

Methodologies

Methodologies define a step-by-step series of process for delivering projects or any other business outcome. Each methodology includes a defined series of steps or processes and describes each step in adequate depth so that the project team understands what has to be done to deliver their project. This is quite different to a standardised knowledge framework such as the *PMBOK® Guide*¹.

Using the same steps for every project the organisation undertakes minimises risks and uncertainty and there is likely to be an overall saving of time and effort on projects.

Defining ‘your’ methodology

The key steps to follow are:

- Define what it is that you want from your methodology, the type of content it should contain and the way in which it will be used.
- Create a set of specific requirements. Some options to consider include defining:
 - How much of the project lifecycle needs to be incorporated
 - How much detail should be included? What practical templates and examples are needed to help to complete the step quickly and easily?
 - Should it follow one of the worldwide project standards such as the *PMBOK® Guide*?
 - Can/should the system be easily customised suit all project types and sizes?
- Determine the best methodology to use:
 - Review the methodologies currently used by your organisation and compare them to your requirements to see if there is a good fit.
 - Review the commercially available methodologies to see if there is a good fit.
 - Select the option with the best fit to your requirements
- The best methodology is still only likely to have a 90% fit (or less), this is normal. Make sure you can customise the remaining elements to meet your specific requirements.
- Ensure adequate flexibility for the range of projects in your organisation.

Building ‘your’ methodology

The basics of what is required to define a business process within a methodology include:

- Knowing precisely what is to be done. Standards and guides such as the PMBOK only provide general guidance.
- Defining precisely the inputs, outputs and performance criteria. One example: Qualitative risk analysis (*PMBOK® Guide* 4th Ed., page 292) identifies relative impacts – but what represents a 0.80 impact (extreme), \$5000, \$50,000, \$500,000 – the methodology has to make these definitions. The ‘impact’ can apply to quality, safety, time, cost – which ones matter and need including in the methodology, which can be left out??
- Defining the people responsible for performing the processes by roles, responsibilities and authority levels.
- Creating or adapting templates and guidance documents to implement the processes consistently.

¹ For more on the difference between methodologies and standards see:
<http://mosaicprojects.wordpress.com/2009/04/11/pmbok-v-methodology/>

- Define the work flows. The *PMBOK® Guide* is well laid out in this respect but only deals with a single pass – methodologies need to deal with iterative builds.
- Then you get to the questions of how often the processes are used, how intensely they are applied, who oversees the processes, how performance is measured, how the processes are improved and what happens if there is an identified problem or issue.

The real skill is to make sure the methodology is as simple, quick and easy to use as possible whilst applying sufficient rigour to optimise project outcomes. Creating a ‘good’ methodology from scratch using a standard such as the *PMBOK® Guide*, or adapting an existing methodology such as PRINCE2, involves some serious work and the research and development work needs to be properly resourced to ensure the methodology is developed properly and is useful and usable.

Implementing the methodology

The key steps to make sure the ‘useful’ methodology is used are:

- Create an Implementation Plan supported by a change management plan. Implementing a methodology is a significant organisational change.
- Run the implementation as a change management program, including customising the methodology for your environment. Stakeholder engagement is vital to the overall success of the initiative².
- Train the users and support staff in the methodology and ensure ongoing support.
- Ensure the methodology is followed.
- Start improving the methodology³.

Continuous Improvement

Ensuring the methodology is rapidly perceived as ‘productive’ is essential for it to be generally accepted and supported by your stakeholders. This factor linked to the fact it is usually easier to add more detail to a system than it is to remove established processes suggests starting with ‘too little’ process in a methodology and adding extra features later if they can be justified is better than going for a ‘big bang’ system with every bell and whistle.

The first rounds of improvement are based incrementally adding processes and procedures in a designed ‘roll out’ until the full methodology is used by everyone. The second phase of improvement is to focus on ‘process improvements’⁴ by continually questioning the value of each step and process to minimise the amount of effort directed to running the methodology whilst maximising its effectiveness.

Summary

No methodology works ‘out of the box’ they all need customisation and tailoring. However, the effort is worthwhile. OPM3 has demonstrated standardised processes that incorporate best practices can provide significant benefits to an organisation⁵.

² For more on stakeholder management see: http://www.mosaicprojects.com.au/Stakeholder_Circle.html

³ for more on measuring and improving the organisations project management maturity see Mosaic’s OPM3 home page: <http://www.mosaicprojects.com.au/OPM3.html>

⁴ For more on process improvements see WP1046: http://www.mosaicprojects.com.au/WhitePapers/WP1046_Process_Improvement.pdf

⁵ See more on OPM3 at: <http://www.mosaicprojects.com.au/OPM3.html>

The challenge is balancing systemised processes with the need for adequate flexibility to deal with the circumstances of each unique project. An effective project management methodology needs core components, scalable components and optional components designed to meet the needs of your organisation.
