

Product Integration Model's Guide  
for the Hybrid Model

# PIM-Go Hybrid

Version 2.1

## Contents

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<b>CONTENTS</b>	<b>2</b>
<b>THIS GUIDE'S OBJECTIVE</b>	<b>3</b>
<b>WHAT IS THE PRODUCT INTEGRATION MODEL (PIM-GO)?</b>	<b>3</b>
Value-centered	3
Product-centered	4
Agile and Hybrid	5
<b>PIM-GO MANIFESTO OF VALUES</b>	<b>6</b>
Simplicity	6
Fail Fast	6
Breadth	6
Ease of Use	7
<b>CULTURAL AND ORGANIZATIONAL ASPECTS</b>	<b>7</b>
<b>TOOLING ASPECTS</b>	<b>8</b>
<b>THE HYBRID MODEL</b>	<b>8</b>
<b>PIM-GO HYBRID'S ACTORS</b>	<b>9</b>
Initiative Leader	9
Program Leader	9
Technical Specialist	10
Portfolio Manager	10
Development Team	10
Development Team Member (Conception Stage)	11
Stakeholders	11
<b>PIM-GO HYBRID'S STAGES</b>	<b>12</b>
Conception	12
Maturing	14
Cycles	15
Program	17
Portfolio	18
Discontinuation	18
<b>ACKNOWLEDGEMENTS AND REVIEW</b>	<b>19</b>
<b>MAIN CHANGES IN THE CURRENT VERSION</b>	<b>20</b>

## This Guide's Objective

This guide was designed to support the understanding and use of the Product Integration Model (PIM-Go<sup>®</sup>) for the development of products and projects in hybrid environments.

Organizations that wish to promote, or are involved in, digital transformation processes will benefit from the contents of this guide. Fully or partially distributed teams will be able to use the model's processes and canvases to improve their results.

The model's simplicity and ease of understanding are meant to engage professionals at various levels and in various areas; it is not limited to the Information Technology industry.

This guide was created based on the model and information available on the PIM-Go website ([www.pim-go.com](http://www.pim-go.com)), but is not restricted to them. The information on the website complements and provides details on the contents of this document, and both should be used together.

## What is the Product Integration Model (PIM-Go)?

The **Product Integration Model (PIM-Go)** is a set of models and artifacts for the development of products based on cutting-edge practices in product and project management.

PIM-Go is currently comprised of **PIM-Go Agile**, for products in highly changing environments, and **PIM-Go Hybrid**, for more predictive contexts, as shown in the figure below



Figure 1: Context of use of PIM-Go's models according to the expected degree of changes.

While there is great similarity between PIM-Go Agile and Hybrid, especially regarding values, cultural aspects and the Conception, Program, Portfolio and Discontinuation stages, **this guide deals with PIM-Go Hybrid only.**

The **use of PIM-Go is free, and it is publicly available to be applied in organizations and training institutions.** However, citation is required as its content is protected by international copyright law, which includes its models, canvases and texts.

**PIM-Go is:**

### Value-centered

PIM-Go is a model that is centered on value delivery.

By value delivery we mean delivery of a specific benefit, less its associated costs. The potential value to be delivered is defined based on a previous perception by the organization itself, and it is called **value hypothesis**. Based on the product's delivery, the validation of the value created may or may not confirm the value hypothesis.

Both the delivered value and the associated costs can be measurable or immeasurable.

For example, when an apartment is delivered, there is delivery of value to its user (owner) in a measurable way (savings on rent the owner will no longer pay), but also in an immeasurable way (satisfaction in living in that neighborhood or in a larger home). The associated costs for the owner will be the costs of moving (only once), in addition to property taxes and condominium and utilities fees (recurring) if higher than previously incurred.

Whenever possible, efforts should be made to translate immeasurable value into measurable value, through indicators. In the example above, the degree of satisfaction could be captured through a survey with the target audience.

Therefore, value creation occurs whenever a specific benefit is delivered to the user, and also by reducing the associated costs for using that delivery. In the example above, lower condominium fees of the new apartment can be a value hypothesis to be confirmed with the new owners.

Two types of value can result from a delivery:

1. **Internal Value:** the value of the delivery from the organization's perspective. It is usually related to the organization's strategic goals, such as: increased profitability, revenue, market value, reputation or image; or, conversely, a reduction in risk, operating costs, among others;
2. **External Value:** the value of the delivery from the perspective of the user (who uses the product) or the client (who pays for the product). It is usually related to solving a problem or meeting a need of this audience. In the example above, it refers to the benefit the owner receives through the delivery of the apartment, less its associated usage costs.

Note that even if a product is created to serve an intra-organizational audience, there will be internal and external value to be created. For example, if an organization is developing a new internal HR system in order to reduce operating costs, the internal value will focus on aspects related to financial gains (reduction in operating costs). The external value will be related to the satisfaction of the HR system's users and other workers who interact with it.

As a general rule, the teams involved in the product's construction level emphasize the concern with the value created for users and customers (external value). At the program and portfolio levels, internal and external values are balanced in line with the organization's goals.

## Product-centered

Although it works with products and projects, PIM-Go is a product-focused model.

By product we mean a solution (whether physical or digital) that will be delivered to a user for use. Unlike projects, which are temporary, products have a more permanent temporal nature, although they may be discontinued at any time.

Even though it is also used for projects, we recommend adopting a more product-centric mindset in order to encourage a value-delivery culture.

This product-centric mindset refers to a departure from the predominant concern with delivery within scope, deadline and cost, towards a vision of value. In this context, a successful

product is one that actually solves a user's need or problem, even if changes occur during its development.

Note that the product-centric mindset should not be understood as using resources indefinitely. Products in the final stage of value delivery, i.e., with the user's main needs already solved, will only be allocated the resources necessary for maintaining the value that has been created or for taking advantage of some opportunity to create value that has not yet been explored.

## Agile and Hybrid

In an organization, complex products and projects can have a wide range of contexts.

On the one hand, some initiatives have a high degree of stability of requirements and security regarding the solution's construction, and no major changes are expected during development. In these environments, establishing a thorough plan from project's outset is generally very useful for a successful execution. This context is called predictive and is usually associated with waterfall project development models.

On the other hand, there are initiatives with a high degree of uncertainty regarding the requirements or the construction to be carried out. In many situations, there may be no consensus on what should be built. And even if there is a set of initial requirements, there is also a high probability that they will change, as if they were a moving target. Or, even if there is certainty about what should be built, there is no clarity on how to do it, and changes are expected throughout the process, due to the team's learning. In these environments, thorough planning at the outset is not useful, since frequent changes will quickly make the plan obsolete. In these contexts, which are the opposite of predictive, an agile approach is usually recommended. **PIM-Go Agile** is a model aimed at this environment. To this end, the model uses consolidated agile practices, especially Scrum, and combines them with conception and management techniques for programs and portfolios.

**PIM-Go Hybrid** is a model aimed at building products and projects that have **some degree** of uncertainty. In this model, while there is consensus on the initiative's goals, some changes are expected, whether in the requirements or in the team's learning regarding how to build the solution, though to a limited extent. Thus, initial planning is still useful here, though without the thoroughness inherent in the waterfall model. Indeed, the degree of planning will be just enough for developing the first cycles, according to a similar concept called "rolling wave". On the other hand, the hybrid model has events and artifacts from the agile context which enable constant inspection, adaptation and value delivery, with reduced costs associated with change management. Thus, the essential practices of agile development are combined with those of the predictive context, becoming hybrid.

# PIM-Go Manifesto of Values



Figure 2: PIM-Go values.

PIM-Go is founded on 4 values:

1. Simplicity;
2. Fail Fast;
3. Breadth;
4. Ease of use.

## Simplicity

*“We believe in practices that are simple, understandable for those who lead or participate in them.”*

There are several practices to be used in product development. Without a clear understanding of those, there will be a lack of team engagement and less value delivery.

Thus, PIM-Go seeks to be simple by filtering what is essential for developing an outstanding product, through an understandable flow (Big Picture). Particularities of each organization can and should be incorporated as needed, though without losing sight of the final simplicity. Complex workflows for dealing with exceptions should be avoided and direct communication promoted.

## Fail Fast

*“We believe that failing is inherent in the learning process, but it must be anticipated as much as possible.”*

“Fail Fast” is directly related to “Learn Fast”. Organizations adopting PIM-Go should create environments that foster experimentation, validation and learning, preferably as early as possible.

Thus, PIM-Go includes stages and activities specifically designed for this purpose. As an example, the Conception stage uses ideation, design and feedback techniques to validate value hypotheses at an early stage, when few resources have been spent.

## Breadth

*“We believe that products have different market characteristics and contexts and should therefore have different approaches.”*

PIM-Go is not a methodology, but models and techniques that can and should be adapted by organizations according to the characteristics of products and projects to be developed. Both models, PIM-Go Agile and PIM-Go Hybrid, cover largely recurrent situations in product and project management.

However, the nature of a product or project does not necessarily imply its adoption in all the organization's initiatives. As an example, PIM-Go's program and portfolio management is comprehensive to incorporate different initiatives developed with predictive, hybrid or agile processes.

## Ease of Use

*"We believe that theoretical models should be associated with guidance and artifacts that facilitate adopting them quickly in practice."*

The lack of practical guidance on processes is also one of the reasons for decrease in the value created by teams. Thus, PIM-Go has contents integrated in the model that detail each stage in order to facilitate its use in organizations.

In many cases, these stages are supported by templates and Canvases with step-by-step instructions. This does not imply, however, that other techniques or adaptations cannot be used. On the contrary, throughout PIM-Go's flow, teams and organizations are encouraged to choose the technique that relates most closely to their characteristics.

An example is Risk Analysis. While there are several techniques for this purpose, PIM-Go suggests adopting a model based on three Canvases (Assumptions and Constraints, SWOT and Analysis). However, if the organization is familiar with another technique that achieves the same goal, that technique can be used.

## Cultural and Organizational Aspects

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Cultural and organizational aspects can boost PIM-Go's implementation or, on the contrary, they can create barriers or impediments to it.

To a greater or lesser extent, attention to the following is recommended:

- **Innovation Environment:** the existence of an environment that fosters experimentation, accepts failure and encourages learning is essential for teams to accept testing and innovating without the perceived risk of punishment;
- **Open Communication:** people should be able to communicate without hierarchical silos. Direct communication should be encouraged and information of common interest radiated to everyone involved without intermediaries. Tools should be integrated whenever possible to facilitate consistent, instant communication;
- **User-centered Vision:** the organization's processes should aim to create value for the user and constantly collect feedback. The collected data should be routinely stored and transformed into information and provide the grounds for decision-making;
- **Team Empowerment:** teams should have autonomy and power to decide the best way to build product increments. Processes that influence teams, such as budget and rewards, should preferably be aimed at the team and not the individual. This will encourage teams to organize themselves more effectively and establish a culture of commitment to the desired results;
- **Inspiring Leadership:** encouragement to change should be routinely reinforced by managers at various levels, stimulating value creation and impediment removal.

Leadership should be strategy-oriented and focused on creating a sense of engagement and purpose needed by the teams.

## Tooling Aspects

PIM-Go is suitable for implementation through digital tools (software), and all the collaborative activities in the model can be carried out both in person and remotely.

For example, the OKR activity included in the item “Strategic Objectives” can be carried out in face-to-face workshops or through visual collaboration tools (a.k.a. Whiteboard tools), or both. The agenda and dynamics provided for the activity should be adapted according to the chosen means.

The use of digital tools makes it easier to capture and move data between the model’s teams and levels in a quick, consistent and effortless manner. This helps the organization manage knowledge more efficiently. An example: using Digital Canvases allows recording the whole discussion and migrating it to databases and other systems automatically. This guide does not present, or direct to the use of, any particular tool.

## The Hybrid Model

PIM-Go’s Hybrid Model is based on a map-like graph called Big Picture, which presents a step-by-step path for the development and delivery of products and projects.

The model assumes adaptations to be made by organizations according to their reality. While different techniques may be used, it is expected that each stage in the model will be, in some way, carried out, even if tacitly.

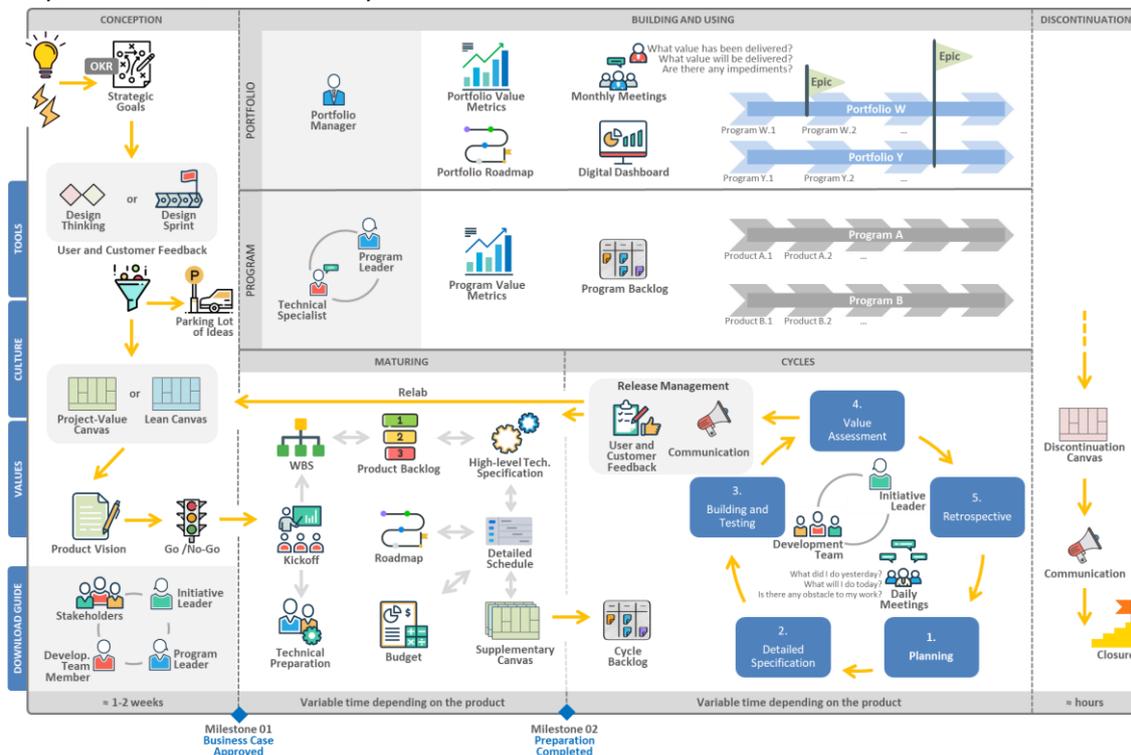


Figure 3: The Big Picture of the Hybrid Model.

## PIM-Go Hybrid's Actors

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Different actors participate in each stage of the model.

### Initiative Leader

The Initiative Leader is a professional who combines two essential abilities.

The first is the technical aspect of product and project management. It is the technical knowledge of developing WBS, Backlog, schedule, budgets, among other artifacts that are commonly needed in predictive and agile environments.

The second is the ability to understand the business requirements and present priorities from the perspective of user value, similarly to what the Scrum Guide defines as the Product Owner.

While there are benefits from both activities being carried out by a single person, in some organizations, due to excessive workload or the lack of skilled human resources, each of these roles may be performed by a different person.

#### **Duties**

The three main duties of an Initiative Leader are:

- Measuring and maximizing the value to be delivered to the user and customer (external value);
- Keeping the Product Backlog updated, ordered and clearly communicated to the development teams;
- Managing the initiative's aspects, particularly those related to scope, time and cost.

### Program Leader

Often known as Product Lead, Senior Product Manager, Program Manager, or Head of Product, this position is common in organizations with multiple complex products and projects.

The Program Leader's main duty is to keep consistency regarding the program's multiple initiatives under a guideline that is aligned with the organization's strategic goals. To that end, the program leader can influence the priority given to specific product initiatives, if that impacts other products.

As indicated for the Product Owner in the Scrum Guide, the program leader should be one single person, not a committee. This prevents noise caused by inconsistent decisions about the program.

#### **Duties**

The three main duties of a Program Leader are:

- Measuring and maximizing the program's overall (i.e. internal and external) value when considering multiple related products or projects;
- Keeping the Program Backlog's consistency by keeping it organized, ordered and communicated to Product Owners and/or Initiative Leaders;
- Supporting the Portfolio Manager in identifying risks and opportunities of optimizing human and material resources within the Program.

## Technical Specialist

The professional who works with technical aspects within the program. Their objective is to provide an integrated infrastructure across the different products to minimize risks and resources.

The name of this professional varies according to their industry, but it is always associated with a senior position. In the IT field, for example, the solution architect or enterprise architect usually takes on this role.

### Duties

The main duties of a technical specialist are:

- Providing an integrated technical vision across the various products and projects;
- Creating new technical standards resulting from the initiatives' needs;
- Identifying technical risks related to the interdependence of initiatives;
- Proposing good practices related to technical aspects;
- Identifying resource optimization opportunities by reusing technical solutions across the multiple initiatives;
- Removing technical impediments that impact the program's delivery.

## Portfolio Manager

The professional who manages integration across multiple programs and initiatives and their relationship with the organization's strategic goals.

The Portfolio Manager should be able to communicate to management and executive stakeholders the program's general status, the value delivered and yet to be delivered, as well as the associated risks. It is also the portfolio manager's duty to analyze the resources used and yet to be used, as well as to identify any opportunities for optimization or synergy.

### Duties

The duties of a portfolio manager can vary from one organization to another but are commonly related to:

- Communicating and aligning the Portfolio's Roadmap with senior stakeholders;
- Keeping coherence across the programs and checking their alignment with the strategy;
- Measuring the internal and external value promoted by ongoing programs and the expected future delivery;
- Promoting an integrated view of risks;
- Identifying and promoting any human and material resource optimization across programs.

## Development Team

The technical team responsible for developing the product.

In line with some of the concepts in the Scrum Guide related to Developers, the team should be:

- **Self-managed**, i.e., having the autonomy to decide the best way to convert the Backlog item into a product increment;
- **Integrally responsible**, i.e., responsible as a whole for the increment, without individual responsibilities;
- **Skilled**, i.e., the team as a whole must have the necessary skills to carry out the development.

### Duties

The development team is responsible for:

- Developing the product using the organization's standards and guidelines;
- Organizing its way of working during the Development Cycles according to the activities planned in the detailed schedule;
- Keeping the Cycle Backlog updated on the status of each technical activity.

### Development Team Member (Conception Stage)

In the Conception stage, this professional is a technical representative of the future development team to be formed if the product is approved in the “Go/No-go” stage. In addition to having a technical background, it is advisable for this member to be interested in the organization’s business domain and processes.

This representative is necessary for two reasons:

- To incorporate a technical view in the discussion of the product, always associated with the value created by the product to solve a user problem or meet a user need;
- To facilitate the initial transition with the technical team in the Maturing stage. This role will be performed mainly during the initial weeks, when the team is not yet familiar with the solution and its context.

### Stakeholders

Stakeholders are individuals who can somehow change or influence the potential value of a product or solution.

This influence can take place in the form of **value identification**. Product users and customers, UX team members, business unit managers directly related to the product are common examples of stakeholders who can assist the Initiative Leader in identifying higher-value solutions.

Another form of stakeholder influence is the ability to change the **delivery of value**. The project’s financial manager, technical specialists required for delivering the solution, government representatives, or other members directly or indirectly impacted by the solution are also examples of stakeholders.

### Duties

In the Conception stage, stakeholders participate as team members, usually with no hierarchical distinction. Their role, like that of any other member, is to contribute in the pursuit of the best solution to the user problem or need. Only in some very specific situations –

such as in decision-making moments in Design Sprint – can the stakeholder, in the role of Decider, have a greater influence than that of other participants.

In the Building and Use stage, stakeholders are not formal members of the team and, therefore, do not have specific duties. However, they should be invited to key events, such as Review meetings and Roadmap presentations.

## PIM-Go Hybrid’s Stages

### Conception

Conception	Portfolio		Discontinuation
	Program		
	Maturing	Cycles	

This is the stage of understanding the target audience, their problems or needs, and seeking solutions. Also in this stage, starting from a chosen idea, an initial detailing is carried out, which will be useful for obtaining authorization to proceed to the next phase (Maturing).

It is in the Conception stage that validation with users takes place so that inadequate solutions can be discarded and replaced quickly and with little impact. That is one of the practical implementations of the concept of Fail Fast, one of the PIM-Go values.

#### Why use it?

A solution that fails to solve the user's problem or need, even if well-constructed, is a bad solution. Therefore, the Conception stage is considered one of the most important in the PIM-Go model as it allows, through a range of techniques, discussing and understanding the best value creation alternatives.

#### How to use it?

A working group should be formed which includes the Initiative Leader, the Program Leader, a senior member of the future development team and the relevant stakeholders.

With the Initiative Leader as the facilitator, the group should:

1. Start the process with a [need or problem](#), which may come from various sources. For example, a problem may be identified from a competitor’s move or a need may arise from the customer service team. Problems or needs can also be identified based on the goals resulting from the [organization’s strategic planning](#).
  - a. If the source is not the strategic goal, then the validation on whether the problem or need is aligned with the organization’s strategy should be carried out at this point.
  - b. PIM-Go recommends using [OKR](#) (Objectives and Key Results) to identify strategic goals and related initiatives.
2. To identify a suitable solution to the problem or need, use an ideation method. PIM-GO’s specific Design Thinking ([Design Thinking-Go](#)) or [Design Sprint](#) processes are recommended, but any other method can be adopted.

- a. Whatever the method, interaction with the product's direct user is essential and should not be suppressed. Sometimes we tend to adopt preconceived solutions or adhere to certain value hypotheses that are part of our viewpoint. Only by directly consulting with users, through prototypes and user experience, can we confirm or dismiss those hypotheses, as well as expand our understanding of the solution;
  - b. *Design Thinking-Go* is an excellent option when there is some knowledge about who the target audience is. If that (i.e., the target audience, its pains or needs) is not clear, then previous stages for persona definition, empathy maps, user journey and other UX techniques are recommended;
  - c. If the option is a 5-day Design Sprint process, then problem definition is carried out on the 1st day (Define), ideation on the 2nd day (Sketch), selecting the winning idea on the 3rd day (Decide), prototyping on the 4th day (Prototype) and testing with users on the 5th day (Test);
  - d. If the option is Design Thinking-Go, then the detailing of the problem and its root causes should be done in the "Design Thinking - Causes" Canvas, ideation in the "Design Thinking - Ideas" Canvas, and selecting the idea in the "Idea Filter" Canvas. In the end, the selected idea should be prototyped and validated with users. Relevant unused ideas can be stored in the Parking Lot of Ideas ("Parking Lot of Ideas" Canvas).
3. Detail the selected solution using the "[Project-Value Canvas](#)", the "[Lean Canvas](#)" or another Canvas the organization prefers.
    - a. The "Lean Canvas" is recommended when the solution has the characteristics of a business unit, i.e., it competes for market share and has its own revenues and expenses. E.g.: startups;
    - b. The "Project-Value Canvas" is recommended when the solution doesn't need to compete for market share or generate its own revenue. E.g.: internal projects of the organization or in particular clients.
  4. Consolidate information in the [Product Vision](#). This summarized vision is important for communicating with stakeholders and teams, and it is used throughout the building process as guidance on what is expected of the future product. The "Product Vision" Canvas is recommended for that purpose.
    - a. As an alternative, some organizations may choose a more formal documentation model, such as a Project Charter. With no detriment to this approach, we recommend building the product vision also in this case, to guide the development carried out by the future teams.
  5. Deliver a presentation of the solution to decision-making stakeholders based on the Product Vision and support documents (other Canvases). This stage is called "[Go/No-go](#)" and it is intended to filter initiatives at an early stage before more resources are mobilized (i.e., forming development teams, acquiring infrastructure, etc.). The expected result is authorization for the product to proceed to the Maturing stage.
    - a. This presentation is highly dependent on organizational culture: it may be as simple as an e-mail, or sophisticated as a pitch for an initiative selection committee;

- b. If approved, the initiative will formally enter the organization’s program and portfolio, with the respective associated value metrics.

## Maturing



It is the stage of initial detailing of the solution within the “Building and Using” phase. The goal is to initially engage the Development Team and design artifacts related to scope, time, cost, risk and quality aspects.

By the end of the Maturing stage the teams should have the technical, human and material conditions to execute the first Development Cycle.

### Why use it?

Without this stage, part of the first Cycle’s time would be dedicated to designing some fundamental artifacts, such as the Product Backlog, in a disorganized manner.

Using a previous stage for the initial detailing allows the team to discuss the solution at a higher level, with an overview of the user’s journey and the detailing of the initial requirements

Since it is a model for hybrid initiatives, this stage also provides the detailing of scope, time and costs that are usually required by the organization before starting the development.

### How to use it?

The activities in the Maturing stage follow a logic order, however, they are not unidirectional, and returning to previous stages based on information from current activity is not uncommon. For example, while creating the schedule, the team may identify a need to return to the detailed specifications or even to the WBS.

The Initiative Leader, with the Development Team, should:

1. Prepare and hold the [Kickoff](#) meeting to align and motivate the team about the work to be carried out and the previous discussions in the Conception stage;
2. Design the Product’s Work Breakdown Structure ([WBS](#)) with the deliverables for the Cycles stage;
  - a. The WBS is normally based on the breaking down of the product to be built, which is called the Product Breakdown Structure (PBS) in the PRINCE2® method and in the IPMA Individual Competence Baseline®;
3. Detail the [Product Backlog](#) based on the WBS deliverables. Each item of the product decomposed in WBS should correspond to one or more items in the Backlog;
  - a. Depending on the product’s characteristics, designing a Story Map first may be relevant to contextualize the deliverables from the viewpoint of the user’s journey;
4. Define the Backlog’s initial order (Initiative Leader) including, at the top, the top-priority items from a user and customer value standpoint;

5. For the Backlog’s top-priority items, the Development Team, with information from the Initiative Leader, should detail them to a point that they can be executed in the first cycles.

The Initiative Leader, helped by the Development Team, should:

6. Design a [detailed schedule](#), based on the activities defined in the high-level specification and on the logical dependence for the Product Backlog’s delivery;
  - a. The term “detailed” about the schedule should not be confused with a “full, thorough description”. In fact, it is “Detailed” as in the acronym DEEP, from the agile world, also related to “Rolling Wave” in the context of schedules. Thus, the schedule should be detailed for the top-priority items, while using a more macro-level approach for lesser priority items. The goal is to dedicate efforts just to what is necessary at the moment, minimizing impacts and reworking if changes occur over the development;
7. Draw an overview of [costs](#) for the product’s delivery based on the activities detailed above;
  - a. In many cases, depending on the tool being used, drawing a budget and the flow of expenditures over time results naturally from the detailed schedule itself;
8. Design the [Supplementary Canvases](#) (e.g., Risk), according to the product’s characteristics;
  - a. Other supplementary Canvases or activities of the organization should be included at this point as needed. For example, the mapping of processes, approval by specific stakeholders, more complex purchases, etc.;
9. Define a [Roadmap](#) with a high-level schedule to be presented to the stakeholders at the end;
10. In parallel, throughout the process, the Development Team should initiate the [technical preparation](#) so that all resources and configurations are available for the first Cycle.

## Cycles

Conception	Portfolio		Discontinuation
	Program		
	Maturing	Cycles	

It is the stage where the solution is developed and increments are made available to users. Its goal is to carry out a cyclical development that promotes frequent releases which add value to users and allow testing the product’s value hypotheses.

Cycle length can vary according to a wide range of contexts. However, it should not exceed 1 month and, once defined, it should be kept so as to provide pace and organization.

### Why use it?

Using development Cycles enables development in iterations and increments. This allows meeting the organization’s requirements that are typical of predictive projects, while keeping the possibility of correcting the product’s course (adaptation) through constant user feedback.

### How to use it?

Cycles are comprised of four events and five sequential steps.

Based on the Scrum, the four cycle events are:

- **Planning Meeting:** an event chaired by the Initiative Leader with the Development Team to define the activities to be carried out in the cycle. These activities, often resulting from the Detailed Schedule, will be detailed by the Development Team and will result in the Cycle Backlog. This meeting should not consume more than 8 hours for 1-month Cycles;
- **Daily Meeting:** it is the time the Development Team will align the day's activities in a meeting of up to 15 minutes. This meeting is aimed at the team's internal alignment. Normally, each team member answers 3 main questions: (i) What did I do yesterday? (ii) What will I do today? (iii) Is there any impediment?
- **Review Meeting:** an event chaired by the Initiative Leader to present the created increment to the stakeholders and/or users to collect feedback. This meeting should not consume more than 4 hours for 1-month cycles;
- **Retrospective Meeting:** a reflective meeting conducted by the development team and the Initiative Leader to analyze what was done right during the Cycle, what can be improved, and what actions are necessary to improve the team. This meeting should not consume more than 3 hours for 1-month cycles.

The Cycle's five steps are:

1. **Cycle Planning:** refining the plan for a particular cycle. It involves defining with the team, through the Planning Meeting, the activities to be carried out in the cycle, which will result in the Cycle Backlog. This activity also involves organizing the practical aspects necessary for executing the cycle, such as: deliveries of resources, scheduling with suppliers, checking experts' availability, alignment with other teams or products, etc.;
2. **Detailed Specification:** detailing the high-level specification to a sufficient degree for conducting the cycle's development activities. It is during this step that daily meetings begin;
3. **Building and Testing:** developing the product and its tests for activities whose specification has been detailed. To begin this step, it is not necessary to have completed the detailing for all activities in the cycle, only for the one inherent to what will be built. According to the development method and the product's nature, the tests may be built before, simultaneously to, or after building the product. The work in progress can be monitored and aligned by means of the daily meetings and the Cycle Backlog;
4. **Value Assessment:** assessing the value created by the product's increment with stakeholders by means of a Review Meeting. If a release has been made, the assessment can also be conducted with the users. In this case, the users should be adequately communicated about the release, and their feedback should allow validating or refuting the increment's value hypothesis;
5. **Retrospective:** when the team assesses the opportunities for improving its own performance. The Retrospective Meeting is held in this step.

## Program



The management level that operates with multiple interrelated products through a Program Leader and a Technical Specialist.

Programs are groups of initiatives that seek to deliver value which would not be available if those initiatives were to be independently conducted.

This analysis of created value may be externally oriented (regarding the user and client) or internally oriented (regarding the organization). At the program level, the goal is to maximize the value created by the initiatives together, as well as reduce their associated costs:

1. **External Value Increase:** an increase in the final value for the user or client by composing individual value deliveries or reducing their use costs. Example: applications related to the same target audience (e.g., accountants) and which may be used in combination (increased value resulting from the combination);
2. **Internal Value Increase:** an increase in the final value for the organization by composing individual value deliveries or reducing the organization's costs. Example: initiatives related to sustainability which share the same management structure (decreased costs associated with managing the initiative and similar purchases).

### Why use it?

For medium and large organizations, management just at the product level cannot provide a comprehensive view of the integration between multiple products. Using a Program-based approach allows taking advantage of synergies between different products, as well as aligning their actions to maximize the generated value.

In addition, analyzing at the Program level allows identifying risks in an integrated manner.

### How to use it?

Coordinated by the Program Leader, Program management is constant and necessarily implies executing at least 3 activities on a routine basis:

1. **Periodical Program assessment meeting:** attended by the Program Leader, Technical Specialist and respective Initiative Leaders, it is aimed at aligning ongoing activities, identifying dependencies and program risks, as well as evaluating metrics and opportunities for synergy. It should be held at least fortnightly;
2. **Keeping a [Program Backlog](#):** i.e., creating and updating a Backlog that includes all initiatives in progress and a view of each epic's status. It is usually in digital format and is sometimes integrated to the control systems of the development teams of related products;
3. **Keeping [Value Metrics](#):** i.e., creating and updating the program's value metrics based on the metrics of each product. These metrics will also be provided for interaction by the Portfolio Manager at the Portfolio level.

## Portfolio

Conception	Portfolio		Discontinuation
	Program		
	Maturing	Cycles	

The strategic management level that operates with multiple programs or key products through a Portfolio Manager.

Portfolios are groups of programs or complex products linked to one or more strategic goals.

### Why use it?

For large organizations, portfolio management is the connection between strategy and ongoing initiatives, which allows alignment with the organization's executive level.

### How to use it?

Portfolio management is continuous, even if changes occur in the set of portfolios.

For an effective portfolio management, the Portfolio Manager should execute these activities on a routine basis:

1. **Monthly meetings:** periodical meetings with the executive team to update the portfolio. These meetings are aimed at identifying the value that has been generated, the value to be generated, and related impediments. The mapping of changes in the organization's external and internal environments should also be discussed so as to identify the necessary adaptations to the portfolio;
2. **Keeping Value Metrics:** i.e., creating and updating the portfolio's value metrics and directly linking them to the related strategic goals. The value metrics should become visually available to the organization through a [digital dashboard](#);
3. **Keeping a Portfolio Roadmap:** this should provide a comprehensive high-level view of the programs' activities and related initiatives, as well as their relationship with the associated value metrics. It is usually created in digital format to make it visible to stakeholders regardless of their location; its language and format should be easily understandable.

## Discontinuation

Conception	Portfolio		Discontinuation
	Program		
	Maturing	Cycles	

It is the stage conducted when a decision has been made to terminate the product or project. This stage is also applicable when the product is being developed for another company, and the agreement is terminated.

### Why use it?

In product development models, as a rule, efforts are focused on the previous stages, which are viewed as value generators. However, terminating a product's life cycle can also affect the value perceived by users.

For example, when a product is being terminated, there may be an opportunity to offer the user an alternative as a way of minimizing the negative value generated by that termination.

In the case of projects, this stage occurs when the initiative is terminated, whether in a planned way (e.g., when all releases have been completed) or abruptly (e.g., through the sponsor's decision to terminate the project).

Thus, the goals of the Discontinuation stage include:

- Mapping who is potentially impacted by the Discontinuation and identifying the actions and opportunities to be taken for maximizing value generation;
- Defining the schedule of actions of discontinuation and the releasing of human and material resources;
- Promoting team reflection about the work done in the initiative, and collecting the lessons learned that can be used in other initiatives.

In many situations, strategic issues will lead to Discontinuation. It is important that the rationale for such decisions be written down in case the product is resumed, or just to clarify to the organization the trade-off enabled by the Discontinuation.

### **How to use it?**

Once the decision to discontinue the product has been made, the Initiative Leader and the team and relevant stakeholders should:

1. Use the [Discontinuation Canvas](#), to discuss and list anyone potentially impacted by the discontinuation;
  - a. In addition to users and customers (as potentially impacted groups), employees and partners should also be included;
2. List on the Canvas any actions to maximize the product's value (or reduce any negative value) for those groups;
3. Capture on the Canvas the lessons learned from the initiative development journey which may be useful in future solutions;
4. Define and execute the necessary communication actions to keep the impacted groups informed of ongoing activities and possible alternatives.

The initiative's actual discontinuation only takes place once the actions related to discontinuation have been completed.

## Acknowledgements and Review

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## Main Changes in the Current Version

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In addition to other specific adjustments, the version 2.1 of the PIM-Go Hybrid Guide incorporated some specific changes to the Scrum Guide 2020. The term *Developers* is cited, but the original name *Development Team* is kept for the hybrid context. Additionally, the team is now self-managed and not self-organized.