

Chicago Project Summit Business Analyst World



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BUSINESS ANALYST WORLD
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Hybrid Project Management with AI Blending Agile & Waterfall for Maximum Success

Presented by Jacques Goupil

Learning Objectives:

1. Explore fundamentals of hybrid project management
2. Learn integration techniques for Agile and Waterfall
3. Microsoft and AI tools that support hybrid
4. Adapt to diverse project needs with hybrid approaches



Questions to Get Started



What types of projects do you have?

Raise your hand if you have run ...

- Run a waterfall project
- Run an agile project
- Run a hybrid project

Do you consider type of project before project managers are selected?



PPM Works



Microsoft Partner



Partner of the Year Finalist
Project and Portfolio Management Award
Gold Project and Portfolio Management
Gold Cloud Productivity
Silver Small and Midmarket Cloud
Solutions
Silver Data Analytics


Premier Partner

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Project Online End of Life

Microsoft has officially announced the end of life for Project Online, with the service retiring on September 30, 2026.

- Project Online environments will no longer be supported or accessible after retirement.
- Custom workflows, reports, and integrations built on SharePoint Add-Ins must be re-platformed.
- Microsoft's roadmap centers on Planner (Premium), OnePlan, and the Power Platform for modern work management.

Oct 2025



Sales End

Microsoft will end sales of new Project Online-only SKUs. Existing Project Online environments will continue to operate uninterrupted.

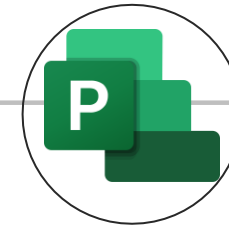
Apr 2026



Add-Ins Retire

Microsoft will retire SharePoint Add-Ins, which directly impact Project Online's classic functionalities, including custom scripting and Project Pages

Sep 2026



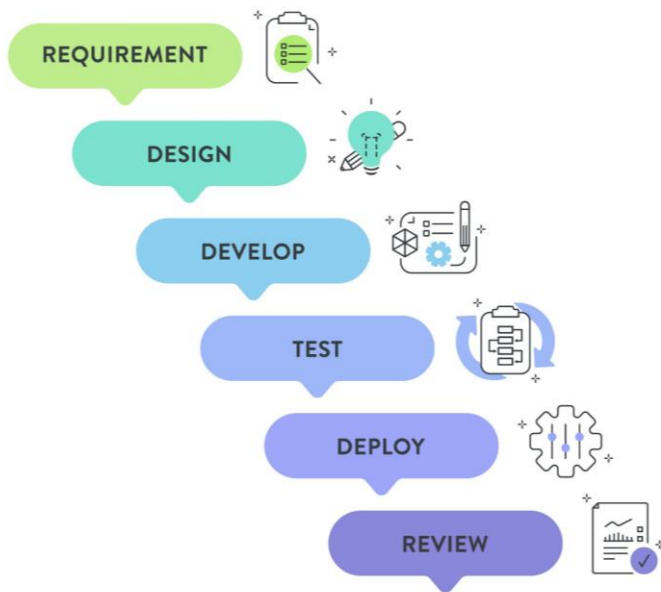
Service Retires

Final retirement of Project Online. After this date, the service will no longer be available.

Waterfall, Agile, & Hybrid Project Management



Waterfall Project Management



What is Waterfall?

Waterfall is a sequential, linear project management methodology. Emphasized thorough upfront planning and fixed scope definition.

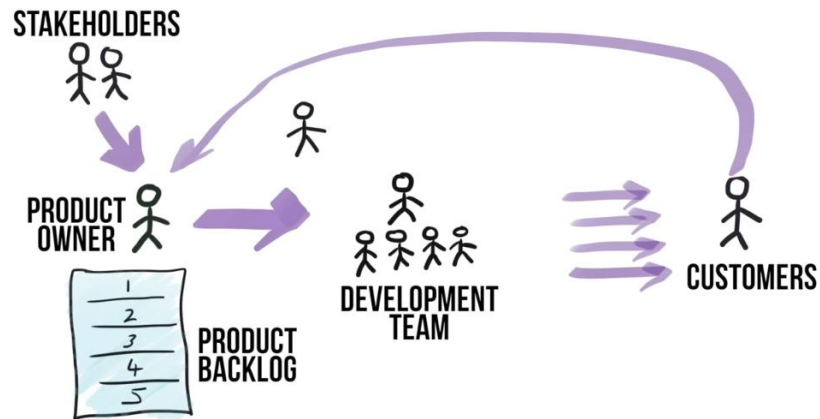
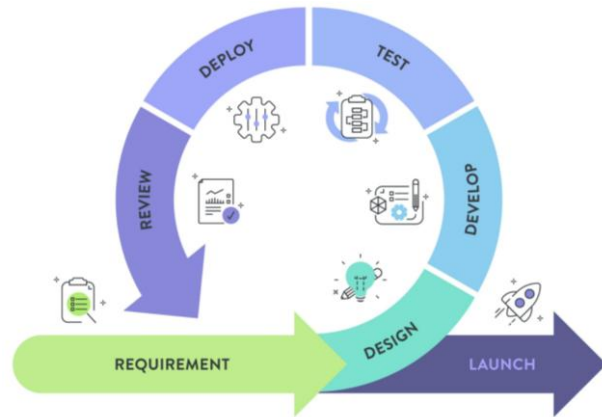
Benefits of Waterfall methodologies:

Predictability, clear milestones, and comprehensive documentation. Best suited for projects with well-defined requirements and minimal changes.

How modern tools support Waterfall :

By tracking phases, dependencies, and deliverables. Allow you to manage sprints, backlogs, and tasks efficiently

Agile Project Management



What is Agile?

Agile emphasizes flexibility, iteration, and collaboration to deliver high-quality products efficiently

Benefits of Agile methodologies:

Increased employee input, faster delivery, adaptability, and improved teamwork

How modern tools support Agile teams:

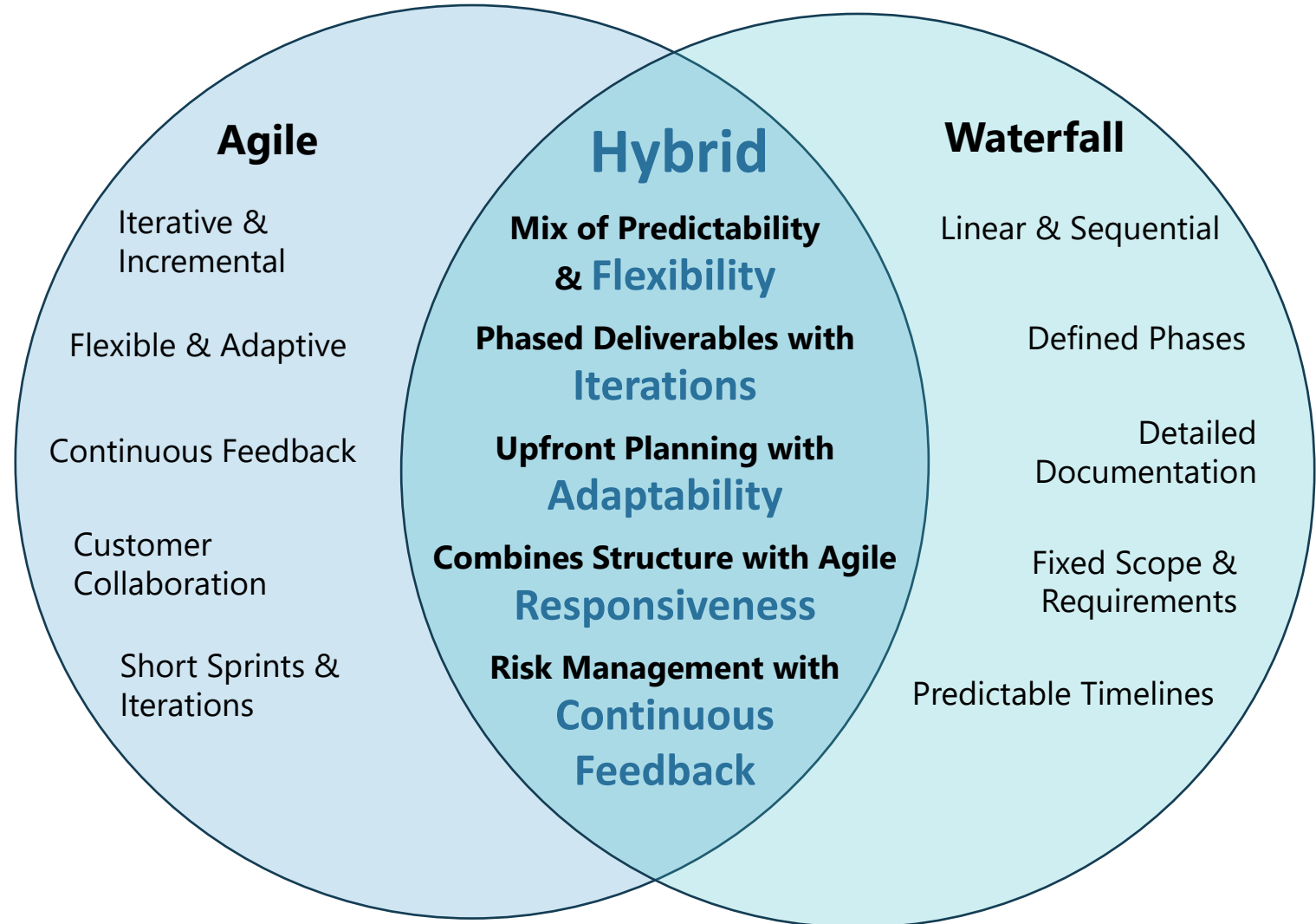
Allow you to manage sprints, backlogs, and tasks efficiently

Hybrid Project Management

- Combines Agile and Waterfall methodologies
- Provides flexibility with structure
- Helps manage complex projects with diverse needs

Benefits:

- Balances planning and adaptability
- Accommodates different project requirements
- Enhances collaboration across teams
- Stakeholder satisfaction with evolved needs



When to Use Agile, Waterfall, or Hybrid

Agile

Best for: Fast-changing, flexible, and iterative projects.

Project Type: Software development, MVPs, UX/UI design, marketing campaigns.

Key Factors:

- Unclear or evolving requirements.
- Frequent customer feedback is needed.
- Short development cycles (sprints).
- High flexibility in scope and priorities.
- Small, cross-functional, self-organizing teams.

Example: Developing a new mobile app where features are tested and adjusted based on user feedback.

Waterfall

Best for: Predictable, well-defined, and structured projects.

Project Type: Construction, manufacturing, government projects, legal processes.

Key Factors:

- Clear, fixed requirements from the beginning.
- Sequential phases with minimal overlap.
- Strong documentation and compliance needs.
- Budget, scope, and timeline are set early on.
- Large teams with specialized roles.

Example: Building a bridge, where each phase (design, permits, construction) must be completed in order.

Hybrid

Best for: Projects needing both **structure** and **flexibility**.

Project Type: Enterprise software dev, large IT implementations, product dev.

Key Factors:

- Parts of the project are **fixed** (Waterfall) while others evolve (Agile).
- High-level planning is needed, but execution can be iterative.
- Compliance requirements exist, but flexibility is also crucial.
- Large teams that need structured coordination but still require Agile adaptability.

Example: Implementing an ERP system where initial planning (Waterfall) is detailed, but features are deployed iteratively (Agile).

Real-World Case Study #1

- Enterprise software rollout blending Agile and Waterfall
- Agile sprints for development and Waterfall for milestones
- Tools used: OnePlan, Azure DevOps, MS Project, Power BI
- Resulted in improved visibility and stakeholder alignment



Real-World Case Study #2

- Marketing campaign with tight deadlines
- Agile for creative iterations, Waterfall for budget control
- Tools used: Teams, Planner, M365 (Whiteboard, Copilot Teams Recap)
- Outcome: Faster delivery and better cross-team collaboration



Beyond Zero & Hybrid Project Management



Key Principles from Beyond Zero

- **Mission Zero:** Eliminate negative environmental impact by 2020
- **Systems Thinking:** Reimagined entire value chain
- **Biomimicry & Innovation:** Nature-inspired product design
- **Employee Engagement:** Sustainability embedded in culture
- **Purpose-Driven Leadership:** Bold vision sparked by *The Ecology of Commerce*

Beyond Zero Principle	Hybrid PM Strategy
Clear Vision & Purpose	Waterfall for long-term goals
Iterative Innovation	Agile sprints for design
Stakeholder Engagement	Cross-functional collaboration
Systemic Change	Portfolio-level governance
Cultural Integration	Change management & training

Harnessing AI for Hybrid Project Management Success

- AI enhances decision-making by analyzing complex project data in real-time.
- Combining AI with hybrid management balances flexibility and structure effectively.
- AI-driven tools automate routine tasks, reducing administrative overhead.
- Machine learning predicts risks and resource needs for better planning.
- AI supports continuous feedback loops for adaptive project adjustments.



Microsoft Tools for Hybrid Management

- **Agile** support through Azure DevOps, Planner, and Teams
- **Waterfall** support via Planner, Project Desktop, and SharePoint
- **Hybrid** project management with OnePlan, Power BI, OneNote, and AI

Empower seamless workflow across methodologies with Planner and/or OnePlan



Demonstration

Recommended Hybrid Tools



OnePlan

OnePlan delivers **enterprise-grade** project and portfolio management that connects seamlessly with Microsoft tools. It provides leaders with visibility into strategy, resources, and financials, while integrating with Planner, Project, DevOps, and Teams to keep execution aligned. Designed for hybrid work, OnePlan empowers organizations to balance Agile delivery with structured portfolio governance.



Planner

Microsoft Planner makes it simple for teams to organize and **manage tasks** within Microsoft 365. With its visual boards, timeline (Gantt) views, and integration with Teams and Copilot, Planner supports both basic task tracking and advanced project scheduling. Planner Premium adds custom fields, dependencies, and AI-driven assistance to bring agility to modern work management.

Business Challenges for R&D



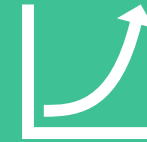
Centralized Project Portfolio Management Needed

The R&D organization needed a single source of truth for project portfolio information that would also serve the diverse needs of each Business Unit to improve project management, resource management and portfolio management/analysis.



Low Adoption and Disparate Solutions

There was a PPM solution in place that was not meeting the needs of several groups and had poor adoption. Several Business Units investigated purchasing or developing their own PMO solutions. (3 PPM solutions were being considered including OnePlan.)



Minimizing Costs and Maximizing Value

R&D Leadership recognized the fact that too many unique solutions would lead to inconsistent portfolio reporting, increased costs, and an inability to leverage best practices.

Managing the Challenges

Key Challenges

Competing requirements across the businesses and obtaining agreement on consistent structure – hierarchy, page layouts, field names, etc.

Loss of momentum at times due to organization changes and other business priorities

Preference for legacy tools Some wanted to stay with the tool they had before or preferred how certain functionality worked in their legacy tool

Unmet requirements Some requirements couldn't be met without significant enhancement work from PPM Works or the need for an enhancement by OnePlan

Technical challenges that required escalations to OnePlan or internal IT

Budgetary constraints Licensing, configuration, reporting

Managing the Challenges

Consensus and Flexibility Focus on achieving consensus on critical issues while allowing flexibility at the BU level where possible

Governance and Escalation Utilize your program governance structure (Steering Committee/Sponsor) to escalate issues and realign the project. Assist groups facing delays to maintain momentum

Tool Benefits and Adoption Consistently highlight the benefits of the new tool and its support for the future state organization. Maintain a firm stance on the transition to the new tool.

Workarounds and Enhancements Explore workaround opportunities with OnePlan (e.g., customizations, Power Automate/Power BI) and advocate for necessary enhancements where it makes sense.

Escalations and Partner Leverage Leverage your implementation partner to lead escalations to OnePlan, ensuring issues receive appropriate attention based on issue severity. As a Premier Partner, PPM Works ensure fast results.

Central Funding Make a business case and advocate for central funding (whenever possible) when implementing solutions across multiple businesses to ensure consistent support and resources.

Other Tips for Dealing with Challenges

Showcase Success Stories

Highlight teams excelling with the process/tool. Invite them to leadership meetings to share their journey and demonstrate the value they're getting.

Focus on Progress

Don't let slower teams hold you back. Help them where possible or escalate issues. Prioritize teams that are moving forward.

Leverage Positive Peer Pressure

Resistant groups may come around when they see others praised for their success. This can create pressure to adopt the tool (especially at lower levels of the organization).

Highlight Efficiency Gains

Show how the solution simplifies data output through reports, replacing our previously, very manual and laborious efforts.

Stay Patient

Don't fret or take it personally – understand that some groups may take longer to get on board. Focus on steady progress.

Best Practices for Hybrid Success

- Clearly define roles and responsibilities
- Align tools with team workflows for efficiency
- Use dashboards to provide unified project visibility
- Encourage continuous feedback and iterative improvements

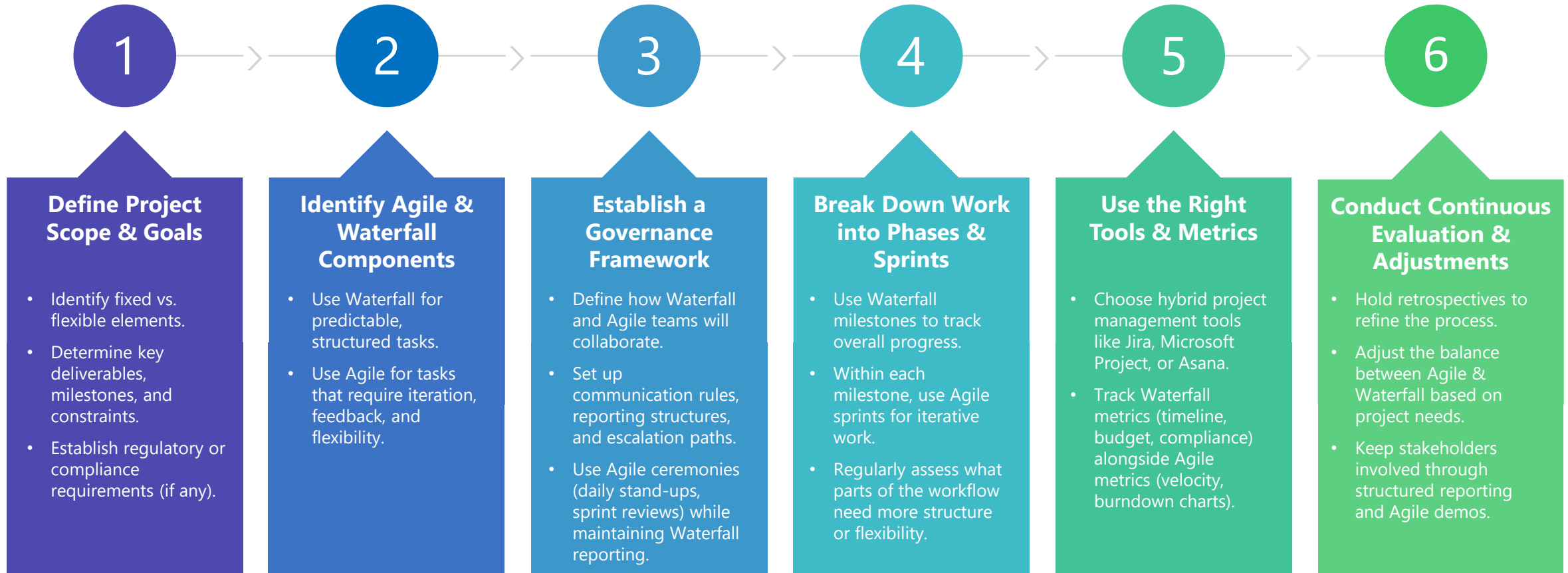




Key Benefits for Hybrid Teams

- Everyone is included
- Less admin, more delivery
- Smarter sprint planning
- Real-time risk detection
- AI-powered stakeholder reporting

Implementing a Hybrid Approach



Key factors to consider:

- Project size and complexity
- Team expertise
- Stakeholder expectations

Key Tips:

- 1) Emphasize flexibility, training, and continuous feedback loops
- 2) Ensuring Stakeholder Alignment in Hybrid Environments

Monitoring, Reporting, and Driving Outcomes with Hybrid Project Management Solutions

Real-Time Monitoring

Allows stakeholders to stay updated on project status instantly and act proactively.



Customizable Reporting

Customizable reports enable tailored insights for different stakeholders, enhancing clarity and decision-making.



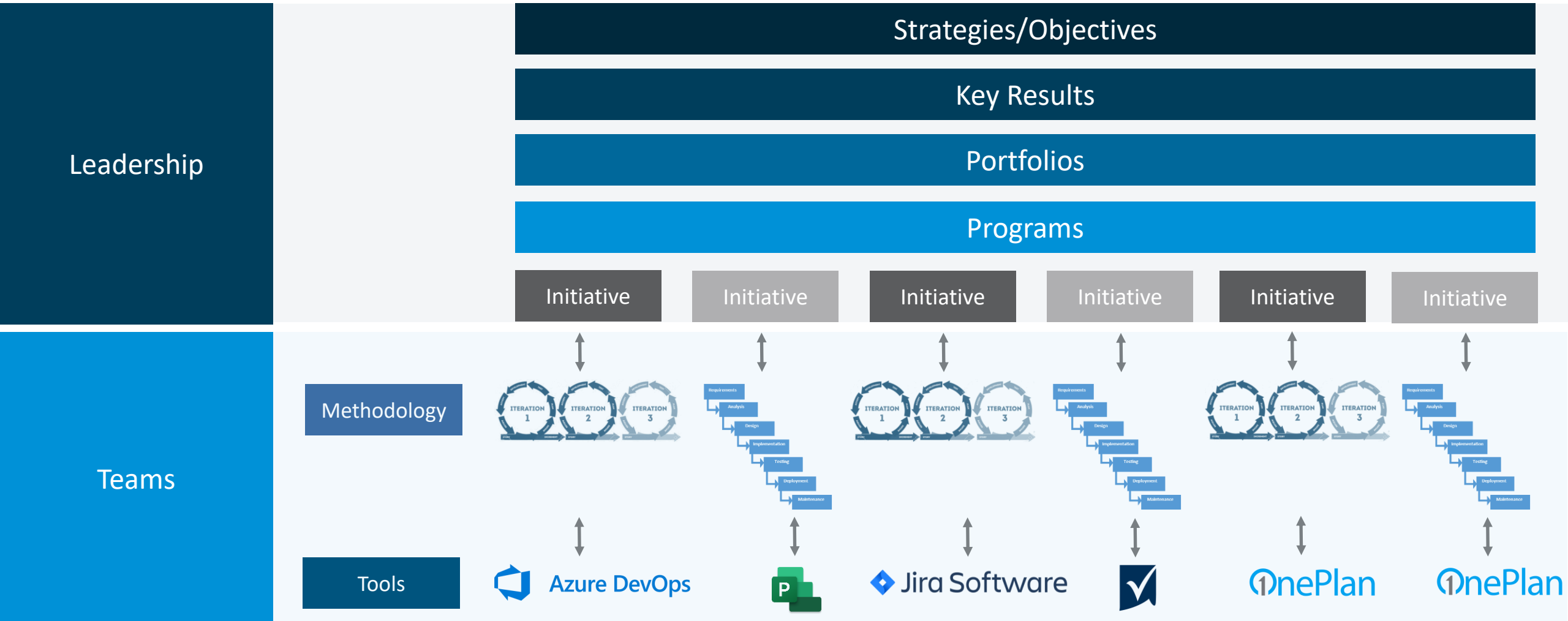
Risk Identification and Decision Making

Early risk identification through data-driven insights supports informed decisions to keep projects on track.



Teams Execute How They Need To

Leadership Gets Visibility It Needs

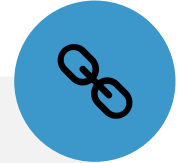


Challenges and Considerations when Blending Frameworks



Cultural Clashes

Differences in Agile and Waterfall mindsets can create cultural clashes affecting team collaboration and project progress.



Tool Compatibility Issues

Integrating tools from both frameworks can lead to compatibility problems, hindering workflow efficiency.



Coordination Complexity

Coordinating workflows between Agile and Waterfall requires careful planning to manage complexity and avoid delays.



Importance of Communication

Clear communication and strong leadership are crucial to successfully blend Agile and Waterfall frameworks.

Questions & Answers



From Insights to Action

Complimentary:

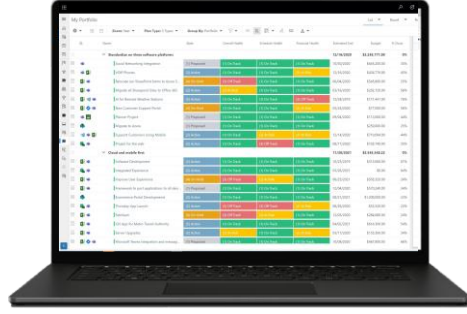
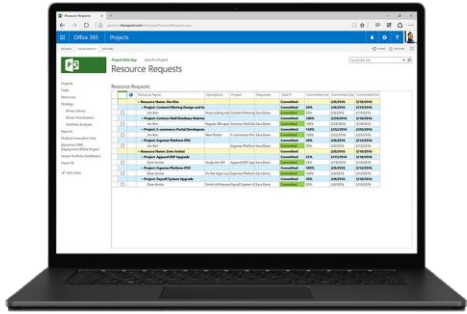
- ✓ Discovery Call
- ✓ Microsoft & OnePlan Workshops
- ✓ Partner Led Trials
- ✓ Training & Adoption Support

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OnePlan & Microsoft Workshops



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PPM Works



Microsoft and OnePlan Premier Partner

Focused on Microsoft 365, Project, Power Platform solutions via Teams.



Guaranteed Results

We guarantee your success and our results – we are not done until you are a satisfied client reference.



Project Experts

We have contributed to the new release of Microsoft Project and OnePlan and continue to partner with the leading experts in the industry.



Extensive Experience

We have performed over **500 PPM implementations** and trained thousands. Our team has delivered dozens of business apps across Microsoft 365. Offer Microsoft-sponsored client workshops

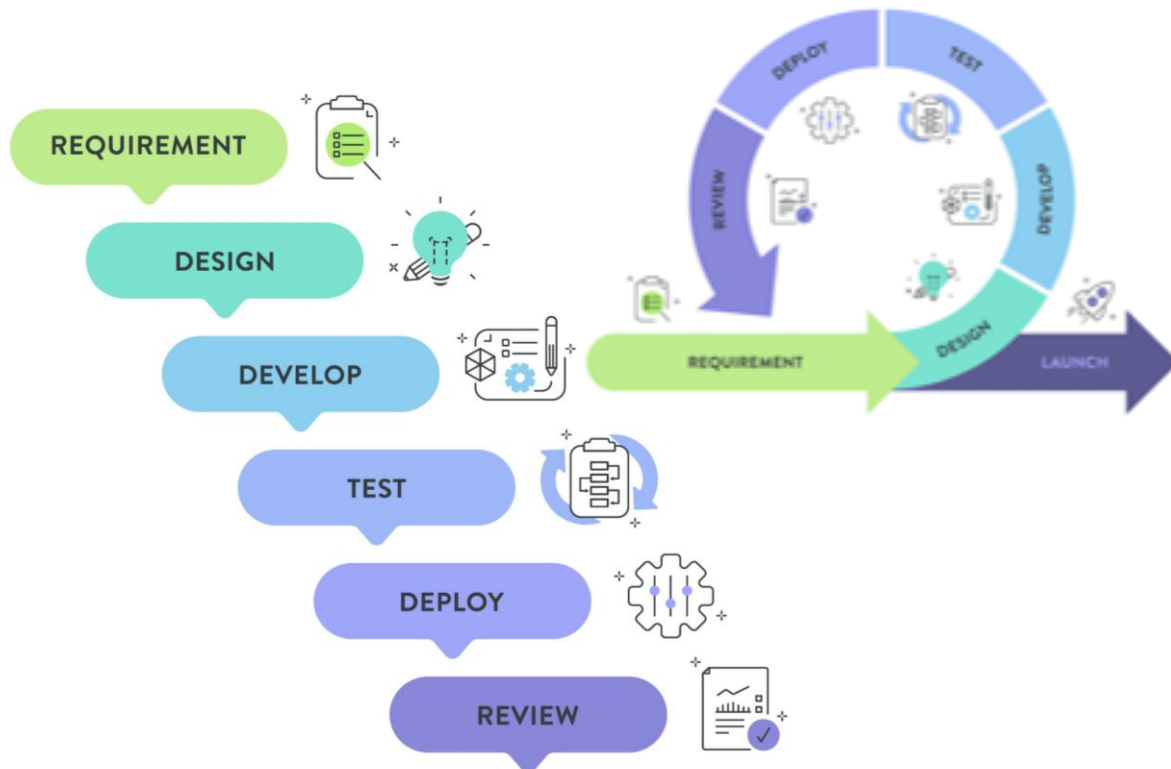
Some Recent Experience



A person wearing a blue and white checkered shirt is sitting at a wooden table. They are holding a blue pen in their right hand and pointing with their left hand towards a document on the table. The document contains various charts, including bar graphs and pie charts. The background is slightly blurred, showing a green plant on the left and a white wall. The overall scene suggests a professional or educational setting where data is being analyzed or presented.

Reference Slides, Real-World Examples & Case Studies

Defining Hybrid Project Management Approaches



Agile-Waterfall Phased
Waterfall planning, Agile execution

Parallel Hybrid

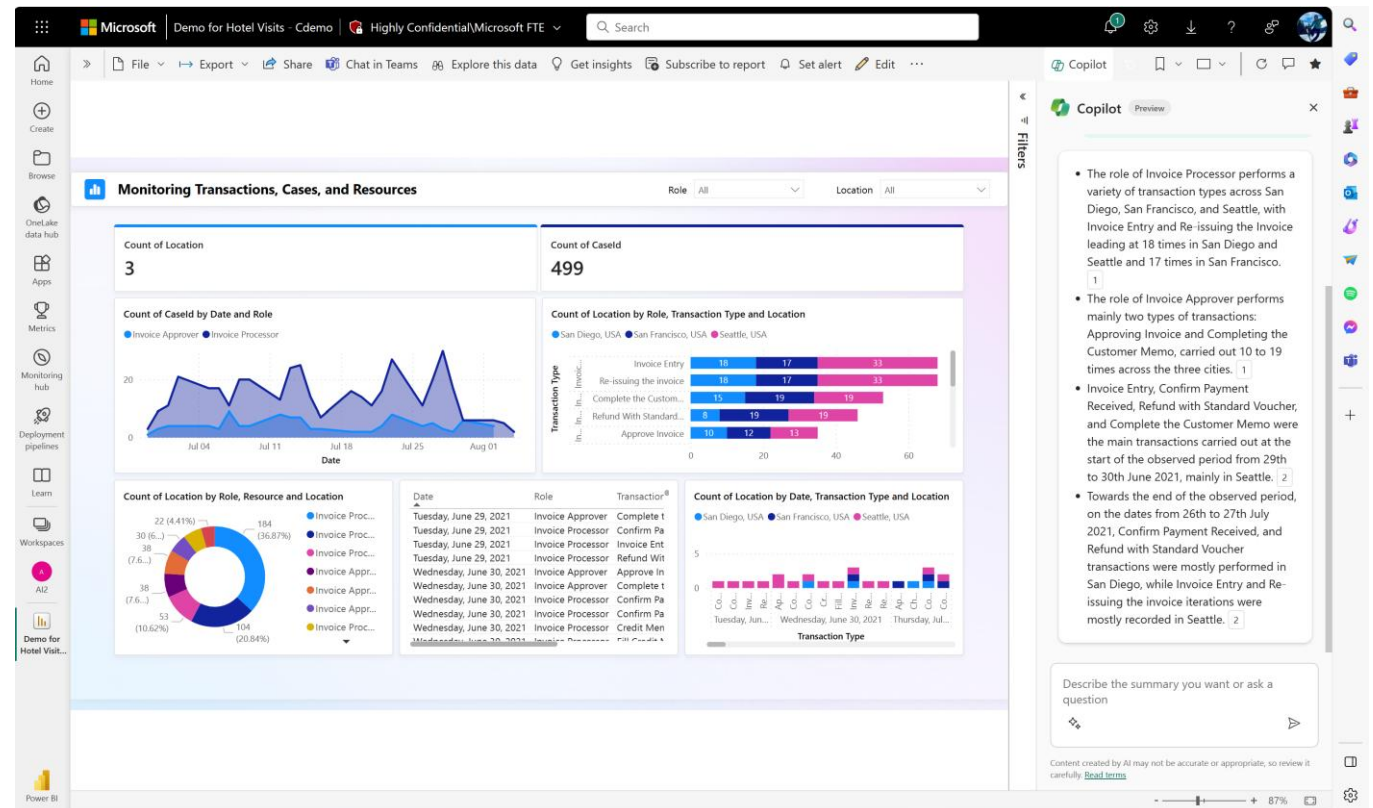
Agile and Waterfall run concurrently

Blended Hybrid

Waterfall structure with Agile iterations

AI for Metrics & Reporting

- Burndown & velocity charts auto-generated
- Predictive risk analytics
- Natural language dashboards
- Cross-tool integration (DevOps, Teams, OnePlan)



Case Studies and Examples



Software Product Development (Agile + Waterfall)

- **Scenario:** A product team is developing a new mobile app.
- **Waterfall elements:** Initial requirements gathering, high-level timeline, budget approval, and resource allocation are set up in **OnePlan** (with portfolio, cost, and resource management).
- **Agile elements:** The dev team uses **Microsoft Planner (Premium)** boards for sprint planning, backlog grooming, and tracking features in Kanban style.
- **Hybrid in action:**
 - The product manager links Planner boards to OnePlan, so executive stakeholders see milestone progress and budget burn alongside sprint burndown data.
 - Releases are tracked in OnePlan's roadmap while day-to-day sprint tasks stay in Planner.

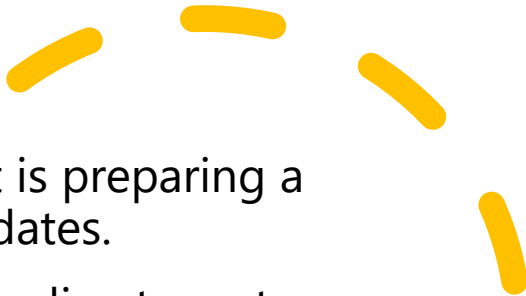


Professional Services Engagement (Client Deliverables + Iterative Work)

- **Scenario:** A consulting firm (like PPM Works) delivers a client engagement with both structured and evolving needs.
- **Waterfall elements:** Deliverables, contract milestones, and billing dates tracked in **OnePlan**.
- **Agile elements:** Consultants track day-to-day tasks, research, and workshops in **OnePlan** (or Planner).
- **Hybrid in action using OnePlan:**
 - Engagement manager forecast resource hours and report status.
 - Consultants update timesheets / tasks for work in progress.
 - Forecast and Actuals are visible across views, boards, and dashboards or with Power BI




Marketing Campaign Launch (Agile Iterations + Fixed Milestones)

- 
- **Scenario:** A marketing department is preparing a major campaign with fixed launch dates.
 - **Waterfall elements:** The marketing director sets campaign phases (strategy, creative, execution, measurement) with key deliverable dates in OnePlan.
 - **Agile elements:** Creative and social media teams run iterative cycles in Planner to test messaging, design assets, and social posts.
 - **Hybrid in action:**
 - OnePlan acts as the “master plan” with dependencies to external vendors and budget.
 - Planner tasks provide agility for creative cycles.
 - Campaign managers roll up Planner progress into OnePlan dashboards for leadership.



R&D Portfolio (Stage-Gate + Agile Prototyping)

- **Scenario:** A pharmaceutical company runs research projects with regulatory gates and experimental work.
 - **Waterfall elements:** Stage-gate process (concept, pre-clinical, clinical, approval) managed in **OnePlan** for portfolio oversight.
 - **Agile elements:** Scientists use **Planner** for iterative lab work and daily experiments.
 - **Hybrid in action:**
 - OnePlan holds the gating decisions, budget allocations, and resource approvals.
 - Planner captures daily stand-up actions and lab test cycles.
 - Executives get consolidated dashboards showing both gate progression and experiment throughput.
- 

Construction & Facilities Projects (Sequential + Agile Field Work)

- **Scenario:** A university is renovating a campus building.
 - **Waterfall elements:** Permitting, design approval, and construction milestones are tracked in **OnePlan** with dependencies and financial controls.
 - **Agile elements:** The facilities and IT teams use **Planner** to track punch-list items, equipment installs, and rapid issue resolution onsite.
 - **Hybrid in action:**
 - OnePlan provides a traditional Gantt view for executives and donors.
 - Teams in the field update their Planner tasks from mobile, ensuring real-time updates sync back into OnePlan.
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