

Lean-Agile is easy to talk about but hard to pull off in a “chunky” corporate. Katie Tamblin shares practical strategies for navigating layers, budgets, and oversight, keeping teams moving, communicating vision, handling legacy data, fostering experimentation, and leveraging AI—actionable advice for project managers making Agile work at scale.

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Intro

KATIE TAMBLIN: a lot of project managers get mired in the bureaucracy. And they have my deepest sympathy because I know I have been in those shoes, and I have shouted to the rafters, like, its slowing me down. So, I totally get it.

But one thing, when I reflect on myself and say, well, how could I have seen that differently and been more positive? One of the things that keeps coming back to me is

sometimes I would get so focused on the top-down bureaucracy of you're making me do it this way that I lost sight of the bottom up. Actually, if I can just unlock the miscommunications that are happening at the grassroots level, the rest of the stuff becomes easier.

WENDY GROUNDS: Welcome to [Manage This](#), the podcast by project managers for project managers. We're so thrilled to have you with us today. I am Wendy Grounds, and Bill Yates is with me in the studio. If you're enjoying the show, we'd love to hear from you. If it's on our website, [Velociteach.com](#), on Velociteach social media, or your favorite podcast app, your feedback helps us keep inspiring and supporting project managers just like you. Also, if you have any questions about our podcast or project management certifications, we're here to help.

So, what happens when Lean-Agile meets corporate reality? In this episode, we're talking with Katie Tamblin. She's an award-winning author of "[The Lean-Agile Dilemma: Product Management Inside a Chunky Corporate](#)." And she's talking about what it really takes to manage software and product development in large established organizations.

Katie is a data and software consultant who has previously served as chief product officer and board member at Alcumus, and she was also chief product officer at Achilles Information Limited, where she managed over 220 billion in assets. Today Katie shares practical insights on balancing innovation with predictability, navigating complex systems, and helping teams deliver real business value in the corporate world.

BILL YATES: Yeah, Katie has incredible insights, and she really started as a data analyst, and started in a role that helps me relate to the experiences that she's had.

Data is king. You've got to have good data no matter how pretty your software is. She gets that. And she also gets the dilemma of trying to run projects effectively and efficiently in a really large, chunky corporation.

WENDY GROUNDS: Hi, Katie. Welcome to Manage This. Thank you so much for joining us.

KATIE TAMBLIN: Thank you so much for having me. I'm delighted to be here.

Chunky Corporates

WENDY GROUNDS: We are a little intrigued by your term "chunky corporates" and want to talk a little bit more about that. So, tell us, what does it mean in terms of project managers working in these environments that you call "chunky corporates"?

KATIE TAMBLIN: Well, that's a great place to start. I was working in a large organization, one of many, and I kept hearing the words "lean" and "agile" bandied around. And I kept thinking, but we're not a lean startup. There are fundamentally different things about this organization that are kind of incompatible with lean startup principles. And they have huge implications for project managers and really for, you know, anyone working with tech or products in those spaces.

The key differences are, you know, you think about your typical lean startup, and there's always exceptions, but let's generalize for simplicity. Lean startups are often seeking capital, you know, they don't have a lot of investment. They're made to be lean because they haven't got deep pockets.

And they're typically young. They're often small, under 500 employees or so, and they don't have a lot of oversight. So, they have a lot of freedom. On the other hand, most of the what I call "chunky corporates," meaning kind of the opposite of the lean startup, that I have worked with have higher access to capital, so their budgets are bigger.

They're typically a bit older. There are more employees. And with all of those things, predominantly with the bigger budget, usually that is funded by external investors. And with that investment comes oversight. So, you kind of get deeper pockets, but you give up your freedom in a lot of organizations.

And so, what does that mean for project managers? Well, I don't know a lot of lean startups that have a huge raft of project managers working in them. There are some. And boy, are those project managers lucky because you've already got a small number of people working really tightly aligned toward the common goal. In a chunky corporate, you often have more than one project manager, so you have lots of project managers that are covering different areas, and you need to focus your efforts on coordination across silos.

Because as organizations walk up that maturity curve from lean startup to chunky corporate, they typically break specialist roles out into silos. So, you've got product; you've got tech; you've got your business stakeholders; you've got external stakeholders. And so, project managers need to be focused on coordinating across those silos, much more so in a chunky corporate, simply because they're bigger, and they're more defined and more specialized than verticals.

The Pros and Cons

BILL YATES: That's so true. As I was reading over some of the content that you've written and preparing for this, I was laughing because the first half of my career before I

got into project management training was leading projects for software implementations for utilities, financial software packages. So, we did a lot of integrating with, you know, the PeopleSofts, the Oracles of the world, that kind of thing, at large utilities. And our company was small. So, we had, I think when I was with the company early on it was maybe 100, 150 employees. And then we had a chunky come in and get us. It was EDS. EDS, the old Ross Perot company, they acquired us.

And so, we went from being, you know, like you said, lean and very flexible to, okay, now there are quite a few layers of corporate chunk that we had to figure out how to navigate as project managers. Fortunately, they left us alone for the most part. You know, they left us alone with our utility software specialty that we were doing. But it was very interesting. And it just made me think as I was looking through the topics that we were going to cover, I just kind of had flashbacks to, you know, some of the overhead, some of the good and the bad that comes with working with a larger corp like that.

KATIE TAMBLIN: Absolutely. And I think you make a great point. There are pros and cons.

BILL YATES: Yeah.

KATIE TAMBLIN: And so, you know, “chunky corporate” is a term of endearment. It’s where I’ve spent most of my time. And again, don’t underestimate the power of having investors kind of giving you guidance and oversight in those deep pockets and those budgets. And so, you know, I think like a lean startup, a chunky corporate has a lot going for it. It’s, you know, more predictable, more stable.

And for most people, that is in and of itself a fantastic raft of qualities. But to your point, we need to think differently about how we work because it is different, not better, not worse, just different.

Large Enterprise vs. Lean Startup

BILL YATES: Yeah. Talk more about that. When you're managing a project in a large enterprise, how is it different than a lean startup? There is the speed, the agility side. But what are some other things that that you've seen in your career and your experiences that you point out to PMs?

KATIE TAMBLIN: One of the things that I've observed that causes a lot of friction, that I think if we don't name it and really understand the root of it, can cause a lot of disruption to a project, is the mismatch between lean-agile purists, often within the product and tech space, and the leadership team and/or your kind of institutional stakeholders and your investors.

One of the things I observed that was really common was we would have leaders, business leaders using those words without a full understanding of what that really means to someone in tech and product who's done the full training in lean-agile.

And so, I think the biggest thing I would say is first really achieve alignment down in the weeds. And if you're a project manager, flesh this out. Get it all on the table. Get your agile purists sitting around the table with your CEO, and make sure your CEO knows, when they say "I want this to be an agile project," that the agile purist says, "Okay, well, then stop telling me there's a fixed budget and fixed pilot." Watch how that conversation plays out.

BILL YATES: Whoa, whoa, whoa, wait a minute.

KATIE TAMBLIN: I mean agile, but I don't mean that kind of agile.

BILL YATES: Right, right, right.

KATIE TAMBLIN: Understand that you can't truly project manage in the traditional sense a purist agile project, or a purist lean project, because if it was truly lean startup, and I mean that in not Six Sigma, but in this lean startup way, if it's truly lean startup, you don't know what product you are producing.

Aligning Expectations

And so with that friction of not really getting all that on the table, I have observed a lot of times the kind of the grumblings – in a large organization, the grumblings don't get fleshed out as well as they do in a lean startup because you can grumble along if you're four layers down from the leadership team and never really get resolution on, well, they keep telling me this is an agile project, but then they told me to deliver it in the next six months. You know? And that creates a little bit of an "us" and "them" tension.

BILL YATES: Yeah.

KATIE TAMBLIN: So, what I would say is project managers, you have a fantastic opportunity to really get alignment on that fundamental point first and make sure, not only hold your product and tech team to account to say, look, I know you want to be fully purist about this, but this is our reality. We have institutional investors. We have to report monthly, quarterly, annually. We can't just have the freedom that a purist would require.

And also hold your leaders to account. You've got to be really careful of the implications, you know, of what you're creating when you use those terms without qualifying.

BILL YATES: That's so true. You hit on a key word there of "alignment." It's so funny, Katie. I think of – there was a sense from our small standpoint, the small corporate standpoint that we had was we felt like every project needed to be profitable. And we would, you know, we'd account for it that way. And we knew what the numbers were down to the team level. It wasn't like some sales guy or the VP level. Like on our team we knew whether or not we were profitable or whether we were reaching the end of what had been agreed to in the contract with our utility customer.

And I recall we were going through a major rewrite of our system. So, this is a software system that we've deployed to dozens and dozens of utilities all across the United States. And the core system was going to be rewritten, and we were going to use the EDS way instead of the way we'd done it in the past. And that meant – like I remember specifically Friday was when we had the code review. We'd have a code walkthrough, and that was kind of a big thing for EDS. It's like, okay, that's when the DBAs all come together. I don't care what billable project they're on. They have to be in town. They're all going to be in the same room.

And they're going to review what code's been written that week and basically give it a sniff test, make sure it's all good. Take a look at the master tables again and see if there's any conflict, which sounds great; right? Unless you've got billable projects; right? I'm like, you can't have my DBA. You can't tie Eric up for four hours. Are you kidding me? You know, we're in San Antonio, or we're in Louisville or whatever. So,

he's got to fly back early, and then you're going to sit him in an office for four hours?
Are you kidding me?

There was an alignment issue there. Somebody way above my pay grade needed to explain to me, here's the process. Here's the value in it. And here, you know, okay, I get your profitability thing per project. That's great. Here's how we're going to account for that.

KATIE TAMBLIN: Exactly that. Yes. Here's how we're going to adjust your metrics to reflect the new reality.

BILL YATES: Right.

KATIE TAMBLIN: I think that so often leaders don't realize that there are ripple effects to the changes that they're making. And so, again, project managers have an amazing opportunity to work through and tease out those ripple effects.

BILL YATES: Yeah, I love that you say "getting alignment down to the grassroots level" because that's exactly where my head was as far as my project team was, hey, you know, we're either going to earn a bonus or not, based on how profitable we are this year. And this is a major project, and you're pulling my resources off. Time out. Something's got to be made fair here. We've got to make this right so we can do it. So, yeah, you need to have that conversation down at the granular level. That's good.

Maintaining Momentum and Motivation

So, Katie, I guess I'm baring my soul and sharing some of my frustrations, some of my flashbacks that I had. What advice do you have for project managers when they're

dealing with – maybe it's a new environment. Like in my case it was, you know, we'd been a small company, very project focused, and then we became part of a larger, chunky corporate.

How can a project manager maintain momentum and motivation when they're looking at the big corporate stuff and feeling like it's really slowing them down?

KATIE TAMBLIN: Yeah, and that's a great question, and so common. So, as we talk, you know, with project managers about how you can ensure that these projects go smoothly and maintain that momentum when there're so many layers of bureaucracy and so many silos to coordinate across. I outline an approach in my book, and I call it "orienteering." It's kind of a hybrid of agile, but mixing in other software development methodologies. And what we're trying to do is adapt agile for exercises that are more like replatforming.

And we talked about replatforming earlier, like where you're rewriting your code base. And it can feel to project managers, tech, products, you know, it can feel to everybody in the organization that replatforming exercises are so slow. Because compared to building a new product, rebuilding what is already there, it's a lot longer before you can switch from the old software to the new. And so, I developed orienteering to account for that.

And I talk in the book a bit about, you know, in agile we talk about a minimum viable product. So, you want to release your software into the world and into usage as soon as possible with a minimum viable product. And lean startups are all about getting their minimum viable product onto the market. That's very easy if you're not replacing something that already exists in the market. Right? So, I like to use the analogy of a

house. It's kind of like saying, you know, if I live in a four-bedroom house, saying to me, here, come move into this tent in the garden for a while, while we rebuild your house. I'm going to say no.

BILL YATES: And I want you to be happy about it.

KATIE TAMBLIN: I like my warm house. It's got four bedrooms, got a kitchen, bathrooms, all that. So, you can't. Replatforming, you know, asking somebody to go back to an MVP when they have the four-bedroom house is kind of like asking them to move into a tent. So agile just was not written for replatforming. So, what I try to do with orienteering is take the elements of agile that are incredibly powerful, regardless of whether you're rebuilding or building new, and carry them through into a replatforming exercise. And, you know, the biggest challenge around momentum that you mentioned is in the inability to have an MVP that your customers will switch to.

Demonstrate Progress

So, you've got to find really creative ways to demonstrate within the organization and your customers that we are making progress. I know it doesn't feel like there's a lot going on because you're not ready to use it yet, but we're making progress. And the way that different organizations accomplish that will be different. You know, some organizations, if they have slightly more modern software, can take out certain microservices and plug in new versions of those microservices.

If your software is ancient, like many of the organizations I've worked with, which just means it was built really well the first time, then you might have to think more creatively about how you pull out and plug in different bits. And at the heart of that is getting the

data right. So, what I find is often the hurdle that we trip over right at the end is that we build software, and then we want to put our legacy data into it.

And as project managers, there's an incredible opportunity to say, actually, we can get around this MVP issue if we pull the data out and start doing really interesting things with the data first, and then we rebuild the software around the data in the structure that we wanted for this modern world.

BILL YATES: That's really good. There are so many practical steps that I think a project manager can take if they, again, speaking from my own experience, if they kind of get over some of the things that are annoying me about, okay, there are more levels of bureaucracy here than I'm accustomed to, and that makes me mad. That slows me down. That's impacting my project team.

Okay, so deal with it; right? Get over it and start to think through what are some solutions that we can do. And, yeah, I can really relate to this. I like your idea of the orienteering because MVP sounds wonderful, and I love teaching about it. But actually doing it? Yeah, my client that I'm replacing their system, they already have a system that's pretty good, and it's got a ton of customized features. So, yeah, I can't give them a tent and expect them to be happy. So, yeah, all that really makes sense to me. So, this is helpful.

KATIE TAMBLIN: And the reason I chose the term "orienteering" is because in agile, you don't have fixed waypoints. You're adapting to the market feedback you get. When you're replatforming, the features you have to rebuild are fixed. Those are your waypoints. So, it's all about how quickly you navigate between those milestones as opposed to just your course being uncharted, as it would in a truly lean agile project.

BILL YATES: Yeah.

Communicating the Vision

WENDY GROUNDS: Katie, we have talked about alignment across different layers of leadership and teams and so on. But what is the best way for a project manager to communicate the vision of the project in a way that's going to resonate across all these different departments and to communicate the different priorities?

KATIE TAMBLIN: That's a great question. It is one of the biggest challenges that I think a lot of organizations have. So, there's a few things I think we can do as project managers and working with our teams to help enable deeper alignment.

So one is, as you rightly say, make sure everybody's aligned to the vision. Everybody sees the bigger picture. Because you'll have a lot of stakeholders saying, well, what does it mean for me? This doesn't feel like it helps me. So, personalizing the message, you know, and working through change management in each of the silos and across all of the silos and helping. You know, your operations team may say, well, you're working on the front end for customers, and I don't get any benefit out of that, to try to help them understand, well, there's always going to be some benefit. It may not be direct. It may be indirect.

And if it feels like there's no benefit, why is that? And what can we do to change that within the confines of what we're trying to do? But also, you know, to your previous point, a little bit of like, okay, well, get over it. By hitting this milestone and staying laser focused on this waypoint, we will then open up resource that we can solve, you know, your operational issues.

But this is the burning platform. So, let's all get onboard, stay focused on addressing the burning platform, and then that gives us the freedom to move on. But I think also, fundamentally, one of the biggest things is you mentioned earlier that a lot of project managers get mired in the bureaucracy. And they have my deepest sympathy because I know I have been in those shoes, and I have shouted to the rafters, like, slowing me down. So, I totally get it.

But one thing, when I reflect on myself and say, well, how could I have seen that differently and been more positive? One of the things that keeps coming back to me is sometimes I would get so focused on the top-down bureaucracy of you're making me do it this way, that I lost sight of the bottom up. Actually, if I can just unlock the miscommunications that are happening at the grassroots level, the rest of the stuff becomes easier.

So, if I really reflect and say, okay, drives me nuts that for this board meeting I have to put together a 30-slide slide deck explaining the progress we've made. Well, actually, that exercise becomes really easy if I am so into the weeds of that project that I have 30 slides' worth of comments on what's actually happening because what I see is so common that we have project managers that are run off their feet, managing the top down, and then they've lost sight of the bottom up.

So, they don't know, they're reporting on what's happening within scrum teams and across scrum teams, but they don't actually know what are the challenges within the scrum and across the scrum and when they put it together until those challenges become problems. So, my advice would be focus on the bottom up, and the top down will take care of itself.

Keep Leaders Close to the Work

BILL YATES: That's great advice. Anytime that project manager can say, hey, here's what's going on with the development team, here's what happened in the last test, here's the aha moment that the team had last week when we had this problem occur, man, those will resonate.

If I'm a sponsor, I want to hear the leader of the team talking at that level of detail and not the gamesmanship of, like you said, trying to figure out how to manage me from top down. No, no, no. You know, they need to be intimately involved.

KATIE TAMBLIN: I have seen so many board meetings that engage in success theater and, you know, this is what we did, and this is amazing. And it's very superficial. And I find when that's the way things go, then when all of a sudden you miss a deadline, then things get really negative, and it goes from success theater to blame game.

And the reason I weave a lot of really detailed examples into the book – because what I found was when I dug back down into the individuals, and when we missed deadlines, and I spoke to the individuals on the ground and asked them why did we miss the deadline, what happened, there's usually a really good reason. Never in my career did I come across somebody going, well, I just didn't really feel like hitting the deadline.

BILL YATES: Yeah.

KATIE TAMBLIN: Is it really that serious. I mean, 90% of the time you have people working really hard and something unforeseen comes up. Somebody shifted the priorities and didn't communicate that outwardly. Somebody ran into an issue that took way longer than they thought it was going to take, but it's, you know, through no fault of

their own. And so, I find the best project managers know exactly why we got off track. And that will prevent these leadership meetings from turning into blame game, which gets really uncomfortable and usually does not go anywhere positive, and certainly does not help you regain momentum.

BILL YATES: That's so good.

A Word from Jess

JESS CLEVENGER: Velociteach is a team of leaders, project managers, and hard-working professionals who are here to help you grow, learn, and succeed. Our e-learning platform, called [Insite](#), is where you can prepare for your PMP certification, or get better at your job by choosing from over 70 high-quality and engaging, online courses.

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Be Curious about Data

BILL YATES: One of the things that you mentioned earlier, Katie, we want to focus on that, and it's the word "data." You know, you talked about how really at the heart of it, we've got to get the data right; and, man, that was so true.

I mean, it's like you've written content specifically for me because the projects that we did were all – they weren't very exciting. It was accounting data. It was regulatory data

that utilities used. You know, you'd see it in their annual reports and that kind of thing. Pretty boring. But man, oh man, if the data was messy, if the data didn't add up, it didn't matter how beautiful our code was. It was going to have results that were not good. You know, it is truly garbage in, garbage out.

So, getting the data right is so, so true. And when you talk about the use of curiosity in project leaders that are most successful, I think, you know, it kind of drives along with the data, what's coming out of the project. What's the data that we're seeing? And where do I have trends, or where are things not trending as they were before?

Some project managers are just – they're natural sleuths; right? They're always detectives. They're looking for those anomalies. And they remain curious. And when something doesn't smell right, or something doesn't look right on a report, they dig into it, or they have team members dig into it.

Talk a bit about that curiosity and how we can foster that. And we don't want to spend hours and hours of our time chasing dead ends. But on the other hand, we need to remain curious and encourage the team to be curious when data is telling us something that we need to go investigate further. So, talk to that a bit.

KATIE TAMBLIN: Yeah, I think you raise a great point. You know, the best project managers I've worked with would come and grab me and say, "I just had my spidey sense says, you know, we're going off the rails." Quite often what they're picking up on is, as you say, something in the data doesn't quite add up. They maybe can't put their finger on it. Or something between, "I heard this from this person. This person over here stated it this way. You stated it that way. That person over there said it that way. I'm not sure we're all speaking the same language."

And so, I think you're right. Curiosity is the saving grace to that. You know, it's kind of the antidote to that going off the rails and continuing to trundle along. I think the thing we're trying to avoid is a project trundling along without alignment for too long, because that's when I see us, like, majorly miss deadlines.

If you get to it really quickly, and you identify it really quickly, and you just face into it and go, "Guys, how big is this challenge?" then I think you're best placed to address it. And so that curiosity will help you get there. I think it's those that kind of, you know, the tendency, sometimes we want to just bury our head in the sand and hope it gets better. For project managers, we don't have that luxury.

Spidey Sense and Strategies

BILL YATES: Yeah, that's so true. So, I want to ask a follow-up question related to that because I am, when you said "spidey sense," I'm like ding, ding, ding. I like that phrase, and I totally relate to it. However, I've found from my own experience, if I go to a sponsor and say, "My spidey sense is going off, I'm not really sure what it is, but I think we need to, you know, give us a little extra time to look at it," they're like, "What is wrong with you, Yates? What is this spidey sense stuff? Show me something. Show me a graph, you know, show me some data. Don't come in here empty-handed saying the sky's falling kind of a thing."

So, what are some successful strategies that we can use where we go, okay, here is some proof or some – here are some things that I can show to a sponsor to actually have a call to action.

KATIE TAMBLIN: Yeah. That's a great question. And I think, you know, the key thing is not to be biased, not to let your own bias impact how you interpret data because, prior

to working in software, I was an economist, and I used to joke that as an economist, you can kind of find information that will fit a story if you have the story in your head; right?

BILL YATES: Yeah.

KATIE TAMBLIN: And so, I think the key thing is to try to clear the story from your head and really interpret what, you know, what the data are telling you so that you can, again, retell that story. So, if you're, you know, listen to your intuition, listen to your spidey sense, but also try to remain as unbiased as possible when you're investigating.

So, it's about finding the right balance between healthy skepticism and naive optimism, right, of what is the reality of where we are? And curiosity is at the heart of that, but good data backs up the curiosity. And spidey sense is right. You will find the markers and the metrics. The unfortunate reality is it may take time.

BILL YATES: Yeah.

KATIE TAMBLIN: And, you know, again, with that investor and leadership oversight, sometimes, as you rightly say, time is not a luxury that you may feel like you have. It is a challenge.

Hard Truths in the Data

WENDY GROUNDS: Now, when that data tells a story that you don't want to hear, what's the best way for the project manager to handle that conversation?

KATIE TAMBLIN: I mean, if I knew that. You know, this is where strong leadership and good relationships make the difference, I genuinely believe. I think it partly depends on

having leaders that want to hear reality, that want to know an issue. I've worked with leaders that do, and I've worked with leaders that don't. And strong leadership will be able to hear it and see it as a challenge and an opportunity, but want to face into it.

And I, you know, I think a project manager who does not have that kind of leadership support, that's a really tough position to be in. I think all you can do in that scenario is, as pragmatically and honestly as possible, put forward the information and maybe shut your ears when the blowback [laughter]...

BILL YATES: That's good.

KATIE TAMBLIN: Sometimes the messenger does get shot verbally.

BILL YATES: That's true.

KATIE TAMBLIN: You know, and I suffer from this. I'm a person, and I don't want to disappoint anybody, and I don't want to let anybody down. And when you're telling somebody what they don't want to hear, you will feel like. And I have worked with leaders that just don't hear it, and then hammer you to continue delivering, continue change your priorities, do this, refocus that.

And I have observed two approaches. One is stick to your principles and, if you believe that you know the way forward and the best way forward, continue with that message in a calm, cool, clear way that is as unemotional as you can be, and hope that you work with grownups who are able to work through that with you. But I've also worked with people who just say, "Oh, I just ignore whatever they say, and I just get on with it."

BILL YATES: Okay.

KATIE TAMBLIN: I'm not saying I definitely purport that. I'm the former. But I will say that I've seen very successful people that get on that way, and they face a lot less blowback than that.

BILL YATES: That's true.

KATIE TAMBLIN: So, at work we stick by what the data are telling us.

Private First, Public Later

BILL YATES: That's so good. Katie, I was thinking about this, too, and just some of the experiences that I've had with different project sponsors. Some of them, if it's bad news, probably my default is to talk to that person one-on-one first, preferably face to face. I think where I've kind of taken the pin out of a hand grenade and then realized later, oh my gosh, look what I just did. I bring up the bad news in a meeting. So that leader has their peers. They have their team with them. I've got my team with me.

There's too many people in the room. I'm sharing bad news, and the sponsor is feeling the heat. And sometimes they react fine and great as a good leader. Sometimes it catches them off guard. And I've looked at it and gone, dang it, I really should have had that one-on-one conversation first.

KATIE TAMBLIN: You are so right. And I have had the same experience, and looked back at those experiences and thought, gosh, if I could go back in time, I would have made 15 minutes before. I would have conjured up that time out of nowhere. And I think you've hit on a point that I want to make sure we make, because hopefully it goes

without saying, but I'm not sure it does. It's a conversation, not an email. And it should be a constructive, collaborative conversation. We are all on the same team. This is where the team is.

BILL YATES: Right.

KATIE TAMBLIN: These are the reasons why. Now we need to decide as a team how we're going to take it forward. And I think you're right. I think when you're in a shared setting, ego is in the room, as well. More so than when you're in a one-to-one. And so, you may find that sponsors are insecure or defensive off the back of being shocked by bad news, I think 100%.

And then you open up the room to people who feel that they're in competition to exploit that. And I think the key thing is remembering that our aim is to be in collaboration, not competition in these shared forums. And to try to, as effectively as possible, deescalate any situation in which you can feel someone getting defensive or feeling insecure.

BILL YATES: Mm-hmm. Great advice.

First Steps in Re-Platforming

WENDY GROUNDS: Katie, let's talk a little bit about re-platforming and legacy systems. So, re-platforming projects can be very daunting, especially if those legacy systems are really deeply embedded. What's the first thing that a project manager should do before they kick off a re-platforming effort?

KATIE TAMBLIN: Again, fantastic question. And I think we are probably only going to see more and more re-platforming. One of the things I talk about in the book is the fact

that the longer your organization has been operating, the more legacy software you have. These days, new products are often being coded by AI. And so, you may have competitors cropping up on a scale and at a speed that you've never experienced before. So, the pressure to re-platform is likely growing and going to continue to grow.

And we're going to have to re-platform more often than we ever have before, I suspect, if I could predict the future. Re-platforming is harder than building new products. And agile was not written for re-platforming, and neither was the lean startup. So, the key thing that I think is left out is data. Agile doesn't mention it, and neither does the lean startup because in new products it doesn't exist for the most part.

BILL YATES: Mm-hmm, that's true.

Understanding the Data First

KATIE TAMBLIN: You manufacture data as your users use your software. So, it's much more common to have to deal with data. The thing I would say to a project manager – and you know, it's funny, I don't know how to emphasize this enough because I have said this to project managers in projects that I am working on and still watched it not happen. It's really hard.

But what I would say is get the data out of your legacy systems first, clean it up, organize it, get it in the structure that you want it in. And that could be a lake. It could be, you know, a database. It could be a warehouse. It could be all of the above. Get it how you want it and then build the new software around it.

And as a project manager, that probably means not starting with software developers. Because, you know, no disrespect to software developers, but they think software first.

They think code first. Of course they do. That's their job. So, I think a project manager needs to start with data scientists, data analysts, and understand the differences between those different roles.

And there may be building of data infrastructure that the tech team thinks is superfluous, not necessary, inefficient, because in most of the organizations I've worked in, software engineers by their training will code it all and will figure out the data later, and we'll all be fine. Only ever worked on new products, that's true because there is no data to bring in.

But I have worked on a number of projects. I've worked on more than one project where that was done, you know, oh, we'll get the software built, and we'll stick the data in. And it resulted in more – between six and 24-month delays.

BILL YATES: Oh.

KATIE TAMBLIN: Twenty-four-month delays getting data. So, we underestimate these things. And a little anecdote from, you know, from recent times, I joke in the book that managing dates across the U.S. and the UK is my biggest bugbear because, you know, we struggle, we do it different way around, day and month and all of that. And then how Excel treats it. Is it a text? Is it a date? All of these things. It's little tiny things like that that take months to unpick.

And so, I played a game with ChatGPT a few weeks ago where I asked ChatGPT, please tell me you can solve this. I'm going to give you dates in three different formats. Can you please put them into a single format and get them into a column? Even ChatGPT cannot solve this problem as of today. I say that as a warning, that if you

don't get out in front and get all of your data into a common, consistent format in your underlying database, you are asking for trouble. It has been my experience so far.

BILL YATES: That is so true. A lot of our projects that I worked on were re-platforming. We did a lot of data analysis upfront. You're right. Not a lot of new code was being written. It was basically, let's pull the data up. We need to build interfaces. We need to pull the data out of the old system. And then we have to look at it and see if it makes sense. You know, is this logical? Does the math work?

And that's a great point is think about it in terms of your team and when you're going to need resources because it may surprise you, especially if it's the first time you're doing that type of project. It may surprise you. You need a lot of analysis heavy upfront on the project. Then the coders come in later.

How AI Is Changing Things

KATIE TAMBLIN: Yeah, absolutely. And it's funny, you know, catching up with a lot of former colleagues, I've been asking them, because this is the question I keep getting asked, how is AI changing all of this? And everyone that I have spoken with at kind of chunky corporates have said, "Oh, yeah, AI is brilliant for prototyping. It's brilliant for, like, building example interfaces and all of that. Man, it is terrible at data. Not giving us any wins."

BILL YATES: Right, right.

KATIE TAMBLIN: In pulling, transforming data. So, it will get there, I'm sure; but it's not there today. And so, this is an area where I think chunky corporates, you can view this. Oh my gosh, this is something that's a challenge for us that new companies don't have.

But equally its value. There is value in that data. And that is your differentiation point from a new startup that doesn't have years' worth of user data, years' worth of, you know, software-generated data. So, make sure you treat it with care because it could very well be your competitive edge.

BILL YATES: Yeah.

Encouraging Safe Experimentation

WENDY GROUNDS: So, Katie, in a highly structured organization, how can a project manager encourage experimentation without triggering that fear of failure?

KATIE TAMBLIN: It's tricky in a chunky corporate. And the main reason is because a chunky corporate with that investor oversight is going to be kind of in default mode, more focused on execution over innovation. So, we've got a predictable pattern of generating revenue. We know how it works. We know our customers. Keep executing that, keep generating that predictable revenue. Whereas lean startups are all about innovation because they're trying to build predictable revenue.

So, there can be an assumption that then therefore innovation doesn't work in a chunky corporate, which is not true either. It's about where you innovate. I think the lean startup focuses innovation on finding product market fit. That is not what a chunky corporate is looking for. They have the market identified, they have the product, and they know it fits.

So, then we need to ensure that where we're innovating and experimenting is on the how, not the what. We have the fixed waypoints we talked about previously, you know, in orienteering. We know the features because they already exist. Our customers are

already using them. So, where we want to innovate is in how we build those features, how we rebuild those features, how they might adapt to the persona and the use case, and how the use case is adapting.

So, we want to focus our experimentation within the boundaries that our leadership team and our investment base are comfortable with. And new products, new, exciting, risky, margin-diluting products is probably not the space. Unless you have an explicit mandate from your leadership team, which is great if you do. But if you don't, I would assume that that is not where you want to focus your experimentation.

And I made that mistake tons of times in my product manager career where I was putting forward these, what I thought were fantastic ideas for new products, and they kept getting shot down. And what I realized in retrospect was none of them were going to succeed in convincing our leadership team to unlock resources because they were all unproven and margin-diluting.

If a chunky corporate at the size of organization that I was working at wants to go after a new adjacent product stack, they're going to let a startup prove the market. And then they're going to go buy the startup. So where do you want to experiment? If you are asking your chunky corporate to do that, you will trigger fear of failure. Because they're hearing diluted margins, diluted margins, diluted margins. You want to focus your experimentation on within your customer base.

So how do we just tweak? How can we get a little bit more revenue out of the existing product set? How could we experiment to make the software work better for you, get more embedded in your workflow, do more for you, kind of leave the greenfield to one

side and really, really experiment within your swim lane? And I think that's less likely to trigger that fear of failure.

BILL YATES: That's so good. There are advantages to being a part of a large corporation. And I saw that from both sides. You know, we were small, and then we got acquired by EDS that became a part of HP. But there were benefits to that.

And even down to the level, you know, I complained about the Friday code walkthrough. After I got over my temper tantrum over, you know, this is taking away from my team, wah wah wah, you can't have my resources, then I saw the value in it, and I could see how, okay, we can engage in this. Yeah, let's see if we can change it some so we're using this as efficiently as possible. But man, now we can start to take some of these pain points that our customers have had. And as we're re-platforming, we're going to be able to tackle those.

You know, with processes that are inherently slow, we can speed them up now. Data connections that should be there that are not in our existing system. Now we can use these code walkthroughs to figure out how to make those connections. So, yeah, embrace it and try to work through it to make it better for your team and the corporation.

KATIE TAMBLIN: Absolutely. Well said.

Find Out More

WENDY GROUNDS: Katie, unfortunately we've run out of time, but it has been absolutely fabulous talking to you. If our audience has some questions, and they want to hear more about what you do, where's the best way that they can find you?

KATIE TAMBLIN: The easiest way is on my website, KatieTamblin.com. And the book is called “The Lean-Agile Dilemma,” and you can find it at major book resellers. And I would love to hear from your audience, from anyone who has any questions, reach out to me via my website, please.

BILL YATES: Katie, thank you so much. This has been just a treat. So, thank you for sharing. Anytime somebody can speak from, okay, this is something I struggled with, and here’s how we adjusted and had better results, I know the project managers are going to just lap it up. So, thank you for sharing that. I really appreciate it.

KATIE TAMBLIN: Thank you so much for having me. It’s been absolutely delightful speaking with you both. I really appreciate it.

Closing

WENDY GROUNDS: That’s it for us here on [Manage This](#). Thanks for hanging out with us today. It’s always a pleasure to have you along for the ride. Don’t forget, you can visit us anytime at Velociteach.com to subscribe, catch up on past episodes, or read the full transcript of today’s show.

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