Part I:
Introduction

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Introductions

- Take 5 Minutes

- Turn to a Person Near You

- Introduce Yourself

- Business Cards

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Agenda

- Introduce Dual Operating Model

- Selecting the right methodology for your work

- Identify future improvement steps for implementing dual operations in your strategic processes

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Presentation Concepts

Hybrid Model

- Hybrid model combines Waterfall methods and Agile practices, providing structure for well-understood needs and flexibility for less understood parts

Dual Model

- Dual operating model is best suited for organizations where some deliverables follow Waterfall and some follow Agile, with their own governance

Governance

- Governance is important for both Hybrid and Dual operating models, with guidelines and procedures to support each way of working

Selection

- Select Hybrid or Dual operating models depending on organizational and product needs, and ensure funding models support the selected approach

What a Dual/Hybrid Operating Model Should Not Be

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Waterfall vs Agile or Both

- Avoid the Wild West.
  - Pick a Lane.
- Pragmaticism is a must with either.
- Understanding product and project needs through litmus testing.
  - If outcomes are known, repeatable, and have expertise, then Waterfall.
  - If outcomes are complex, greenfield, and change is a given, then Agile.
- Avoid having team members working on a feature that is on a waterfall team and then another feature/user story for an agile team.
- Upfront planning and iterative development do not mix.

Anti-Pattern – Pure WAGILE

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Hybrid and Dual – Do's and Don'ts

| DO	DON'T
✓ Teams are either all Agile or Waterfall ✓ Have clear processes without overlaps ✓ Artifacts are simplified and can support both WoW where it makes sense ✓ Gain buy in from Leadership, Product Management, and Delivery teams	⊘ Mix teams WoW with both Agile and Waterfall work ⊘ Gate or waterfall sprints for Agile teams ⊘ Avoid mandating WoW without clear objectives to why teams follow process

What is Dual Operating Model?

Waterfall vs Agile

Waterfall	Agile
Follows a sequential process for software development	Follows an incremental and iterative approach
Best suited for work with a clear and well-defined scope	Best suited for work with changing scope and requirements
More rigid and structured	More flexible and adaptable
Longer delivery time	Faster delivery

Incorporating Agile with Waterfall is common in organizations that have well-established Waterfall processes. In these instances, it is important to establish how they can work effectively.
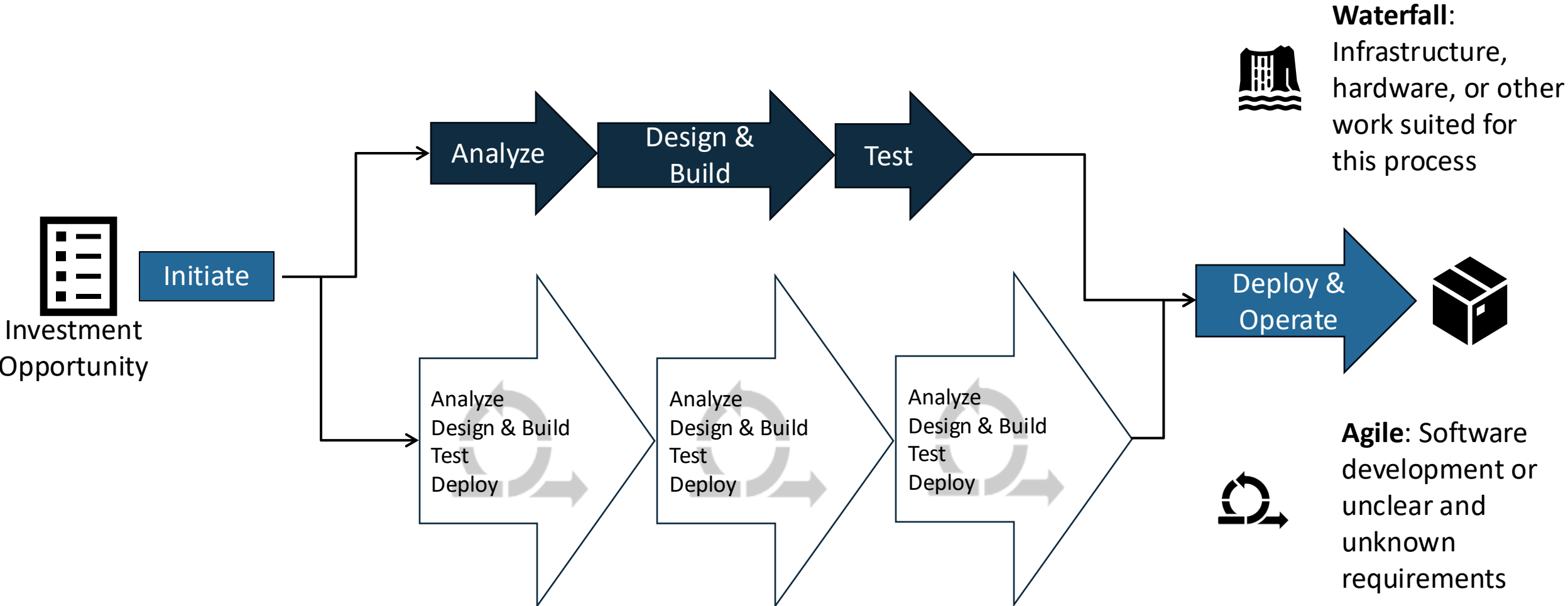
What is Hybrid
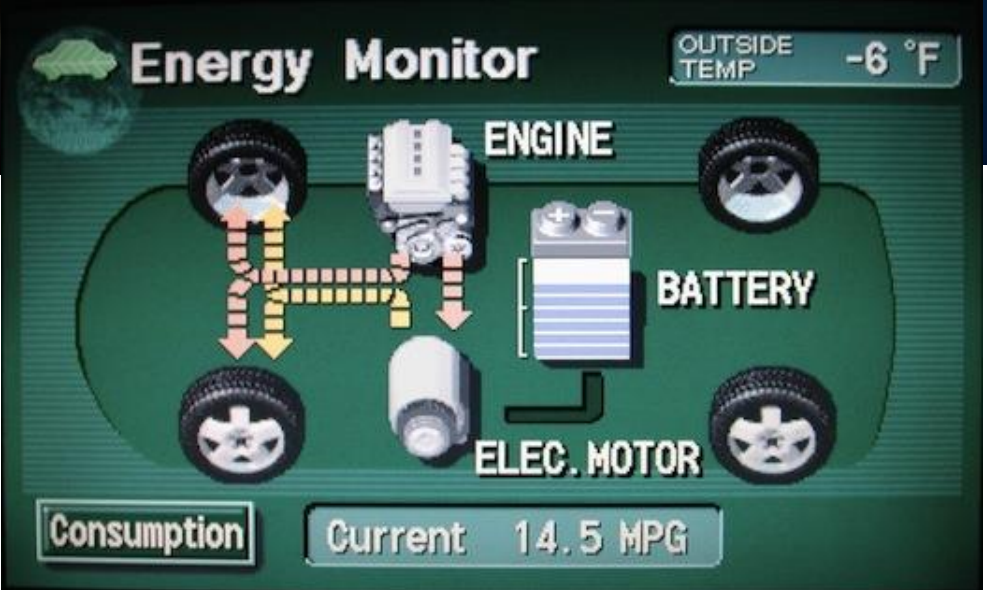
What is Hybrid Operating Models?

- Hybrid is a combination of Waterfall methods and Agile practices. Typically, Waterfall provides the structure for well-understood needs for Investment Opportunity, and Agile practices can be used for the less understood and unknown parts to iterate through the solution.

- The Key to working in a Hybrid manner is to be flexible and open to working through challenges. Waterfall only permits changes after detailed review and approvals. In Hybrid, changes should be built into the ways of working. This will require mindset and cultural changes across the organization to adopt.

What is Hybrid Operating Models?

- Reasons for working in an Agile-Waterfall Hybrid model:
  - ✓ It shortens design, analysis, and planning, but lets you define project frames including budget and time of delivery.
  - ✓ Your domain requires delivery of both hardware & software together.
  - ✓ It helps maintain compliance with standards.
  - ✓ It enhances collaboration.
  - ✓ When the adoption of the Agile culture is problematic, Hybrid is a good first step.

Hybrid Operating Model

Investment Opportunity

Initiate

Analyze

Design & Build

Test

Analyze
Design & Build
Test
Deploy

Analyze
Design & Build
Test
Deploy

Analyze
Design & Build
Test
Deploy

Deploy & Operate

Waterfall: Infrastructure, hardware, or other work suited for this process

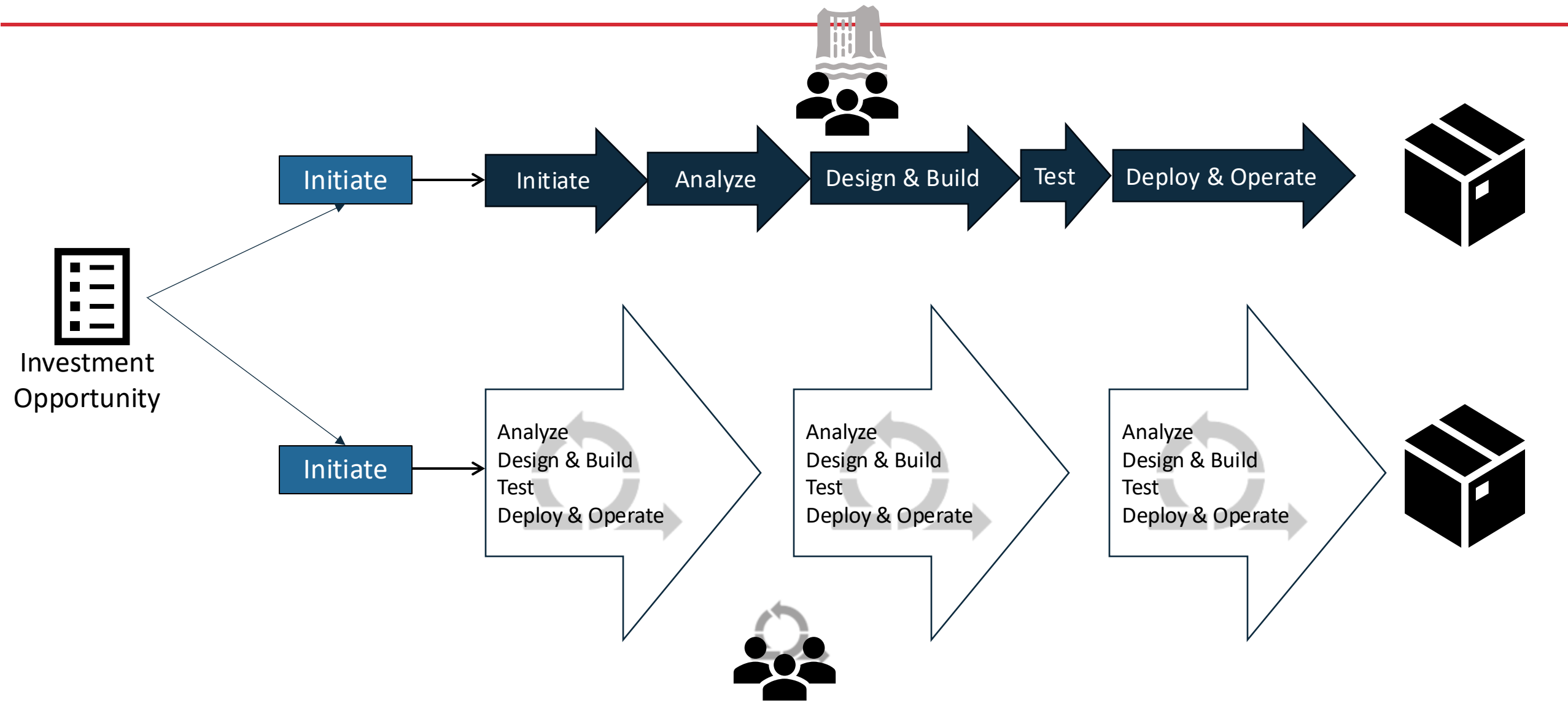**Agile**: Software development or unclear and unknown requirements

What is Dual Operating Model

What is Dual Operating Models?

- Dual operating model is best suited in organizations where some deliverables will follow Waterfall from beginning to end, and some will follow Agile from beginning to end. This requires both to have their own governance and will require additional effort from teams to ensure dependency and integration.

- It is important that these two worlds run as independently as possible with few dependencies.

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Dual Model

Investment Opportunity

Initiate → Initiate → Analyze → Design & Build → Test → Deploy & Operate

Initiate →

Analyze
Design & Build
Test
Deploy & Operate

Analyze
Design & Build
Test
Deploy & Operate

Analyze
Design & Build
Test
Deploy & Operate

Governance to support Hybrid or Dual Operating Models

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Governance – Hybrid Operating Model

The Hybrid Operating system allows leaders to select among the key components of Waterfall and Agile to build a Hybrid approach based on each Initiative's unique demands. However, it's important to note that mapping between multiple ways of working can add overhead and complexity. Therefore, the choice of using a Hybrid Operating system should be made carefully, considering the specific needs and context of the phases of the Initiative.

- Establish a Governance organization and team with experts from both Waterfall and Agile.

- Establish appropriate Governance guidelines and procedures to support each way of working, especially during handoffs.

- Establish guidelines that clearly outline deliverables and process states needed to manage the complexity of multiple methods/frameworks.

Governance – Dual Operating Model

The Dual Operating system allows leaders to select either Waterfall and Agile to deliver on the Initiatives. It's important to have characteristics & guidelines for determining which model for each Initiative. Therefore, the choice of using a Dual Operating system should be made carefully, since each Initiative will follow one or the other model.

- Establish Governance to determine the model to be followed for each Initiative.
- Create one Governance team for Waterfall Initiative and one for Governance team Agile Initiatives.

When and How to use Hybrid or Dual

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Hybrid should be used when:

✓ You desire more collaboration between teams.

✓ You have tried or given up on transformation efforts, but complexity has slowed down the process.

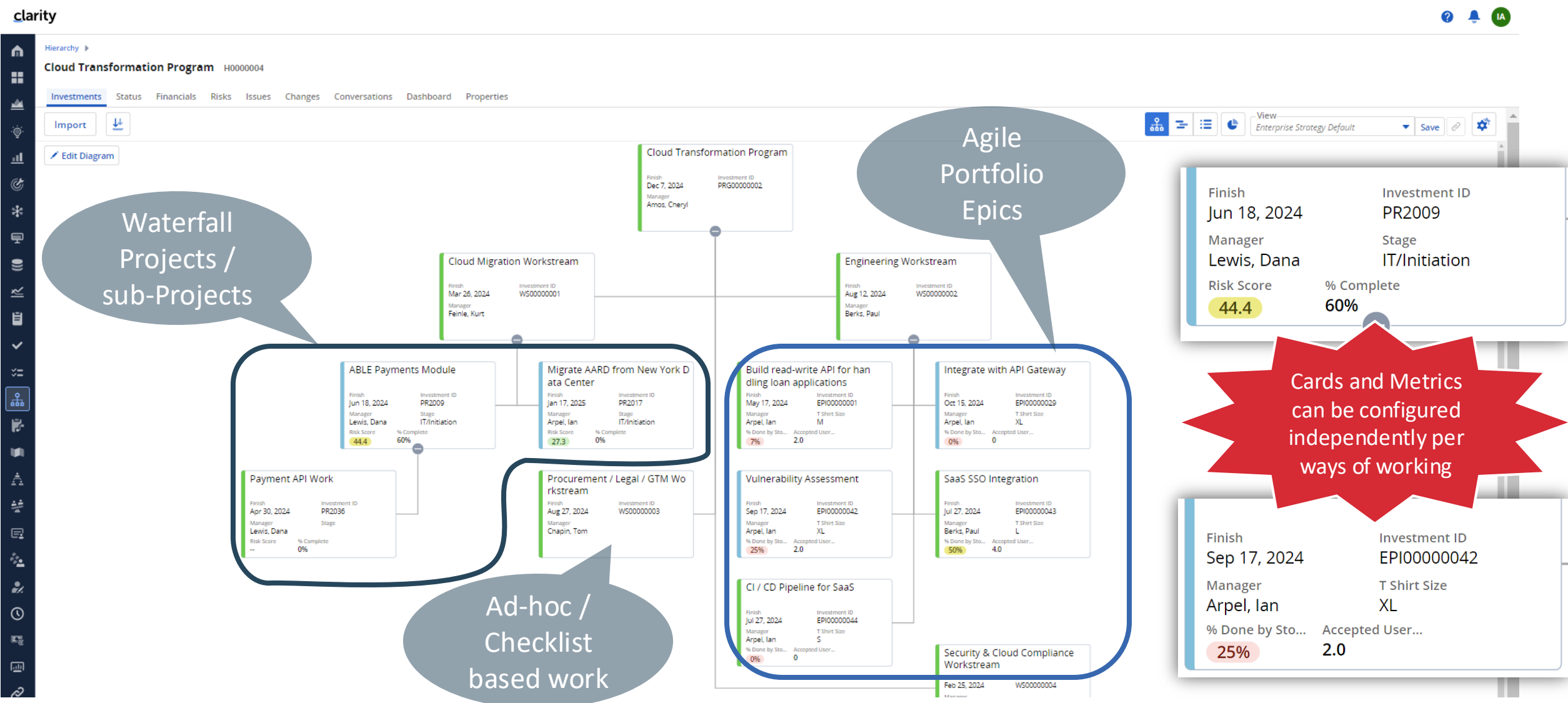✓ You have a fixed budget and deadlines but many unknown requirements and need the flexibility of agile.

✓ You have aspects of your product that are best delivered with Waterfall and others that are best delivered with Agile.

Dual should be used when:

✓ Your organization's Investment Opportunity clearly fall into a Waterfall or Agile models

✓ You have tried or given up on transformation efforts, but complexity has slowed down the process.

✓ You have a fixed budget and deadlines but many unknown requirements and need the flexibility of Agile.

Dual Operating Model

- Dual operating model will have stages that are very much governed/constrained by the phases, for example, during initiation and analyze the teams would follow a waterfall approach. When the work and problems are better understood or ready for development, then the teams executing design and build would deliver in a more agile approach.

- Delivering in a Dual operating model won't necessarily deliver faster, but will empower faster understanding of customer needs during key phases, and should result in higher value and quality to the customer.

Hybrid / Dual In Clarity

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Dual: Strategic Program with multiple workstreams

Dual: Strategic Program with multiple workstreams
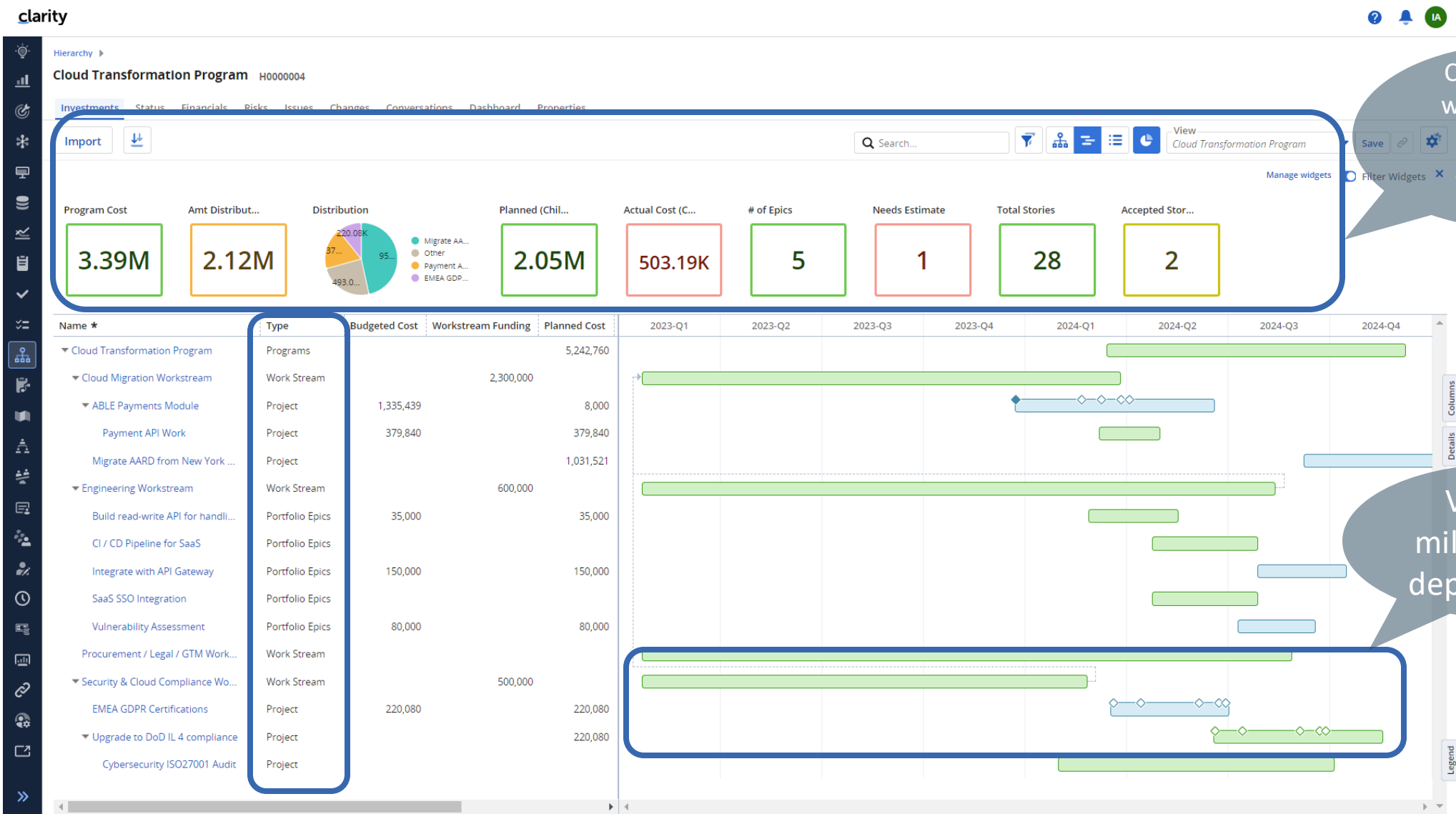
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Hybrid: Project with bimodal ways of working

Rally direct integration for interfacing with Agile teams

Development tasks delivered via Sprints using Rally

Overall plan follows conventional waterfall approach

Wrap-up

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Conclusion

- Select Hybrid or Dual operating models depending on your organizational and product needs.

- Regardless of operating models, be pragmatic in your application of either Waterfall or Agile.

- Governance is important for both Hybrid and Dual operating models, with guidelines and procedures to support each way of working.

- Remember that the models are there to support delivering outcomes and value.

Questions?

Surveys

Please take a few moments to fill out the class survey.
Your feedback is extremely important for future events.

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- Click on **Report PDU's**
- Click on **Course or Training**
- Class Provider = **Rego Consulting**
- Class Name = **regoUniversity**
- Course **Description**
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Part I:
Introduction

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Agenda

Sample Table

Post Time Sheets	6:00 PM	6:00 PM
Post Transactions	6:30 PM	6:30 PM
Post to WIP	6:45 PM	6:45 PM
Import Financial Actuals	7:00 PM	7:00 PM

Questions?

Master Clarity with Rego University

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Rego is excited to introduce our **new certification programs**, designed to enhance your expertise in Clarity administration, leadership, and technical skills. These certifications provide hands-on experience and knowledge to excel in your career.

Certification Requirements:

✓ **Completion**: 12 units per certification track

✓ **Eligibility**: Open to all Rego University attendees

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Let us know how we can improve!
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Icons

A Belief

- There are some groups that manage their work in ADO or ServiceNow
- These groups have the perception that Resource Management would be performed differently, if at all
- This deck intends to demonstrate that the Resource Management capability still remains the same whether:
  - You manage work in a traditional Waterfall manner
  - You maintain a backlog of Epics/Features/Stories in ADO
  - You track a backlog of incidents/defects in ServiceNow
- Regardless of where work is tracked, time tracking is performed in Clarity in order to enable other capabilities as well such as Chargebacks

Time Tracking Tasks

Project: ENM: Enterprise Network Modernization - *Team - Detail*

Scenario: [--Select--]   Actions

Filter: None

Allocation and Actuals By Period

Resource/Role ▲	Project Role	Start	Finish	Allocation	Actuals		Jul 23	Aug 23	Sep 23	Oct 23	Nov 23	Dec 23	Jan 24	Feb 24
Bruemmer, Debra A., CISSP		4/1/21	12/31/27	0.00	0.00	Allocation Actuals								
Butrum, Jason R.		4/1/21	12/31/27	0.00	0.00	Allocation Actuals								
Caulkins, Patrick T.	IT Analyst	4/1/21	12/31/27	0.04	0.02	Allocation Actuals	0.70 0.42	0.25 0.24	0.25 0.22	0.25 0.28	0.26 0.29	0.27 0.07	0.27	0.30
Coleman, Sherry L.	Project Manager	4/1/21	12/31/27	0.09	0.07	Allocation Actuals	0.05 0.24	0.62 0.17	0.73 0.67	0.74 0.42	0.46 0.51	0.45 0.57	0.49 0.53	0.45 0.56
Grady, Brandon C., CISSP, OSCP		4/1/21	12/31/27	0.02	0.00	Allocation Actuals	0.30	0.30	0.30	0.30	0.30	0.30		
Griggs, Kurt A., M.S.		4/1/21	12/31/27	0.01	0.00	Allocation Actuals	0.15	0.15						
Ihrke, Eric R., M.B.A.	IT Architect	4/1/21	12/31/27	0.00	0.00	Allocation Actuals	0.02	0.03	0.05 0.04	0.05 0.06	0.05 0.01			
Johnson, Andrew D.		4/1/21	12/31/27	0.00	0.00	Allocation Actuals	0.10	0.10						
King, Elsa, PMP	Project Manager	4/1/21	12/31/27	0.00	0.00	Allocation Actuals				0.06				
Marr, Gerad J.	IT Architect	4/1/21	12/31/27	0.02	0.02	Allocation Actuals			0.32	0.18	0.18 0.13	0.16 0.12	0.18 0.17	
Massman, Ron E.	Project Manager	4/1/21	12/31/27	0.01	0.01	Allocation Actuals						0.52 0.18	0.12 0.19	
Olson, Ramona L.		4/1/21	12/31/27	0.09	0.02	Allocation Actuals	0.88 0.15	0.80 0.19	0.80 0.21	0.80 0.11	0.80 0.15	0.80 0.21	0.09 0.12	0.10 0.07
Ortiz, Julian A.	IT Architect	4/1/21	12/31/27	0.06	0.05	Allocation Actuals	0.20 0.21	0.15 0.17	0.20 0.17	0.25 0.28	0.40 0.41	0.40 0.40	0.40 0.43	0.40 0.50
Pfund, Art T.	Manager	4/1/21	12/31/27	0.02	0.01	Allocation Actuals	0.30 0.11	0.30 0.14	0.09	0.07	0.02	0.05	0.05	0.05
Puetz, Rick N.	Architect	4/1/21	12/31/27	0.00	0.00	Allocation Actuals	0.04	0.01		0.05	0.03			
Rhea, Cristopher J., CISSP		4/1/21	12/31/27	0.00	0.00	Allocation Actuals	0.10 0.02	0.10 0.04	0.02	0.01				
Segura, Bryan S.	IT Architect	4/1/21	12/31/27	0.04	0.02	Allocation Actuals					0.20 0.09	0.20 0.16	0.20 0.18	0.20 0.10
Sun, Qian-Sophie	Developer / Programmer	4/1/21	12/31/27	0.00	0.00	Allocation Actuals	0.05	0.05						
Tefera, Mesalie S.		4/1/21	12/31/27	0.00	0.00	Allocation Actuals	0.07 0.07	0.02 0.02	0.06 0.06					
Truesdale, Philip A., M.S., CISSP		4/1/21	12/31/27	0.00	0.00	Allocation Actuals								
Total				0.61	0.35		3.65	4.18	3.24	3.08	3.35	3.52	3.10	2.78

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Displaying 1 - 20 of 24

Work Effort=FTE

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- This approach is often used in complex projects with well-defined, predictable aspects and more uncertain, iterative components.

In a Dual Operating system:

- The **Waterfall methodology** lays the foundation for the well-understood, predictable aspects of the project. Waterfall is a linear process that begins with requirements and ends with the final release or completion of the project.
- The **Agile methodology** takes the stage for the iterative, more uncertain components. Agile prizes rapid iteration, autonomy, and flexibility. Work is divided into sprints, time-based bursts of activity, to deliver value to the customer or user as quickly and often as possible.

Delivery with Traditional Waterfall

Investment Intake

Annual Planning

Investment Planning

Approve/ Fund Investment

Allocate Labor Resources

Delivery Monitoring

Time Tracking

Chargebacks

Enhancements

Defects

Close/End of Life

Work/Task Management

WBS

Gantt Chart

Schedule
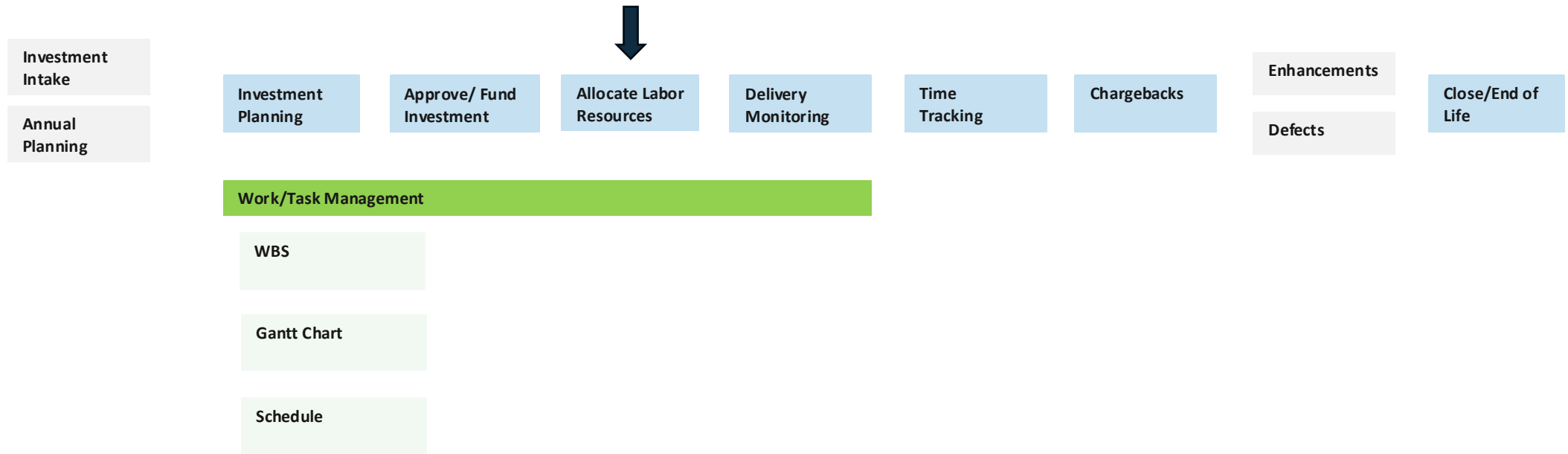
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Waterfall Tool

ServiceNow

Delivery with Agile Methods

Done the exact same way

Investment
Intake

Annual
Planning

Investment
Planning

Approve/ Fund
Investment

Allocate Labor
Resources

Delivery
Monitoring

Time
Tracking

Chargebacks

Enhancements

Defects

Close/End of
Life

The only change is
how you do the Work
Management

Agile Delivery

Epic Backlog Creation	Epic Prioritization	Epic Tracking
Feature Backlog Creation	Feature Prioritization	Feature Tracking
Story Backlog Creation	Story Backlog	Story Tracking

Clarity

Agile
Delivery

Delivery with Agile Methods

Done the exact same way

↓

	Investment Intake		Investment Planning	Approve/ Fund Investment	Allocate Labor Resources	Delivery Monitoring	Time Tracking	Chargebacks	Enhancements	Close/End of Life

Investment Intake

Annual Planning

Investment Planning

Approve/ Fund Investment

Allocate Labor Resources

Allocation of Resources is done on the Investment record in Clarity

Delivery Monitoring

Time Tracking

A set of standard tasks are created on the Investment record in Clarity. There is no data

Chargebacks

Enhancements

Defects

Close/End of Life

The only change is how you do the Work Management

Agile Delivery

Epic Backlog Creation	Epic Prioritization	Epic Tracking
Feature Backlog Creation	Feature Prioritization	Feature Tracking
Story Backlog Creation	Story Backlog	Story Tracking

Clarity

Agile Delivery

Investment Hierarchy

Investment	Epic
	Feature
	Story

Modality	Epic
	Feature
	Story

Guide Posts to Consider

For teams that maintain work in some sort of backlog:

1. A team should only have one backlog to work off of
    a. If teams are working on more than one backlog, it might be worth looking into whether the team(s) should be restructured to better facility flow
    b. Multi-threading often results in inefficiencies
    c. Think assembly lines in a factory, having workers move from one assembly line to another is obviously inefficient and makes it difficult to measure whether each assembly line is experiencing flow
2. It should be assumed that for these teams, an Investment (Clarity record) represents the funding of that work, as well as documenting the anticipated capacity of the team (should be a high capacity value)
    a. An investment can represent an application, application group, product, product group, service, and even traditional programs and projects
    b. This level also represents a customer or set of customers that are expecting the team to deliver value, in the form of new capabilities, features, addressing defects/incidents
    c. Allocation of the resources should occur at this high-level, it would not make sense to try to allocate at the Epic or Feature level as those are outcomes that are usually expected by a customer
3. An overall responsible individual (i.e. Product Manager, Product Owner) should provide oversight for the team's backlog doing things such as (much of this work is done in ADO):
    a. Maintaining and prioritizing a backlog based on the needs and expectations from business partners, and also might need to account for IT for IT sponsored work (i.e. Windows 11 upgrade)
    b. This individual should also be informing business partners of the progress that the teams are making and also informing them of how new work might impact existing work
        i. Sometimes the work being requested is simply a backlog item (i.e. Feature) that just gets
    c. This person also ensures that "work is visible" to all stakeholders as appropriate
        i. This could be done in a variety of different ways
            1. SN can be used for intake and updates of that work
            2. ADO can be used to help make work visible to the teams responsible for that work
            3. Clarity is used for the tracking of the overall progress, labor allocations and actuals
    d. It should be assumed that teams that are operating using Agile methods, that the leading-practice roles such as Scrum Leader, Product Owner

Terms

- Investment
- Epic
- Feature
- Story
- Backlog
- Allocation
- Actuals