



Tailoring: A PMBOK 7th Edition Guide

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Introduction to Tailoring Concepts

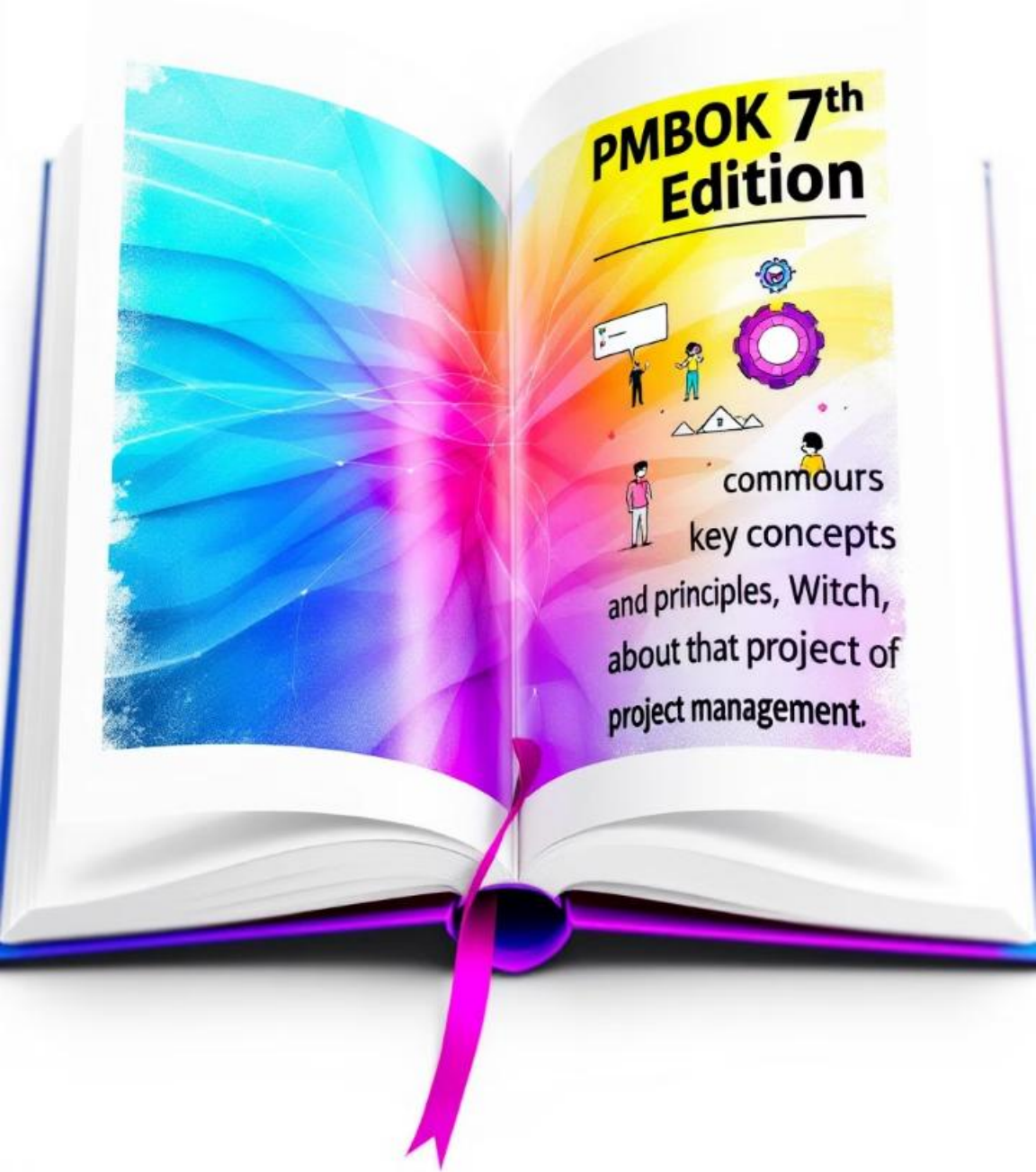
Adaptability for Success

Tailoring projects in the PMBOK 7th Edition framework involves adapting processes, tools, and techniques to individual project needs. It's a key skill that ensures projects align with the specific context.

Optimizing Outcomes

Tailoring effectively allows projects to achieve optimal outcomes by streamlining processes, reducing redundancy, and focusing efforts on critical areas.

PMBOK 7th Edition Overview



1 A Framework for Success

The PMBOK 7th Edition provides a robust framework for managing projects effectively. It emphasizes principles, practices, and methodologies that can be adapted to various contexts.

2 Global Standardization

This edition represents a global standard in project management, offering a comprehensive guide for individuals and organizations worldwide.

3 Continuous Improvement

The PMBOK 7th Edition encourages continuous improvement and adaptability, emphasizing the need to adjust practices based on project specifics.

Structure of 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.

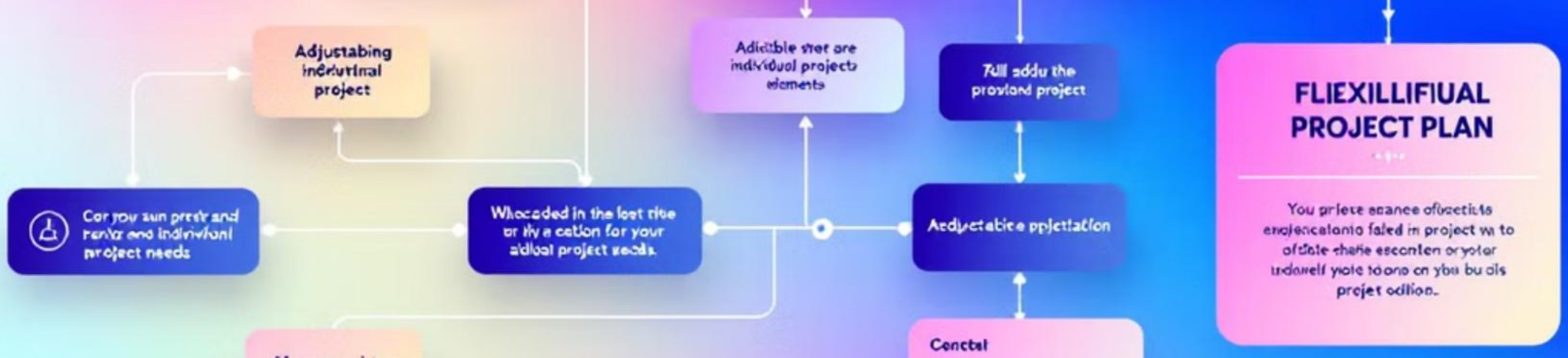
Section 3: Tailoring

- 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.





Tailoring Project Overview

Concept

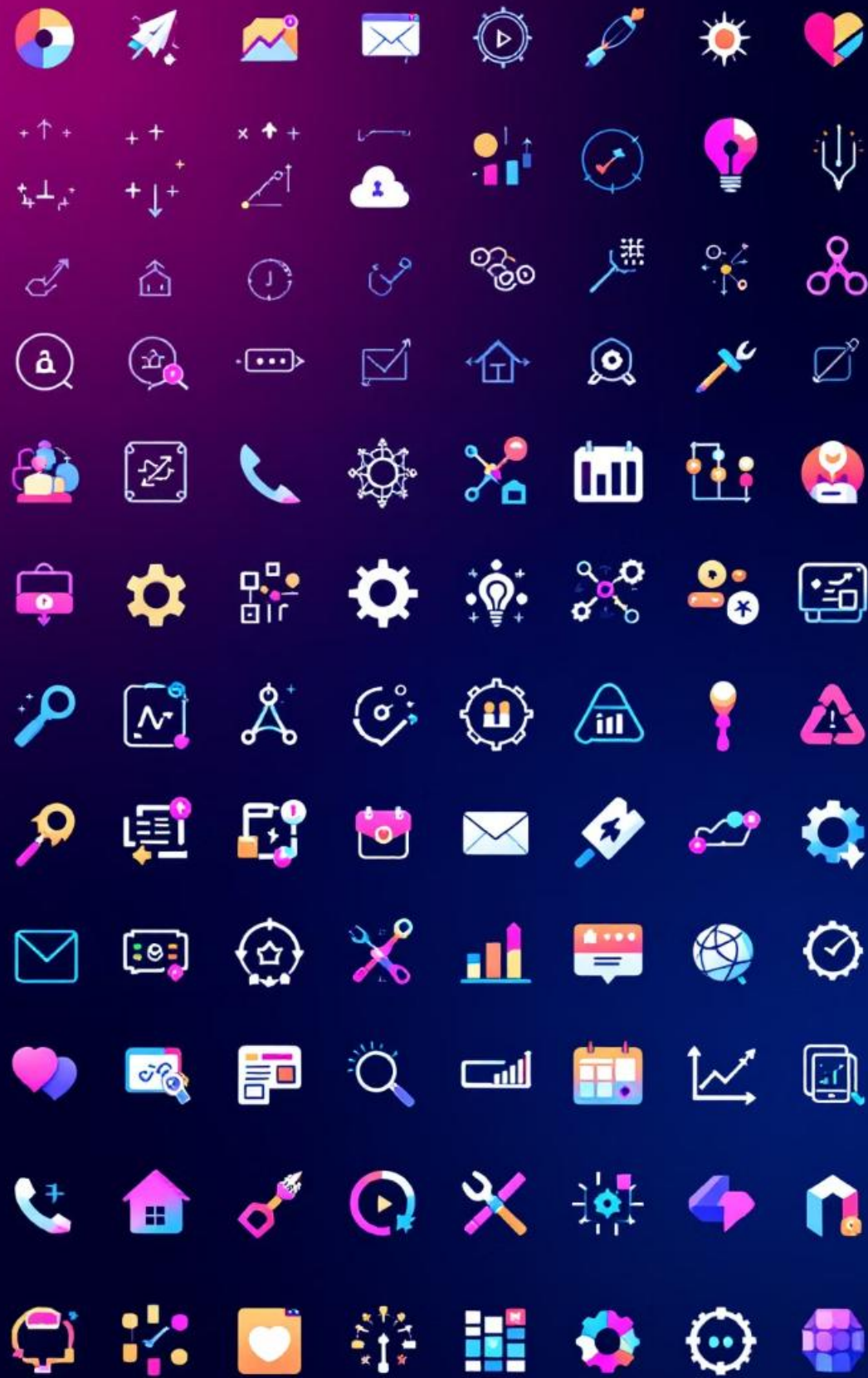
Tailoring involves customizing project management processes, tools, and techniques to align with unique project characteristics.

Purpose

The goal is to optimize project performance and efficiency by focusing on the most relevant elements for each project.

Impact

Tailoring ensures that projects remain aligned with the specific needs of the organization and the project team.



What to Tailor



Project Life Cycle & Development Approach

Adapt the project's life cycle and development approach to suit its complexity and specific requirements.



Project Processes

Tailor the specific processes used in the project to ensure they are aligned with the project's needs and context.



Stakeholder Engagement

Adjust the level and method of stakeholder engagement based on their roles, influence, and needs.



Project Tools and Techniques

Select and implement the tools and techniques most suitable for the project's context, such as communication methods and risk management approaches.



WHAT TO TAILOR – Life Cycle & Development Approach Selection



WHAT TO TAILOR – Process

- 1
- 2
- 3

Scope Management

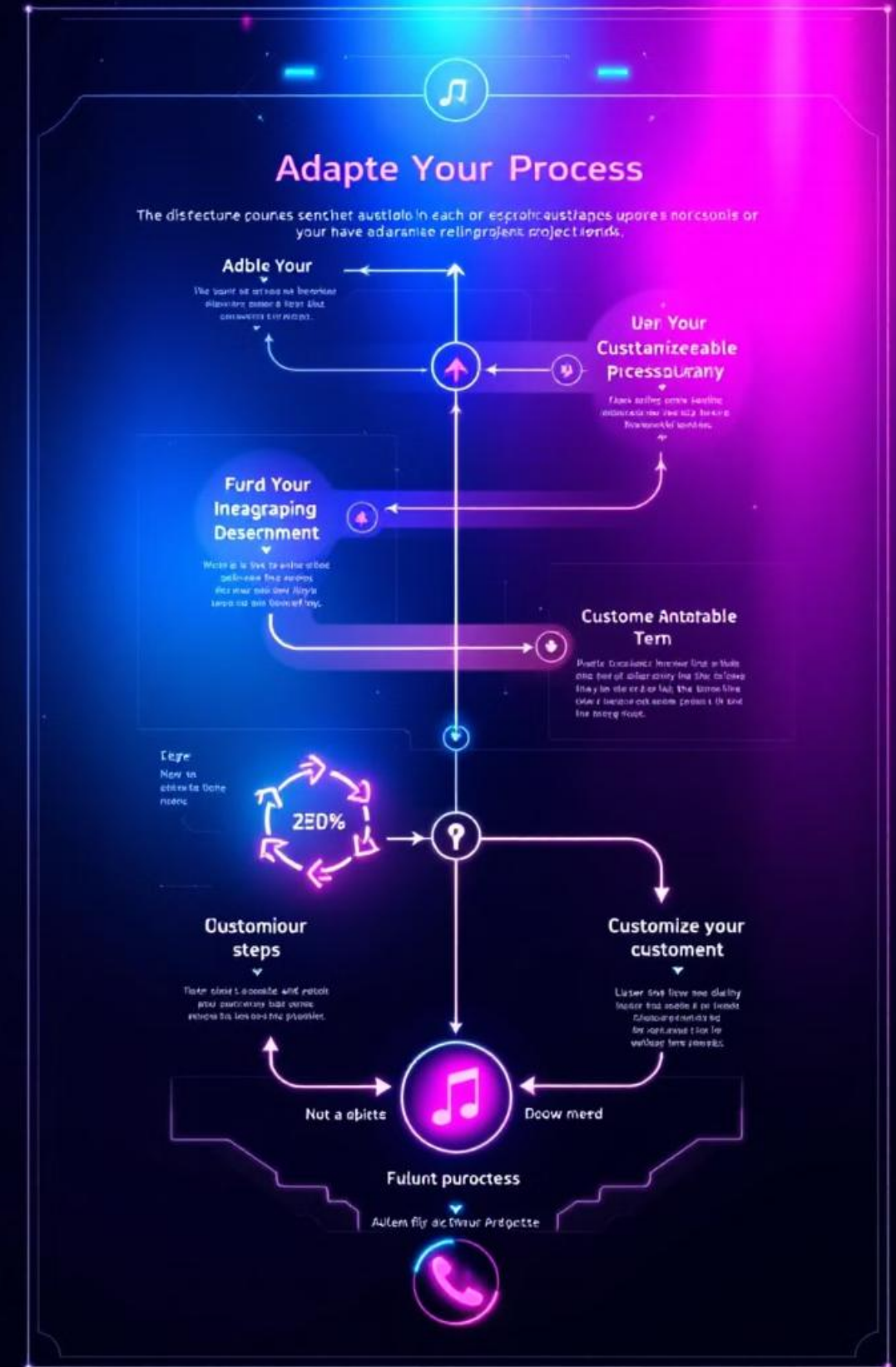
Tailor scope management processes to align with the project's specific requirements, ensuring clear definition and control.

Risk Management

Adjust risk management processes to address the specific risks and uncertainties associated with the project.

Communication Management

Optimize communication plans to cater to the unique stakeholders and their communication preferences.



Project Management Context



WHAT TO TAILOR – Engagement

1

Internal Stakeholders

Tailor engagement strategies for internal stakeholders, such as employees, based on their roles and responsibilities.

2

External Stakeholders

Adapt engagement approaches for external stakeholders, such as customers and suppliers, based on their influence and expectations.

3

Project Team

Customize engagement strategies for the project team to foster collaboration and communication.



Stakeholder Engagement

1

Identify Stakeholders

Clearly define and document all relevant stakeholders involved in the project.

2

Understand Needs

Determine each stakeholder's needs, expectations, and potential influence on the project.

3

Develop Engagement Plans

Craft tailored engagement plans to effectively communicate with and involve stakeholders throughout the project.

WHAT TO TAILOR – Tools



Project Management Software

Select project management software that aligns with the project's specific needs, such as task management, communication, and reporting capabilities.



Visualization Tools

Choose visualization tools, such as Gantt charts or mind maps, that effectively communicate project progress and key milestones.



Communication Tools

Utilize communication tools, such as email, instant messaging, or video conferencing, that effectively facilitate communication between project stakeholders.

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TAILORING PROJECTS

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The Tailoring Process



THE TAILORING PROCESS – Select Initial Development Approach



1

Project Complexity

Analyze the complexity of the project and its deliverables, determining if a traditional, agile, or hybrid approach is best suited.

2

Project Scope

Evaluate the project's scope and define clear boundaries for the work to be performed.

3

Stakeholder Needs

Consider the expectations and requirements of key stakeholders to ensure their needs are met.

THE TAILORING PROCESS – Tailor for The Organisation

Organizational Policies

Ensure the tailored approach aligns with the organization's existing policies and procedures for project management.

Resource Availability

Consider the organization's available resources, including skills, expertise, and budget, when tailoring the project approach.

Existing Processes

Integrate the tailored approach with the organization's existing project management processes for seamless implementation.

TAILORING PROCESS – Tailor for The Project

Project Constraints

Identify and address project constraints, such as time, budget, or resources, when tailoring the approach.

Project Risks

Develop tailored risk management strategies to mitigate potential threats and capitalize on opportunities.

Project Team Capabilities

Consider the skills, experience, and expertise of the project team when adapting processes and tools.





Project Team



Team Dynamics

Tailor communication and collaboration methods to foster effective teamwork and maximize team performance.



Skill Sets

Identify the skills and expertise required for the project and tailor training or mentorship programs to address any gaps.



Motivation

Adapt project management styles to maintain team motivation, engagement, and a positive work environment.



Project Constraints

1

Time Constraints

Tailor project scheduling and resource allocation to meet tight deadlines and optimize time utilization.

2

Budget Constraints

Adjust project cost management processes to ensure the project remains within budget limits.

3

Resource Constraints

Tailor resource allocation and utilization strategies to manage limited resources effectively.

Project Phases

1

Phase Definition

Define clear objectives and deliverables for each project phase, ensuring a structured and well-defined approach.

2

Phase Duration

Adjust the duration of each project phase based on the complexity and scope of the work.

3

Phase Activities

Tailor the activities and tasks within each phase to align with the project's specific requirements and deliverables.

Project Deliverables

1

Deliverable Definition

Define clear and measurable deliverables that meet the project's objectives.

2

Deliverable Acceptance

Establish clear acceptance criteria for each deliverable, ensuring they meet quality standards.

3

Deliverable Management

Implement processes for managing and tracking the progress of each deliverable.



Project Work



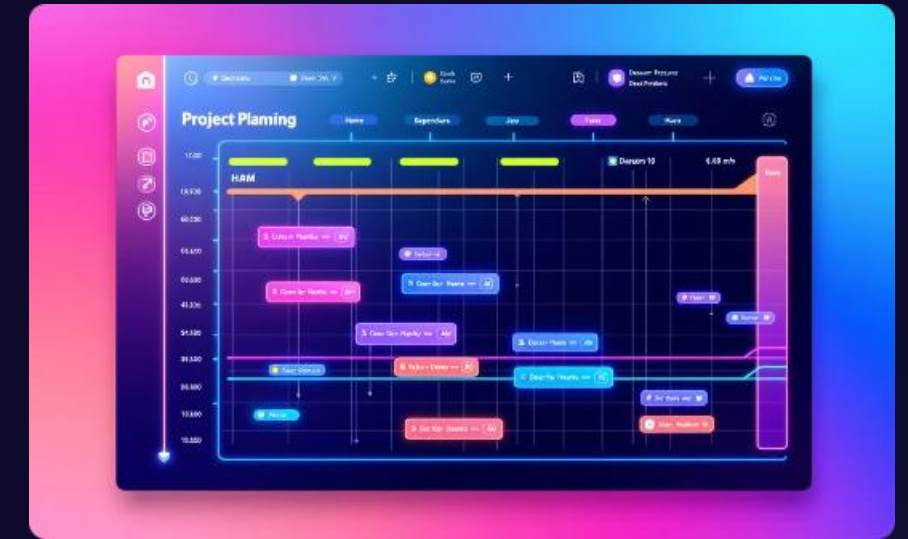
Work Breakdown Structure

Create a tailored work breakdown structure that effectively breaks down project work into manageable tasks.



Task Management

Select appropriate task management methods, such as Kanban or agile sprints, to track progress and ensure timely completion.



Resource Allocation

Tailor resource allocation strategies to match the project's specific needs and ensure optimal resource utilization.

Project Change Management

1

Change Control

Establish a tailored change control process for managing and evaluating project changes, ensuring they are documented and approved.

2

Change Impact Assessment

Develop a process for assessing the impact of proposed changes on project scope, schedule, and budget.

3

Change Implementation

Tailor the process for implementing approved changes, ensuring they are implemented efficiently and effectively.



Project Performance and Monitoring



1

Performance Indicators

Define and track relevant project performance indicators to measure progress and identify areas for improvement.

2

Progress Reporting

Tailor reporting mechanisms to provide stakeholders with clear and timely updates on project status and performance.

3

Issue Tracking

Implement a process for identifying, tracking, and resolving project issues to ensure timely resolution.

Tailoring Considerations

Project Size

Tailor project management practices based on the project's size and complexity, adjusting processes and tools accordingly.

Project Complexity

Adapt project management approaches to the complexity of the project, considering the number of stakeholders, dependencies, and risks.

Project Environment

Tailor project management methods to the specific project environment, such as industry standards, regulations, and organizational culture.



Tailoring for Small Projects



Simplified Processes

Adopt streamlined project management processes for small projects, focusing on essential activities and reducing complexity.



Flexible Approach

Utilize a flexible approach that allows for adjustments and adaptability based on the evolving needs of the project.



Effective Communication

Prioritize clear and concise communication between team members and stakeholders, especially for small projects.



Tailoring for Complex Projects

1

Detailed Planning

Develop a comprehensive and detailed project plan to manage the complexity of the project.

2

Risk Management

Implement a robust risk management plan to identify, assess, and mitigate potential risks.

3

Stakeholder Engagement

Engage all stakeholders effectively, ensuring their needs and expectations are addressed throughout the project.





Tailoring for Agile Projects

1

Iterative Development

Adopt an iterative development approach, allowing for flexibility and adjustments as the project progresses.

2

Customer Collaboration

Prioritize customer collaboration, ensuring their feedback is incorporated throughout the development process.

3

Continuous Improvement

Embrace continuous improvement through regular retrospectives and adjustments to processes and practices.

Tailoring for Hybrid Projects

Traditional Elements

Utilize traditional project management elements, such as detailed planning and risk management, when appropriate.

Agile Elements

Incorporate agile practices, such as iterative development and customer collaboration, to enhance flexibility and responsiveness.

Tailoring Governance and Control

1

Project Charter

Develop a tailored project charter that defines project scope, objectives, and authority levels.

2

Change Management

Implement a robust change management process to control and track project changes.

3

Performance Reporting

Tailor reporting mechanisms to ensure transparency and accountability for project performance.

Tailoring The Project Performance Domains

1

Stakeholders

Tailor stakeholder engagement strategies to ensure their satisfaction and support throughout the project.

2

Project Team

Customize project management practices to enhance team motivation, collaboration, and performance.

3

Development Approach & Life Cycle

Adapt the project's life cycle and development approach to optimize project execution and deliver value.



Implementing Tailoring Strategies

1

Define Tailoring Objectives

Clearly define the goals and objectives for tailoring the project management approach.

2

Conduct Tailoring Assessments

Evaluate the project's specific requirements, constraints, and context to determine areas for tailoring.

3

Develop Tailoring Plans

Create detailed plans for implementing the tailored strategies, outlining steps and timelines.



Case Studies in Tailoring



1

Agile Software Development

Tailoring agile methodologies for software development projects can lead to increased customer satisfaction and faster time-to-market.

2

Infrastructure Projects

Adapting project management for complex infrastructure projects can ensure efficient resource utilization and on-time delivery.

3

Global Marketing Campaigns

Tailoring project management practices for global marketing campaigns can optimize reach, engagement, and campaign effectiveness.



Tailoring for the Performance Domain - **Stakeholders**



Communication Plans

Customize communication plans to address specific stakeholder needs and ensure effective information sharing.



Engagement Strategies

Adapt engagement strategies to different stakeholder groups based on their influence and expectations.



Feedback Mechanisms

Establish clear channels for receiving and addressing stakeholder feedback throughout the project.

Tailoring for the Performance Domain - **Project Team**

1

Team Dynamics

Adapt leadership styles and team-building activities to foster a positive and collaborative team environment.

2

Skill Development

Provide training and development opportunities to enhance team skills and address knowledge gaps.

3

Motivation and Recognition

Implement strategies to recognize and reward team achievements, fostering motivation and engagement.





Tailoring for the Performance Domain - **Development Approach & Life Cycle**

1

Agile Methodologies

Consider adopting agile methodologies for projects with changing requirements and a focus on iterative development.

2

Traditional Waterfall

Utilize a traditional waterfall approach for projects with clear requirements and a predictable scope.

3

Hybrid Models

Explore hybrid models that combine elements of traditional and agile approaches to optimize project management.

Tailoring for the Performance Domain - **Project Work**

Work Breakdown Structure (WBS)

Customize the WBS to effectively break down project work into manageable tasks, aligning with the project's specific needs.

Task Management

Adopt task management methods, such as Kanban or agile sprints, that align with the project's development approach.

Resource Allocation

Tailor resource allocation strategies to match the project's specific requirements and ensure optimal resource utilization.

Tailoring for the Performance Domain - **Delivery**

1

Delivery Milestones

Define clear delivery milestones to track project progress and ensure timely completion of key deliverables.

2

Quality Assurance

Implement rigorous quality assurance processes to ensure that project deliverables meet defined standards.

3

Stakeholder Acceptance

Establish clear criteria for stakeholder acceptance of project deliverables, ensuring their satisfaction.

Tailoring for the Performance Domain - **Uncertainty**



Risk Assessment

Develop a tailored risk assessment process to identify and prioritize potential risks, evaluating their likelihood and impact.



Risk Mitigation Plans

Create detailed risk mitigation plans to address each identified risk, outlining strategies and contingency measures.



Risk Monitoring and Control

Implement a process for continuously monitoring and controlling identified risks, ensuring timely adjustments to mitigate threats and capitalize on opportunities.



Tailoring for the Performance Domain - Measurement

1

Key Performance Indicators (KPIs)

Define and track relevant KPIs that align with the project's objectives and measure progress.

2

Performance Reporting

Develop tailored performance reports to provide stakeholders with clear and timely updates on project status and performance.

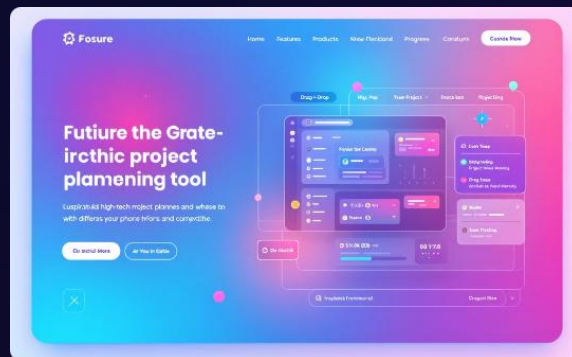
3

Continuous Improvement

Regularly review and adjust performance measurement strategies based on project performance and feedback to ensure effective monitoring and improvement.

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 Organization



Tailor for the Project



Implementing ongoing improvement

Conclusion and Key Takeaways

Adaptability is Essential

Tailoring project management practices is crucial for achieving project success in diverse contexts.

Focus on Context

Understand the unique characteristics and challenges of each project to effectively tailor project management approaches.

Continuous Improvement

Embrace continuous improvement by regularly reviewing and adapting tailoring strategies based on project performance and feedback.

