

# Tailoring's Last Name Is Not "Out"

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**Abstract.** Frequently, organizations think tailoring is about skipping steps in the organization's standard process. This misinterpretation causes many organizations to backslide in their process maturity and prevents them from gaining great insight into their process potential. Once an organization learns that tailoring's last name is not "out," they mature their process implementation more rapidly.

When first working with an organization on tailoring processes, they always seem anxious to find out what part or parts of their processes they can skip. After all, isn't that what tailoring is about—taking out the unnecessary parts of a process for a particular project? After shaking my head once again, I let them know that tailoring is not about skipping parts of processes but scaling them to a specific need. This consistent misinterpretation of tailoring out parts of processes has several causes that need to be addressed.

For CMMI®, tailoring processes is a major component/aspect of institutionalizing a "defined process." It is the primary element of Generic Practice 3.1 and what differentiates Integrated Project Management from Project Planning and Project Monitoring and Control. When done correctly, tailoring takes a generic process and makes it meaningful to its users. In other words, it transforms the Organization's Set of Standard Processes into a Project's Defined Process.

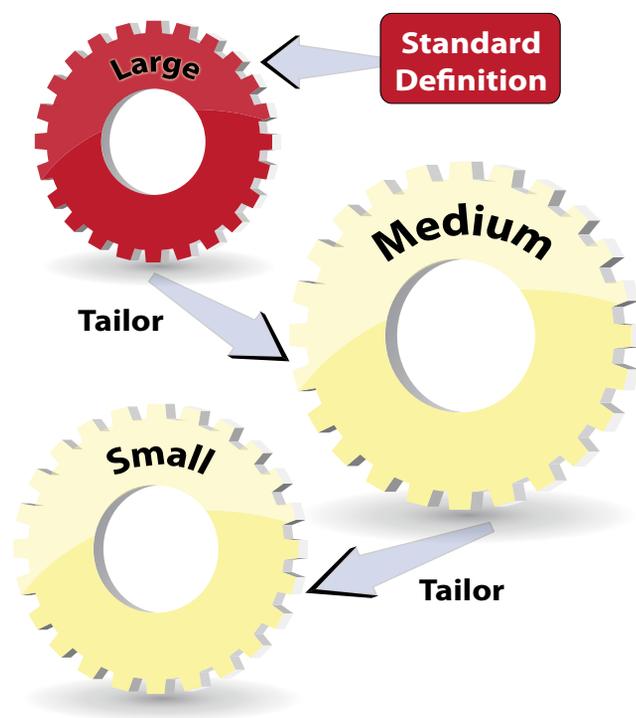
Unfortunately, many people that are new to process tailoring assume that tailoring involves eliminating steps or skipping entire processes. This misinterpretation of tailoring tends to inhibit the potential of the organization and misses the intent of tailoring. Besides making a process meaningful, tailoring should be the source for organizational learning.

I generally find that the usual root cause of the misinterpretation of tailoring is an organization's assumption that they should have a single process. Let's face it, a "one size fits all" solution usually fits no one. That is why people are anxious to skip parts or all of a process when addressing tailoring.

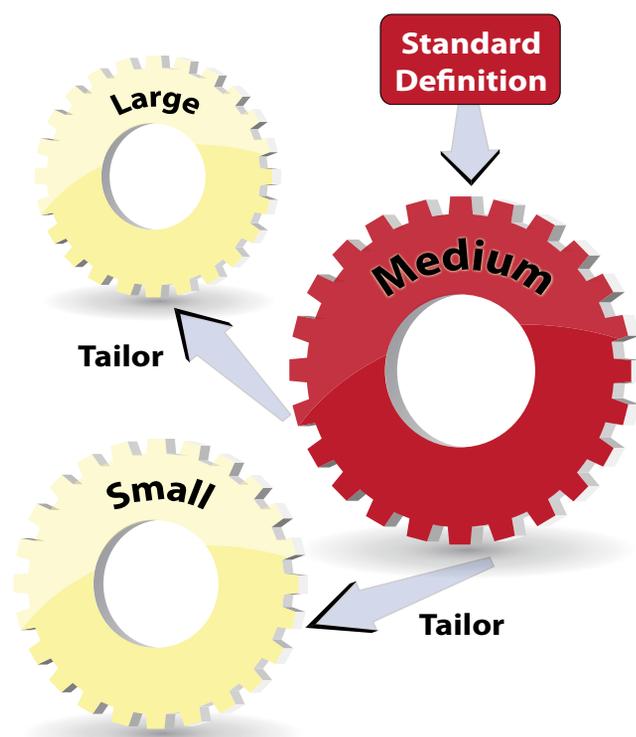
In order to position itself for tailoring, the organization needs to examine its approach to process definition. It always fascinates me when organizations realize they have different types of projects but then target the wrong project type to document their processes. For instance, most organizations will divide their projects into large, medium, and small based on staff size or number of estimated hours. They will document their processes for the large projects and assume they can tailor the processes down for the other project types.

The problem with this approach is that these large projects usually are the exception and not the norm for the organization. It does not make sense to define processes that represent the least common work for the organization. Organizations need to

## Inappropriate Process Targeting



## Appropriate Process Targeting



document processes for the “sweet spot,” where most of the work is performed. If a medium-sized project represents most of the organization’s work, the process should be defined for that project type. The process then can be tailored up or down for the other project types.

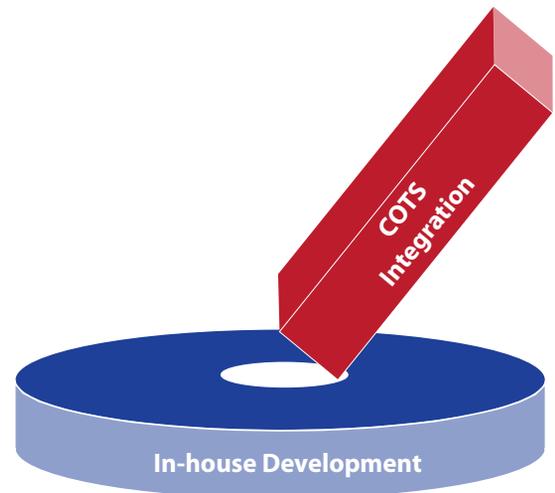
This brings us to another key aspect of tailoring. Tailoring is really about scaling and scoping, not skipping. Organizations can tailor up or down, not out. When a project needs more process detail, more detail is added. When less detail is needed, the process can be summarized, not skipped. For instance, projects should always have physical configuration audits. The standard process may be designed for small projects (one or two person projects lasting a month or two) since that is the major project type for the organization. The standard process may state that a physical configuration audit is conducted right before delivery. Tailoring for large and medium sized projects may specify that physical configuration audits are added at the end of unit testing. Tailoring for large projects may require that physical configuration audits are conducted at the end of each major milestone. This is tailoring up for projects, not just tailoring down (and definitely not out).

Appropriate tailoring needs to happen during process definition. The organization should identify tailoring factors such as project size, product life cycle (e.g., new development, maintenance, acquisition), customer type (e.g., federal government, local government, commercial), life cycle model (e.g., waterfall, spiral, Scrum), etc. These tailoring factors and their instructions are what create tailoring guidelines as specified in Organizational Process Definition Specific Practice 1.3.

Other input for tailoring should be the waiver process. When a project feels the need to do something different from the organizational standard set of processes, the organization should monitor this change in order to learn from what is done. The waiver should specify not only what they will not be doing from the standard organization process but what they will do differently so the organization has a potential alternative practice. What a project that has a waived process does may identify additional tailoring factors or additional process options.

Finally, the organization needs to recognize when it is beyond tailoring and into creating another process for the organization to add to its set of organizational standard processes. I worked with a group one time that had three organizational standard

processes to choose from: development, maintenance, and databases. The group I worked with did COTS integration projects. They would brute force their projects into the development process by significantly tailoring the process. Essentially, they were trying to force the proverbial square peg into a round hole. When I pointed out that they had enough experience at tailoring the process that they should define a fourth standard process type, they responded with, “We can do that?” Consistent tailoring should either result in a process change or a new standard process.



When preparing to tackle process tailoring, an organization should keep several thoughts in mind. First, the organization needs to shoot for the “sweet spot” when defining processes. The organization needs to identify tailoring factors when defining the process. The factors could come from the waiver process and eventually lead to a new standard process for the organization. Based on the process definition and tailoring factors, projects will be scaling and scoping the process in order to tailor it to their specific needs. All this leads back to the primary thought; tailoring’s last name is not “out.” ♦

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