



HAIKAI MANAGEMENT

the Natural Path to Intelligent Evolution

PAPER

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Haikai Management

an AgileConstellation Star



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1. Overview

This document aims to provide a description of **Haikai Management**, pragmatic solutions that allows you to address today's management challenges inherent in business initiatives in terms of *Portfolios, Projects and Products*.

The various topics will be treated at a medium-high level, leaving the reader to study and search for the insights he or she may deem necessary. This approach has been chosen to avoid turning this guide into a "tome", avoiding, therefore, reporting elements easily found in the literature and focusing on putting together a flexible operational logic, and of immediate use, which puts the reader in a position to be immediately operational.

The paper is accompanied by a second document, **Haikai Management PlayBook** (available on request), which provides operational guidance on how to apply what has been written



2. Haikai Management

Haikai Management is the art of leading organizations through fluid harmony, adaptive intelligence, and the beauty of simplicity.

Inspired by the Japanese poetic philosophy of *haikai*, which celebrates the natural balance between different elements, Haikai Management proposes a new approach: *synthesizing complexity, connecting people, technologies and visions in a natural way, making systems evolve as intelligent flows, never forced.*

In a world where uncertainty is the rule, Haikai Management teaches how to orchestrate change with lightness and depth, transforming artificial intelligence, data and human thought into living and harmonious ecosystems.

It's not about controlling, it's about tuning in and evolving gracefully.

2.1 ModernPM Frameworks

Through modern tools and evolutionary approaches, Haikai Management helps transform individual actions into a constellation of value, maintaining a constant pace towards evolution. The goal is to **produce value for the reference stakeholders**, creating quality **initiatives** capable of solving their needs. This takes the form of the ability to **continuously adapt** to changing conditions, from strategy to more operational aspects.

Initiatives can be of different types: from marketing actions to product development, so it is clear how fundamental it is to define a specific **bouquet** of tools adapted to the specificities of the business context. The pragmatic approach of Haikai Management leads to entering into the merits of things and appropriately evaluating which is the tool that best allows objectives.

The different initiatives are strategically managed through the **Portfolio**, which allows you to develop the big picture in a way that ensures that developments are aligned with strategic objectives and are executed efficiently.

A company could still pursue an initiative even purely in terms of **Project**, for example when it concerns an action to review internal processes or a research project, in the event that the deliverables produced cannot be considered as a real product.

When initiatives concern the development of **Products**, it is essential to emphasize that the following types can be related to:

- **Off-the-Shelf Product:** Ready to use, designed and manufactured to be adopted *by a wide range of customers with minimal adaptations*. Ideal for scenarios where business needs are common and standardized, avoiding custom development costs.



- **Custom Product:** tailor-made *for a specific customer*, with fully customized functionality, interface and logic. Suitable for companies that have special needs not covered by standardized solutions.
- **Semi-Custom Products** that combine elements of standard products with customization possibilities. Typically, there is a common basis that can be modified or extended to meet the specific needs of a customer or market segment.

A company could still pursue an initiative even purely in terms of **Project**, for example when it concerns an action to review internal processes or a research project, if the deliverables produced cannot be considered as a real product.

To achieve this goal, Haikai Management branches out into a series of **frameworks** focused on a specific area of organizational management:

- **Modern Project Management (ModernPjM):** designing adaptive, iterative and intelligent systems, capable of evolving with needs and data.
- **Modern Product Management (ModernPdM):** building fluid, evolutionary experiences based on insights and perceived value.
- **Modern Portfolio Management (PfM):** Govern priorities and investments with *dynamic flexibility*, driven by predictive analytics and real-time feedback.
- **Value Stream Management (VSM):** integrating people, processes and technologies into ecosystems of harmonious and continuous growth.

All these frameworks live under the **umbrella of ModernPM**: a unified, agile and scalable language that allows the organization to **move** as a single evolutionary organism, where the "P" is declined according to the specificity of the field: **Project, Product, Portfolio** or **Process**.



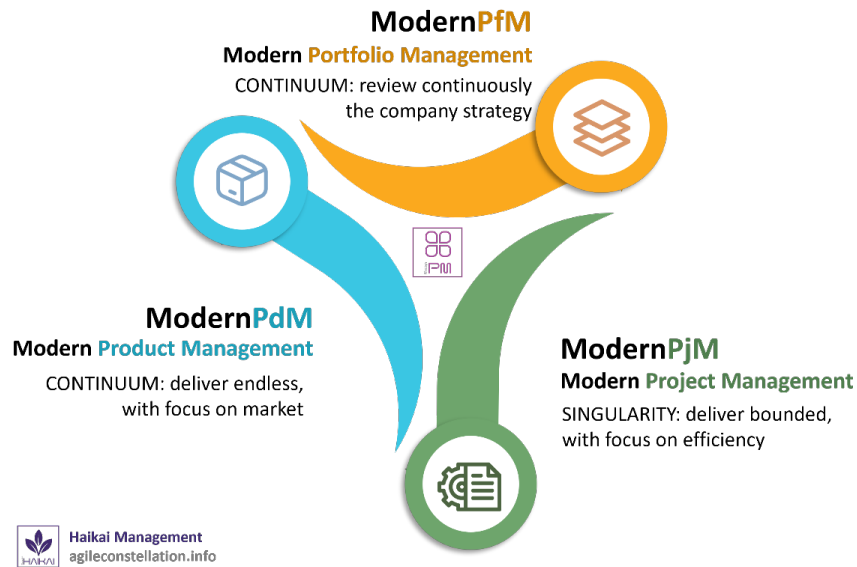


Figure 1 – Haikai Management: ModernPM Frameworks

ModernPM thus represents a fluid and *adaptable family of frameworks*, capable of evolving with the strategic needs of the organization.

Through these *frameworks*, Haikai Management provides a modern and resilient framework that enables organizations to navigate complexity, foster agility, and build a harmonious constellation of value and innovation.

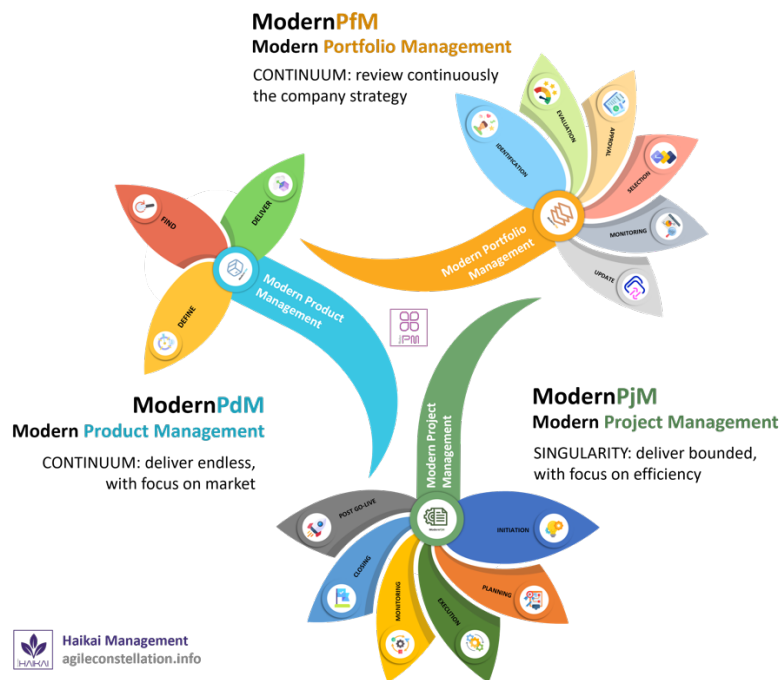


Figura 2 - ModernPM Frameworks Details



A mature and robust use of Haikai Management requires the development of a broad knowledge of different approaches (**knowledge**), experience in their use (**competence**) and an understanding of how they can help in the specific context (**pragmatism**), continuously experimenting with a view to continuously finding new options and solutions.

2.2 Pillar

The core of Haikai Management is composed of 4 fundamental Pillars:

- **Mindset**, i.e. the cultural aspect to be developed, in line with the philosophy and core aspects of the AgileConstellation Manifesto
- **Principles**, which guide the operational focus, extending and integrating those of the AgileConstellation Manifesto
- **Practices**, which allow the various activities to be concretely implemented, also here integrating and extending those of the AgileConstellation Manifesto
- **Toolkit**, a set of tools to support the various governance and operational activities.

2.2.1 Mindset

In the application of processes and practices, it must always be remembered that **each initiative is different**, so it is essential to adapt the principles to the specific context, with a view to "*inspect and adapt*".

It is essential to determine the correct level of rigor to be adopted:

- **Too much formality** can slow down progress, even cause paralysis
- **too little formality** can lead to a non-approach

Haikai Management is a Star of AgileConstellation, providing the "beat" needed to synchronize and harmonize different activities within the organization. Its foundations are represented by the Philosophy, Principles and Practices of the Agile Constellation Manifesto¹, also defining specific practices and principles pertaining to the reference domain.

¹ www.agileconstellation.info

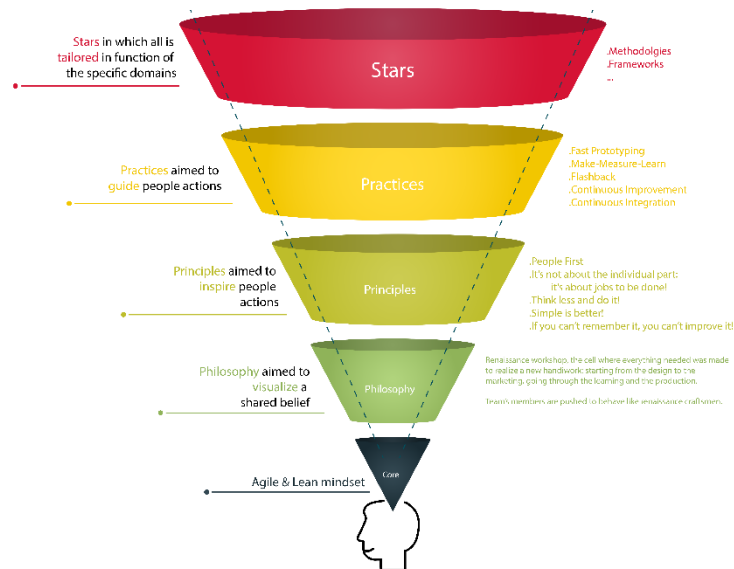




THE AGILECONSTELLATION FUNNEL

DISCOVER THE FOUNDATION

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Based on a work at www.agileconstellation.info.

Figura 3 - AgileConstellation funnel

We have, therefore:

- **Philosophy**, inspired by the **Renaissance Workshop**, or the cell that fulfills what is necessary for the creation of a new work: from design, to construction and marketing.
 - **Principles (core):**
 - *It is not a question of the individual parts: it is the whole that must be done well!*
 - *Think less and act sooner!*
 - *Simple is better!*
 - *If you can't remember it, you can't improve it!*
 - **Practices (core):**
 - *Fast Prototyping*, validating the sustainability of the solution
 - *Make-Measure-Learn*, quickly experiment with different assumptions and assumptions
 - *Flashback*, quick alignment in which the observer goes to the work desk
 - *Continuous Improvement*, constantly improving every aspect
- Continuous Integration*, constantly integrating the different souls of the solution



Specifically, Haikai Management declines the AgileConstellation funnel as follows:

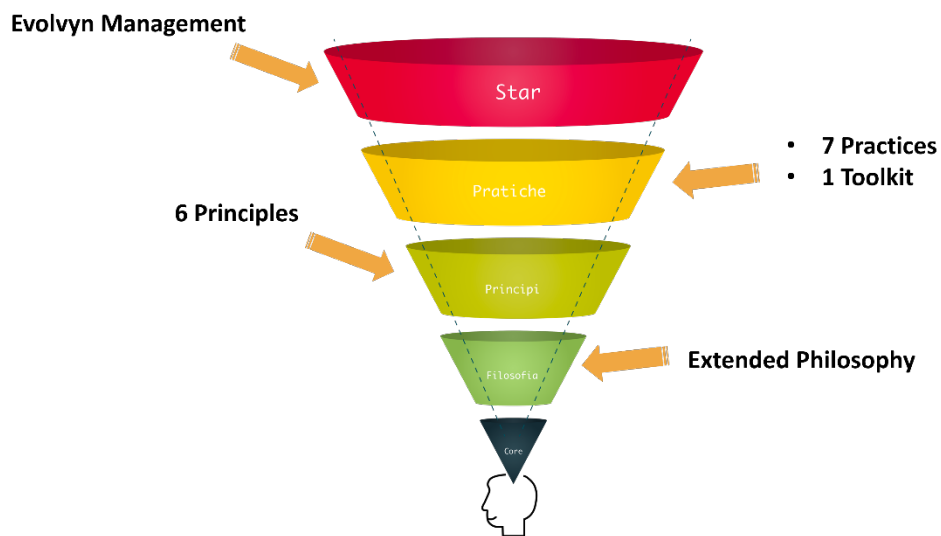


Figure 4 – Haikai Management Mindset funnel

2.2.2 Principles

The Principles of Haikai Management allow us to focus operational attention on:

- *attitude and mindset needed to tackle today's complex projects*
- *support risk management*
- *develop the ability to synergise with the team*

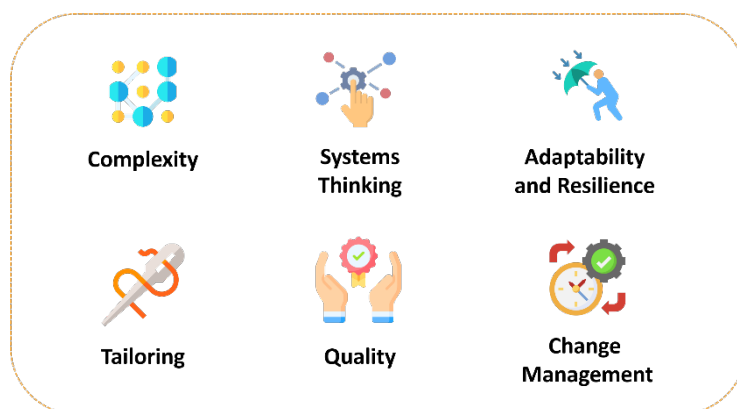


Figure 5 - The Principles of Haikai Management

Specifically, we have:

- **Complexity**, navigating complexity with an open mind to grasp all its aspects, pitfalls and opportunities, maintaining a certain balance between the need not to complicate things more than they already are. Duly it is essential to remain sensitive to circumstances and details that can hide valuable information.



- **Systems thinking**, it is essential to consider all the components of an initiative and an organization as a whole that must be optimized to produce the best results. This requires breaking down organizational silos and acting as a glue and business analyst.
- **Adaptability and resilience**, not being overwhelmed by circumstances and emotionality is an important character trait that can be strengthened by living every experience as a learning opportunity. Experiences that develop outside the "comfort zone" are those that will give a fundamental imprint for growth.
- **Tailoring**, the management criteria of an initiative must be tailored to the specificities of the initiative and the organizational and market context in which it is called to operate. The choice of the framework must also be made in this perspective just as the styles of communication and negotiation must take into account the characteristics of one's interlocutors.
- **Quality**, the management of which must be integrated into the processes and understood in a broad sense: quality of people, materials used and work processes. But also the quality of behavior which, as mentioned above, must be oriented towards maximum responsibility and transparency.
- **Promoting change**, the person in charge of an initiative does not always have to act as an agent of change, but it is a fact that today a good part of projects have a substantial component of product or process innovation. New technologies and digitization processes require careful management of innovation and an attitude that sees innovation as a positive factor for business development.

2.2.3 Practices

The fundamental practices of Haikai Management are:

- **Vision Definition**, it is crucial to establish the Vision for the initiative and ensure that it is shared by and with all stakeholders. A good vision of the initiative remains relatively constant, while its implementation path needs continuous adjustments and alignments.
- **Roadmap Management** provides a high-level overview of the objectives to be achieved and the related timing, allowing you to define priorities in relation to medium to large time frames. The roadmap becomes the litmus test to validate the progress of the initiative, inform stakeholders and make decisions on the matter.
- **Lifecycles Mastering**, each initiative is unique, so it is essential to be able to choose between different operating modes to carry it out in the most effective and efficient way possible. Having different operational lifecycles (aka processes) allows you to adapt better in relation to the specificity of the initiative, the team and the context of reference.



- **Measurement**, leading an initiative without metrics is like driving a car blindfolded: you can also proceed, but it is certain that you will crash somewhere. Metrics and methods for quantifying, monitoring, and tracking progress are essential to evaluate the performance of the initiative and implement the right responses to remedy any deviations from expectations.
- **Refinement**, by definition, the characteristics of an initiative evolve progressively, and this is even more true for its deliverables that must be updated continuously. Defining an appropriate refinement strategy, with objective levers, allows you to activate a healthy relationship of continuous "bargaining" with stakeholders, the team and the organization.
- **Prioritization**, it is essential to identify the value of the different deliverables and associate each of them with the relative priority. In this way, it is possible to implement timely and specific strategies to respond to changes or any problems that will be encountered.
- **Risk Management**, knowing how to move in uncertainty, **identifying threats and opportunities**, is an essential skill for the governance of an initiative. The projects are developed in environments with different degrees of uncertainty, i.e. a state that is not known a priori but can be intercepted many times



Figure 6 - Haikai Management practices

2.2.4 Toolkit

Haikai Management is accompanied by the **Haikai Management Toolkit (HMT)**, which is a set of methodological and operational tools that allow you to perform all the tasks in the best possible way.



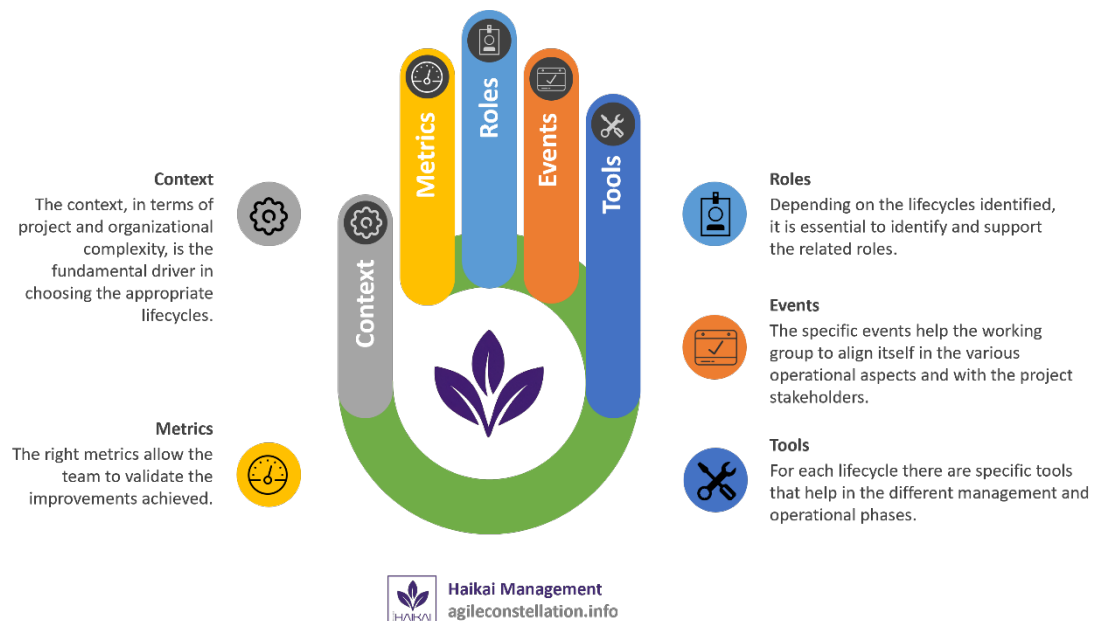


Figure 7 - Haikai Management Toolkit (HMT)

Specifically, the Haikai Toolkit is characterized by the following reference components:

- **Context:** the reference context is the fundamental driver in the choice of the appropriate lifecycles.
- **Metrics,** the right metrics allow the team to validate the improvements achieved.
- **Roles,** depending on the lifecycles identified, it is essential to identify and support the related roles.
- **Events,** the specific events help the work team (or teams) to align in the different operational aspects.
- **Tools,** for each lifecycle there are specific tools that help in the different management and operational phases.

The Haikai Toolkit is designed for each type of debate, allowing you to identify the best set of elements to support the specific initiative, taking into account the specific complexity and the specific risks involved.

2.3 Guided Continuous Improvement

Guided **Continuous Improvement** ² (**GCI**) extends the basic principle (AgileConstellation) of Continuous Improvement, and is based on two fundamental aspects:

- the **Kaizen loop**, or the approach in which the team progressively experiments with small changes in its *Way of Working* (WoW). Downstream of each experiment, if what has been

² <https://www.pmi.org/disciplined-agile/gci/guided-continuous-improvement>



experimented has given the desired results, the team adopts it in a structured way, vice versa it will choose a different option that will go on to experiment again.

- Continuous **Improvement**, or the act of applying a series of *Kaizen loops* to improve one's WoW over time.

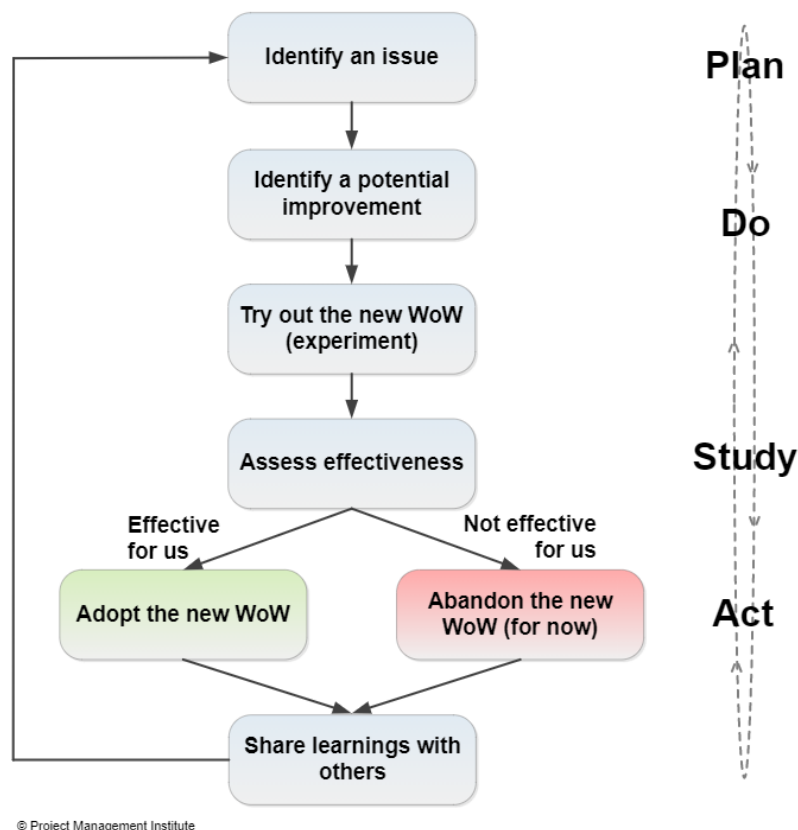


Figure 8 - Kaizen Loop and Continuous Improvement

Guided Continuous Improvement is a technique (suggested by the *Disciplined Agile toolkit*) that reinforces Continuous Improvement, suggesting to the team a bouquet of options to pragmatically address the problem of the "method prison"³:

"The only option that development organizations and teams see themselves as having is to adopt a method and to reject all others—whereas, in fact, what is needed for organizations and teams to be free is to select the professional practices that they need, from wherever these may be defined, and use them in whatever permutations and combinations are appropriate to meet the exact set of circumstances and challenges they face".

³ <https://essence.ivarjacobson.com/publications/white-papers/tear-down-method-prisons-set-free-practices>



The impacts of getting caught up in an overly prescriptive framework (or method) were further highlighted by *Donald J. Reifer*⁴ and represented in the following figure:

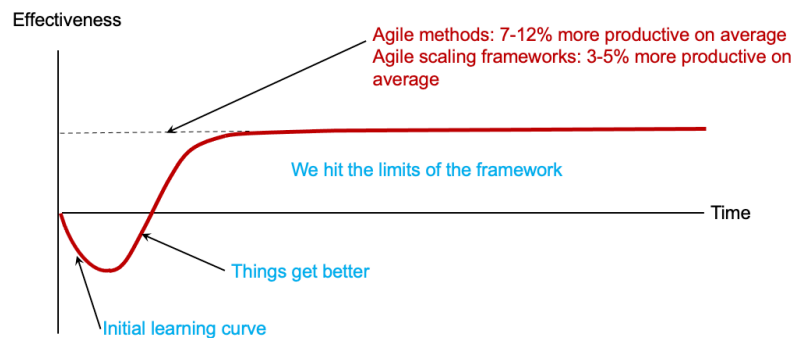


Figure 9 - Source: Reifer, D. Quantitative Analysis of Agile Methods Survey (2017): Twelve Major Findings

The basic problem, with such approaches, is that too often we forget that they are *models*, often linked to well-defined contexts. If we combine this with the claim to use them indiscriminately for every initiative in a dogmatic way, and not in a critical and contextualized way, we find ourselves imprisoned in a mechanism that does little to help develop the ability to adapt according to the objectives to be achieved.

To *break out of this prison*, GCI is the winning weapon, providing direct support in identifying potential problems and, above all, *proven guidance* to help the team identify techniques that might work in the specific context.

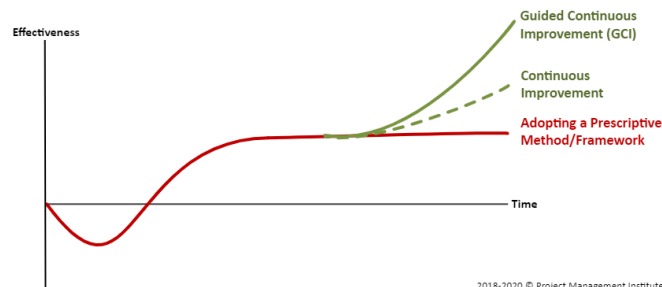


Figure 10 - CGI, CI & Methods/Framework

Although each option should still be treated as an "*experiment to do*", the advantage is that CGI allows you to increase the percentage of successful experiments and therefore increase the overall rate of improvement.

⁴ <https://www.infoq.com/articles/reifer-agile-study-2017/>



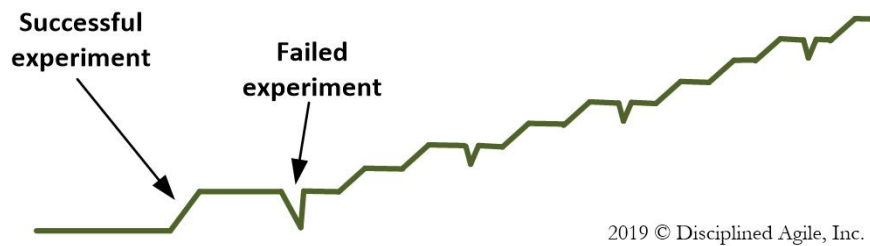


Figure 11 – GCI increases the chances of successful experiments

There are two key takeaways for adopting a GCI-based approach:

- *Make use of an expert (PM, Scrum Master, Coach, etc.) and, above all, listen to him.* It is not easy to find a real expert who knows how to help the team and guide it in its growth, but, once found, it is essential to have the time and patience to listen to him and follow him.
- *Use established practices in the context,* in order to provide a set of reasoned options to pragmatically support the team. Good coaches have the humility to recognize that they don't know everything and, in turn, they will leverage a mix of tools and solutions to help the team make better decisions on how to face challenges, continuously improving themselves in an experimental way.

2.4 The importance of Leadership

Identify the appropriate *Leadership style* is critical to the success of any initiative.

However, it is difficult for a single style to be sufficient, more realistically, it will be necessary to constantly adapt to the evolution of the activities and the related development context.

A help in this direction comes from *Situational Theory*⁵, i.e. from the studies and experience of *Paul H. Hersey, Kenneth Blanchard and Dewey E Johnson*, who describe ***Situational Leadership*** in the book *Management of Organizational Behavior: Leading Human Resources*:

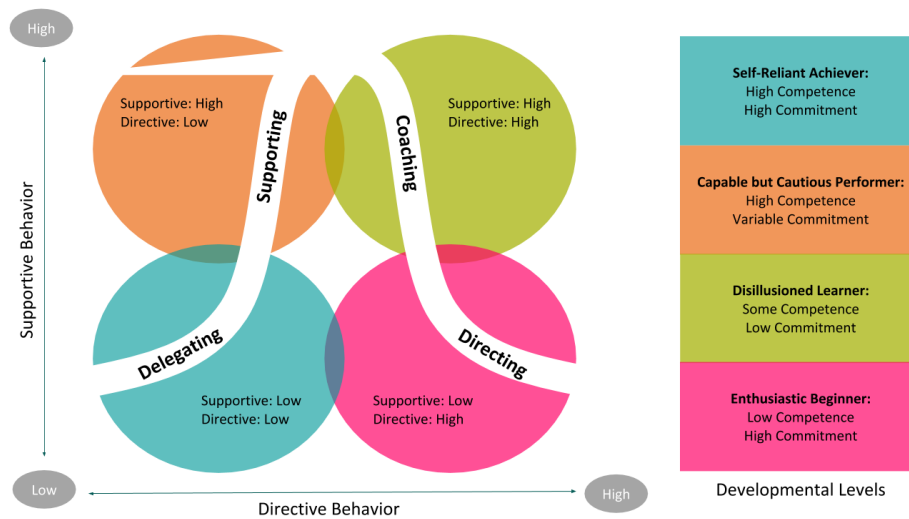
"There is no 'right' and unique way to be a leader, but you need to choose the style that is most appropriate for different situations."

Situational Leadership is based on the relationship between *leaders, teams and stakeholders*, providing a framework for analyzing different situations based on the level of maturity of the team and that of the stakeholders.

⁵ <https://it.brainmain.net/10493030-the-situational-theory-of-leadership>



Hersey-Blanchard Situational Leadership Theories



*This graphic combines elements of the Hersey-Blanchard Situational Leadership Theory & Blanchard's revised Situational Leadership Theory II

Figure 12 - Situational Leadership (source: <https://guntergroup.com/situational-leadership/>)

Identifying the most appropriate leadership style for the *level of maturity* helps to have fewer conflicts and a broader motivational drive, generating greater cohesion in the work group. In fact, as tasks and/or projects change, the necessary skills that must be acquired by team members vary and, therefore, the leadership style necessary to achieve goals through the development and growth of its people must vary.

Also according to Blanchard (see *Leadership and the One Minute Manager* and the *SLII model*),[®] there are three elements that support an effective leader:

- **Goal setting**, the starting point of a situational leader, creating alignment on what needs to be done and when and then motivating participants in an initiative.
- **Team member maturity level**, the leader co-assesses the maturity (development) level of each team member based on their expertise and commitment to a specific goal or task. The level of maturity is always related to the goal or task, and not to the person.
 - There are *four levels of development* characterized by different combinations of competence and employee commitment: *D1 (Low Competence and High Commitment)*, *D2 (Some Competence and Low Commitment)*, *D3 (Moderate-High Competence and Variable Commitment)* and *D4 (High Competence and High Commitment)*.
- **Correspondence between leadership style and development of team members**, provides the most appropriate leadership style to guide and support the employee according to his or her level of development. With this skill, leaders learn about different leadership styles and how to be more flexible.



- Just as there are four levels of development, there are also *four leadership styles* characterized by different combinations of leadership behavior and supportive behavior: *S1 (High Leadership and Low Support), S2 (High Leadership and High Support), S3 (Low Leadership and High Support), S4 (Low Leadership and Low Support).*

The *matching* phase is the decisive moment, with the aim of matching the leadership style with the level of maturity to identify the most appropriate match for the context: the more leadership styles are aligned with the levels of maturity, the faster people will improve and evolve from one level to another.

Although it is difficult to identify all the possible leadership styles, the following matrix tries to represent the most common ones in relation to the complexity of the activities and the experience of the work group.



Figure 13 - Types of Situational Leadership



3. Roles

There are many roles in an initiative, with specific responsibilities and objectives, but also with overlaps that can make it difficult to clearly identify the relative operational periphery.

3.1 Portfolio Roles

Within the portfolio, the key roles involved are:

- **Portfolio Manager:** central figure responsible for the overall management of the portfolio.
- **Portfolio Governance Committee (Committee):** A high-level decision-making group that approves and oversees the portfolio of initiatives.
- **Business Lead:** A representative of the company's leadership who supports and sponsors a specific initiative.
- **Product Manager (PdM):** expert in the product and the reference markets.
- **Project Manager (PM):** responsible for the development of project initiatives.
- **Experts:** experts in the various domains involved and impacted by the initiatives.

Each role is essential to ensure that the portfolio is managed efficiently and effectively, developing appropriate governance and a constant focus on strategic alignment and results.

The roles in relation to their responsibilities and specific stages of involvement are set out below:

- **Portfolio Manager**
 - Coordinating the Portfolio Governance Committee
 - Coordinate communication between different business stakeholders
 - Improve the portfolio process
- **Portfolio Governance Committee (Committee)**
 - Ensure that all initiatives are aligned with strategic objectives
 - Monitor and manage the entire portfolio lifecycle
 - Review portfolio choices based on changes in priorities or operating conditions
 - Review and approval of initiatives
 - Monitor overall portfolio performance
- **Business Lead**
 - Ensure that the initiative is supported at the company level.
 - Provide the expected needs and expectations.
 - Collaborate closely with the Product Manager/Project Manager
 - Provide feedback on delivered progress
- **Sales Coordinator**
 - Customer Request Management
 - Collection of internal needs



- Collaborate with the Portfolio Manager
- **Area Manager**
 - Ensure that the initiative is technically and technologically feasible
 - Support the staffing and coordination of the people involved
 - Nurturing people
 - Define the new needs, in terms of People and resources, in relation to strategic objectives
- **Product Manager (PdM)**
 - Manage the evolution of the individual product
 - Analyze the related markets and define the reference product roadmap
 - Develop product team leadership (with team lead/architecture owner and scrum master/coach)
- **Project Manager (PM)**
 - Provide regular updates to the Product Manager and Portfolio Governance Committee, as well as stakeholders where necessary.
 - (plus all the functions defined below)
- **Experts**
 - Provide domain-specific information
 - Carry out technical analysis and evaluations

3.2 Project Roles

Typical roles in a project are:

- **Project Manager:**
 - Manage all the **activities related to the project** as a whole
 - Coordinate the management **of the project** economy and the project **aspects**
 - **Validate** completed tasks
 - Coordinating the **risk**
 - Implement the necessary **monitoring actions**
 - Create and update the **necessary project documentation**
 - Manage contractual aspects
- **Product Owner/Product Manager:**
 - Clearly express the aspects characterizing the functional scope of the project
 - **Prioritize** the Attached Items to best achieve the objectives
 - Ensure that the Product Backlog is **visible, transparent, and clear** to everyone



- Establish an **ongoing relationship** with the client regarding their specific expectations
- **Functional Analyst:**
 - Clearly formalize project requirements
 - **Prioritize** different requirements to best achieve goals
 - Ensure that all documentation is **visible, transparent, and clear** to everyone
 - Establish an **ongoing relationship** with the client regarding their specific expectations
- **Architecture Owner:**
 - Evaluate and define the **best relative architecture**
 - Indicate the **most suitable** technical/technological choices
 - Define quality aspects
 - **Wading through the team** as a team leader
 - Operationally support developers
- **Developers:**
 - Develop deliverables
 - Select the most appropriate **development patterns** in line with the architecture
 - **Testing and Integrating** Code in Relation to Testing Strategy
 - Develop a maturity on technical issues and the selected lifecycle
- **Tester:**
 - Define the **most appropriate** testing strategy
 - Define the **different levels of tests**: from unit to end-to-end
 - Analyze and **monitor** technical **debt**
 - Support the Product Owner in **writing and validating the Acceptance Criteria**
- **Experts:**
 - Provide **domain-specific information**
 - Carry out **technical analysis and evaluations**
 - Provide **operational support**
- **Account (Commercial):**
 - **Manage** customer requests
 - **Continuously align** with the Project Manager and Product Owner
 - Check **customer satisfaction**
 - Developing **new opportunities**
- **Area Manager:**
 - Ensure that the initiative is **technically and technologically feasible**
 - Support the **staffing** and **coordination** of the people involved
 - Nurturing **people**
 - Define the **new needs**, in terms of People and resources, in relation to strategic objectives
- **Client:**
 - **Officially commission** the project



- **Support the team in developments** by providing clarifications and supporting reviews
- **Take care** of the progress of payments
- **Stakeholders:**
 - **Provide support** at the different levels required
- **Customer Care:**
 - Assist the customer in the use of **what is produced**
 - Collect **technical support requests**
 - Collecting **evolutionary requests**
- **Service Manager:**
 - Manage **customer** post-release requests
 - Ensuring an **adequate level of quality** in risk resolution (**SLA**)
 - **Engage developers and testers** necessary to process the request
- **Agile Delivery Manager (ADM, convergence between Agile Coach and PMO)**
 - Controlling **the application of standards**
 - **Optimize** project management
 - **Gather insights** to improve project management processes
 - Support the appropriate adoption **of the lifecycle and the chosen practices**
 - Support the organization in developing the **culture suitable for the chosen lifecycle**

The trio composed of the Project Manager, the Architecture Owner and the Product Owner create the **PROJECT LEADERSHIP GROUP** which manages the economy and the order address.

The skills of these roles can be mapped in relation to the *Performance Domains* of the *PMBOK*⁶, i.e. on the focus aspects of a project/initiative leader:

- **Team**, addresses the activities and functions associated with the people responsible for the development and deliverables of the project/initiative.
- **Development Approach and Lifecycle**, addresses the activities and functions associated with the development mode, cadence and phases of the project/initiative life cycle.
- **Measurement**, addresses the activities and functions associated with evaluating the performance of the project/initiative and taking appropriate actions to maintain reasonable performance.
- **Stakeholders**, addresses the activities and functions associated with stakeholder management.

⁶ "A Project Performance Domain is defined as a group of related activities that are critical for the effective delivery of project outcomes."



- **Project Work**, addresses the activities and functions associated with defining project/initiative processes, managing physical resources, and fostering a learning environment.
- **Planning**, deals with the activities and functions associated with the aspects of initial planning, continuous review and evolution, the coordination necessary to deliver the expected results of the project/initiative.
- **Uncertainty**, addresses the activities and functions associated with risk and uncertainty.
- **Delivery**, addresses the activities and functions associated with the delivery of expected features and related quality aspects.

The different roles can cover all, or only part, of the overall spectrum of performance domains, in relation to their contribution to the project/initiative. For example:

3.2.1 The Project Manager

The **Project Manager (PM)** is a specific role within the projects and is accountable for a specific project, resources and the scope of the related requirements, and as such has overall governance over all related activities, constantly confronting the relevant stakeholders.

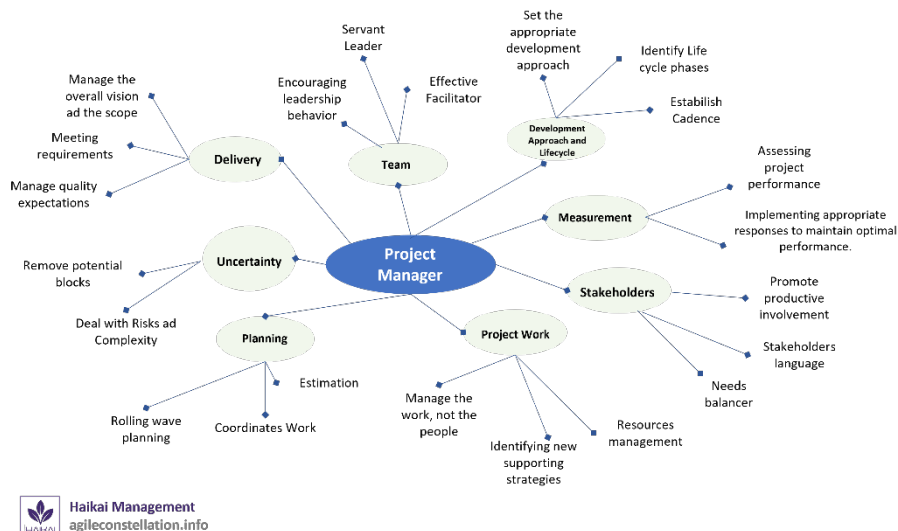


Figure 14 - Project Manager skills

To perform their activities in the best possible way, the project manager must possess a balanced mix of *hard* and *soft skills*, always proving to be an excellent communicator and an empathetic leader. This must be combined with organizational meticulousness, a resolution in making decisions, as well as flexibility and a spirit of adaptation.



Last but not least, it is essential to know how to calmly and adequately deal with the various problems that arise during the entire life of the project, bringing to boro the people who can help bring it back in line with expectations.

3.2.2 The Product Owner/Product Manager

The **Product Owner/Product Manager (POPM)** in the context of projects that follow an Agile lifecycle, is responsible for the value of a product and as such constantly interacts with the customer to validate its scope.

Unlike the Project Manager, his focus is on the product, with respect to which he declines his activities and actions.

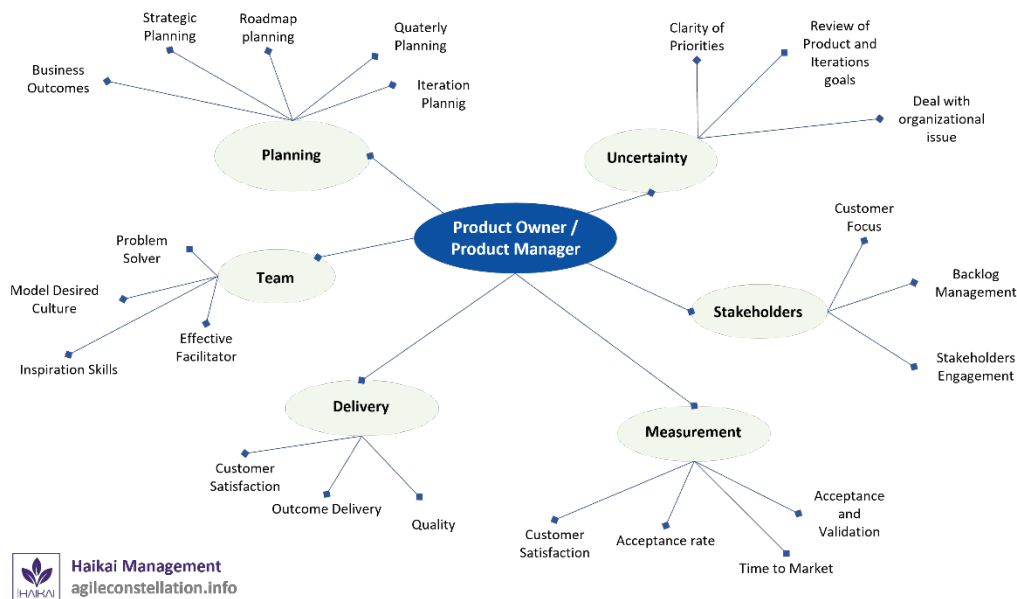


Figure 15 - Product Owner skills

The POPM takes care of and develops the vision of the product and has the primary objective of *harmonizing the needs of stakeholders in relation to the product*. To achieve them, the OP:

- it has the exclusive governance of the Product Backlog⁷;
- ensures that the team creates Value, accepting or rejecting what has been achieved according to the "Definition of Done";
- ensures that the Product Backlog is visible to everyone;
- participates in Iteration Planning;
- defines and verifies the *Acceptance Criteria*.

⁷ For a description of the specific tools attached to the different lifecycles, please refer to the following.



3.2.3 Agile Delivery Manager

The **Agile Delivery Manager (ADM)** supports all phases of the project, with a particular focus on supporting the growth of the team, monitoring and applying the aspects of the various lifecycles chosen. The role combines the typical approach of a PMO (Project Manager Officer) with that of an Agile Coach.

His action is supported by a *servant leadership* combined with coaching skills that allow him to establish an atmosphere of trust and collaboration with the whole team.

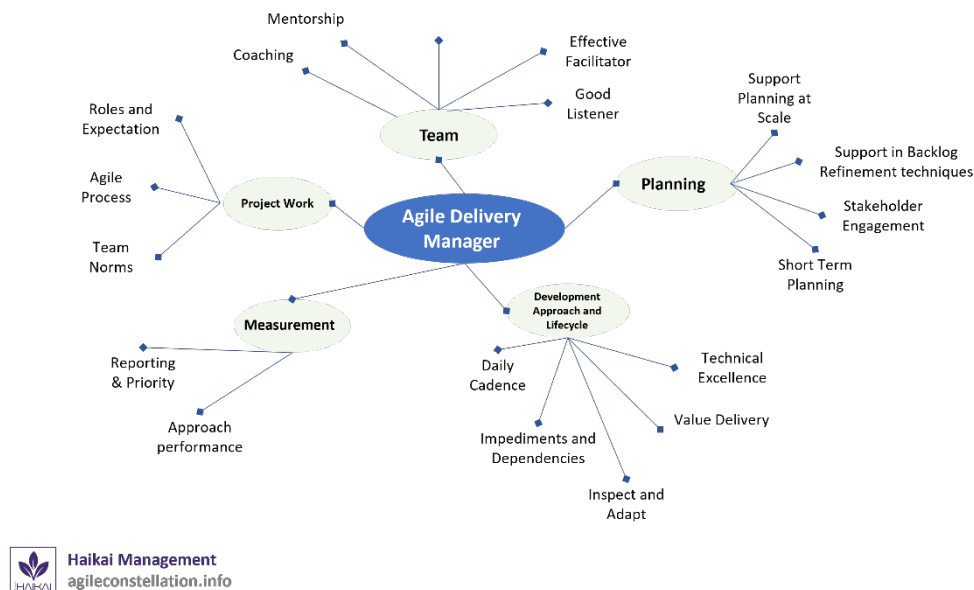


Figure 16 – ADM skills

The ADM plays an almost "consultant" role, supporting in particular:

- the **Product Owner**, in setting product objectives, using the Product Backlog, in Iteration Planning and in the various meetings
- the **Team**, in the adoption of the specific *lifecycle toolkit* (see below), in ensuring the correct implementation of deliverables and in the search for actions for continuous improvement.

The ADM focuses on the team development path:

- making sure that the team itself, and the organization, develops an Agile mindset
- helping him, together with the organization, in the adiment of agile practices
- supporting him in improving his productivity
- emphasizing the quality of what has been achieved
- protecting it from external interference
- removing its impediments.

Looking at the project, he deals with:



- Define processes, tools and methodologies for portfolio and project management.
- Monitor performance and provide methodological support to Project Managers and Portfolio Managers.
- Ensure consistency and adoption of best practices in portfolio management.
- Support data collection for monitoring and reporting.

3.2.4 Architecture Owner

The **Architecture Owner (AO)** actively guides the specific work team in relation to the objectives that it has in charge.

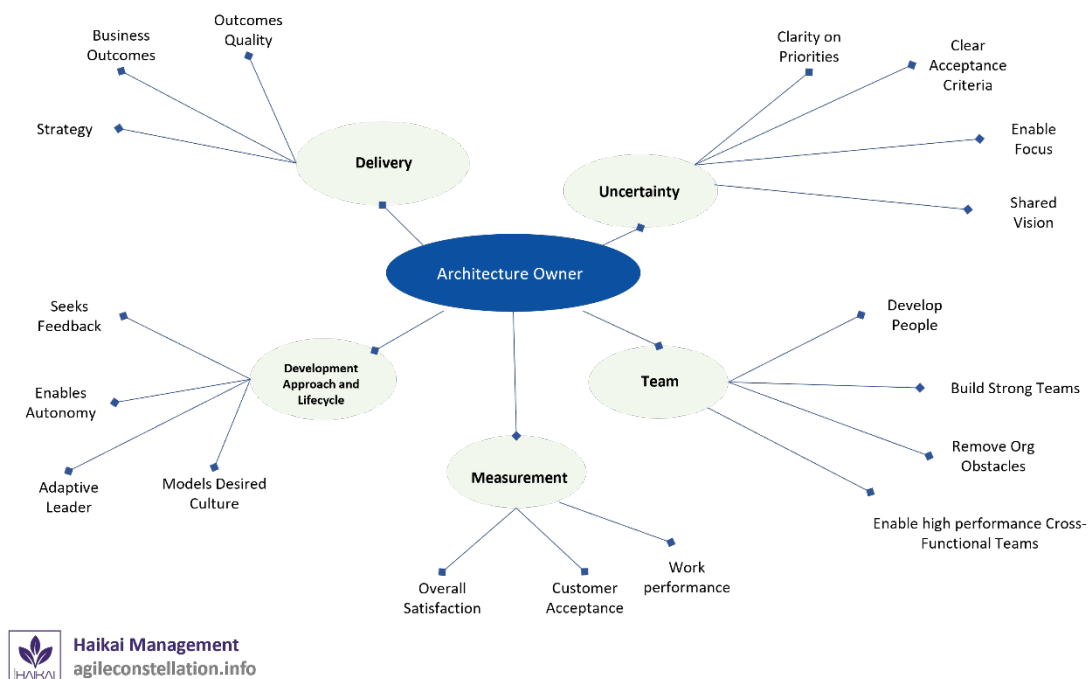


Figure 17 – Architecture Owner skills

The figure of the Architecture Owner is often decisive in obtaining maximum involvement and, consequently, adequate productivity of the team. The AO supports the team:

- in daily work
- in solving problems inherent in specific tasks
- in identifying possible solutions
- in conflict mitigation
- in professional growth.



3.2.5 Developers

The **Developers** are the group of specialists who will implement the deliverables/products envisaged by the initiative.

These are technical experts able to actively work in a team and use the best technological solutions (related to the production domain) to achieve the expected goals.

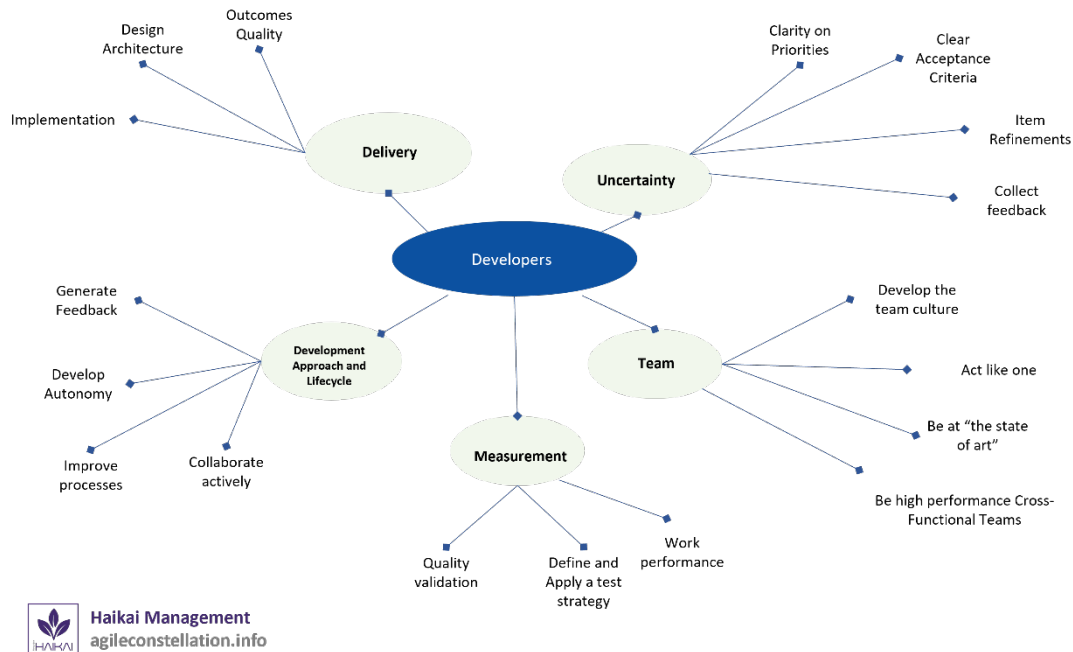


Figure 18 - Developers



4. ModernPfM: Modern Portfolio Management

Almost always the number of initiatives to be developed exceeds the number of resources available, making it essential to define a decision-making process that allows them to select which of them to focus on.

The most important challenge is to ensure that this process is as "objective" as possible, i.e. oriented towards the evaluation of the real Value, developing the necessary awareness that leads to the appropriate structure of a **Portfolio**, an essential tool for a project management office and managers who juggle multiple projects.

4.1 The Portfolio as an enabler of Business Agility

A modern portfolio offers several benefits for organizations looking to efficiently and effectively manage their portfolio of initiatives, balancing engagement on new and business-as-usual (BAU) initiatives.

This is crucial for developing Business Agility internally, *i.e. the ability to quickly align with market changes, in a productive and cost-effective way.*

Management uses the Portfolio to better understand how initiatives support the company's medium and long-term objectives, considering the risks, the alignment of the strategy and, as mentioned, the potential return on investment (ROI).

More generally, the Portfolio makes a large portfolio of initiatives (typically Projects and/or actions related to Value Streams) manageable and places those with the highest priority at the top of the to-do list.

The primary advantages that derive directly from an appropriate strategy attached to a modern Portfolio are:

- **Strategic alignment:** Ensure that all initiatives, regardless of how they are developed, align with the organization's strategic objectives. This alignment values initiatives that contribute most to the company's long-term goals.
- **Value-based prioritization:** adopt a value-oriented approach to prioritizing initiatives. Using criteria such as Customer Value, Effort Required, Cost of Delay, we try to focus resources on initiatives that produce the most value and contribute most to business objectives.
- **Resource optimization:** Optimize the allocation of resources, including budgets, staff, and capabilities, to maximize the overall performance of the Portfolio. Through practices such as workload balancing, identifying and managing resource constraints, and optimizing the value stream, the modern Portfolio helps avoid over-allocation and underutilization of resources.



- **Reduced time-to-market:** Reduce the time it takes to bring new products and solutions to market. Adopting Lean and Agile practices enables the rapid and iterative release of value to customers, allowing them to remain competitive in a rapidly changing environment.
- **Increased transparency and accountability:** Promotes greater transparency and accountability within the organization, through the setting of clear goals, measurable performance metrics, and regular reporting mechanisms. This allows you to monitor the progress of your portfolio, identify any challenges or obstacles, and make informed decisions to optimize operations and improve results.
- **Risk mitigation:** A modern portfolio allows organizations to comprehensively assess project risks. Early identification of potential barriers allows for better risk management and proactive decision-making.
- **Clarity of accountability:** Foster a culture of accountability by setting clear goals and metrics. Working according to established expectations can motivate team members to perform better than expected and encourage transparency between the different functional areas involved.

4.2 The Main Challenges to Overcome

The implementation of a modern Portfolio can be very complex, and can encounter several challenges that must be prepared for.

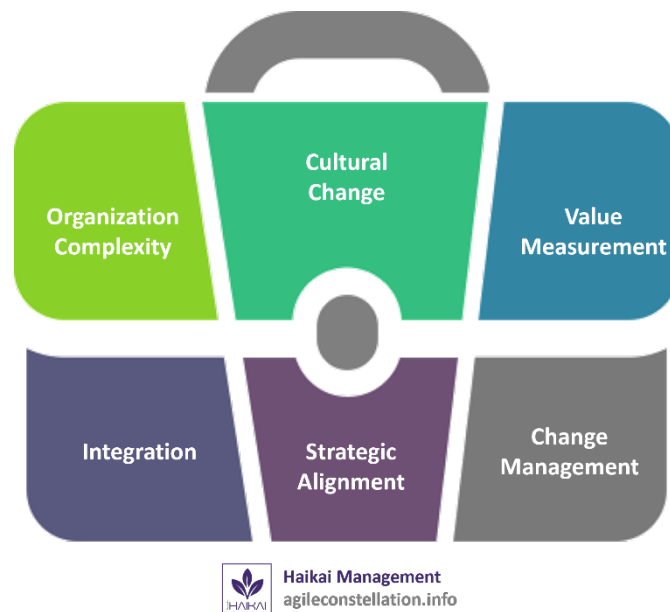
Key challenges include:

1. **Cultural Change:** this can lead to a more or less marked resistance to change, in relation to what they are used to more traditional processes and highly hierarchical organizations. It is essential to actively involve members of the organization, provide training and support to promote a flexible and value-oriented mindset.
2. **Organizational Complexity:** Coordinating and integrating the elements that underpin a modern approach to the Portfolio can be challenging, especially if there are organizational silos or complex dependencies between different parts of the Portfolio. It is important to invest time in a thorough understanding of the organizational structure and in defining effective mechanisms for managing these dependencies and interconnections.
3. **Value Measurement:** Determining the overall value of initiatives within the portfolio can be a challenge. You need to define clear and measurable value metrics that reflect your organization's strategic goals and allow you to assess the impact of your activities accurately and fairly.
4. **Integration with Existing Processes:** Portfolio implementation may require integration with existing project, budget, and business strategy management processes. This can be complicated if current processes are rigid or poorly suited to the agile and lean mindset.



promoted by the Portfolio. A balance must be struck between adapting existing processes and introducing new practices to ensure a smooth and consistent transition.

5. **Change Management:** Portfolio implementation can represent a significant organizational and operational change. It is important to carefully manage this transformation process, involving stakeholders, clearly and continuously communicating the goals and benefits of change, and addressing concerns and resistance from members of the organization proactively.



Addressing the different challenges presented requires a long-term commitment from the organization, with strong leadership, active employee involvement, and detailed strategic planning. However, overcoming these difficulties can lead to significant improvements in portfolio management and in achieving overall business goals.

4.2.1 Involvement of different business functions

The implementation of an adaptive Portfolio Management action involves different business functions, each with a specific role in the process. Among the main ones are:

1. **Executive leadership:** Leaders (CEOs, senior executives, function managers) are responsible for defining the overall business strategy and setting the strategic objectives of the portfolio. Together, they must provide the vision and support needed for the adoption of a modern portfolio and drive cultural change within the organization.
2. **Portfolio Manager:** Responsible for overseeing and allocating resources to projects and initiatives within the portfolio. This can include evaluating proposed projects, prioritizing backlogs, managing risks and dependencies, and measuring the value generated by the portfolio as a whole.



3. **Value Management Office (VMO):** Responsible for facilitating the Portfolio management process and driving operational excellence and Lean governance as part of a Lean-Agile transformation.
4. **Project Management Office (PMO):** provides operational and administrative support for the implementation of the Portfolio, including tools and processes for portfolio management, data collection and analysis, standardization of project management practices, and training of members of the organization.
5. **Development and delivery:** These are the functions involved in the development and delivery of products and services, such as developers, engineers, designers, and production teams, responsible for delivering projects and initiatives within the portfolio. These functions must adopt agile practices and actively collaborate with other teams to ensure fast, high-quality delivery.
6. **Finance and management control:** involved in the management of budgets and financial resources within the portfolio. It may include: planning and allocating budgets, monitoring costs and expenses, and evaluating the financial performance of projects and initiatives.
7. **HR and organizational development:** responsible for supporting cultural change and developing the skills necessary for the adoption of the Portfolio within the organization. This can include: training on Agile and Lean practices, training in the Traditional/Waterfall environment, promoting collaboration and transparency, creating a work environment focused on value and innovation, etc.

These functions work together to ensure the success of modern implementation of portfolio management, actively collaborating to define common goals, align processes and practices, and foster a company culture of value and collaboration.

4.2.2 Legal and tax issues and constraints

In the implementation of the Portfolio it is possible to find some legal and tax constraints that can affect the process.

Some of these constraints include:

1. **Tax regulations:** These can affect the allocation of financial resources and the management of budgets within the portfolio. For example, there may be specific rules regarding the deductibility of expenses, the taxation of proceeds from projects and the methods of tax reporting. It is important to comply with applicable tax regulations and obtain professional tax advice to ensure that the implementation of the Portfolio complies with the law.
2. **Labor legislation:** It can affect the organizational structure and human resource management practices within the organization. There may be specific regulations regarding: working hours, employment contracts, union representation and employee rights that must



be considered in the implementation of the Portfolio. It is important to comply with labor legislation and work with union representatives and HR professionals to ensure legal compliance.

3. **Data protection:** regulated by the various reference regulations (in the EU the General Data Protection Regulation - GDPR is in force). In the implementation of the Portfolio, it is essential to comply with data protection regulations and ensure that adequate measures are taken to protect sensitive information and respect the rights of data subjects.
4. **Industry regulations:** Depending on the industry in which the organization operates, there may be specific regulations governing activities and investments. For example, in the healthcare sector, the financial environment, or the infrastructure sector, there may be particular regulations that need to be considered in resource allocation and project management.
5. **Contracts and commercial agreements:** Contractual agreements with customers, suppliers and trading partners can affect the management of the portfolio and the implementation of the Portfolio. It is important to consider contractual obligations, confidentiality clauses, payment terms, and other relevant legal provisions to ensure compliance with commitments and compliance with agreements made.

Addressing these legal and tax constraints requires careful evaluation and diligent management during the implementation of the Portfolio.

It is advisable to involve specific experts to provide advice and support in complying with regulations and managing the associated risks.



4.1 The Portfolio Budget

4.1.1 Cost Tracking

The implementation of the modern Portfolio includes the evaluation of costs for each individual initiative, allowing a more efficient allocation of resources in a strategic and dynamic way.

Some steps that can be followed in this direction are:

1. **Internal resource analysis:** First of all, it is important to conduct a detailed analysis of the internal resources available, including staff, skills, and capabilities. This also includes an assessment of the costs associated with these resources, such as salaries, benefits, training, and other business charges.
2. **Define internal resource costs:** You must integrate the costs attached to internal resources into the cost calculation process of portfolio initiatives. This may require the creation of new models or systems for costing that include internal resources.
3. **Value-added assessment:** Assessing the added value provided by internal versus external resources. In-house resources might offer benefits such as familiarity with the organization, industry knowledge, and increased flexibility. These factors must be considered in the determination of costs and the allocation of resources.
4. **Training and communication:** It is essential to provide training and clearly communicate to employees and business leaders about changes in the costing process and resource allocation. This will help ensure that new practices are understood and accepted, and mitigate any resistance to change.
5. **Monitoring and optimization:** It is important to regularly monitor and evaluate the results obtained. This will help identify any inefficiencies or areas for improvement and make adjustments as needed to optimize resource allocation over time.

Navigating the transition to including internal resources in the cost calculation can take time and effort, but it leads to more accurate and comprehensive cost and resource management, allowing the organization to make more informed decisions and optimize the use of its internal resources.

4.1.2 Budget from different functional areas

When the budget comes from different functional areas, implementing a modern portfolio requires careful management and effective collaboration between different stakeholders.

Some steps that can be followed to address this challenge:

1. **Establishing a governance structure:** Establish a clear and transparent governance structure that involves all relevant entities. This structure should define the roles, responsibilities, and decision-making mechanisms for managing different portfolios and allocating budgets.



2. **Strategic coordination and alignment:** Working closely together to ensure strategic alignment between different portfolios and efficient use of available resources. This could involve setting common goals, sharing best practices, and collaborating in prioritizing initiatives and allocating budgets.
3. **Process standardization: standardize** portfolio management processes and practices across different entities to ensure consistency and cohesion in the implementation of portfolio management. This could include the establishment of value assessment models, prioritisation criteria and procedures for managing financial resources.
4. **Transparent communication:** Maintain transparent and open communication between different entities to ensure a common understanding of the objectives, priorities and decisions made regarding the implementation of the Portfolio. This includes regularly sharing information about the budget, the status of projects, and the challenges encountered during the process.
5. **Performance measurement and monitoring:** establish a performance measurement system and monitoring process to assess the effectiveness of the implementation of the Portfolio and the achievement of strategic objectives. This will allow different entities to assess their contribution to the overall success of the portfolio and make any necessary corrections or improvements.

Addressing the complexity of managing budgets from different entities requires close collaboration, clear definition of roles and processes, and a commitment from all stakeholders to work together for the success of the Portfolio implementation.

4.1.3 Resistance and change of mindset

Addressing the cultural issues related to the formation of shared budgeting can be very challenging, especially if managers are accustomed to requesting and managing the budget "locally" for their projects, rather than in relation to an overall strategic approach.

Some tips on how to deal with this situation are:

1. **Clear communication and involvement of managers:** it is essential to clearly communicate the benefits of implementing the Portfolio to stakeholders and actively involve them in the decision-making process from the early stages. The focus should be on making people understand how the new approach can lead to greater transparency, strategic alignment and resource optimization.
2. **Training and awareness:** provide training and awareness on the principles and practices of managing a modern Portfolio to help managers understand change and adapt to a new way of managing budgets and resources. It is often useful to organize workshops, training sessions and sharing of best practices to facilitate learning and understanding.



3. **Involvement in process design:** Involve managers in the process of defining and developing the new portfolio management process. Ask for their feedback, opinions, and concerns to work together to find solutions that meet the needs of all stakeholders.
4. **Demonstration of results:** Showing the tangible results achieved through the new approach. Highlight how a modern Portfolio can lead to greater efficiency, waste reduction and better alignment with the organization's strategic objectives.
5. **Support and coaching:** Provide support and coaching to managers during the transition to the new way of working, helping them overcome challenges and successfully adopt new portfolio management practices.
6. **Recognition and incentive:** Recognize and reward managers who successfully adapt to the new approach and achieve positive results through MPfM. This can encourage others to follow suit and embrace change in a more positive way.

Tackling cultural issues takes time, effort, and patience.

It is important to be sensitive to managers' concerns and resistance and to work together to overcome obstacles and successfully adopt a modern approach to Portfolio Management within the organization.

4.1.4 II Participatory Budgeting

Participatory Budgeting (PB), or participatory budgeting, is a practice that directly involves community members or stakeholders in the allocation of financial resources, allowing them to propose, discuss, and vote on how to spend a portion of the public or corporate budget.

The implementation of Participatory Budgeting within modern Portfolio Management leads to several benefits:

1. **Stakeholder engagement:** Stakeholders actively participate in the decision-making process on resource allocation, resulting in greater involvement and understanding of the priorities and needs of different stakeholders.
2. **Transparency and accountability:** Participatory Budgeting promotes transparency in decision-making, allowing stakeholders to understand how resources are allocated and to monitor the actual use of funds. This increases accountability and trust in the organization.
3. **Strategic Priority Identification:** Identify strategic priorities that may not have emerged otherwise. This can help to ensure that resources are allocated in a way that is more aligned with the organization's goals and needs.
4. **Innovation and creativity:** Participatory budgeting can lead to greater innovation and creativity in project proposals and resource allocation, as it involves a wide range of perspectives and ideas.



5. **Link between decisions and impact:** By allowing stakeholders to participate in the decision-making process, a stronger link is created between the decisions made and the impact they have on the community or organization. This can help to improve understanding of the importance of decisions and promote greater accountability in the implementation of projects.

Although Participatory Budgeting is not an intrinsic element of modern portfolio management, it can be integrated as a complementary practice to improve the alignment of investments with stakeholder needs and expectations and promote a culture of participation and transparency within the organization.



4.2 ModernPfM Workflow

The **ModernPfM workflow** proposed below includes a series of key steps that ensure strategic alignment, resource allocation and monitoring of the value generated, i.e. all the aspects explained so far.

In particular, this workflow is divided into 6 steps: *Identification, Evaluation, Feasibility, Selection, Monitoring and Update*.

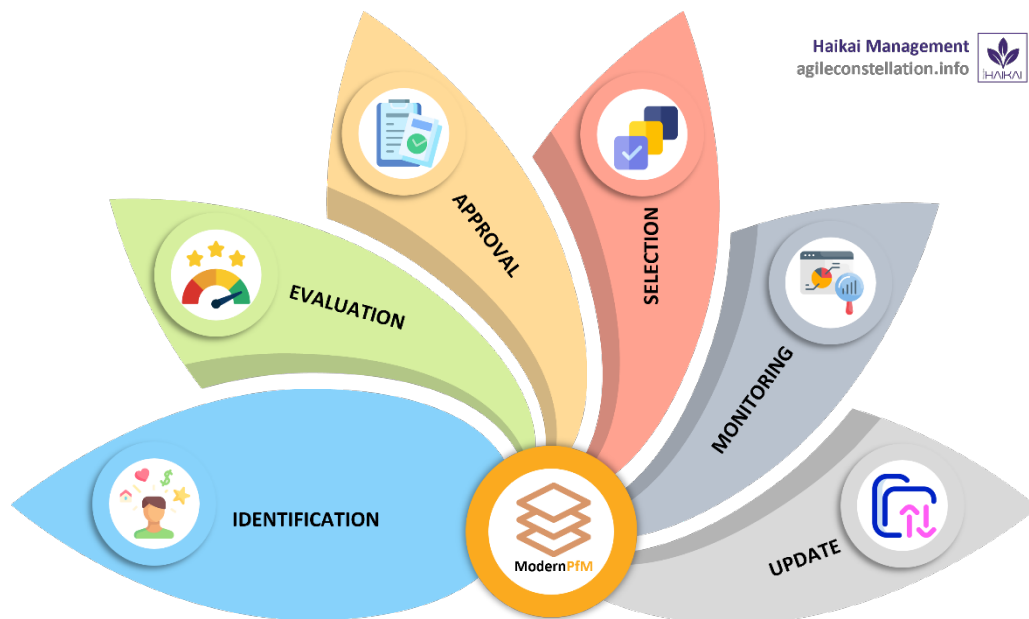


Figure 19 – ModernPfM Framework

With respect to the **Roles** presented, the link with the portfolio workflow is as follows:

Role	MPfM workflow steps
Portfolio Manager	Everybody
Portfolio Governance Committee	Everybody
Business Lead	Identification, Selection and Monitoring
Product Manager (PdM)	Everybody
Project Manager (PM)	Feasibility, Selection, Monitoring and Review
Experts	Feasibility



The Portfolio Management process is a **constantly evolving** process: in relation to the information and feedback collected, efficiency and improvement actions are identified.

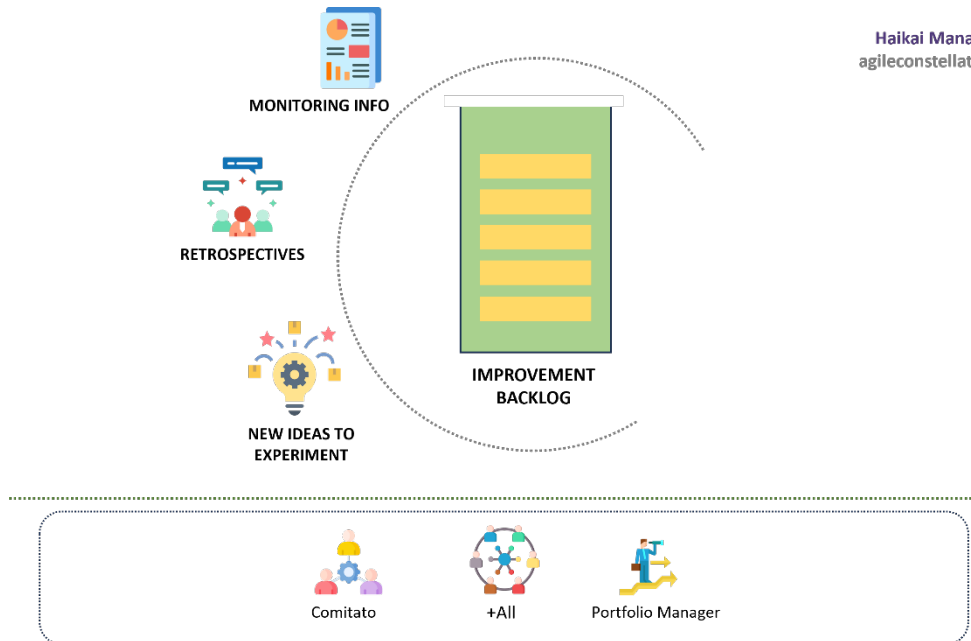


Figure 20 - Continuous improvement

The reference activities of the phase are:

- **Feedback collection**
- **Collection of new ideas**
- **Definition of improvements**

The portfolio archetype looks like the following figure:

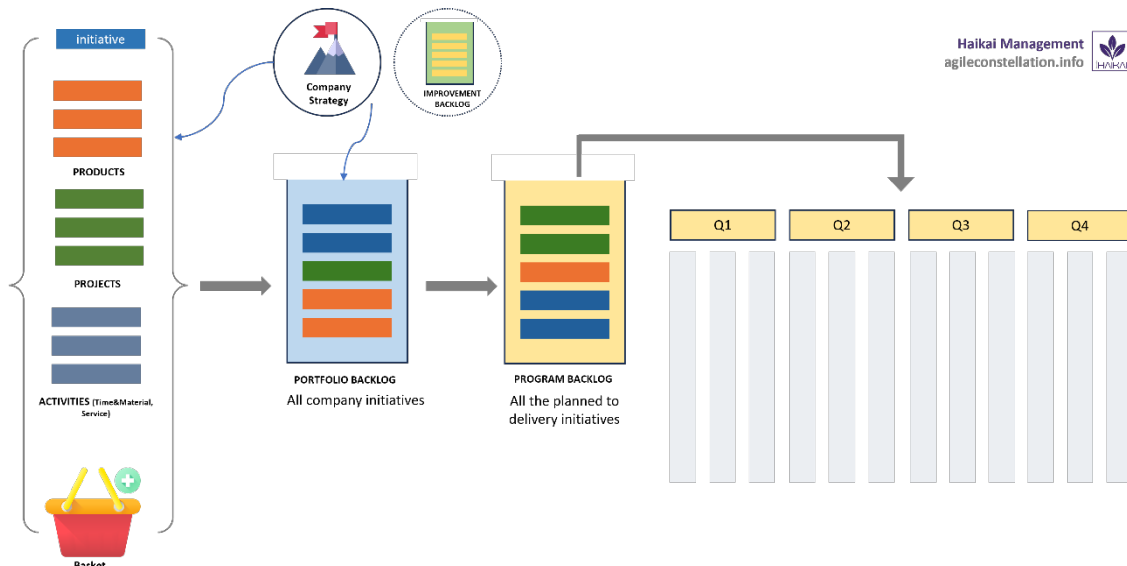


Figure 21 - Archetype Portfolio



4.2.1 Identification

The **Identification** phase is the starting point to start populating the portfolio and structuring an initial reference draft.

Initiatives can come from different business areas that bring their needs to the attention of the Portfolio Committee. In turn, the Portfolio Committee, coordinated by the Portfolio Manager, will have the task of mediating the various needs by assessing their relevance and development opportunities.

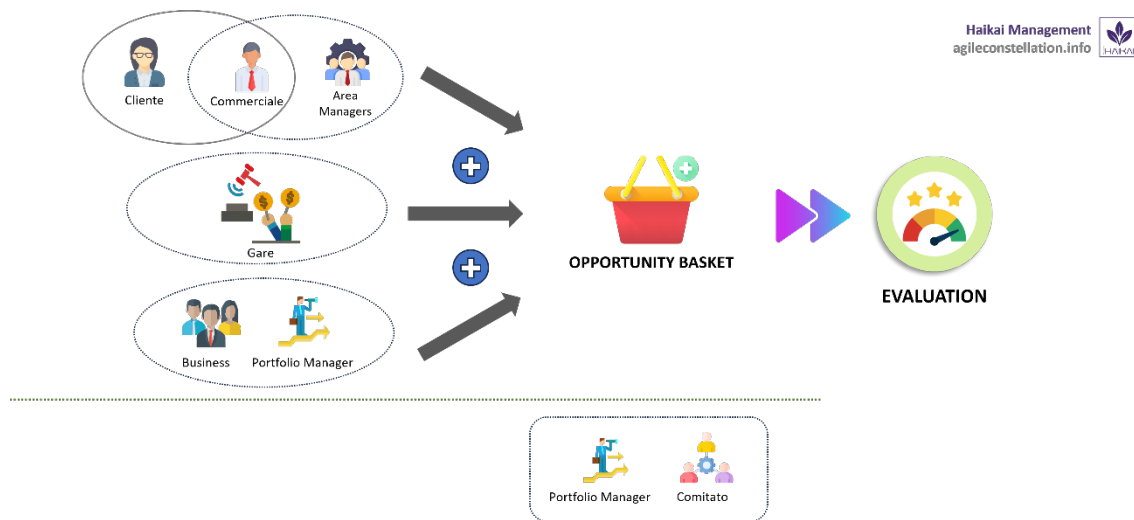


Figure 22 - Identification

The requests (business needs) can come from different business areas that bring their needs to the attention of the Portfolio Manager. In turn, the Portfolio Manager will have the task of mediating the different needs by assessing their relevance and development opportunities.

The reference activities of the phase are:

- **Gathering Needs**
- **Identification of objectives and benefits**
- **Definition of related initiatives**
- **First commercial or operational hypothesis**

Upon completion of the activities, the phase will produce a list, not prioritized, of the various needs received, net of those put on idle because they cannot be pursued or not functional from a strategic point of view.

4.2.2 Evaluation

Starting from the list produced in the previous phase, during the **Evaluation phase** the *Portfolio Governance Committee*, always assisted by the Portfolio Manager, analyzes in detail the different initiatives with respect to two primary dimensions:



- **Strategic value:** a strategic evaluation of the initiative is carried out, they make an estimate of the specific contribution. This can be done by using a set of KPIs from those proposed below or from those deemed most appropriate.
- **Operational commitment:** the Committee, with the help of experts, including program and project managers, assesses the operational impact of the relative development in terms of: *costs, resources required, risks and implementation times.*

The goal is to assess the **feasibility of the initiative** and define a specific **score**.

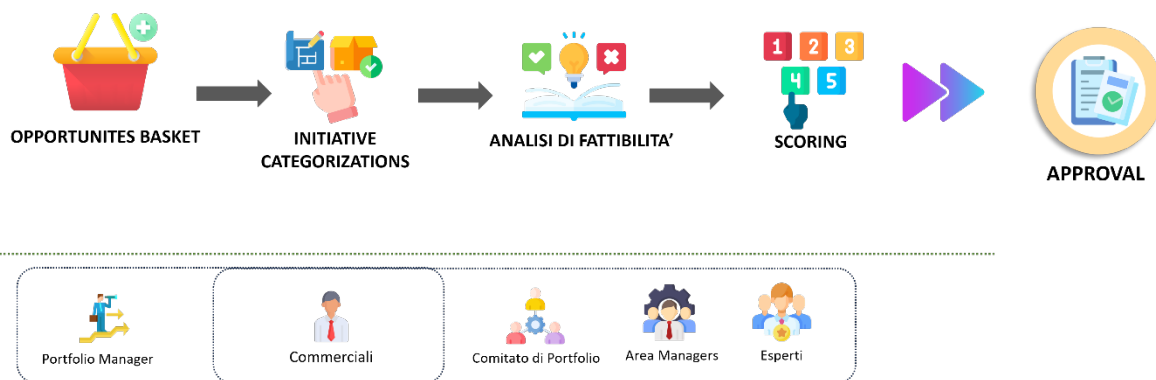


Figure 23 - Evaluation

A well-structured evaluation process allows you to have a clear view of all critical aspects before starting the initiative, reducing risks and increasing the chances of success. Furthermore, to avoid that, as a result of continuous monitoring and review, an initiative ends up indefinitely in the background, it is essential to add the concept of **Aging** and **that of Likelihood** (probability of acquisition)

The reference activities of the phase are:

- **Categorization of Initiatives**
- **Feasibility Analysis: economic, technical and constraints**
- **Scoring Definition**

4.2.3 Approval

Once the feasibility assessments have been carried out and the score of the initiative has been defined, it is possible to proceed with the **contractualization** (or confirmation in the case of an



initiative with internal sponsorship) and its inclusion in the portfolio backlog in relation to the **calculated priority**.

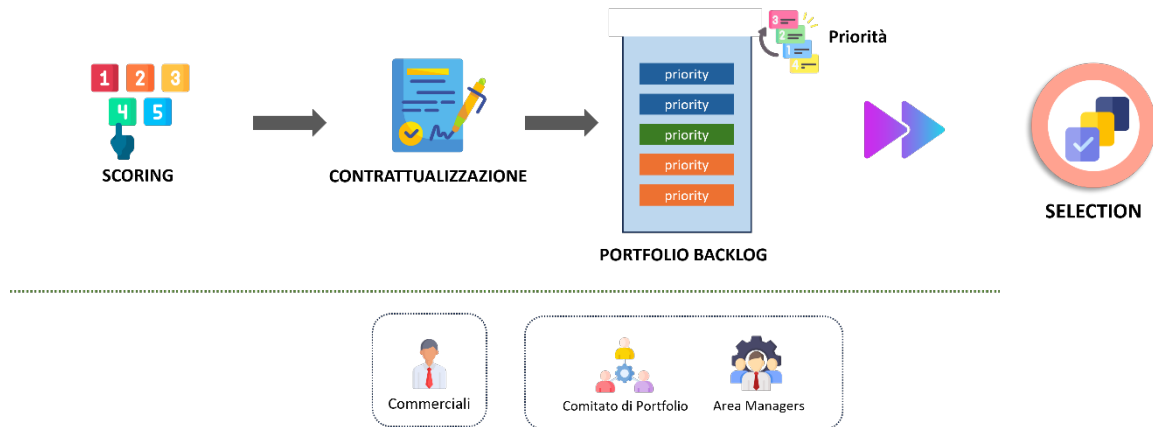


Figure 24 - Approval

The contractualization can be towards a customer (with the possible use of standard templates), or towards internal sponsors, in which case the steps depend on the specific organization.

Once the contractualization has been completed, we move on to the **prioritization of the initiative** (using the *Weighted Shortest Job First* -WSJF technique) and its inclusion in the portfolio backlog

The inclusion in the portfolio backlog is an **explicit declaration** that the initiative must be implemented and is ready to be put into planning, i.e. included in the production cycle.

The reference activities of the phase are:

- **Contracting**
- **Prioritization**

4.2.4 Selection

Starting from the feasibility analysis and the priorities assigned, we move on to the **Selection** of the initiatives to be carried out in the reference time, for example a quarter or a month.

The Program Backlog *is then structured (or updated)*, i.e. the operational plan of the individual initiatives to be launched in the reference time window, giving way to the specific initial phases of the initiatives:

- **Planning / Speculate** for projects
- **Inception** for product-oriented developments

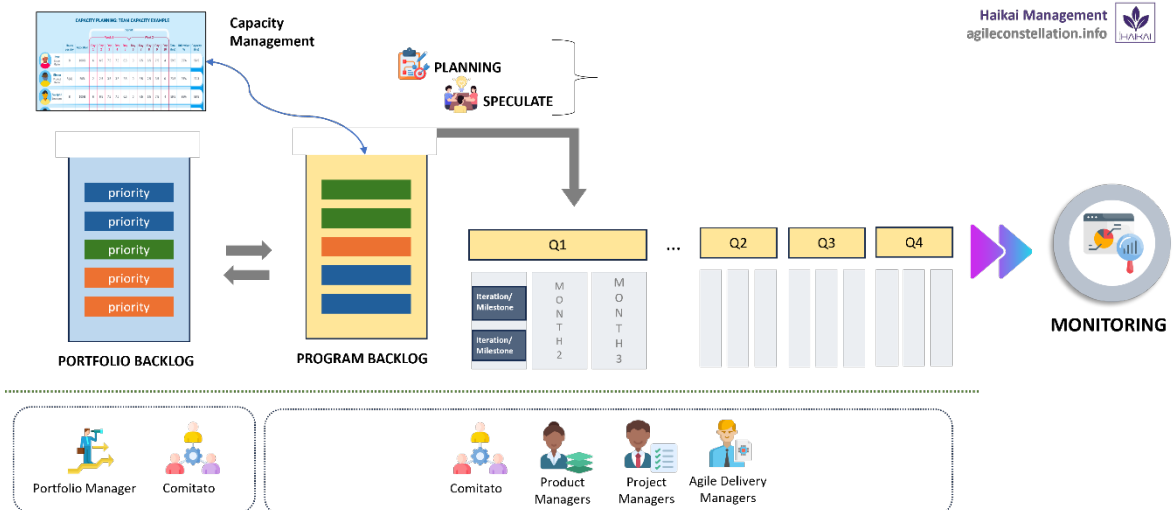


Figure 25 - Selection

The reference activities of the phase are:

- **Timeframe definition**
- **Implementation Roadmap**
- **Capacity mapping**

4.2.5 Monitoring

Portfolio **Initiative Monitoring** is essential to ensure continuous updating of all initiatives launched and upgrades of those in basketball.

Good monitoring allows you to identify potential problems early, make informed decisions, and adjust resources or priorities when necessary.

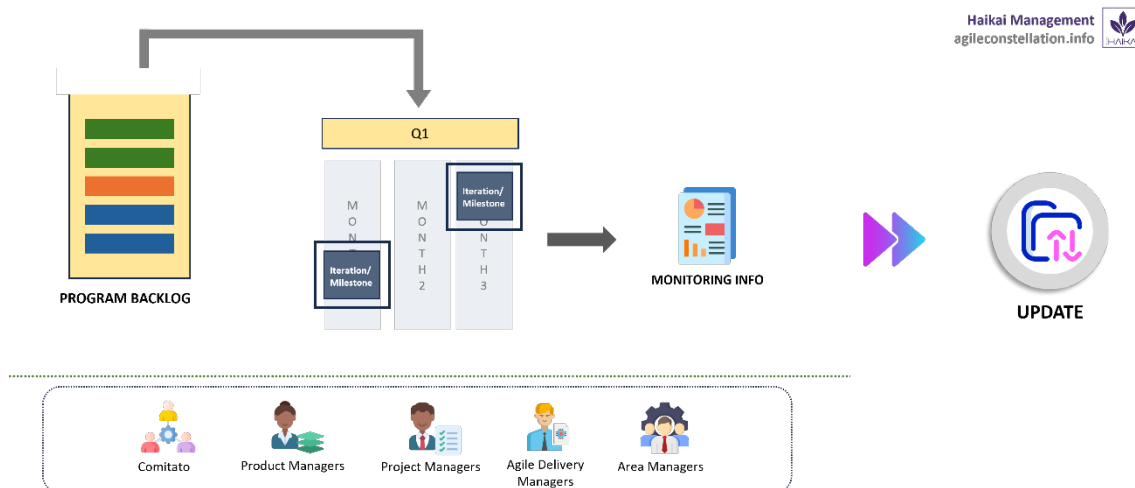


Figure 26 - Monitoring

The reference activities of the phase are:

- **Meeting Landscape**



- **Information Collection**
- **Aggregation**

4.2.6 Update

Updating portfolio initiatives is essential to ensure that priorities are still aligned with business goals and that resources are allocated efficiently.

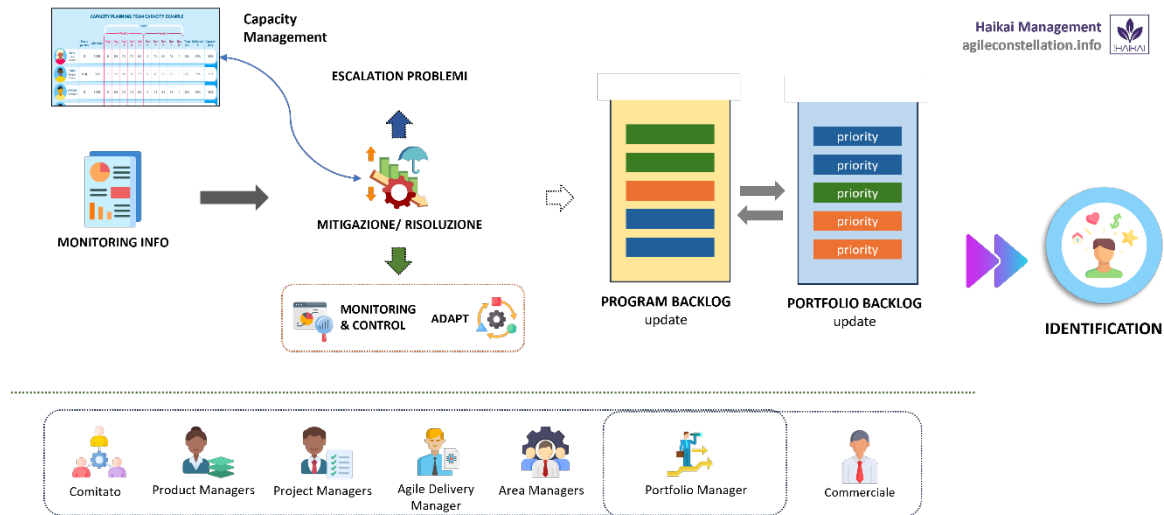


Figure 27 - Update

When a significant deviation is found, mainly thanks to the information obtained from the *Monitoring* phase, of an initiative that does not allow a "local" resolution (at the implementation level), it is necessary to proceed with an appropriate strategic review action.

The reference activities of the phase are:

- **Mitigation actions**
- **Capacity mapping review**
- **Escalation of issues**



5. ModernPjM: Modern Project Management

The declination of the Suite from a project perspective, which takes the name of **ModernPjM**, deals with providing the fundamental tools for the governance of the activities related to the development of *custom products*, managed through a project-based action, making the best use of predictive (waterfall) or adaptive (agile) practices in relation to specific needs.

5.1 ModernPjM Steps

ModernPjM fully embraces the 5 canonical phases of project management: *Start, Planning, Execution, Monitoring and Control, Closing*, adding that of *Post Go-Live* and providing a guideline on how to adequately fill each phase with the most appropriate methodological and operational tools.

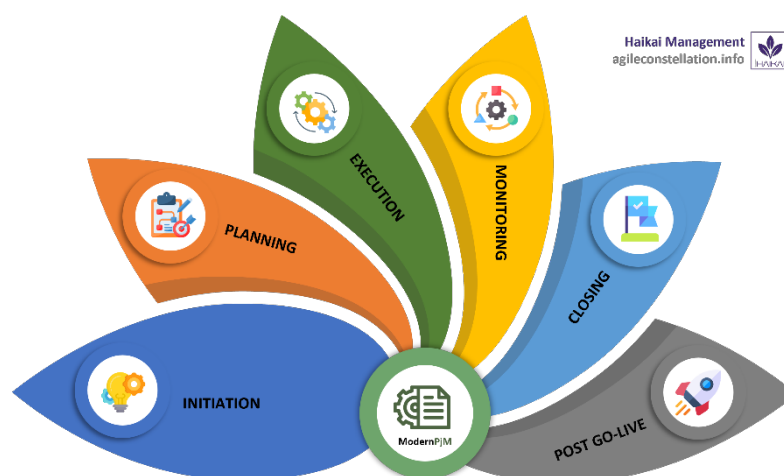


Figure 28 – ModernPjM Framework

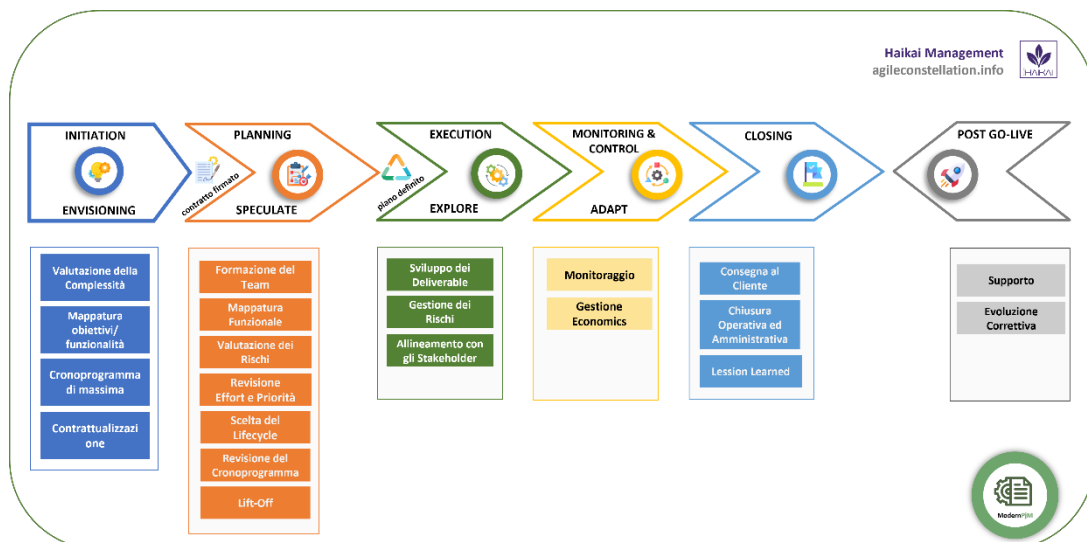


Figure 29 - The ModernPjM phases



5.1.1 Start

Typically, the **Start-up** phase begins with a feasibility study, downstream of which, if the project is considered valid and feasible, we move on to the definition of its perimeter, the identification of the objectives and the necessary resources.

The end result of this phase is a Project Charter approved by all parties involved, as well as the full support of management and sponsors.

The elements characterizing this phase are:

- Complexity Assessment
- Goal/feature mapping
- Rough timeline
- Contracting

5.1.2 Planning / Speculate

The **Planning phase** is fundamental for the successful management of a project, the specificities of which are collected in a **project plan**.

Determining **the scope** of the project, identifying stakeholders, determining the **resources** needed, aligning **procedures** with overall **business objectives**, and identifying risks are the primary, not exclusive, actions that underlie good planning.

The elements characterizing this phase are:

- *Functional Mapping*
- *Risk Assessment*
- *Effort and Priority Review*
- *Team Training*
- *Choosing the Lifecycle*
- *Revision of the Timeline*
- *Operational Kick-Off*

5.1.3 Execution / Explore

The **Project Execution phase** is the phase in which the activities and deliverables useful for the project objectives are developed, making use of the support of the project manager who monitors the implementation of the plan and provides for the appropriate alignments with stakeholders.

Typically, this phase begins with a kick-off meeting and is declined in relation to the type of operational approach chosen (predictive, adaptive or hybrid).

The elements characterizing this phase are:

- *Deliverable development*
- *Risk management*



- *Stakeholder alignment*

5.1.4 Monitoring & Control / Adapt

The **Monitoring and Control phase**, parallel to the execution and closure phase, is focused on monitoring the implementation of the plan and managing the appropriate alignments with stakeholders.

In this phase, it is essential to have a continuous exchange of information between all the people involved in order to make the common work more efficient and promptly highlight the deviations from what was defined during the planning.

- *Monitoring allows us to answer the question: "Where are we compared to where we should be?"*
- *The control, on the other hand, deals with the following questions: "why are we at this point?", "how will the project end?", "what can we do from here on out?"*

The elements characterizing this phase are:

- *Monitoring*
- *Management Economics*
- *Corrective Action Definitions*

5.1.5 Closing

The **Closure of the project** is responsible for finalizing all aspects of the project and allowing the different participants to collect the results, as well as to carry out a critical analysis of what happened during its implementation.

The project manager makes sure to deliver what has been achieved to stakeholders and assess their degree of satisfaction.

The elements characterizing this phase are:

- *Delivery to the Customer*
- *Operational and Administrative Closure*
- *Lesson Learned*

5.1.6 Post Go-Live

The **Post Go-Live phase** includes an action to support what has been released in production.

It is a post-project phase (like the start-up phase which is practically pre-project), with a short duration (typically 3-6 months).

The elements characterizing this phase are:

- *Operational Support*
- *Corrective maintenance*



5.2 Operational Lifecycles

5.2.1 Lifecycle Predictive/Waterfall

In the **predictive** approach, also known as *waterfall* or *serial*, the scope of the project, the time and the associated costs are determined as soon as possible.

The ability to develop detailed plans, before execution, allows the project manager to identify the reference phases and the sequence of activities that will be carried out in them, trying to optimize the related costs and the impact of the identified risks.

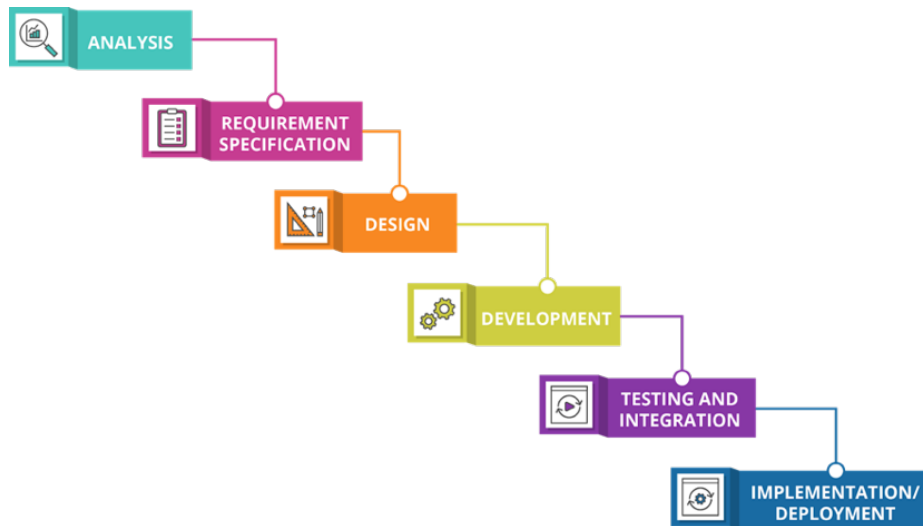


Figure 30 - Predictive (Waterfall, Serial)

This approach is characterized by *phases*, each of which focuses on specific deliverables and in which different teams can be involved. The final result of each deliverable is generally not made available individually, but only in aggregate form at the end of the project.

Although the scope of the project is well defined at the beginning, it is not uncommon to carry out re-planning and revising the budget of a project, with often considerable effort.

In general, predictive lifecycles are best suited to projects that have pre-defined and well-detailed deliverables.

5.2.2 Iterative and Incremental Lifecycle

Although they are often confused, there are specific differences between an **iterative** and an **incremental lifecycle**.



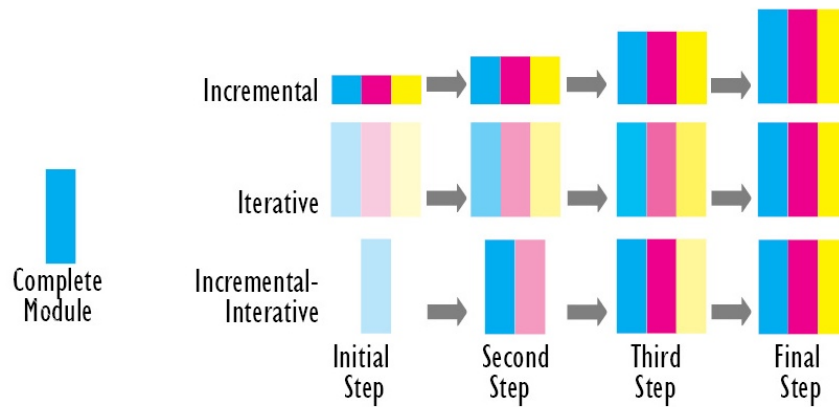


Figure 31 – Iterative, Incremental and Iterative + Incremental

The goal of the **iterative** lifecycle is to achieve *the correctness of the solution*.

The scope of the project is typically determined early in the project lifecycle, but time and cost estimates are regularly adjusted as the project team's understanding of the product increases.

The repetition (or iteration) of one or more project activities allows the project team (and possibly the customer) to deepen their understanding of the product, allowing development and risk management plans to be progressively developed. Iterations therefore allow deliverables to be developed through a series of repeated cycles, representing the key element used to drive value in the correct direction. While there is the concept of "increments," these are not distinct deliverables, but rather features or refinements of a single deliverable per stage.

A project with one or more prototypes, but with only one deliverable, is an example of an iterative approach

In contrast to the iterative approach, **the incremental** approach focuses on getting a solution quickly, developing its components incrementally. In an incremental project, new usable deliverables are continually created that produce an increase in product functionality.

Unlike a predictive design, having iterations at the end of which finite elements are obtained, allows the requirements to be dynamic for those parts of the project that still need to be planned and executed.

An example of incremental development is the creation of the different sections of a web portal that can be used, significantly, independently.

In practice, iterative and incremental approaches are often used together, even implicitly, with significant overlap: an iterative lifecycle uses increments to some extent, and an incremental lifecycle uses iterations to some extent.

In general, iterative and/or incremental lifecycles are preferred when:



1. The project is too complex to be planned from the beginning and feedback (or lessons learned) are the main tool to improve the next phases.
2. The scope and objectives are subject to change as stakeholders learn more aspects of the project itself.
3. Many of the decisions relate to partial or incremental deliverables, unlike the predictive approach where deliverables are only available at the end of the project.
4. The overall project may not yet be considered complete, but the increments provided so far can be used to deliver to the customer in advance.
5. It is decided to make concrete use of *rolling wave planning*, in which the next phase can take place while the project team is carrying out the current phase.

An iterative and incremental approach can be characterized by long-running iterations and detailed schedules, specifically resembling a sequence of predictive cycles. When, on the other hand, an iterative and incremental approach is based on short iterations, often independent of each other and without extreme planning, we naturally move to an *Adaptive* lifecycle, also more commonly known as *Agile*.

5.2.3 Lifecycle Agile

An **Agile** (or Adaptive) life cycle is also both incremental and adaptive, but it is characterized by short iterations (typically in the order of a few weeks) and the robust application of *rolling wave planning*. This allows this approach to address risks and revise costs in relation to the changing environment.

The agile approach aims to make projects that involve high uncertainty and a high frequency of change better manageable, requiring a high degree of continuous involvement of stakeholders. At the heart of the action is the concept of *time-boxing*, i.e. the fact that each event/meeting/action normally has a well-defined time limit, also accompanied by a stable cadence.

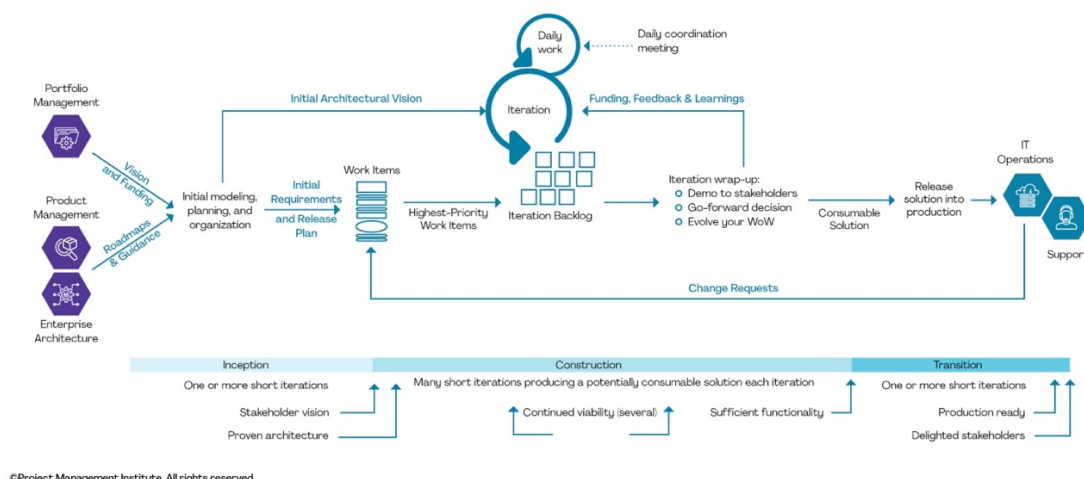


Figure 32 - Agile Lifecycle (SME Disciplined Agile)



Each iteration is used to minimize requirements uncertainty and have updated contextual plans, closing with an increment that is evaluated at its end. Planning for this occurs at the beginning of the iteration itself, with the team determining how many of the highest priority requirements can be completed. Downstream of the iteration, the team identifies ideas to improve the process and any new features, affecting the next iteration.

A project executed with an Agile approach can be seen as a series of short-term operational loops in which feedback is collected continuously, thus allowing economically viable changes to be made, even at an advanced stage of project development.

When the project deals with the evolution and stabilization of an existing product, it is possible to make use of a specific declination of the Agile lifecycle from a Continuous Delivery perspective, defined by PMI DA as: **"Continuous Delivery: Agile"**.

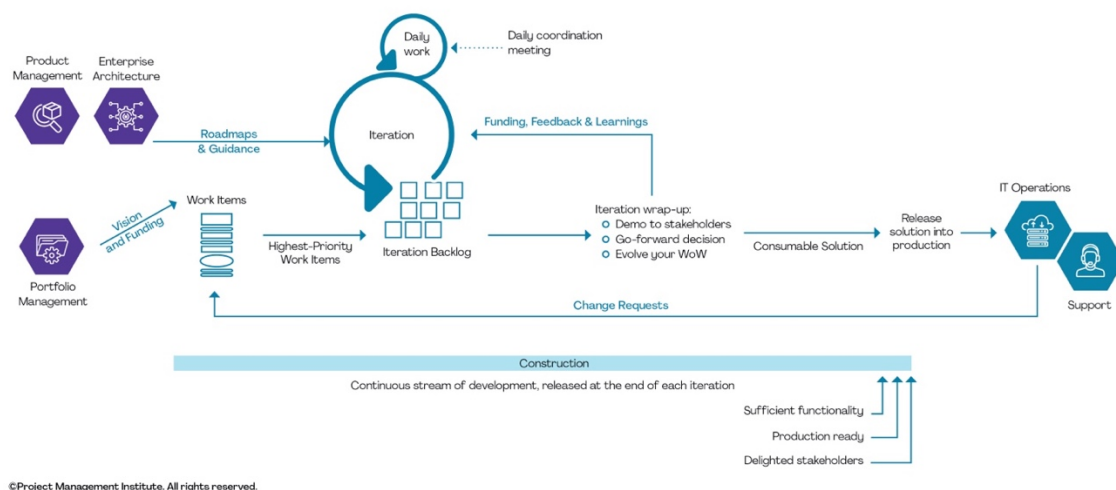


Figure 33 - Continuous Delivery: Agile

While maintaining all the characteristics of the agile lifecycle, this specialization normally involves one-week iterations (maximum 2) and requires the automated delivery capacity typical of a mature adoption of the DevOps philosophy⁸, with each iteration.

As mentioned, a "Continuous Delivery: Agile" lifecycle is generally best for situations where the goal is to stabilize a product from a specific quality point of view, without changing the features offered.

5.2.4 Lifecycle Lean

In addition to the Agile approach, there is a second operating mode that falls under the adaptive umbrella, based on the management and optimization of the operational flow, namely **Lean**.

⁸ <https://www.pmi.org/disciplined-agile/process/disciplined-devops>



While we share many key aspects of the Agile approach (such as quick feedback and just-in-time planning), the concept of iteration is not explicitly present, but the focus is on the *continuous value stream*. When a new deliverable is requested, it can be immediately put into action, as long as the limit of concurrent activities for the team, a limit called *Work-in-Progress limit (WIP limit)*, is respected. It goes without saying that even in the Lean approach, every opportunity is valid to discuss the progress of the process and the evolution of the project itself.

Figure 34 – Lean Lifecycle (SME Disciplined Agile)

Just as with the Agile lifecycle, it is also possible to identify a Continuous Delivery declination for the Lean lifecycle, which provides for a continuous release into production of what has been achieved: **"Continuous Delivery: Lean"**.

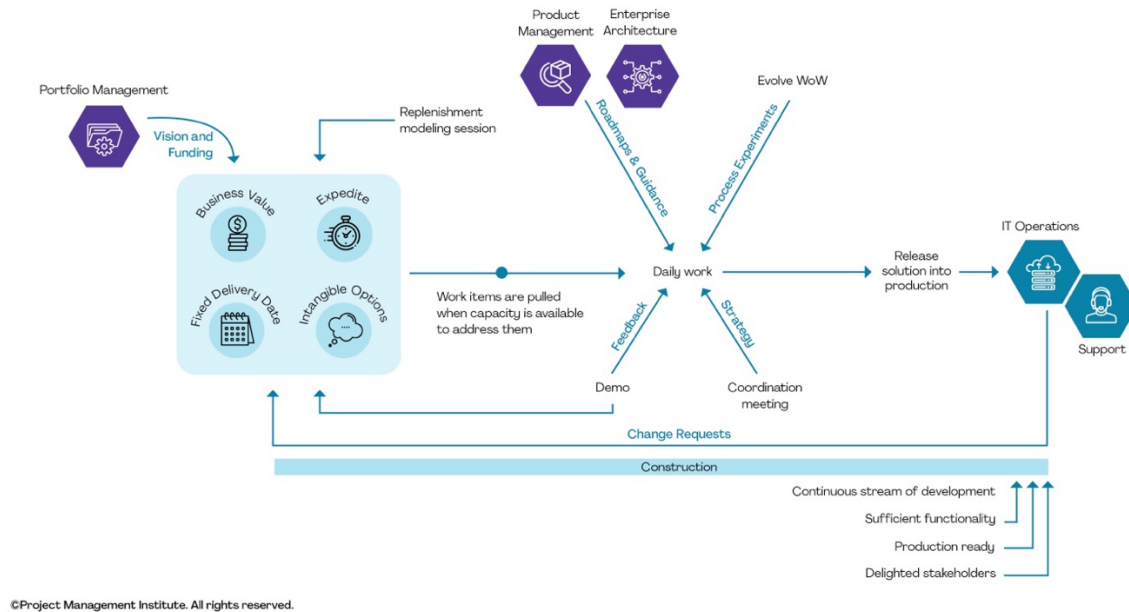


Figure 35 – Continuous Delivery: Lean Lifecycle (SME Disciplined Agile)

A "Continuous Delivery: Lean" lifecycle is generally best for situations where the goal is to allow the customer, or stakeholders in general, an immediate response to their requests. Also in this case, a mastery of DevOps practices and techniques is required.

5.2.5 Lifecycle Exploratory

The **Exploratory lifecycle** is inspired by *Lean Startup*⁹, designed to validate the sustainability of a new idea and/or hypothesis thanks to a series of *Minimum Viable Products* (MVPs) and a specific implementation of the Build-Measure-Learn cycle.

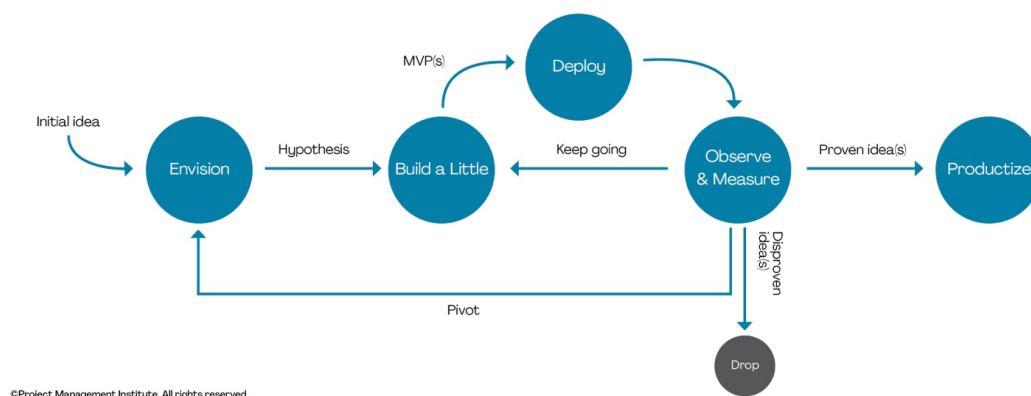


Figure 36 - Exploratory (Lean Startup) Lifecycle

⁹ <http://theleanstartup.com/principles>



The goal is to reduce the range of uncertainty and think about the sustainability of the initiative through six reference actions:

- **Envision**, it is a matter of exploring the new idea and formulating the related hypotheses.
- **Build a Little**, quickly develop what is necessary to validate your hypotheses: *Minimum Viable Product (MVP)*. It is not important to focus on technical quality, but to be extremely fast and able to highlight the peculiar characteristics.
- **Deploy**, the MVP must be quickly tested in order to prove its value.
- **Observe & mesure**, by observing the reactions of the people involved in the test, it is possible to realize if what is hypothesized is in the right direction or needs to change.
- **Cancel**, if after testing the load-bearing aspects and exploiting the pivots you are unable to hit the target, it is advisable to consider the idea/hypothesis as "not validated" and discard it.
- **Productize**, if validation is achieved, you can move on to the engineering phase through one of the other lifecycles presented.

A **Hybrid lifecycle** is a combination of different lifecycles.

It is up to the team to determine which mix is most appropriate, ensuring that they have the flexibility to best achieve their intended goals.

In a hybrid lifecycle, instead of associating a single lifecycle with the entire project, a mix of different life cycles is created in relation to the characteristics of the expected deliverables, analyzing their specificities and the attached release strategy. In any case, deliverables are usually shared with the client (and/or other stakeholders) to show progress and gain valuable feedback.

Deliverables can also be developed *sequentially* and/or *in parallel*, and a project can have both cases. With deliverables developed sequentially, the development of the next one begins only after the previous one has been completed and accepted. This approach is recommended when deliverables are functional to each other, when there are strong dependencies, and when you don't have resources to implement parallel development.

In the case of deliverables developed in *parallel*, the processes can overlap (several teams) or be carried out simultaneously (a single team). This type of approach is recommended when the deliverables are independent of each other (or the relative dependency is very minimal) and you have adequate teams and resources.



6. ModernPdM: Modern Product Management

The ModernPdM wants to actively implement a **product-oriented/value stream development**, at the basis of Off-the-Shelf products, focusing the action on an iterative cycle divided into three phases: **Define, Find and Deliver**.

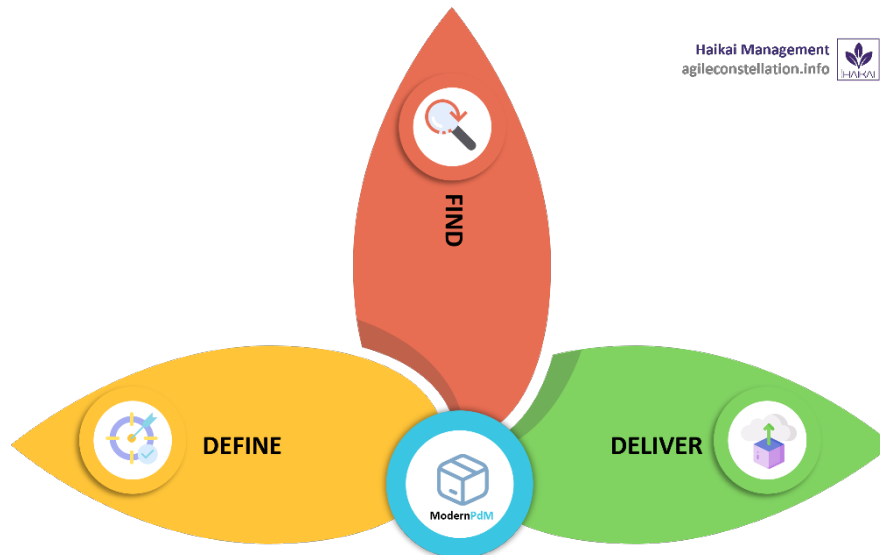


Figure 37 – ModernPdM Framework

Each of these steps plays a key role in ensuring that the product is developed strategically, starting from understanding the problem to its realization and optimization.

The product-oriented approach allows you to reduce the risk of failure, validate ideas before developing them and create more effective and usable products. This iterative process ensures that the final product truly meets the needs of users.

The different phases are divided into specific subphases that make use of special methodological tools, not necessarily exclusive, as shown in the following map:



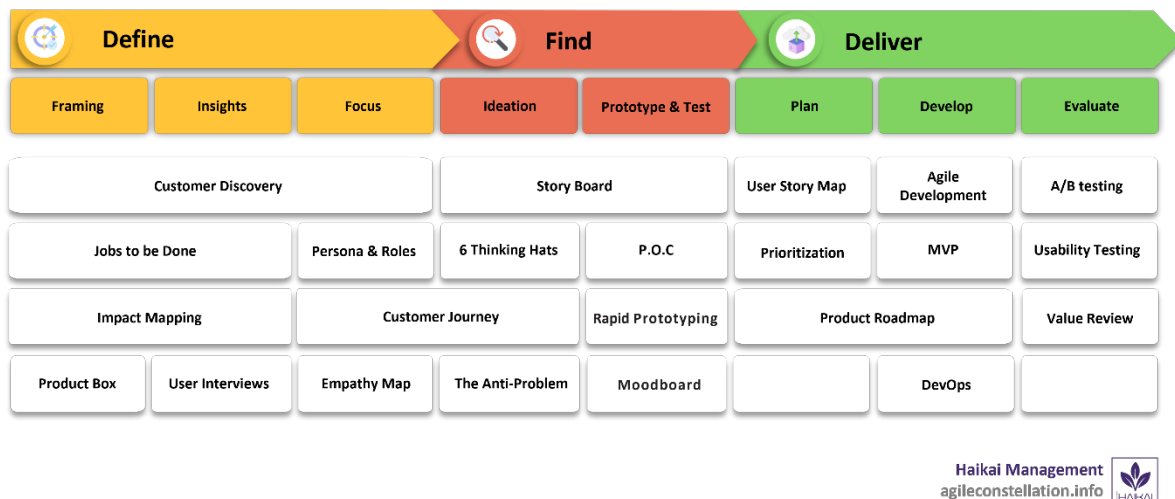


Figure 38 - ModernPdM Tools Map

6.1 Step 1: DEFINE – Understanding and Defining the Problem

The **Define** phase is critical to building a successful product, as it establishes context, gathers key insights, and defines the problem to be solved with clear metrics.

Without in-depth work at this stage, there is a risk of developing a solution that does not meet the real needs of users or that does not have an adequate market.

The main goal is to **understand the problem and the market** to make sure that the product meets a real need, is desirable for users and sustainable for the business.

In summary, we want:

- *Avoid wasting resources: hypotheses are validated before development.*
- *Maximize value for users: you build a product based on real data.*
- *Creating truly impactful products: it starts with clear and measurable objectives.*

The phase is divided into three sub-phases: **Framing**, **Insights** and **Focus** which develop a structured process to reduce uncertainty and create successful products.

6.1.1 Framing – Defining Context and Goals

This step is to clarify why the product exists and what impact you want to achieve.

The focus is on vision, strategic objectives and actors involved, developing a:

- *Clear vision of the product and its objectives*
- *Identification of key players and their needs*
- *Mapping of impact levers*



Tools and practical applications:

- *Customer Discovery: Understanding and Meeting the Real Needs of Potential Customers*
- *Jobs to Be Done (JTBD): What Are Users Trying to Get?*
- *Impact Mapping: relationship between objectives, actors and actions*
- *Product Box: summarizing the essence of your product*

6.1.2 Insights – Data Analysis and Understanding

After defining the context, we collect qualitative and quantitative data to validate hypotheses and identify opportunities.

The objectives are to achieve:

- Real data on user needs and behaviors
- Validation of the existence of a market
- Defining Key Opportunities

Tools and practical applications

- *Customer Discovery: Understanding and Meeting the Real Needs of Potential Customers*
- *Jobs to Be Done (JTBD): What Are Users Trying to Get?*
- *Impact Mapping: relationship between objectives, actors and actions*
- *User Interviews: Talking directly to users*

6.1.3 Focus – Problem Definition and KPIs

Once data and insights have been collected, the problem to be solved and how to measure success is clearly defined.

The primary objectives of this subphase are:

- *Clear definition of the problem to be solved*
- *Identifying KPIs to measure success*
- *Mapping user-critical interactions*

Tools and practical applications:

- *Customer Discovery: Understanding and Meeting the Real Needs of Potential Customers*
- *Persona & Roles: Who are the main users?*
- *Customer Journey: What is the user experience?*
- *Empathy Map: What does the user think, see, hear and do?*



6.2 Phase 2: FIND – Generate and Validate Solutions

After clearly defining the problem in the Define phase, the Find phase focuses on generating solutions and their initial validation. This phase is crucial for exploring innovative approaches, prototyping quickly and testing ideas before investing resources in full development.

The main goal is to generate ideas, select the most promising ones and test them quickly to see if they can work in practice, in order to:

- *Generate innovative and out-of-the-box solutions*
- *Quickly validate ideas before investing resources in development*
- *Get initial feedback to reduce the risk of failure*

This phase ensures that the product is **designed with an iterative approach**, experimenting with different alternatives before defining the final direction.

The phase is divided into two sub-phases: **Ideation** and **Prototype & Test**

6.2.1 Ideation – Generation of Ideas and Concepts

This subphase focuses on creating possible solutions through structured brainstorming techniques and design thinking.

The aim is to explore innovative alternatives and select the most promising ones in order to obtain:

- Several solution alternatives explored
- A clear concept of the direction to take
- A first alignment on tone, design and key features

Tools and practical applications:

- *Story Board: Visualize the user experience*
- *6 Thinking Hats: analyzing an idea from multiple perspectives*
- *Customer Journey: What is the user experience?*
- *The Anti-Problem: Turning the Problem Around to Stimulate New Ideas*

6.2.2 Prototype & Test – Rapid Idea Creation and Validation

Once the most promising ideas have been identified, they are put into practice through prototypes and initial tests.

The primary objectives are:

- Working prototypes for preliminary testing
- Technical feasibility validation
- First feedback from users or stakeholders



Tools and practical applications:

- *Story Board: Visualize the user experience*
- *P.O.C. (Proof of Concept): validating technical feasibility*
- *Rapid Prototyping: Create simplified versions of the solution*
- *Moodboard: defining the aesthetics and tone of the solution*

6.3 Phase 3: DELIVER – Develop and Optimize the Product

After generating and validating ideas in the Find phase, the Deliver phase focuses on the creation of the product and its optimization based on testing and feedback.

It's important to note that the Deliver phase takes an agile approach, which involves developing the product through short cycles of development, testing, and feedback, ensuring continuous improvements based on user needs. The agile approach facilitates rapid adaptation to emerging needs and allows for frequent iterations, reducing the risk of errors and improving the effectiveness of the final product.

The goal is to **turn concepts into a working product**, making sure it is effective, usable, and in line with user expectations.

In summary, the goal is to:

- *Develop an iterative and scalable product*
- *Optimize the user experience based on real data*
- *Reduce the risk of failure through continuous testing and feedback*

The phase is divided into three sub-phases: **Plan, Develop and Evaluate.**

6.3.1 Plan – Planning Product Development

This subphase focuses on defining key capabilities, developing priorities, and creating a roadmap for reference.

The objectives are those of:

- *Clear definition of functionalities and priorities*
- *Realistic use case to guide development*
- *Product roadmap indicating functional development*

Tools and practical applications:

- *User Story Mapping: Defining Features*
- *Prioritization: Prioritizing*
- *Product Roadmap: Define a Product Reference Roadmap*



6.3.2 Develop – Development and Implementation

We move on to the concrete realization of the product, both from a technical point of view and from a user experience point of view.

The objectives of Develop are:

- *A working product with an implemented interface and logic*
- *A smooth and well-structured user experience*

Tools and practical applications

- *Agile Development: iterative and incremental development*
- *MVP (Minimum Viable Product): Define the first version of the product*
- *Product Roadmap: Define a Product Reference Roadmap*
- *DevOps: Using automated, scalable practices for testing and release*

6.3.3 Evaluate – Testing and Optimization

Once the product is developed, tests are conducted to evaluate its effectiveness and optimize it.

Evaluate focuses on:

- Hard data on the usability and effectiveness of the product
- Optimization based on real feedback
- Ready-to-launch product with a better user experience

Tools and practical applications:

- *A/B Testing: Compare variations of an item to optimize it*
- *Usability Testing: Evaluating the user experience through real-world testing*
- *Value Review: Assessing market response and product value*



7 Calls

7.1 SME Disciplined Agile

The **PMI Disciplined Agile toolkit (PMI DA toolkit)** looks at the entire organization, supporting its path to Business Agility. The areas covered by the toolkit (called *Blades*) are shown in the following poster:

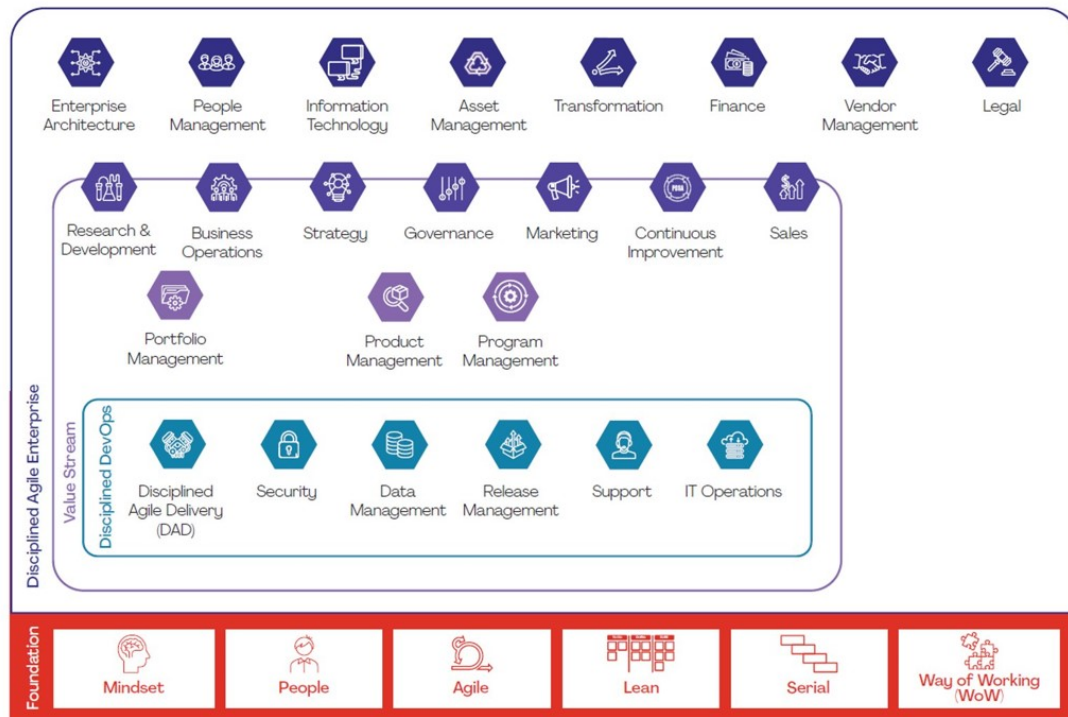


Figure 39 - The Disciplined Agile Toolkit

As you can see, there are 4 layers that impact the entire organization: *Foundation*, *Disciplined DevOps*, *Value Stream* and *Disciplined Agile Enterprise*. In particular, the Foundation layer brings together all those aspects that are the beating heart of the toolkit, aligning it with the reference mindset.

Each layer contains multiple "Blades" (areas), presenting a coherent collection of options (especially *practices* and *strategies*) to be applied in relation to the specific context. Each Blade deals with an "atomic" area, such as: *Data Management*, *Continuous Delivery*, or *Portfolio Management*. The choice of the term "Blade" is conceptually linked to the counterpart of the "Blade Servers" to highlight the possibility of updating, changing, or even replacing it, with extreme agility, in relation to the evolution of the context in which one is operating.

Particular attention should be paid to the **Value Stream layer**, which can be seen as *the dynamic soul* of DA, as it embroiders operations on the needs of stakeholders, or customers, embracing a clearly



Lean mindset that suggests focusing on workflow management and not on how to manage people or micro-activities.

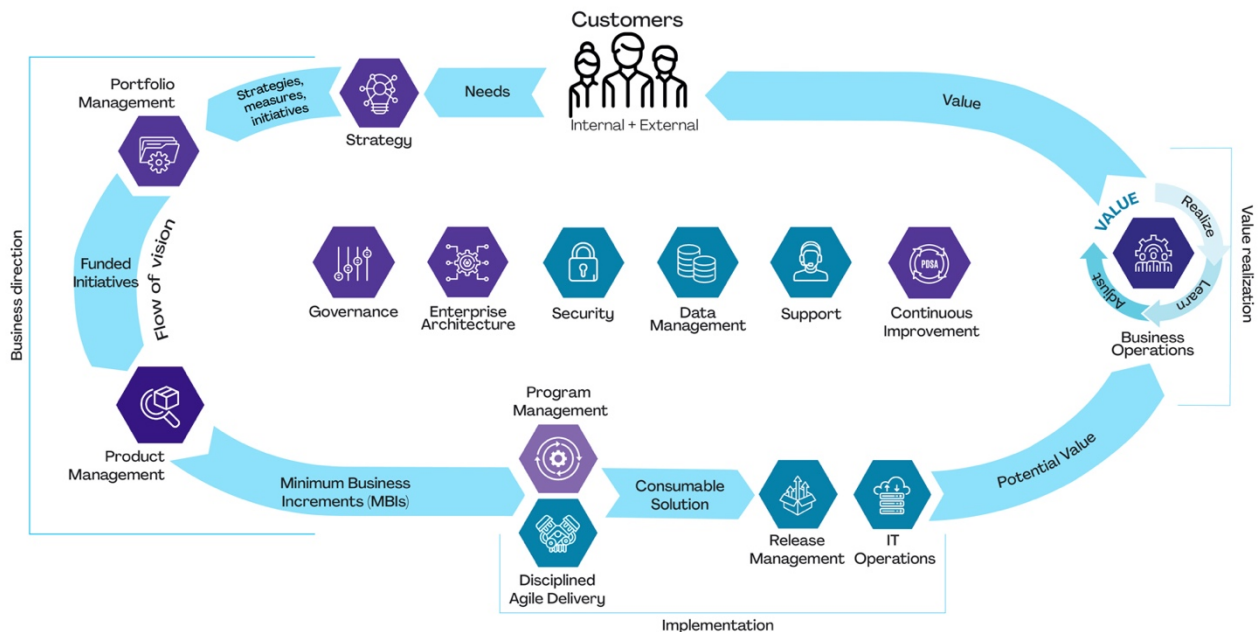


Figure 40 - DA Value Stream

The Value Stream focuses on the development of *MBIs* (*Minimum Business Increments*), i.e. the minimum amount of value to *be built, distributed and used* so that the initiative actually makes sense from a business point of view.

Looking at the more operational side of project management and development, in the Blade *Disciplined Agile Delivery* (DAD) the lifecycles presented above are proposed and characterized by three ideal stages of progress:

- **Inception**, the initialization phase of the project, in which the fundamental elements for its success take shape and aspects such as *Risk* and *Sustainability* are evaluated;
- **Construction**, the construction phase, i.e. where the solution is concretely implemented;
- **Transition**, the phase that deals with *the Deployment* aspects.



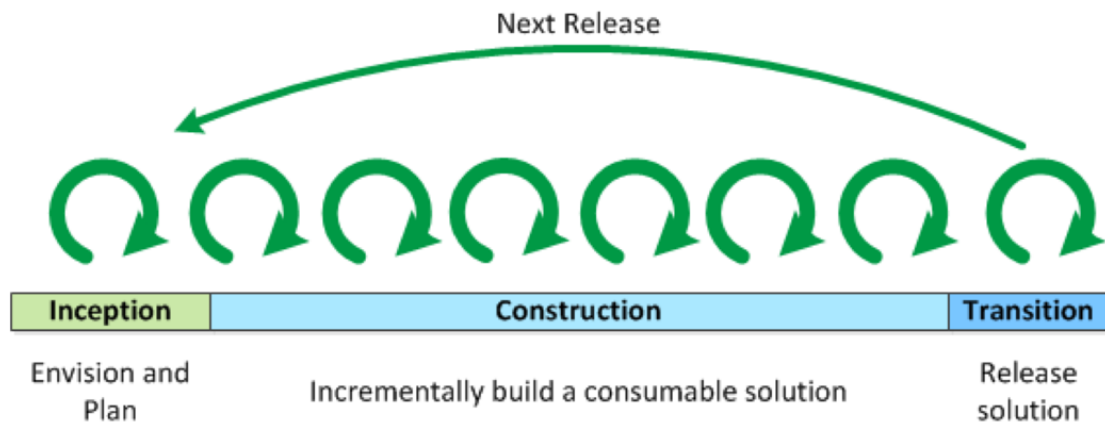


Figure 41 - DAD phases

If the use of phases may seem something "strange" within the Agile context, it must be emphasized that they are not to be understood as *stage-and-gate*, but as "*purpose containers*" that do not limit any review of the decisions made.

Their goal is, therefore, to focus, at different moments, on specific *process goals* that are typically required in the development of a product (project), goals that are made explicit by the attached *process goal* diagrams.

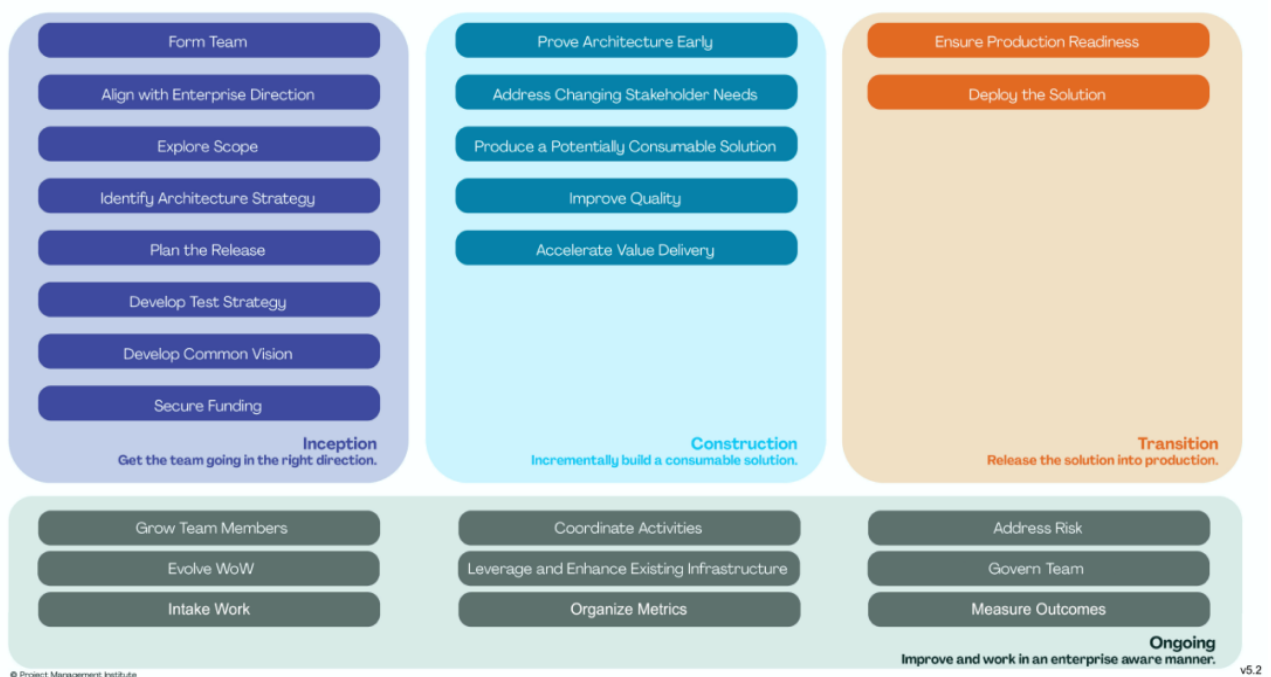


Figure 42 - The process goals of Disciplined Agile Delivery (DAD)

In the previous figure, you can also see goals grouped in a "virtual phase" called *Ongoing*: these are transversal objectives that accompany the team throughout the creation of the product.



7.1 SME PMBOK

Starting with **PMBOK 7**, the most appreciated body of knowledge in project management has embarked on an evolution in strong discontinuity with the past.

The most obvious change is the new approach based on **principles** rather than **processes**, which gives rise to a new basic philosophy: project management standards must focus on outcomes and therefore on the generation of tangible value for the customer.

The operational logic that distinguishes this new edition is that of: "**Begin with the End in Mind**",¹⁰ which highlights how it is always necessary to ask oneself why one wants to achieve something, and not to strive exclusively on the management of operational aspects and the generation of outputs that may not then generate real value.

The changes made compared to previous editions are so many and deserve the appropriate insights that go beyond this brief description. Wanting to make a quick summary, however, there are some key elements:

	PMBOK ® Guide Sixth Edition	PMBOK ® Guide Seventh Edition
General approach	<ul style="list-style-type: none">• Prescriptive, not descriptive• Emphasis on the how, not the what or why	<ul style="list-style-type: none">• Principles to guide mindsets, actions and behaviors reflected on body of knowledge for project delivery, agile, lean, customer-centered structure, etc.
Basics for design	<ul style="list-style-type: none">• Specific processes convert inputs and outputs using tools and techniques• Process focus and more compliance-driven orientation	<ul style="list-style-type: none">• Domains of interdependent and related areas of activity, both with performance results and with an overview of the most used tools, techniques, artifacts and frameworks.
Project environment	<ul style="list-style-type: none">• Project environment, indoor and outdoor	<ul style="list-style-type: none">• Internal and external project environment
Target audience	<ul style="list-style-type: none">• Mainly project managers	<ul style="list-style-type: none">• Anyone involved in a project, with a specific focus on team members and roles, including the project leader, sponsor, and product owner
Levels of change	<ul style="list-style-type: none">• Incremental revision based on previous editions	<ul style="list-style-type: none">• Principles-based review to reflect the entire value delivery scenario
Customization Guide	<ul style="list-style-type: none">• References to tailoring, but not specific reference guidance	<ul style="list-style-type: none">• Specific adaptation guidance

¹⁰ Stephen Covey - 1989



The focus therefore passes explicitly from the *outputs* (the what) to the *outcomes* (the why) of the project, making the *processes* (the how) tools to achieve the ultimate goal of creating value for stakeholders and not considering the purpose of the project themselves.

Furthermore, processes are no longer part of the core of the PMBOK, but are instead part of the *PMI Standards + Platform*, allowing the duality between predictive and adaptive approaches to be developed organically, thanks to the focus on agile project management methods and approaches, which over the years have been adopted by many organizations in project management.



8. Conclusions

As we hope will emerge from reading the paper, the goal of its content is to present a structured path, to discover how today a modern approach to management is able to accompany the most complex challenges in an adaptive logic.

If you are interested in the in-depth study and concrete application, in addition to the **Haikai Management PlayBook**, you can contact us at the e-mail address info@agileconstellation.info or through our social channels that you can find on the official website.





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