

**NAME**

## Agile Methodologies used in Project Implementation

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**DURATION**

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**2 SPEAKERS**

Juan Carlos Castaneda

Rodolfo Gonzalez

**START OF TRANSCRIPT****[00:01:00] Juan Carlos Castaneda**

Good afternoon to all and we welcome you to this webinar organized by TELONLINE about Technology and Telecommunications. And as every Thursday, we are talking about quite interesting topics in the whole area of telecommunications and technology, and we have been talking about different aspects of projects and services that are required by end customers and the companies itself, implementing these type of services, such as the Call Centers topic, Contact Centers topic, the CloudPBX topic, cloud solutions and services, and different types of interaction with the media we work with today, online and both on-premise and virtually, and people working remotely.

**[00:01:49] Juan Carlos Castaneda**

When we summarize all these types of projects and solutions that we find in the industry, we always ask ourselves what is the best way to implement these services? What is the best way to have a project and what is the best methodology to use so that everything is perfect in front of my client, in front of the implementation of the solution I want, as well as the service I am going to give to my final client? And that's why in this webinar we are going to talk about a topic where we will cover all this kind of issues that will be called Project Implementation Frameworks. But let's see a little bit more in-depth about what these types of frames are. Before starting, as always in these webinars, we want to invite you to participate with us during the whole session, asking questions, interacting with us through social networks. And as you well know, we are live right now through the Facebook and YouTube networks. Therefore, you can interact with us on these types of questions for your companies, for your businesses, for your service projects or project implementation. Because today's topic is quite interesting, which applies to many industries. As always we have special guests and today we will have an expert who handles the subject very well.

**[00:03:14] Juan Carlos Castaneda**

Now to start the topic, I'd like us to ask ourselves, what are the benefits of applying industry standards to projects and services in my organization? That's a question we constantly ask ourselves. I mean, why these standards? Why do such standards that exist I can apply it in my organization? but the most interesting thing is how to choose a methodology that suits my organization.

**[00:03:41] Juan Carlos Castaneda**

If I am a company that is providing projects or services, what is the methodology that is best for my organization? And today the most interesting thing is that no matter the size of the organization, we can have a large, medium, small organization and the most interesting thing is that it can be anywhere in the world so that I can apply these methodologies in order to improve what is the value of my services. And the question many of us are suddenly asking is how can these methodologies help our organizations to be more productive? That is because in the end we always seek to be more productive, more efficient, and to be able to provide a better service to our clients, and at the same time that companies are evolving, they require this type of methodology in order to grow. And what does that give us? It offers us that we can reduce costs in the company. Obviously, as I mentioned before, to have better productivity and at a managerial level to have a better management to avoid any kind of risk or disorder that may occur in the company's services to my clients or in the implementation of projects. In addition, to improve everything that is IT services internally. Today that we live in a world full of so much technology, all companies need to be immersed in the IT plan and be knowing and not only knowing, but applying it to all our needs. And obviously, all this is in order to improve customer satisfaction, to have an efficiency in delivering the service and the product, right?

**[00:05:16] Juan Carlos Castaneda**

And the most interesting thing is that we can also have with these methodologies as a guide, a guide that helps us

at the management level to be able to have those in those moments that we are in the projects or in the services, those challenges that appear and that we can handle this type of solutions for our organization. But well, the most important thing is that this is the topic we are working on today and that today we are going to develop it further and for that we always need an expert and they always accompanies us in this type of webinar that are so important, an expert and today is with us the Engineer Rodolfo Gonzalez. Engineer Rodolfo Gonzalez, welcome, and thank you for being with us.

**[00:06:00] Rodolfo Gonzalez**

Good afternoon, Juan Carlos, how are you?

**[00:06:02] Juan Carlos Castaneda**

Excellent engineer, good engineer Rodolfo. Rodolfo, you know him, he is the IT manager of the company, he is daily in different projects, different challenges, both at the level of services and service implementation. Then he is a person who knows very well the day to day of how to deal with this type of situation we are talking about in this brief introduction I've given you. And that's why the certifications and knowledge of this information, it is important to ask, but that we explain an expert as the engineer Rodolfo obviously certified with different certifications of the industries to be able to apply and manage all these types of situations. Engineer, why does a company need to apply these standards in every implementation of a project or a service?

**[00:06:54] Rodolfo Gonzalez**

Of course, Juan Carlos, well, I think the first thing is to understand what a project is or what a service is. Usually, in companies, we always talk about projects and services. Technically what is a project? is a temporary effort that is carried out to create a product or service or a unique result within a company. So, basically, a project is focused on having a defined duration.

**[00:07:28] Rodolfo Gonzalez**

We should not confuse the subject of projects with the subject of the normal day-to-day operation of the company on a project. I start it, I finish it or I interrupt it, but it is a project that has a defined duration. A project must always have a clear purpose and must have a defined scope. The project must be unique, it must be unrepeatable. And as I mentioned a moment ago, a project can be interrupted by the circumstances that arise at the time when we start working on the project.

**[00:08:00] Rodolfo Gonzalez**

The project can be canceled or it can come to a happy ending where, let's say, all the process that should be worked on the project is done, it is delivered and fulfills its function, which was the defined scope. So it is important to clarify as a concept, what is a project. Now what is a service, then equally a service is the means to enable the creation of value in a company. What does it mean to create value in a company? Let's say that in a company or whenever I buy a service let's make the analogy, for example, to the case of the services that we offer. One of the services that we offer in the company is the recharge of communication plans, right? In other words, I offer the customer a service that is a communication plan, and the service has two important things it has a utility and it has a guarantee. What's the use? In the case of the telecommunications service, I will communicate with a client, with my loved ones and so on, from the telecommunications plan that I have, and that is the service that I am offering to my clients. But that service that I am offering to my clients must have something very important and is that it has a guarantee. So, as I mentioned, the usefulness, the service is that I have communication. And now the guarantee, what does it mean? So the guarantee means that if I bought a plan, for example of 100 minutes to communicate to a specific destination, that destination will fulfill me with the minutes I bought to be able to communicate, that I have a very good quality of the calls. Or for example, that I have 24/7 service availability. So, whenever I am offering a service, that service has to be, let's say, I have to guarantee my clients that they have those conditions. So when the services are offered, I involve two issues, I involve clients, I involve providers and I involve users. So, at the concept level it is important that we are clear about what a project is, what a service is within a company, I don't know if the idea is clear there Juan Carlos?

**[00:10:18] Juan Carlos Castaneda**

Yes, yes, I think Rodolfo is right and I think it is very, appropriate to have presented these two, because what you are going to explain and what we are going to talk about is very important, of course, there are projects, projects as I was talking about initially, not only the project of an implementation, for example, of a call center, but as it can be a project of the construction of a building or a house. Right? And the service part, which is also very interesting, I liked the example you gave in telecommunications, since we already have clarified both the project part and the service part in order to structure it. But, knowing this information, tell us how the project structure is in a company? This way we are going to go more step by step at the organization level.

**[00:11:05] Rodolfo Gonzalez**

I happen to have a clear concept of what a project is and what a service is. Now how does that come about in a company? Projects and services in a company, why are they born? First, because I need a client to make a request. So, if a client makes us a request, that can be turned into a project. A customer, for example, may have a market demand that forces me to implement some process, some internal project in the company, either to develop a product or to deliver a service. Those are some of the reasons why projects are born, out of business need, market

demand, technological advancement, and customer requirements. So, let's say that's where all the projects in all the companies come from. Now, why do I need to apply those standards? That was the next question. It is because in the company, that which I must deliver, that product and those services that I must put into operation, it is necessary that they have a standard, which means I worked with a standard. And that standard may make a lot of sense to some people or be handled one way or another by others. But it is necessary that in a project there is always order. In a project, there is always a process to start a project, a definition of the project, a planning, that I can do, if I have a project and if I start to work in a project and that project I repeat it for different clients, let's say a product, an implementation of a product and that implementation of that product I repeat it in 20 clients that I am working in the course of the year, it turns out that I can learn from the experiences, then many processes and many things that I used in the implementation of one of those projects can serve me for another project and I can take advantage to optimize the times. So, that way I can optimize the implementation times. Another super important thing about the advantage of using standards, and that is that in standards you usually cover a number of knowledge areas and those knowledge areas, for example, one of the knowledge areas is I have to foresee, it's not, only the project, but also looking at the environment. Then I have to contemplate more risk scenarios. So, that's why it's also important to minimize how much time you have to spend on the project, taking advantage of everything I know from other projects and evaluating risks you may have on the project. And also I can have, obviously, the fact of implementing a project with standard, it involves me to the company greater customer satisfaction and that is very good because that guarantees me the loyalty of the customers. And at the level of the project, already at the end, when I finish the project, to each project, I must have the documentation, lessons learned and analyze what happened in the project to see what things I could have done better, what things I can improve for future projects. So, at the project level, those are like the advantages of being able to apply project standards. And on the level of services, because obviously it is very important the whole issue of how I mentioned the projects, but additionally on the issue of services it turns out that we are always offering services. There is not a company that does not offer a service. Always a company, whether it is a physical product, in a physical product remember what we talked about a while ago a service is the sum of something I am offering, which offers a utility plus a guarantee. So in all companies, regardless of sector, industry and so on, I am always offering services. So it is important that companies also have their internal, their organization, to focus on providing good service. So those are mainly the reasons why standards can be applied to projects that an organization needs.

**[00:15:13] Juan Carlos Castaneda**

Perfect, interesting, quite interesting. Now, and how is the structure at the level of the company?

**[00:15:20] Rodolfo Gonzalez**

Sure, perfect. So now it turns out that for me to be able to implement projects is necessary, well I can implement a project and I can do the project without any standard and can be viable. But if I want to organize the company on a project level, it is important that there is a project environment. So in this slide that I am visualizing, there we can see a scheme in which there is communication of the project environment both with the customers, because finally the projects can be to deliver to the customers or can be for the internal operation of the company. Right? So there must be a project environment and that project environment in the company must always be aligned with the strategy. What does it mean that it is aligned with the strategy? That I as a company must be clear from the company's management that projects are very important, so they must be considered as part of the mission, vision, budgets and so on, so that the company operates in a project environment and is fully supported by the company's directive, by the company's governance. And based on what I'm telling you, it turns out that there are different types of organizations. There are functional type organizations, there are project-oriented type organizations or there are matrix organizations. I give you an example to give you an idea. As it turns out, for example, I have an organization such as a bank. A bank is an organization that functions on a functional level. What does that mean on a functional level? that has functional areas. Then in the bank there is the portfolio area, there is the credit area, there is the commercial area, there is an area that is the technology area, there is another different area over there, which is the marketing area and each of the areas has a functional leader. Right? the expert in the area of marketing, the expert in the area of credit, portfolio and so on, and in charge of that leader projects can be made. So, those are organizations that work by functional areas and manage projects from a functional point of view for each of their areas. Right?

**[00:17:47] Rodolfo Gonzalez**

Now, there are other types of organizations in which they are project-oriented. I'll put you on another typical case. In a construction company when you implement a project, then it turns out that I will be implementing the core project to build a condo. And then in that project what happens? A project leader is assigned and that's the project manager. Then the project manager is in charge and has all the authority to manage all the resources he has for the implementation of that condominium. But I can simultaneously have another project to build an amusement park. And it turns out that that amusement park has another project manager where I can, let's say, manage and have all the authority to be able to manage and implement the whole project with the resources assigned to it by the company. Those are the two basic types of organizations, but there is a third one, there is a third one where I want to implement a project environment and it turns out that that project environment is within an area of a functional organization. But I want the project environment to be centralized. Why? Because I can have resources from the areas, because not all the projects could be led by just one of the areas.

**[00:19:06] Rodolfo Gonzalez**

I'll give you a typical example, let's say the project area will be led by the technology area, the technology department. It turns out, the technology department only leads in development. But how is the functional definition of the projects made? How is it done? who's going to be the end user? So that is why it is important and many companies make the decision to run the scenario in a matrix model. What does this matrix model mean? It means that I assign project managers to manage the projects. But those project managers are going to have resources coming from the functional areas. So, I'm going to arrange a resource that comes from the area, let's say, of operations, a resource that comes from the area of marketing, a resource that comes from that part. And it turns out those people who are working in that matrix scenario, they will have two bosses, let's call it that, they will have to answer to the project manager that is managing a project and that uses a part of his time to work on that resource and additionally they have to answer for the functional area as such to their boss of the functional area. So that's called organizations that operate in a matrix scenario. I don't know if the concept is clear there.

**[00:20:27] Juan Carlos Castaneda**

Interesting. I think I liked those examples you gave, because of course there's the functional part, there's the project part and the matrix, which is used by many companies, I mean, it's quite used, I would say.

**[00:20:38] Rodolfo Gonzalez**

It is one of the most used and additionally within the matrix I did not go into much depth, since the objective of this talk is to clarify some concepts, but we will not go into much depth on the subject. But for example, on a matrix level there are some schemes that are called weak matrix or strong matrix, where let's say a part of the time, in proportion, it is used more for projects and the other part it's used for what has to do with the functional operation the area of the company. So, there are different levels of matrix, if you know what I mean, but in general those are the schemes that are handled in the company. And the other part that is mentioned there, which is portfolio, programs and projects, is because within the project environment as you see there in the graphic, I can have many projects, but when I manage many projects within the company it is necessary to have what is called a project portfolio. That project portfolio is like investment, it's like where all project investment is handled and that this is aligned with the company's strategy.

**[00:21:53] Rodolfo Gonzalez**

It's like I manage many projects, all of them have to be aligned with the strategy, so for that, it is necessary to identify that there is a project portfolio And after the project portfolio comes the programs. Project programmes are basically groups of projects that are related and coordinated with a specific objective. So those small project groups go with the final purpose of a very big mission. Or I can manage individual projects and all projects individually, I do all their implementation process and so on, that we will explain further, what techniques or what or what framework there is for that? And that way I can work in the company. So, depending on the type of organization, I implement, decide how I want to have the project environment and based on that I assign portfolio, programs or projects. I don't know if we're clear so far.

**[00:22:53] Juan Carlos Castaneda**

Yes, I think we are clear, I liked that part, for example, what you said about, of course, portfolio, programs, projects, and I can have one, I can have many, have a global vision of all, the types of organizations seems excellent. Now, I am a company, I am growing, I have multiple projects, I implement them as you said, maybe they work for me, I have problems, I have complications, I am growing, but I am interested in what you are saying, I am interested in these methodologies. What should I do to have those standards in my company?

**[00:23:26] Rodolfo Gonzalez**

Well, then let's go to the next step. It turns out that now, I want to start optimizing all that. I get the picture. It is important that I manage the projects with some methodology. Now, what's this about methodologies? So, they're basically standards. They are standards that are in the market and mainly its standards that are in the market, all are international and those standards that are in the market can go oriented to that I organize the company, so that everything internally in the company is in function to have a good service, then there is a standard that is called ITIL 4, in fact ITIL, but we go in the version number 4. Then there is a standard called ITIL, which is a globally accepted framework for IT service management, right? And that framework, I'm going to clarify a little more in detail about what ITIL 4 is all about, it allows me to have the organization, from the management, as well as the human resources area, as well as the whole IT area, everything focused on thinking in favor of services and that I manage all this with norms, standards and so on, and I can have a company oriented to the service matter. So that's a standard, if I want to implement the company, focus it on services.

**[00:25:01] Juan Carlos Castaneda**

**[00:25:09] Juan Carlos Castaneda**

**[00:25:14] Rodolfo Gonzalez**

But now there are other frameworks on which I can use standards for project management. One of those standards is a standard based on a thing called or on a book or a standard called the PMBOK. The PMBOK is a standard that is from an institute called the Project Management Institute and is very well known worldwide because it is spread

over more than 170 countries in the world, it has translations in many languages, generates standards and generates norms and so on. And that and that standard is what generates several certifications globally. One of these certifications is the PMP, the Project Management Professional, and this PMP is an international accreditation that is endorsed for those who are certified as Senior Project Managers. This is, let's say, This certification is basically focused on people who have worked on projects for a long time, but have probably not used a standard and have managed projects. So, this will allow the person to assume rules that are important to implement projects. This is the second one. And there's another third framework that I don't know if you've heard that from AGILE. What is this AGILE thing?

**[00:26:49] Juan Carlos Castaneda**

Very common. Sounds a lot these days, doesn't it?

**[00:26:51] Rodolfo Gonzalez**

Sounds like a lot these days. So that AGILE sounds a lot why? Because it turns out that back in the day when the projects were implemented, in a project I defined the scope of the project, I defined the schedule of the project and I defined the cost of the project. And then I was implementing a project and it turns out that the project could perfectly well last 6, 7, 8 months. And after all that time passed, I delivered the project results to the end user. And then in many cases, after 7-8 months that no longer applied, or it was already obsolete. So they started to implement some work philosophies and those work philosophies, within that is the famous AGILE. So, AGILE in all scenarios is a philosophy in which I am supposed to start delivering the work to the end user in a periodical way, but with a whole standard, with specific characteristics and a standard so that the work can be seen by the end user and he can have much more control of what he is receiving and can be much more flexible. Remember that in the previous scenario I was implementing scope and cost and schedule, and when I was already implementing all that until it was finished they didn't have a deliverable. So that started to change and it was when AGILE appeared.

**[00:28:22] Juan Carlos Castaneda**

Right, okay. Yes, this part, that philosophy has already become very interesting, precisely what you say so that companies are much more agile and direct to be able to see what is happening. But since that philosophy, AGILE, is very interesting, what methodologies can you mention using the AGILE philosophy?

**[00:28:45] Rodolfo Gonzalez**

Okay. Then there are many. There's a lot of them It is important to clarify another point there. There are some that are methodology. When one is told about standards or when one is told about methodology, there is a difference. When you talk about methodology it means that someone creates that methodology and I follow step one, then step two, then step three and I get a final result. When you talk about a framework, what they do is that they are standards or norms. When you are told to standardize it means that you can take what you need from that standard or framework and use it depending on the needs of your project. Right? So, there are AGILE methodologies and there are AGILE frameworks. So in the next slide we can see different ones, I only mention here some, but there are many. There is Scrum, there is Lean, there is Kanban, there is DevOs and there is that last one I mentioned there is a standardization that PMI did. That is, remember that we talked about PMP which is based on the book called PMBOK. Right? This is standardized by the Project Management Institute. This last one certification is a framework associated with the PMP. As I mentioned a while ago, all projects at PMP used to be worked with a schedule, a scope and a cost, right?

**[00:30:33] Rodolfo Gonzalez**

Then they said, Ok as it is appearing on the market all this AGILE stuff, so now we are going within PMI, from the Project Management Institute, we are going to add the way in which we can make these projects flexible in time to be able to make partial deliveries, that is, to be able to have finished product in time. So there are several methodologies. I mention here some of the most heard are Scrum right and Lean also Kanban, DevOs and each has a purpose. For example, let's talk about one of the ones listed, for example Kanban. Kanban is famous for its boards. This is a technique that was created in Toyota and is used to control the progress of work on a production line. So that form of agile work they implemented it to be able to work in lines of production and they are boards where I have a column where I have all the tasks that I start. There is another column where I want to know if a task goes on phase 1 or phase 2 or finished. And then we move the tasks from the phase of column 1 to the final column. And when all the tasks are in the final column it means that I am already finishing the project or the work. So they are methodologies and on one of these we are going to deepen in the following slides. So, basically as I mentioned these, there are many more.

**[00:32:10] Juan Carlos Castaneda**

Okay, perfect, so those are the methodologies using the Agile philosophy.

**[00:32:14] Rodolfo Gonzalez**

Correct.

**[00:32:15] Juan Carlos Castaneda**

And there is the last one that generated PMI based on the PMBOK, to do the part of PMI but Agile. Ok, now we have those methodologies, now, Let's imagine that I am a service company. So you were talking at the beginning that ITIL right? is the one that works all the services. So how can I implement, if I am a service company, this type of ITIL

methodology?

**[00:32:45] Rodolfo Gonzalez**

Okay, so let's see, How do I do it? In other words, a very general brief explanation, because in reality this has certifications.

**[00:32:55] Juan Carlos Castaneda**

Is that a lot of books?

**[00:32:56] Rodolfo Gonzalez**

Yes, there are many, there are several certifications, but in principle let's say that we will understand a little how ITIL works, OK?

**[00:33:04] Rodolfo Gonzalez**

Well, then the first thing is, services are the main way organizations create value for their customers. Remember what we mentioned before everyone talks about services and a service is composed of utility and warranty. I have to make sure that when I offer a service, those two things exist. So, within a company, when I am organizing the company to work with ITIL, I should not only work on the project or the specific task that I am going to give to the client to be service-oriented. I have to work in different areas of the company to focus on service. So there are some big processes or big dimensions that are handled within the company so that you can start working and orient yourself to ITIL. Let's start checking them out. This slide that appears there, we see a diagram, there appear 4 what is called the four dimensions of service management.

**[00:34:19] Rodolfo Gonzalez**

So it's the company, they say. According to ITIL, I should have the company oriented on organizations and people, information and technology, which is number 2 in the chart there. Partners and suppliers and value flows and processes handled by each party. So, when we talk about organizations and people, it means that I within the company, at the level of organizations and people, must be clear about everything that is functions, responsibilities, communications, definition of roles and the service delivery models that I will have in the company. When I speak on the level of information and technology, then it's inside the technology. There is a very important issue at the level of technology and that is knowledge. So it is important that I do everything internally in all areas of the company to ensure that knowledge databases are in place so that I can then be in control. As they say, people pass by, but the knowledge stays true? Or the information stays. So, that's why the objective, one of the strategies or important dimensions that ITIL manages, is that I should have all the information in the knowledge, all the information repository

**[00:35:45] Rodolfo Gonzalez**

Automate as much as possible. So, another ITIL philosophy is that I must automate as much as I want and speed up internally. What is technology for? First to automate and to be able to speed up all the processes of service provision.

**[00:36:00] Rodolfo Gonzalez**

So that's why they consider it another dimension. There is another important part, which is the third dimension, which is called partners and suppliers. That dimension of partners and suppliers is basically I don't work alone as a company, I usually have partners, company partners or I may have suppliers that I worked with to do the implementation of things. Then I have to align the company so that there are a relationship and organization with those third parties, both with partners and suppliers. Then I must arrange it that way. I must for example have contracts, I must have service agreements, to get working conditions for when I do all that exercise with my partners or with my suppliers, so that's what I have to handle. I'll explain later how all that will be handled.

**[00:36:52] Rodolfo Gonzalez**

And finally, in the fourth dimension of service management, there comes all the processes that the company has in order to create value. Later on we are going to see what that means of all the little things that I am going to have to create value here at a general level, everything that ITIL contemplates at the level of the four dimensions.

**[00:37:19] Rodolfo Gonzalez**

There's another very important issue coming up. When I want to do the whole process of being certified and working the company focused on services, and is the service value system. So, the service value system has some components. They're like layers that I must guarantee that they work in the company in order to offer value. If you notice at the beginning of this chart it says here I have all the opportunities, I enter to those blocks, process everything and deliver value at the end. Right? So, what are those? Is that it? Let's say those layers that handle the service value system: 1. They are called the guiding principles So, those guiding principles are like the recommendations that the company should always follow so that it can focus on service issues. So, there are seven guiding principles and then one of those comes along and says I want to focus on courage. Let us always think that we must be focused on value. The other thing is if I want to do something and if I need to modify something and I already have something done, well, don't start from scratch and try to improve what you already have, unless you have to completely change it, right? The other thing is that there is always feedback, one must work and always

think in an integral way. Things should be done in a simple and practical way and I should always be thinking about optimizing, automating. So there are seven guiding principles that ITIL has so that everyone in the company is clear when it comes to acting in our respective areas.

**[00:39:03] Juan Carlos Castaneda**  
Great.

**[00:39:03] Rodolfo Gonzalez**  
The other layer that handles ITIL is governance. All organizations must be directed and controlled. And how are they directed and controlled? Through monitoring and evaluation. So there it emphasizes that there should always be heads who are monitoring, who are leading and who should be evaluating what is happening with the organization.

**[00:39:28] Rodolfo Gonzalez**  
There is a third part of the service value chain, that are tasks. This is where the whole practical part comes in. These are all the tasks that I must carry out, so that all these activities, to be able to deliver a product, a service and these tasks and these activities that I must carry out, I have to apply them to some practices. Because everything is based on practices, so there are thirty-eight practices that I should, that I can involve. Remember that this is a framework, it is not mandatory, but they exist, ITIL relates 39-38 practices that I can have within the company and I can organize based on that value chain. Now we'll go over the value chain and finally the last layer. We have already talked about practices, we have already talked about the value chain and finally, we must always maintain continuous improvement. This is the value system to be able to implement ITIL within the company.

**[00:40:37] Rodolfo Gonzalez**  
I don't know if it's more or less clear.

**[00:40:40] Juan Carlos Castaneda**  
Yes, it is understood all that part, the different groups, the feedback and everything; you are doing well. Is a pretty interesting subject because it's deep. We're already getting into each theme, each layer, like we're getting into the operation or different levels.

**[00:40:57] Rodolfo Gonzalez**  
Right.

**[00:40:58] Juan Carlos Castaneda**  
And as you said, This does not mean that there is only one and that is the one the company will take, it depends on the service you offer, it is accommodating.

**[00:41:08] Rodolfo Gonzalez**  
Right.

**[00:41:08] Juan Carlos Castaneda**  
Using obviously the methodology of the standards.

**[00:41:10] Rodolfo Gonzalez**  
Right.

**[00:41:12] Rodolfo Gonzalez**  
And so now we have only a small part of this left. And is that's what's called the service value chain. Remember I told you that they are lots of activities. Right? So, when someone talks about the activities, that means we're already going to this last chart, which is that the third large component of ITIL, which is called the value chain It's a list of activities. In that list of activities, I should make a plan, a planning, a design and if necessary support them, deliver the product and finally remember that everything started with the demand and everything ends in generate certain value. And this applies within the company. And remember that in the previous graph I mentioned that there are a lot of practices, right? These practices are the practices to which the service value chain should be applied. And those practices to which I must apply the value chain of service, remember it is to plan, improve, design, build, deliver and support. It's like a project more or less.

**[00:42:25] Rodolfo Gonzalez**  
But then, what are the practices? All practices are related to functional issues within the company. Right. So there are three types of practices. types of practices are the ones shown here on the left, Service management practices. There are other practices that are called technical management practices and on the right are management practices. So, if you notice, that covers the whole company. And those 34 practices to which I must apply that value chain of services. To each of the practices I have to apply planning, improvement, contracting, design, construction and delivery and support.

**[00:43:20] Rodolfo Gonzalez**  
Then let's mention for example In the service management practice, what the companies usually have? The companies have the Service Desk or what they call a NOC or what they call a help desk. Right? So, if I want to

implement the help desk within the company, I have to do the planning, I have to see how it is going to work, I have to make a work plan, I have to see how I am going to implement it, I have to execute it in order to have the help desk implemented and all that is a focused service, all that is a product. Remember that everything generates value for me, it is a product called Service Desk and it is for internal management or with the, let's say, to be able to do internal management attention of our internal clients or external clients. So there I apply everything that is called the service value chain in service management practices. There are 34 and not all of them are operational, there are some that are managerial, as you see here there are some that have to do with the product portfolio. So if I'm going to sell, if I have 10 products or 15 products in my portfolio, The logical thing is that I should handle it so that I can manage that portfolio of products with a methodology and a standard, with some rules, let's call it that. Then there is a very general overview of how ITIL works.

**[00:44:51] Juan Carlos Castaneda**

Interesting, quite interesting and clear, obviously we are just doing a small briefing of the information for correct speaking, that obviously each of these methodologies is an interesting world for each project and for each option you have.

**[00:45:06] Rodolfo Gonzalez**

That's right.

**[00:45:08] Juan Carlos Castaneda**

Okay, we would then have everything at the service level for the implementation with ITIL. Right?

**[00:45:14] Rodolfo Gonzalez**

Correct.

**[00:45:14] Juan Carlos Castaneda**

There you go. So, now let's go. let's talk. I know that we are short of time, that these are quite intense issues, but it is worth telling us now if I we were talking about projects, we already talked about services, we talked about a project in everything you were telling us about PMBOK. Right?

**[00:45:32] Rodolfo Gonzalez**

Right.

**[00:45:32] Juan Carlos Castaneda**

Tell us more about that PMBOK, about that PMP and about who PMI is so we can better understand that.

**[00:45:40] Rodolfo Gonzalez**

Perfect. So now I had told you that there is another standard by which I can manage projects and it is the standard based on, excuse me in the presentation is an 8 too many. It's not that there's a PMP8, it's that the extra 8 is wrong. So, the PMBOK when I have the PMBOK, remember that the PMBOK is a functional standard of the Project Management Institute and it is a standard that covers all the standard, the norms or the standard to be able to implement the projects based on PMP.

**[00:46:13] Rodolfo Gonzalez**

Now the PMI. the PMI is a non-profit association of professionals with the aim of making project management an indispensable activity to obtain results in any business activity and PMI has a number of certifications.

**[00:46:32] Rodolfo Gonzalez**

If you notice, within those is the PMP. It is one of the certifications, it is Project Management Professional, which is to be able to do project management with the PMBOK standard, then. In the PMBOK standard, how does the cycle and life of a project work? The cycle of a project has basically five phases. Start of the project, initiation, planning, execution, control monitoring and closure. There are about five phases in which I work on the projects and if you look at the graph on the top right, in the execution and in monitoring and control there is feedback. It is because we must always be doing monitoring and control, and in the execution of the monitoring and control part, I can either reprocess to run or I can make reprocess to make changes in planning. So that's why it's important to understand the five phases that projects are managed And additionally, projects are managed as I mentioned: scope, time, cost. It turns out that in addition to the time and cost involved, in the PMBOK guide they also consider other things, such as risks and resources.

**[00:47:50] Rodolfo Gonzalez**

Now What is this about me wanting to implement a project? There are two concepts that are super important in the subject of the PMBOK.

**[00:48:03] Rodolfo Gonzalez**

The first thing is that I keep the processes, the same ones we talked about a while ago which were initiation, planning, execution, control, follow-up and closure. But additionally, if I want to be an engineer, an integral project manager, I have to understand that I have to be an engineer. In the project, I have to manage what are called 10 areas of knowledge. So those ten areas of knowledge are the ones listed here - time, cost, quality, resources. If I am the project manager of a project and I am managing it with this one, with this standard I must be clear or I must do

the analysis of these ten knowledge areas for my project. It's not mandatory, but it's ideal. Remember that here it is not a methodology, it is practice Okay, now that we have the project groups and have the areas of expertise, then we build a matrix.

**[00:48:58] Rodolfo Gonzalez**

That matrix if you notice, column number one is what are called the areas of knowledge. So we have 10 areas of knowledge that PMBOK manages and we have 5 areas of what is called five groups of processes, which are the same as we mentioned earlier, initiation, planning, execution, monitoring and closure. And within each of those 5 groups of processes, I place smaller processes. What does that mean? Does it mean that each one of its processes, How is a process identified? A process always has an input, has an output and internally in the process I apply what is called a technique or a tool to obtain the result. Let's make the case, Let's say I'm going to define, I'm going to start a project. So when I'm going to start a project, there's one thing I have to get and it's called the project charter. That is why it is here where the process is called, the beginning, when I want to implement the act of constitution of the project. First, what do I need? I need to be clear about what the, general scope of the project is, so someone has to pass it on to me and I have to be clear about what the general scope is here. I am not going into detail, I must be clear about the general scope, who will be involved in the project, what is the overall objective or cost of the project, if there is any general risk, some general considerations.

**[00:50:45] Rodolfo Gonzalez**

So what does it mean? What is the input? All that information, what process? I apply techniques or formats or tools in order to generate that project charter. And what's the way out? The signed project charter then approved. So, when I do all that, each one of these processes that are being mentioned here, each one of which for example to whom I initiate there is one, to whom I plan there is one, but below that there is planning at the level of scope, if you notice there are four. So in each one it's a process. Then in each of those processes I have an input, I apply some techniques or tools that some are complex, some are simple and I obtain a result and with that I set the whole scenario, the project to be able to make the schedule, to be able to control the times, to be able to control the costs, the quality, the resources. To know the subject of resource management, communications and to be able to navigate within the 10 knowledge areas in order to reach the end of the project. I don't know if schematically the matrix form is easy to understand?

**[00:52:00] Juan Carlos Castaneda**

If you look at the matrix you understand it quite well and I think it's very good to be able to place yourself in every facet. This is all the part at the project level based on the PMI methodology that they handle.

**[00:52:13] Rodolfo Gonzalez**

That's right, it's the very fast version. Let's call it the very simple version, but it's so that we are all in context that managing projects with standards is a process that has to be followed. I mean, no, it's not as simple as saying come on, I make a start and plan on a simple schedule and so on. No, you have to follow a set of rules.

**[00:52:38] Juan Carlos Castaneda**

Sure. And also when they are projects of different levels, national and international projects.

**[00:52:43] Rodolfo Gonzalez**

Right.

**[00:52:44] Juan Carlos Castaneda**

From different cultures, different languages, languages and in the end that they all have to be synchronized is quite important and it is crucial to have all this type of methodologies applied for the development of any project. Now Rodolfo, you mentioned before in the Agile theme you were commenting the different Framework. Right? And the one framework you mentioned was even, I think, number one. You were talking about Scrum. And it's Scrum, in many companies that develop software, including us TELONLINE that has the development department, use that kind of methodology, that framework. Right, why don't you tell us since we're just finishing up getting to the end, I even have some questions here that are being asked on social networks, but tell us something as a summary about this framework, about SCRUM.

**[00:53:32] Rodolfo Gonzalez**

Well, let's just say it's a framework as well. This is a framework that is used, it is very common for the software development issue. It is used for work teams of no more than 9 people. The teams are self-managed and there are some roles there in the following chart. I think I'm summing up how the whole logic works. And as I mentioned a while ago, the agile methodology is so that I can get started, so that I can deliver results and so that the end user can see in a maximum period of time of 30 days. So the commitment is I put together work packages where I am delivering results every 30 days by far for the end user to see. And that way, if the end user makes adjustments or whatever, it comes back and is reprocessed. But I'm getting feedback from the user every time I make a delivery of work. There you go. Well, then what is it, how does it work? This is how the summary exists a repository of requirements like the one asked to the Child God, and that repository of requirements is what is called the product backlog. That product backlog I can have doing the analogy, let's say I can have, I don't know, two hundred requirements in the product backlog, who is in charge of being able to do the compilation of those requirements.

**[00:55:13] Rodolfo Gonzalez**

There is a role in the methodology, in the framework that is called the product owner. That role is the only role that is communicating with all end users. In order to make the compilation of all of the requirements and all of that is prioritized and placed in the product backlog, which is like what I mentioned asking the Child God. Now, what happens next? After I have the product backlog, I need to deliver, to make partial deliveries, of that product backlog, I say look, I'm going to start taking it in parts. Let's say I take 10 activities out of 200. Those 10 activities are the ones that I'm going to do the delivery after n amount of time of 20 days or 30 days, that's called a sprint. Then there is what is called the sprint backlog; So that means I took the 10 activities out of the 200 in the product backlog. And those are the activities that are going to be worked on a period of time. That period of time cannot exceed 30 days.

**[00:56:29] Rodolfo Gonzalez**

In that period of time that the development team spends there are other roles involved there is one that is called the SCRUM Master and the other that is called the Development Team. So the Development Team and the Scrum Master are the ones that make it all work. There you go. When we talk about Development Team, they are mainly the development team. But it's not just developers, there are people who do development. There can be people who do tests, you can have people do internal functional tests, everything that is needed to be delivered to the end-user. And the Scrum Master is the communication channel. Or since he's a facilitator, he's not the boss. Here there is no figure of the boss, it is like a facilitator who has communication, for example with the Product Owner to be able to see the results of everything that the Development Team does in that period of time. And they have some rules. So there are some rules that should be mandatory. The development team, the entire SCRUM team should always meet for 15 minutes every day for 30 days to be able to determine what was done, how, what is going to be done and whether or not there were any problems. So that's what you have, let's say, is part of the framework of tasks to be performed.

**[00:57:49] Rodolfo Gonzalez**

And the Scrum Master has to be following up on how the progress is going. It's not a boss it's more like I'm in sync with all the people. This means that all the work team has to be self-managed and at the end is delivered when they finish, when those 30 days or the time determined to deliver that sprint backlog has passed. Then the team goes to the delivery, does a sprint review of how we did in the review, does a sprint retrospective, which is to see what I can improve and I give everything to the final customer. I mean, I hand the job over to the end client. And then what's going to happen? Go back and repeat the cycle. I go and take others. If there are adjustments, what happens? You come in and feedback everything. With the product owner you start and change priorities, you modify the product backlog and come back and generate another 10 tasks or a number of activities to repeat the cycle and in this way you deliver the finished product to the end-user, the product to go with the approval. And I'm having interaction every 30 days at most so that I can make deliveries within the framework. I can have as many Scrum teams as I want, that is to say, I can have as many sprints simultaneously as I want to be able to advance work, to be able to work, synchronously and to be able to advance in more task of the backlog in a way, let's say, faster.

**[00:59:25] Rodolfo Gonzalez**

So, I don't know if that makes an overview on how Scrum works.

**[00:59:30] Juan Carlos Castaneda**

Yes, it was understood very well it was understood very well and of course, in a short time you explained it quite well. I think not only what was the Scrum part, but everything that was ITIL. What the PMP part and all these methodologies, which are quite interesting for projects to help companies grow, is obviously already such a big subject. You can't get it in minutes. Rodolfo But you've done quite well, very well summed up. However, before we go and say goodbye I have questions and I think they are quite interesting questions. Here I am watching the social networks there is a question. What profile a person who is going to work with these methodologies should have?. I think it's pretty interesting, don't you? To fit in with the methodology. What's the profile?

**[01:00:17] Rodolfo Gonzalez**

Well, in reality there are different profiles depending on the methodology that one is going to use. If I want, for example, to work in PMP methodology, then it is mainly oriented to professionals who have already had experience. If I want to be certified as a PMP, I must be a professional who has already had PMP experience. So, I must already have experience in having worked with projects and I want to do it and therefore professional in any area, that is, any professional could do it.

**[01:00:57] Juan Carlos Castaneda**

Pretty interesting. So, It doesn't mean that if I don't have experience I can get the PMP. I must have experience in order to get the PMP. Right?

**[01:01:07] Rodolfo Gonzalez**

In the PMP case, it works like this, for me to obtain the PMP, I must demonstrate 4500 hours of having worked in projects during the last 6 years and that experience has to be related in formats and others that PMI requests and they validate the experience. I mean, if I report the 6000 hours and I must report in which project, who was the

person in charge, the boss, what applies and they can call to verify that experience. Additionally, you have to take a formal course of at least 35 hours of knowledge. In how the methodology works that must also be certified with entities that dictate those trainings and that are, let's say, certified and endorsed or are part of PMI. Then, if you meet those two conditions they give you the certification. The certification is valid for 3 years, see in the case, for example, of Scrum, I can get the process started, I have no, no prerequisites, that is, no conditions. I can be professional or not, but I can do the process and there are a number of certifications that I can work with. There's one called the Foundation. Then remember that when we talked about Scrum I mentioned to you that there are some roles that was the product owner, right? I can become a product owner specialist by being the product owner or I can become a Scrum specialist? Then, I can get certified in what role I will have within the methodology that is applied in the company, within the roles that I have within the company and I can get the certification that I want. There is no, as in ITIL, no, basic requirement, experience or otherwise.

**[01:02:58] Juan Carlos Castaneda**

Okay. Well, pretty interesting. Now I have another question that relates to what you said, but it seems to me that it adds up to something here. If I wanted to be certified what is the process? Is it one organization or are they multiple? I think he's already answered that, but it's important that whatever sums it up, you get it straightened out.

**[01:03:15] Rodolfo Gonzalez**

They're multiple. I mean, it's one thing to be certified with PMI. Let's say I want to get certified. It works with all certifications anyway. So if I want to get certified with the Project Management Institute, I mentioned they have like six or seven certifications that they offer. If I want to get certified with them, then I have to do the process with PMI. If I want to do it with ITIL there are certifying people, they have central partners in different parts of the world and I do the process to take the course of, let's say knowledge depending on the certification and then apply the certification process. And the same applies to all the philosophies, let's call it that.

**[01:04:03] Juan Carlos Castaneda**

Okay. Quite interesting, Rodolfo, I think it's a very, very complete subject. I think it can expand a lot on what you were saying. I mean, every certification is a place, a book like that, not like the PMBOK which is quite big, that you have to study a lot, I mean, they are very interesting certifications, you have to study, but it is worth it, right? Because it helps in the structure of the organization for the company and everything we talked about at the beginning to improve costs, and for the processes, the challenges that are in the different projects, in the service of customers and obviously strengthens the company for its growth. Rodolfo well thank you very much for the time. The explanation is super good, super clear, excellent. We hope to see you here again soon in the different presentations and we have many requirements about ITIL or PMP, or about SCRUM. We will be calling you to talk or suddenly with one of your engineers or share your team to share more about your day to day experiences of all these processes.

**[01:05:02] Rodolfo Gonzalez**

Of course, Juan Carlos, thank you very much for the invitation.

**[01:05:05] Juan Carlos Castaneda**

Excellent Rodolfo. Remember that we were working on what is a framework for project implementation, but what is interesting to achieve success in projects and in everything that is being worked on. As always, thank you very much to all of you for following us in this program or in this TELONLINE webinar on Technology and Telecommunications and we invite you to follow us in social networks through the different social networks Facebook, LinkedIn, Twitter and Instagram.

**[01:05:36] Juan Carlos Castaneda**

And also subscribe to our YouTube channel so that you are informed and notified about all the new programs we are working on and dealing with technology and telecommunications expertise. We have special internal guests in our company, expert guests in different areas with suppliers that we work and also guests as clients that come and share with us all their experiences. We look forward to seeing you next Thursday, as always, in the upcoming technology and telecommunications programs. Thank you all for being with us. Rodolfo Thank you very much engineer and see you next time and have a great day.

**END OF TRANSCRIPT**

