risk appetite and risk tolerance for this endeavor?
- * How are threats and opportunities best identified and addressed within the selected development approach?
- * How will the presence of project complexity, technological uncertainty, product novelty, cadence, or progress tracking impact the project?
- * Does the project's size in terms of budget, duration, scope, or project team size require a more detailed approach to risk management? Or is the project small enough to justify a simplified risk management process?
- * Is a robust risk management approach demanded by high levels of innovation, new technology, commercial arrangements, interfaces, or other external dependencies? Or is the project simple enough that a reduced risk management process will suffice?
- * How strategically important is the project? Is the level of risk increased for this project because it aims to produce breakthrough opportunities, addresses significant blocks to organizational performance, or involves major product innovation?

THE TAILORING THE PERFORMANCE DOMAINS – MEASUREMENT

- * How is value measured?
- * Are there measures for financial value and nonfinancial value?
- * How will the project enable data capture and reporting related to benefits realization, both during the project and after the project is complete?
- * What are the project status reporting requirements?

DIAGNOSTICS

Periodic reviews such as retrospectives or lessons learned are effective ways to determine if approaches are working well and if improvements can be made by tailoring. Project teams that do not use retrospectives can look to issues, threats, quality assurance statistics, and stakeholder feedback for signs that further tailoring or adaptation might be required or useful.

This section is intended as general guidance and does not address every possible situation that could surface within a project. Table 1 lists some common situations and suggested tailoring solutions for commonly encountered situations.

DIAGNOSTIC

Table 1. Common Situations and Tailoring Suggestions

Outcome	Check
Poor quality deliverables	Add more feedback verification loops and quality assurance steps.
Team members unsure of how to proceed or undertake their work.	Add more guidance, training, and verification steps.
Long delays waiting for approvals.	Try streamlining approval decisions through fewer people authorized to make decisions up to certain value thresholds.
Too much work in progress or high rates of scrap.	Use techniques like value stream mapping and kanban boards to visualize the work, identify the issues, and propose solutions.
Stakeholders are not engaged or share negative feedback.	Evaluate whether sufficient information is being shared with stakeholders; feedback loops are present and working; and deeper engagement may work better than simply communicating.
Lack of visibility and understanding of project progress.	Check to ensure appropriate measures are being collected, analyzed, shared, and discussed during team and stakeholder meetings; validate agreement with the measures within the team and with stakeholders.
Issues and/ or risks for which the team is unprepared continue to surface, requiring the team to react rather than progress work.	Explore root causes to identify whether there are related gaps in project processes or activities.

SUMMARY

Tailoring involves the considered adaptation of approach, governance, and processes to make them more suitable for the given environment and the project at hand. It involves the analysis, design, and deliberate modification of the people elements, the processes employed, and the tools used. The tailoring process involved four steps:



Select initial approach



Tailor for the organization



Tailor for the project



Implement ongoing improvement.

SUMMARY

While the tailoring process is often undertaken by the project stakeholders, the bounds and approach to tailoring are usually governed by organizational guidelines. Organizational governance helps ensure the external interfaces between project teams mesh correctly and provides guidance in the form of tailoring considerations.

Q & A?

