



Is this Project Management, or is it for the Garbage Bin?

Why Project Management is Essential
for a Successful Project Deliver

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1. Introduction

Project management (PM) in client projects often involves a balancing act. Companies strive to reduce costs by minimising PM effort, although this can increase project risk. At the same time, best practices and a robust governance structure need to be implemented, which can be flexibly adapted to specific client needs. This tension between cost efficiency, risk minimisation, and the adaptation of best practices to the client's reality represents a central dilemma in project management.

This ebook addresses the following questions and simultaneously presents proven solutions:

- 1.** How can methodical best practices be reconciled with the client's operational business?
- 2.** What should be considered when weighing project risk versus project management effort?
- 3.** How can planning and preparation efforts be optimally balanced with the benefits of agile implementation?

In our further ebook, "**Agile vs. Waterfall – Why the Hybrid Model is Still the Gold Standard for (Most) Salesforce Projects**," we delve into the crucial importance of the early conception, discovery, and solution design phases for smooth agile delivery.

Furthermore, our ebook "**Project vs. Continuous Delivery**" explores why both approaches can be right or wrong, and where the added value for the client lies.



2. The Problem: The Dilemma of Project Management in Client Projects

Agile methods promise flexibility and quick adaptation, while a defined project scope offers stability and predictability. Both approaches have their justification, yet choosing one path creates conflicting objectives. Simultaneously, there's the ongoing challenge of balancing cost efficiency and risk minimisation. While less PM effort can reduce initial costs, it carries the risk of increased expenditures later due to unforeseen problems. How does one navigate this tension to ensure project success?

We want to delve deeper into these conflicting objectives.

2.1 Best Practices vs. Client's Daily Practice

The desire for the chosen service provider's support regarding "best practices" is usually strong, but often clashes with the reality of the client's daily business.

Firstly, there is often a lack of resource availability, both quantitatively and qualitatively. While this may sound harsh at first, it usually has very plausible and understandable reasons. Central agile roles, such as the Product Owner, are often not present in many companies initially– for various reasons, be it simply because there isn't enough work outside the specific project to fully utilize a full-time PO, or because they haven't worked agilely before, or because the PO role doesn't fit the company's structure, or simply because they couldn't hire anyone with the necessary skillset and experience.

The most common solution observed is the attempt to temporarily– and usually not 100%– assign someone from the line organisation to this role. In many cases, the selected project manager, who also has operational tasks, simultaneously takes on the PO role. Another frequently chosen scenario, especially in the context of Salesforce projects, is that the internal Salesforce admin temporarily assumes this role.

None of the chosen approaches is truly ideal and usually leads to the same observed challenges:

1. Capacity problems with the selected person lead to poor availability.
2. The clear focus on a Product Owner's core tasks is missing for the same reasons.
3. The urgently needed experience in this role is lacking and must either be compensated by increased consulting services from the service provider, or support is rejected, and the likelihood of suboptimal decisions dramatically increases.

Especially in the latter case– and it is astonishing how often the service provider's consulting support in this area is not accepted– best practices are practically no longer applicable, even when explicitly demanded.

This is just one of many examples where the desire to adhere to best practices remains an admirable goal in reality. Further examples of unrealised best practices include:

- Estimation methods
- JIRA setup
- Content and flow of Daily Scrums and other agile meetings
- And much more.

We will discuss practical and proven solutions in Chapter 3.





2.2 Project Risk vs. Project Management Effort

It is a widespread phenomenon that clients, driven by the desire for cost efficiency, want to minimise the effort for project management (PM) on the service provider's side, and in extreme cases, even want to eliminate it entirely. This attitude is often based on the assumption that PM primarily represents overhead and unnecessarily inflates project costs. The logic behind it seems plausible at first glance: fewer PM hours mean lower expenses. However, this short-term cost saving directly conflicts with two other essential goals crucial for project success: ensuring high project quality and minimising project risk.

The conflict of objectives arises from a fundamental misunderstanding of the role and value of project management. Many clients view PM as an administrative burden, primarily serving to create status reports and organise meetings. What is often overlooked is the central function of PM in controlling, coordinating, and safeguarding the entire project flow. An experienced project manager is not only responsible for adhering to timelines and budgets but also for the proactive management of risks, communication among all stakeholders, ensuring scope definition and control, and promoting smooth collaboration. If this central control instance is missing or understaffed, gaps inevitably arise that can have a domino effect on the entire project.

Reducing PM effort on the client side often leads to a series of negative consequences that can quickly nullify the initial cost savings. One of the biggest risks is a lack of clarity regarding the project scope. Without a dedicated project manager who continuously monitors the scope and manages deviations, requirements can remain unclear, change during the project, or grow unexpectedly (scope creep). This leads to rework, delays, and ultimately additional costs that far exceed what was originally intended by the PM savings.

Another critical point is risk management. Projects are, by definition, unique undertakings fraught with uncertainties. A professional project manager identifies potential risks early, assesses their impact, and develops strategies for risk mitigation or avoidance. If this task is neglected, small problems can quickly escalate into massive obstacles that block project progress and impair project quality. Examples include insufficient resource availability on the client side, technical challenges that are not recognised in time, or communication disruptions that lead to misinterpretations of requirements. Each of these unresolved problems can lead to significant additional costs and an extension of the project duration.

Furthermore, project quality often directly suffers from reduced PM effort. Quality assurance, review of deliverables, expectation management, and ensuring that the delivered solution meets client needs are core tasks of a project manager. If these functions are inadequately performed, the likelihood increases that the final solution will not meet desired standards, functionalities will be missing, or end-user acceptance will be low. This not only leads to client dissatisfaction but also requires subsequent adjustments and corrections, which in turn cost time and money.

In summary, the desire to minimise PM effort on the service provider's side while simultaneously expecting high project quality and low risk is a dangerous conflict of objectives. The initial cost saving is almost always overcompensated by increased risks, quality losses, and ultimately higher overall costs over the course of the project. Competent project management is not an optional add-on service but an indispensable investment that significantly secures project success and leads to more efficient and higher-quality project execution in the long term. It is crucial that clients recognise the true value of project management and are willing to invest in this critical function to achieve their project goals sustainably.



2.3 Preparation Effort vs. Cost Efficiency

The balance between minimised preparation effort and ensuring efficient project implementation is another fundamental conflict of objectives, particularly in hybrid project approaches that combine agile and traditional elements. The desire to move into the implementation phase “as quickly as possible,” i.e., into the first agile sprints, is understandable. Companies want to see results quickly and shorten the “time-to-market.” This often leads to efforts to shorten or completely skip phases such as a detailed discovery phase, a Sprint 0, or comprehensive conception work. The supposed logic behind this is that every day and every hour invested in preparation incurs additional costs and delays the project start.

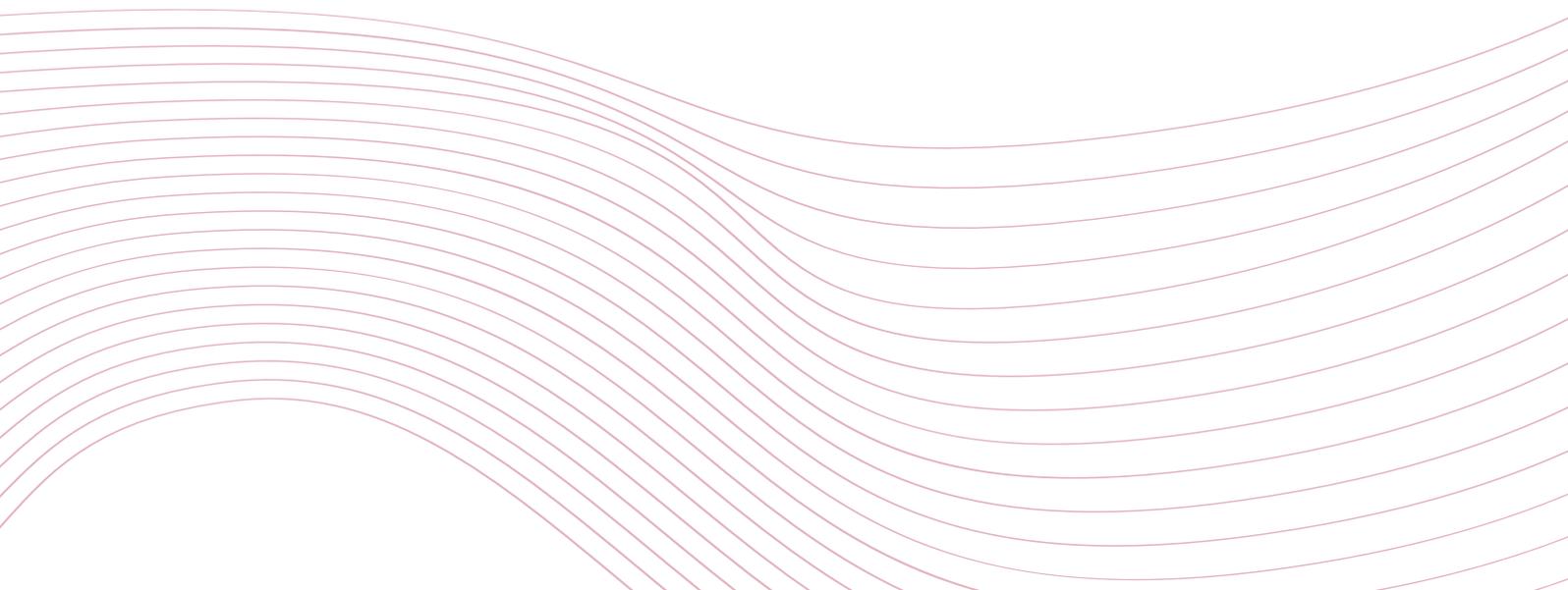
However, this short-term “saving” often proves to be a fallacy in practice and leads to significant problems later in the project. Insufficient preparation takes its toll in many ways. One of the most serious problems is an inadequately filled and unclear backlog. An agile project thrives on a well-maintained, prioritised, and sufficiently detailed backlog, which forms the basis for work in the sprints. If the necessary analyses, workshops, and alignments are missing in the preparation phase to fully capture client requirements and convert them into concrete user stories, the backlog is incomplete from the outset. This leads to development teams being unable to work efficiently in the sprints. They constantly have to wait for clarifications, and requirements are specified ad hoc, leading to misunderstandings, rework, and quality defects. The supposed time saving at the beginning is more than eaten up by delays and increased effort in the implementation phase.



Closely related is the neglect of business processes. Often, in the haste of a “quick start,” the focus is too strongly placed on technical requirements, while the impact of the new solution on the client’s existing or future business processes is only superficially examined. The discovery phase serves precisely to develop a deep understanding of the client’s end-to-end processes, identify weak points, and optimally integrate the new solution into workflows. If this step is skipped or performed inadequately, serious ruptures can appear later. The developed solution may be technically flawless, but it does not fit the actual needs of the users or requires cumbersome workarounds, which massively reduce acceptance and diminish the expected benefit. This leads to lengthy correction loops, unbudgeted retraining needs, and, in the worst case, the necessity to discard and redevelop already implemented functionalities.

Another risk is that important dependencies and interfaces to other systems or departments are not identified early. This leads to unexpected blockers in the sprints, as integration problems suddenly arise or data formats are incompatible. Rectifying such problems in ongoing sprint operations is significantly more complex and costly than in a dedicated planning phase. Teams are forced to interrupt their work, wait for clarification of dependencies, and adapt to work that has already started. This reduces not only efficiency but also team motivation.

In summary, attempting to minimise preparation effort at all costs represents a dangerous tightrope walk. A thorough discovery phase or a well-structured Sprint 0 are not a “waste of resources” but an investment that pays off. They lay the foundation for a clear understanding of the scope, a robust backlog, and the integration of the solution into the client’s real business processes. Only then can it be ensured that subsequent agile sprints run efficiently and purposefully, and that the final solution meets expectations not only technically but also functionally and processually. Overlooking or neglecting business processes in the early phase almost always leads to increased costs, delays, and lower client satisfaction later in the project.



3. Solutions Approach

In this section, we will now address possible solutions to the conflicts of objectives and dilemmas described above that have proven successful in the past.

3.1 How Best Practices Can Be Sensibly Integrated into Business Reality

The integration of best practices, especially agile methods, into the existing operational reality of many companies represents a recurring challenge. While theory envisions agile roles, dedicated resources, and specific competencies, this often clashes with traditional corporate structures and operational realities. The dilemma arises when clients express a desire for agile ways of working but cannot or will not create the internal conditions for them.

A central problem is the absence or inadequate staffing of key agile roles, especially the Product Owner. In traditionally managed companies, this role often does not naturally exist. When it is introduced, it is often done ad-hoc and without clear definition or appropriate release from other duties. Frequently, employees from the line organisation, such as a department head or an internal project manager, are entrusted with the PO role, even though they are already fully engaged in their operational tasks and have no dedicated time for the project. This inevitably leads to capacity bottlenecks, a lack of availability for the project team, and a superficial exercise of PO responsibilities. Decisions are delayed, the backlog remains unclear, and the development team does not work with the necessary clarity and prioritisation.

The same applies to resource availability on the client side in general. Instead of dedicating team members to a project, employees are expected to participate in projects “on the side.” This leads to a dichotomy between operational and project tasks, which reduces efficiency and commitment in both areas. Meetings are postponed, coordination takes longer, and project progress suffers. The quality of contributions decreases due to a lack of necessary focus.



Another sensitive issue is the missing skillset and lack of experience of many employees who are pushed into leading agile roles but bring neither the training nor the practical expertise for agile project work. This affects not only the Product Owner but also other roles that require agile thinking and action. If such individuals, despite lacking experience, are expected to guide the service provider, this can lead to suboptimal decisions, a misinterpretation of agile principles, and resistance to necessary adaptations. The service provider, who is familiar with best practices, finds themselves in the difficult position of either fighting against internal resistance or compromising the quality of agile implementation.

To overcome this conflict of objectives, a pragmatic and cooperative approach is essential:

- 1. Realistic Expectations and Adaptation of Methodology:** Instead of rigidly adhering to the pure doctrine of agile best practices, the service provider must analyse the specific client reality and propose an adapted, hybrid methodology. This does not mean abandoning agile principles but interpreting them flexibly. If 100% PO staffing is not possible, alternative models must be found, e.g., splitting the PO role among several individuals with clear responsibilities or providing an external proxy PO by the service provider who works closely with an internal person.
- 2. Training and Enabling:** It is crucial not only to train client employees but to actively “enable” them, i.e., to empower them in their agile roles through coaching and mentoring. The service provider should take a proactive role here and view training not as a one-time measure but as a continuous process to build the necessary mindset and skills. This also includes concretely demonstrating the added value of agile ways of working.
- 3. Clear Communication and Stakeholder Management:** Transparency about the challenges and potential risks resulting from insufficient resource availability or lack of experience is essential. The service provider must clearly communicate the impact of “shortcuts” on project success and jointly develop solution strategies with the client. Robust stakeholder management helps align the expectations of all parties involved and gain support for necessary adjustments.
- 4. Focus on Process Integration Instead of Pure Role Staffing:** Instead of merely discussing the staffing of agile roles, the focus should be on how agile processes (e.g., sprint planning, Daily Scrums, reviews) can be integrated into existing client processes. The aim is to implement agile principles– such as iterative delivery, adaptability, and customer centricity– even with fewer resources or in traditional structures. This often requires creativity in designing meetings and communication channels.
- 5. Pilot Projects and Gradual Introduction:** To reduce resistance and provide proof of concept, pilot projects or the gradual introduction of agile elements into the organization can be useful. This allows clients to gain initial experience, make successes visible, and increase acceptance for a broader introduction of best practices.

In summary, bridging the gap between best practices and operational reality is less a matter of “either-or” and more a matter of “both-and.” It requires the willingness of both sides– service provider and client– to compromise, be flexible, and jointly develop pragmatic solutions that ensure project success under the given conditions. Only in this way can the benefits of agile methods be realised even in traditional corporate environments.



3.2 When and Why PM Effort Pays Off

Project Management (PM) is a central controlling instance in many client projects, although its necessity and scope heavily depend on the project type, company size, and engagement model. It is a misconception that a PM can always be “saved.” Rather, there are clear scenarios in which an external project manager on the service provider side becomes not only sensible but indispensable to ensure project success, quality, and risk minimisation.

A project manager is essential in classic projects characterised by a clearly defined undertaking with a specific start and end point (e.g., the implementation of a new CRM system or the development of a special software solution). Here, the PM’s role is comprehensive: they are responsible for planning (scope, time, budget), risk management, stakeholder communication, coordination of internal and external teams, and ensuring delivery quality.

Especially in complex projects with many dependencies and a multitude of stakeholders, professional management is crucial to keep the project on track and resolve conflicts of objectives. Without a dedicated PM, scope creep, uncontrolled risks, communication gaps, and ultimately project delays or cancellations threaten, which far exceed the supposed savings.

In contrast, there are continuous delivery models, as applied in large agile frameworks like SAFe (Scaled Agile Framework) or LeSS (Large-Scale Scrum). In these models, the focus is on the continuous delivery of value in short iterations, and the classic project manager role in the traditional sense is often dissolved or integrated into other roles (e.g., Release Train Engineer, Scrum Master, Product Owner). Here, it is less about the one-time management of a clearly demarcated project, but about the orchestration of value streams and self-organising teams. In such environments, an external PM in the classic sense is less in demand, as the organisation already has established agile structures and roles. Nevertheless, an external expert in a coaching or consulting function can be valuable to accompany the introduction or optimisation of such frameworks.

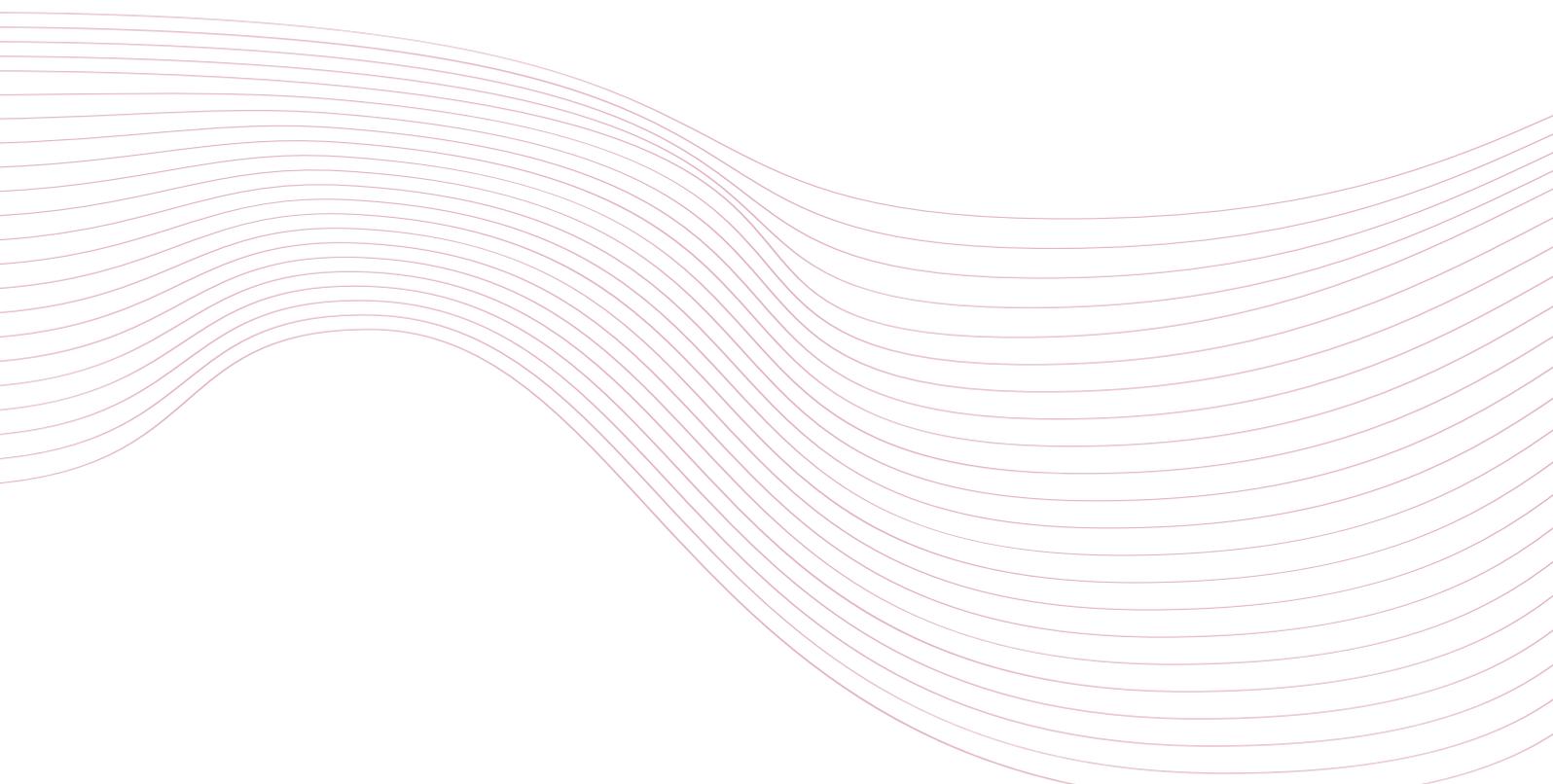
The necessity of an external project manager also depends heavily on the project's dimension and the type of company:

- **Large-Scale Projects:** In extensive projects with high budgets, long durations, many involved departments, and complex technical requirements, an external PM on the service provider side is almost always a necessity. Enterprise companies, which often have a complex IT landscape and high process complexity, benefit immensely from the experience of an external PM who not only manages the project but also acts as a bridge between the service provider and the diverse internal stakeholders. The risks and complexity of coordination here require a full-fledged PM role.
- **Mid-Size Projects:** Even in mid-sized projects, which are less complex than large projects but still involve significant investments and business impact, an external PM is worthwhile. Here, an external PM can particularly add value if the client does not have a sufficiently experienced internal PM resource available or if internal resources are already tied up by other projects. Commercial companies, which often operate agilely and flexibly, can gain the structure and methodology necessary for successful implementation through an external PM, without having to build or redirect their own capacities.
- **Small-Scale Projects:** In very small, manageable projects or specific task packages, the PM role can indeed be taken over by the development team itself or a lead developer, especially when agile methods are practised. Here, an external PM would indeed be perceived as unnecessary overhead. However, there are exceptions even here, for example, if even small projects in small-to-mid-size companies (SMEs) cannot be adequately managed internally due to a lack of experience or personnel bottlenecks. In such cases, a smaller PM engagement by the service provider can also be useful to provide an initial impetus or to accompany critical phases.

In summary, the decision for or against an external project manager on the service provider side should not be based solely on a short-term cost consideration. Rather, it is a strategic investment that generally pays off in projects with high complexity, high risk, and in companies that do not have the internal resources or expertise to manage projects independently. A competent external PM ensures project success, minimises financial risks, and provides a high-quality delivery that meets client expectations.

3.3 Why the Hybrid Model is Still the Gold Standard

The hybrid project model has established itself as the gold standard in most classic projects, defined by fixed specifications regarding time, scope, and budget. The main reason for this lies in its ability to merge the strengths of traditional (“waterfall”) and agile methods in such a way that an optimal balance between planning certainty and adaptability is achieved. By combining a robust planning and conception phase (traditional) with iterative and flexible implementation cycles (agile), the hybrid model allows for the necessary clarity regarding the project goal and framework to be maintained, while simultaneously ensuring efficiency of implementation, rapid response to changes, and quick time-to-market. This way, risks can be minimised through detailed upfront planning, while flexibly reacting to new insights or customer needs during development, ultimately promising the greatest success and the best cost-benefit ratio.



4 Summary and Recommendation

In conclusion, the following recommendations can be made:

- **Project management (PM)** is not an optional add-on service, but a crucial investment: The initial cost savings from minimized PM effort are almost always overcompensated by increased risks, quality losses, and ultimately higher overall costs over the course of the project.
- **Adaptation of Methodology to Client Reality:** Instead of rigidly adhering to the pure doctrine of best practices, an adapted, hybrid methodology must be proposed that considers the specific client reality.
- **Training and Enabling of Client Employees:** Client employees should be empowered in their agile roles through coaching and mentoring to build the necessary mindset and skills.
- **Clear Communication and Stakeholder Management:** Transparency about challenges and potential risks is essential to jointly develop solution strategies and align expectations.
- **Focus on Process Integration instead of Pure Role Staffing:** The aim is to integrate agile principles into existing client processes, even with fewer resources or in traditional structures.
- **Thorough Preparation as an Investment:** A detailed discovery phase or a well-structured Sprint 0 are not “a waste of resources” but lays the foundation for a clear understanding of the scope, a robust backlog, and the integration of the solution into the real business processes.
- **Hybrid Model as the Gold Standard:** The hybrid project model merges the strengths of traditional and agile methods and offers an optimal balance between planning certainty and adaptability.