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PROJECT AND PORTFOLIO MANAGEMENT

Flexibility meets structure

7 ways to master the new operating model for project teams

Contents

The power of balance

As priorities shift more often and stakeholders expect results faster than ever before, today's project teams must learn to adapt. A system that's built to bend (but not break) is essential for staying responsive, aligned, and effective.

But balancing structure and flexibility is one of the toughest challenges in project and portfolio management (PPM). Teams need clear governance, reporting, and accountability — but also room for agility, innovation, and autonomy.

The Smartsheet 2025 project and portfolio management priorities report found

47% of professionals rank structure and flexibility as equally important for responding effectively to change

Too much of one creates bottlenecks, while too much of the other leads to chaos.

But structure and flexibility aren't opposites — they're complementary. And with the right approach, organizations can build systems that scale without stifling progress.

This guide shares seven practical strategies to help project leaders strike the right balance and successfully implement the latest project management operating model.
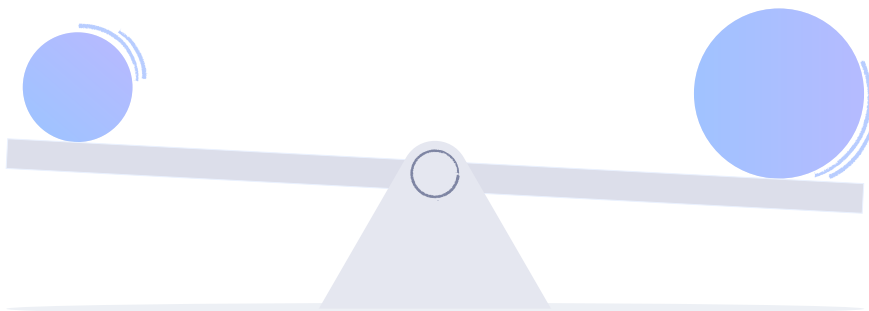
6 key jobs to be done

Project and portfolio management can be broken down into six key jobs to be done. This guide highlights the specific job(s) where teams can apply each strategy to make the most impact.

- Strategic planning
- Demand intake
- Portfolio prioritization
- Project sourcing & planning
- Project / work execution
- Portfolio reporting

Use hybrid methodologies to enable adaptability

One of the first steps of any project is choosing the appropriate methodology. Some, like waterfall, follow a more rigid framework for enhanced governance and visibility. Others, like Agile, are fluid and iterative to allow space for innovation and shifting priorities. However, no two projects, processes, or teams are exactly the same, which is why 42% of teams have embraced hybrid project management, or a blend of multiple methodologies based on specific project requirements and team dynamics.

As hybrid expert and Continuous Improvement Manager for Delta Air Lines, Jeremiah Roberts, said in a recent webinar,

> " **Understanding the recursive focus on defining the problem and then getting into the design is one of the superpowers of hybrid.**"

In other words, assess each project to understand the phases where order and rigor add the most value, such as budgeting and compliance reporting. Then, identify the areas that require the most creativity and adaptability, like design and development iteration. Lastly, determine the right mix of methodologies to support each scenario.

Mapping hybrid frameworks to project types, phases, and deliverables helps teams align on strategic goals early while giving them autonomy over day-to-day work execution, avoiding harmful information silos caused by mismatched processes. This approach keeps governance and reporting consistent, without forcing every project into the same mold and hampering innovation, enabling flexibility where it matters and structure where it's essential.

Strike the right balance with hybrid methodology

Structure
Use Waterfall, Scrum, or other structured methodology for clearly defined and consistent project phases like planning, compliance, and budget approvals.

Flexibility
Let teams choose a more flexible methodology like Agile or Kanban to help guide work execution, depending on what they prefer and the project actually needs.

Where you can apply this strategy

- ◎ Strategic planning
- ☑ Project / work execution

Define standardized processes with flexible templates

Have you ever heard of the "uniqueness bias"? It refers to humans' tendency to think we share less in common with others than we actually do. This same bias occurs in project management: A recent Harvard Business Review study of 1,300 IT projects across 34 companies shows managers are "highly prone" to believing their projects are "one of a kind." Not only does this cause them to unnecessarily reinvent the wheel for each project, but it also leads to poor risk assessment, missed deadlines, and cost overruns. The study found that

> The more unique teams rate a project, the worse it performs.

This is due largely to managers' belief that they have nothing to learn or borrow from other projects. What's the cure for uniqueness bias, according to HBR? Adopt an "outside view" that considers other projects with similar goals and components, incorporate as many of these known elements and best practices into your "new" plan as possible, and tailor it from there. This approach accelerates project creation and delivery while powering quality and scalability through consistency — without sacrificing the customization and innovation necessary to deliver differentiated outputs.

Flexible project templates are one of the most effective tools to achieve this balance. Top project teams like the Corporate Project Management Office (PMO) at Rackspace Technology use templates to codify core components that stay consistent across projects and are critical to establishing visibility and governance, such as intake forms, risk logs, and executive reports. Other project elements, like personal task views, responsibility matrices, and team-specific workflows are easily adjusted to support autonomy, agility, and diverse working styles.

Strike the right balance with flexible templates

Structure
Codify core processes and consistent project components like RAID logs, performance dashboards, and budget approval workflows

Flexibility
Allow teams to customize variable and incidental project elements to fit their unique preferences, responsibilities, and workflows

> "With the previous tool, we could not do portfolio-level reporting without manually compiling weekly reports. Without templates, there was very little consistency, and therefore there was no apples-to-apples comparison of projects. There was absolutely no collaboration. We saw all of that very much resolved by moving to Smartsheet."

Lisa Wagstaff,
Program Manager, Japan Market

rackspace technology.

Where to apply this strategy

- **Strategic planning**
- **Demand intake**
- **Project sourcing and planning**

Facilitate stakeholder communication

With so much disruption in today's workforce, project success hinges on team members' abilities to clearly and consistently articulate themselves. In fact, project teams list "lack of effective collaboration and communication" as the number one roadblock to adapting to change. Poor communication also leads to strategic misalignment, cross-functional silos, conflicting stakeholder feedback, delayed decision making, and many other issues.

Communication styles vary across cultures, languages, industries, offices, teams, and people. It's unreasonable to expect everyone to collaborate the same way, or for project leaders to control how others communicate. However, as Frank Chiocco, Director of PMO for Securitas USA, shared in a recent webinar,

> We've moved our focus from just getting projects done and over the line to really making sure there's business alignment and value."

This requires ensuring the right tools and tactics are in place to help streamline and facilitate communication, while giving teams the freedom to choose their preferred collaboration methods — such as digitally submitting feedback versus in-person creative review sessions.

First, centralize all project-related collaboration, and then clearly define communication timelines and cadences. The best work management platforms allow project leaders to send stakeholders automated reminders to update task statuses or schedule weekly status update meetings, for example, keeping everyone on the same page and projects moving forward with zero manual effort. It's also helpful to create standardized stakeholder dashboards that dynamically display relevant information like the latest project and portfolio progress, risks, performance metrics, and more, depending on the person viewing them. These are the types of tools that enable Frank's team at Securitas to effectively manage 40+ complex projects at once without a hitch!

Strike the right balance with stakeholder communication

Structure
Choose a centralized platform for all project-related collaboration, and establish consistent communication cadences, reminders, and reporting.

Flexibility
Give teams the autonomy to select their own communication styles and formats, from emojis and role-based dashboards to digital versus in-person status updates.

Where to apply this strategy

- Strategic planning
- Project sourcing and planning
- Portfolio reporting

Establish guardrails that empower teams

Rules are often considered pesky barriers. But when applied in thoughtful and balanced ways, they actually act as helpful facilitators. Just think about roads and freeways — without speed limits, traffic lights, right-of-way laws, and the police officers who enforce them, nobody would get anywhere! Following these rules ensures drivers arrive at their destinations as quickly and safely as possible. Similarly, teams need clear project governance. Without it, stakeholders are left unsure of what's required for compliance and approvals, projects go off track due to lack of accountability, and scaling processes becomes impossible.

Project governance establishes guidelines for the structure, people, and information required to make key decisions that shape a project and its direction. It aligns project teams with leadership and organizational goals to select the right initiatives and deliver satisfactory work on time and on budget. It also ensures compliance, risk, communication, reporting, and more are managed appropriately to improve project outcomes. However, it's important to remember that the goal of project governance is not to micromanage, but to set clear boundaries that ultimately give teams a safe space for innovation and agility.

One way to do this is to create a governance checklist to fill out and have teams follow for each project. While there isn't a one-size-fits-all template, here are a few items to consider:

- Stakeholder accountability and responsibilities
- Communication channels and cadence
- Risk assessment and change control protocols
- Required meetings and reports
- Progress and success metrics (AKA assurance)

Once these guardrails have been defined, harness technology to help enforce them. A good work management platform has robust user permission capabilities that ensure only the appropriate people can see certain information or take specific actions. It also automates project assignments to the right owners and stakeholder review and approval reminders.

## Strike the right balance with project governance

Structure
Create a governance checklist that clearly defines non-negotiable policies, permissions, and compliance requirements, and use automation to help enforce them.

Flexibility
Give teams the flexibility to work autonomously within established boundaries by using the workflows, tools, and methodologies that work best for them.
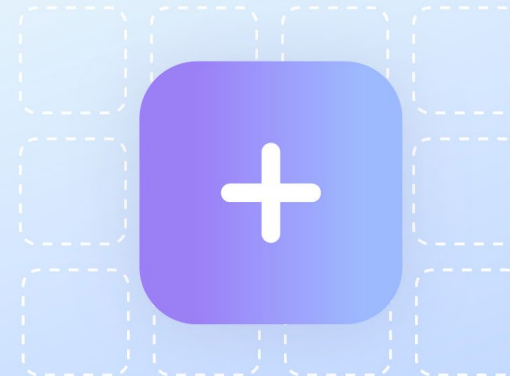
Smartsheet has a vast selection of pre-built, easily customizable templates just for you.

Need help getting started on your project governance checklist?

Learn more

Where to apply this strategy

- **Project sourcing and planning**
- **Portfolio prioritization**

Use tools with integrations and automation

Imagine sending a construction worker to a jobsite with a thermometer and a nurse to the hospital with a sledgehammer. Different jobs require different tools. However, application sprawl is having a negative effect on productivity and decision making, according to Gartner. Not only does the average worker waste time hopping between eleven systems each day, but 47% say they can't find the information they need to do their jobs. Our own research confirms

35% of employees struggle to achieve work visibility due to multiple, poorly integrated systems

that require them to manually copy/paste updates and collect data across them. The best way to accommodate different teams' needs while reducing busywork and bottlenecks is to choose flexible platforms capable of simplifying or automating repetitive workflows and manual data-related processes. As we've mentioned throughout this guide, it's important for work management tools to flex to support multiple project methodologies, use cases, and communication styles. They should also allow anyone to configure process automations and custom work applications through no- and low-code user interfaces. This will help encourage adoption and eliminate excessive point solutions.

Integrations with purpose-built tools teams already use is another major work management requirement — think Salesforce, Marketo, Zendesk, Expensify, Slack, Tableau, and Jira, just to name a few. These robust, bi-directional integrations make it possible to keep information in sync between platforms, automatically aggregate disparate data into comprehensive reports, and trigger notifications or actions across systems. This empowers teams to stay aligned, keep projects moving forward, and make smarter decisions faster — without having to sacrifice their unique needs and the tools they love most.

Strike the right balance with flexible tools
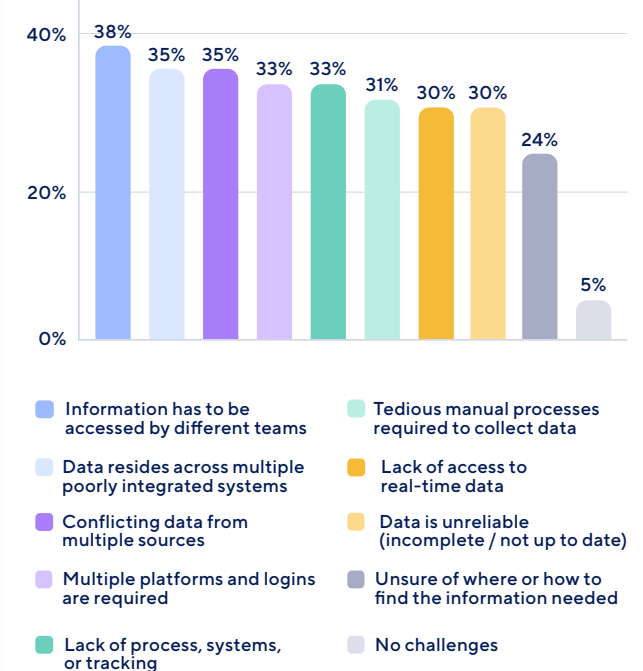
Structure
Automate manual, repetitive workflows and sync data across platforms to accelerate and improve decision making.

Flexibility
Choose customizable tools that meet diverse use cases and connect with the tools teams love and use most.

What challenges do you face when you need to make a business decision?

Bar chart values: 38%, 35%, 35%, 33%, 33%, 31%, 30%, 30%, 24%, 5%

Legend:
- Information has to be accessed by different teams
- Data resides across multiple poorly integrated systems
- Conflicting data from multiple sources
- Multiple platforms and logins are required
- Lack of process, systems, or tracking
- Tedious manual processes required to collect data
- Lack of access to real-time data
- Data is unreliable (incomplete / not up to date)
- Unsure of where or how to find the information needed
- No challenges

n = 1485 ("Not applicable" excluded)

Where to apply this strategy

- Demand intake
- Project / work execution
- Portfolio reporting

Plan for change with contingency strategies

> Nearly <u>90% of project professionals</u> agree they would be more effective at managing disruption if they were better equipped to anticipate change, rather than reacting to it.

"Planning for the unexpected" may seem like an oxymoron, but it's possible through the right balance of standardization and flexibility. And it all starts with understanding, documenting, and evaluating potential project risks — including the ones you know you don't know. Only then can teams effectively reprioritize work and prevent projects from derailing when plans shift.

Risk assessment and change protocols should be baked into the governance checklist we talked about in <u>Strategy 5</u>. These require teams to begin each project by identifying potential risks and assessing the likelihood and impact of each one. Next, teams usually determine their threshold or tolerance for each risk, prioritize the most threatening, and identify any known triggers. Top risks are assigned owners who are responsible for monitoring them, with assessment cadences and communication or escalation processes also clearly outlined.

Perhaps the most critical piece of <u>risk management</u> is the response plan, or what to do if a priority risk occurs. This is also the piece that requires the most built-in flexibility, since exact responses will depend on multiple real-time, evolving situational factors that are impossible to control or predict. <u>Risk response decision trees</u> are fantastic tools to help teams proactively adapt to change by providing multiple contingency strategies for priority risks. This framework starts with the core risk, and then asks multiple scenario-specific questions that help narrow down the problem and lead teams to the most appropriate and impactful response.

Where to apply this strategy

🎯 **Strategic planning**

🗒 **Portfolio prioritization**

Strike the right balance with contingency plans

Structure
Standardize risk management by building structured assessments and change protocols into every project.

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Flexibility
Create contingent response plans that allow for adaptive execution and empower teams to act quickly in real-time.

Continuously improve and mature processes

As we mentioned in Strategy 2, it's important to adopt an "outside view" that makes use of proven best practices and strategies from other projects. This is instrumental in maximizing efficiencies and improving success rates. However, it's also critical to avoid going too far in the other direction and falling prey to a "this is how it's always been done" mentality. This puts teams at risk of repeating the same mistakes across projects and failing to keep pace with evolving business needs.

The best way to achieve balance is to adopt a growth mindset. Forbes defines a growth mindset as "the belief that you can develop your intelligence, abilities and talents over time through effort, practice and learning." Not only do

64% of senior US executives report a growth mindset results in better team productivity & performance,

but 80% also agree that it contributes to revenue growth. Encouraging your organization to approach each project with this outlook ensures they keep doing what's working and continue to optimize what's not, as well as explore new solutions as the needs and opportunities present themselves.

Baking retrospective meetings into each project plan is an easy first step. It provides teams with a dedicated forum to reflect on what went well, openly provide feedback, and work together to make improvements. Eventually, establish a set of core metrics to consistently track and help spot over- and under-standardization across every project. Examples include timeline and budget variances, innovation and stakeholder satisfaction scores, number and/or size of scope changes, and process phase deviation. Last but certainly not least, explore AI-powered solutions that can instantly identify workflow and resourcing inefficiencies and proactively suggest improvements.

Strike the right balance with continuous improvement

Structure
Implement consistent, repeatable retrospective meetings, feedback loops, and reporting to identify what's working and optimize improvements.

Flexibility
Iterate on existing processes and try new solutions based on team feedback, project outcomes, work trends, and evolving business needs.

Continuous improvement is a sign of organizational maturity, and a hallmark of the third and final stage in the Smartsheet PPM Maturity Model.

See where your team stands by taking the PPM maturity assessment.

Get your results

Where to apply this strategy

- Strategic planning
- Project / work execution
- Portfolio reporting

Embracing the new operating model for project teams

Work structure and flexibility once seemed like competing goals, but today's project leaders know they work better together, and teams need equal measures of each to succeed. Leaning too much on either side presents risks: Excessive rigidity can stifle innovation and agility, create resistance to change, and potentially limit growth, while too much flexibility can lead to chaos, inconsistency, and an inability to scale.

Fortunately, the new project management operating model helps teams strike the right balance between standardization and flexibility. Following the seven strategies covered in this guide is sure to put your organization on the right track:

- [ ] Use hybrid methodologies to enable adaptability
- [ ] Define standardized processes with flexible templates
- [ ] Facilitate stakeholder communication and alignment
- [ ] Establish governance guardrails that empower teams
- [ ] Use flexible tools with integration and automations
- [ ] Plan for change with contingency strategies
- [ ] Continuously improve and mature processes

Smartsheet is built to help teams find the sweet spot between work structure and flexibility.

With Smartsheet, project teams are able to drive efficiency and maintain governance and control without stifling agility, innovation, or autonomy. The platform makes it possible to achieve repeatability of best practices without forcing teams into rigid methodologies, empowering them to choose methods that best fit their unique needs while ensuring standardization and value realization at scale.

Want to learn more? Visit our website for more product insights, customer success stories, and industry resources. Ready to jump right in?

Watch a demo

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