

Let's Get Started!



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- Please use the QR code or link to access the interactive form for today's session.



Dr. Arden Dudek, PMP

President + Principal Planner

Planning Management Consulting LLC

Guiding you and your organization from stormy seas to smooth sailing
with Leadership Agility!



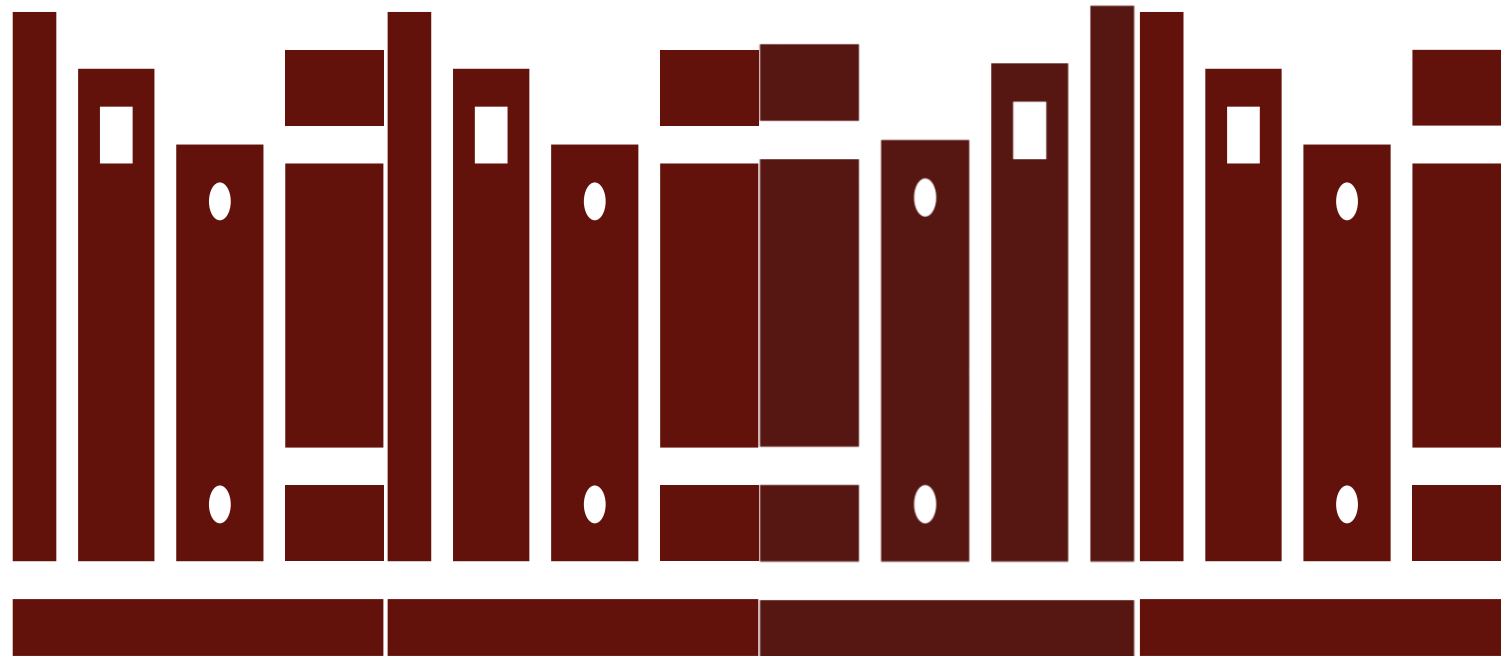
Project Integration Reimagined: Leading with Heart

Dr. Arden Dudek, PMP
Planning Consulting LLC

FWPMI Professional Development Conference 2025
October 10, 2025



What Was Your First “Project Book”?



Charting Our Integration Journey: From Binders to Breakthroughs



Launch Point



Reimagining Integration



Real-World Currents



Anchor Your Insights



Set Sail Forward



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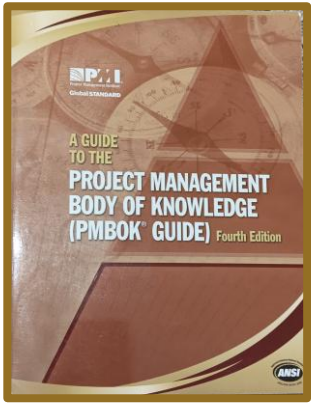
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Integration as Process: A Classic View



Project Integration Management

4.1
Develop
Project
Charter

4.2
Develop
Project
Mgmt
Plan

4.3
Direct &
Manage
Project
Exe-
cution

4.4
Monitor
&
Control
Project
Work

4.5
Perform
Inte-
grated
Change
Control

4.6
Close
Project
or
Phase

Process Groups: *Initiating* *Planning* *Executing* *Monitoring & Controlling* *Closing*

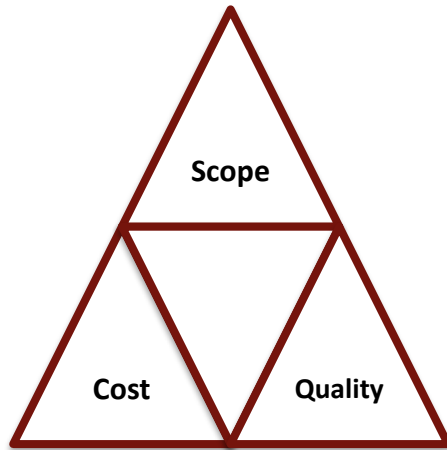
*“Integration felt
like a binder—
not yet a
mindset.”*

- Dr. Arden Dudek, PMP

(PMBOK® Guide, 4th Edition, pp. 71-73)



Leading Through Change: My Integration Story



**IRON
TRIANGLE**



**STAKEHOLDER
MANAGEMENT**



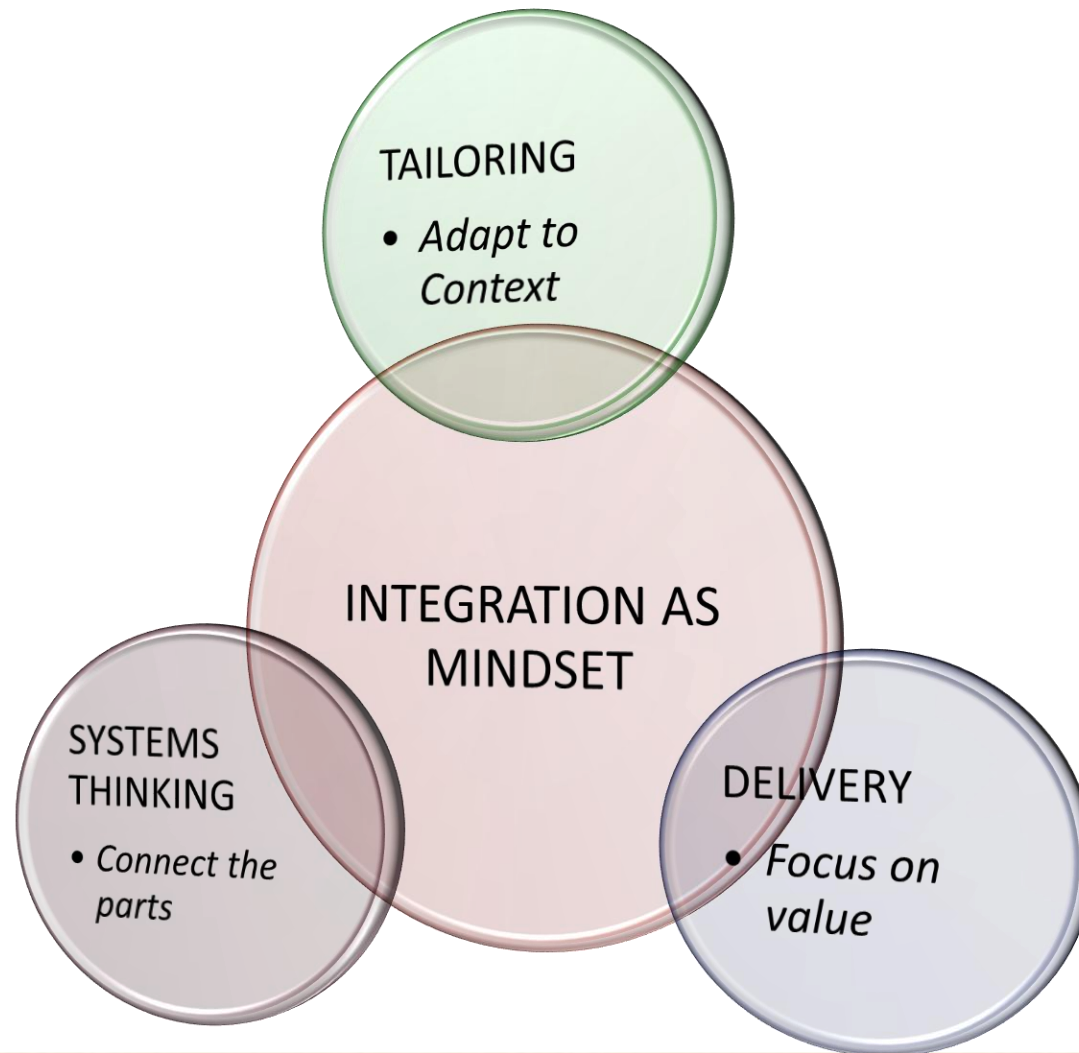
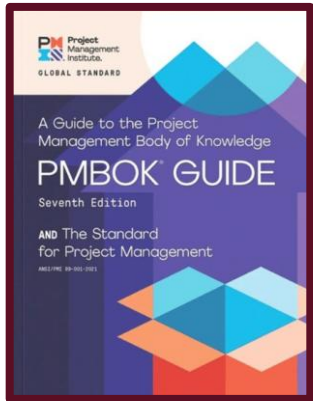
**AGILE MINDSET
SHIFT**



**FRAMEWORK
DEVELOPMENT**



Integration as Engagement: A Modern View



“Integration is no longer just a process—it’s a way of leading.”

- Dr. Arden Dudek, PMP

(PMBOK® Guide, 7th Edition)



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Case Studies







Auto Systems
Breakdown

Merger Intake
Chaos

- **Adapted Scenarios:** Case studies use pseudonyms and are based on real-world scenarios (Dudek, 2024; Dudek, unpublished)
- **Confidentiality Maintained:** Names changed for confidentiality; scenarios align with project management learning objectives.



Integration Lenses from PMBOK®: Let's Look at the Cases

Integration Lens		Maturity Assessment Statement
Stakeholder Engagement		Stakeholders are actively engaged and aligned throughout the project.
Tailoring		Project approaches are adapted to fit the context and evolving needs.
Planning		Planning is iterative, responsive, and aligned with project goals.
Delivery		Outcomes are prioritized and delivered based on stakeholder value.
Measurement		Metrics and feedback loops are used to guide decisions and improvements.
Systems Thinking		Interdependencies across teams, systems, and priorities are well-managed.



Case #1

Auto Systems Breakdown



Introduction:

Auto lender IT integration replacing legacy financial systems with COBOL

Dana (Junior Analyst), Mark (Senior Architect), Elaine (Executive Business Owner), Raj (Systems Engineer)

Challenges:

SDLC binder documentation was unusable from 100 developers

Cross-team gaps
Rigid methods blocked development
Customer raised concerns

Outcomes:

Pivoted methods to process & data modeling
Trained teams
Improved stakeholder collaboration
Cross-team testing
Delivered adaptive multi-year integration

Integration Lens to Consider:

STAKEHOLDER ENGAGEMENT

TAILORING

SYSTEMS THINKING



Case #2

Merger Intake Chaos



Introduction:

Fortune 100 Financial
firm merger IT
projects

Maria (PMO Lead),
Jared (CIO),

Tanya (Agile Coach),
Devon (Business
Analyst)

Challenges:

Agile maturity unclear
No integrated intake
process for M&A and
non-merger project
prioritization

Day One conflicts
emerged

Outcomes:

LEAN intake launched
quickly

Priorities aligned, for
IT teams and the
business

Day One delivery
success in 18 months:
150 IT requests valued
at \$12M

Integration Lens to Consider:

PLANNING

DELIVERY

MEASUREMENT



Case Study Group Work

5:00

 **Apply what you've learned.**



Case Studies

Let's Discuss!



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Integration Lens :

STAKEHOLDER ENGAGEMENT

Communication bridge

TAILORING

Pivoted development methods

SYSTEMS THINKING

Managed Interdependencies



Case #2

Merger Intake Chaos



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Integration Lens:

PLANNING

Iterative process with
stakeholders

DELIVERY

Prioritized high-value
work

MEASUREMENT

Transparent tracking &
decision-making



Two Eras. One Mindset.



Stayed the Same OR Evolved?

Stakeholder Engagement



Tailoring



Planning



Delivery



Measurement



Systems Thinking



Want to go deeper? Download both Case Studies at the end of the survey.



From Best Practices to Better Leadership: Two Frameworks for Change



SERVE™ Framework - Values-Based Planning and Execution

- **Solve** – Co-create solutions that address real needs
- **Evaluate** – Reflect and assess progress meaningfully
- **Respect** – Foster psychological safety and honor diverse perspectives
- **Value** – Align priorities with stakeholder needs and purpose
- **Execute** – Deliver results with integrity and adaptability

A flexible, values-based framework rooted in Agile, Lean, and systems thinking. Designed to guide planning maturity and stakeholder alignment.

Supports leaders navigating change, building trust, and adapting across predictive, Agile, and hybrid environments.

Leadership Agility™ Framework - Adaptive Leadership

- **Growth Mindset** – Learn through challenge
- **Values-Based Leadership** – Make ethical, people-centered decisions
- **Agile Integration** – Respond with flexibility
- **Emotional Capacity** – Lead with empathy and awareness
- **Strategic Visioning** – Align long-term goals with execution

Frameworks applied in PMO consulting, strategic planning, and professional speaking engagements at UT Dallas, PMI Conferences, and regional leadership forums.



Charting Our Integration Journey: From Binders to Breakthroughs



Launch Point



Reimagining Integration



Real-World Currents









Anchor Your Insights



Set Sail Forward



 *Using what you've learned from the Case Studies, rate how well YOUR teams demonstrates the Integration Lenses using the **1-5 survey scale**.*

Integration Lens		Scale: 1 = Rarely 2 = Occasionally 3 = Sometimes 4 = Often 5 = Consistently	Maturity Assessment Statement
Stakeholder Engagement			Stakeholders are actively engaged and aligned throughout the project.
Tailoring			Project approaches are adapted to fit the context and evolving needs.
Planning			Planning is iterative, responsive, and aligned with project goals.
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Next Steps: Apply an Integration Mindset with Your Teams



🧩 *What's one way you can be more intentional about serving your teams and stakeholders "with heart"?*



Neighbor Share: Exchange one action item to better serve your teams.



Charting Our Integration Journey: From Binders to Breakthroughs



Launch Point



Reimagining Integration



Real-World Currents



Anchor Your Insights



Set Sail Forward



From Binders to Breakthroughs: Set Sail Forward



*Spinnaker sails only move forward—
and only with the right winds.*

So does integration leadership.



Apply what you've learned.

Download the slide deck and the two case studies to
continue your journey.



Let's Get Started!



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We'd Love Your Feedback!



-  **Final Survey Questions:** Your insights help us improve future workshops and serve your organization.

 **Thank You for Your Engagement!**

Now, we'd love your feedback on today's session.
Please rate the following aspects of Dr. Arden's presentation
Use 5 stars for Absolutely! and 1 star for Not at all.

-  = Absolutely!
-  = Not at all



About the Presenter



Dr. Arden Dudek, PMP

President + Principal Planner

Planning Management Consulting LLC

Guiding you and your organization from stormy seas to smooth sailing with Leadership Agility!



INDUSTRIES

- Entrepreneurial Consulting
- Financial Services, Banking, Mortgage
- IT, Info Security, AI
- Higher Education
- Education & Non-Profits

ROLES

- Fractional CxO Services & Advisory Board Member
- Founder & Director of PMOs
- Global / Fractional Executive Coach & Planning Director
- Program / Project Manager
- School Board President, Principal K-12

CERTIFICATIONS

- PMP, PMI-ACP
- Scaled Agile (SAFe) Practice Consultant
- John Maxwell Leadership Certified Team (MLCT)
- DISC Certified
- Advanced French Language

PMI CONTRIBUTIONS

- Contributor, PMBOK 4th ed.
- Presenter, UT Dallas PM Symposium
- Presenter, PMI Educational Foundation
- PMP Prep Instructor

Let's Start Planning Today!

I work with organizations to clarify strategies, prioritize projects, and build teams of servant leaders.

Connect with me to explore how we can achieve your goals together.

[LinkedIn: ardendudek](#)

ArdenDudek@PlanningMgmtConsulting.com



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Design & Content Support

This presentation includes author-owned visuals, Microsoft PowerPoint stock images, and adapted references from PMI.org. Microsoft Copilot (GPT-4) was used to support layout design, phrasing refinement, and formatting consistency.



Further Exploration: **SERVE™** as an Integration Leadership Framework

- ❖ As mentioned earlier, **SERVE™** is one of the frameworks I've developed to support integration leadership.
- ❖ The following appendix slides offer deeper alignment between **SERVE™** and the **PMI PMBOK®** Knowledge Areas and Agile Principles.
- ❖ These are included for PMO leaders and Agile practitioners who download the deck and want to explore how **SERVE™** can support planning maturity, stakeholder engagement, and adaptive leadership.



- ❖ *Let's connect if you'd like to explore how **SERVE™** could support your team's integration journey.*



Integration as Process: The Classic View

These frameworks offer powerful tools—but they can be complex to navigate.



PMBOK® Knowledge Areas

Management of:

1. Integration
2. Scope
3. Schedule
4. Cost
5. Quality
6. Resource
7. Communications
8. Risk
9. Procurement
10. Stakeholder








Agile Manifesto Principles (Condensed)

1. Customer satisfaction through early and continuous delivery
2. Welcome changing requirements
3. Deliver working software frequently
4. Daily collaboration between business and developers
5. Build projects around motivated individuals
6. Face-to-face conversation is best
7. Working software is the primary measure of progress
8. Sustainable development pace
9. Continuous attention to technical excellence
10. Simplicity—the art of maximizing work not done
11. Self-organizing teams
12. Regular reflection and adjustment (Dweck, 2001a)

SERVE™ helps leaders stay focused on what matters most –by simplifying complexity and aligning actions across frameworks.








Mapping SERVE™ to PMBOK® Knowledge Areas

SERVE™ Guidepost	PMBOK® Knowledge Area Alignment	Why It Aligns
 SOLVE	Integration, Scope, Time, Stakeholder	Metrics, financials, feedback loops, and continuous improvement.
 EVALUATE	Quality, Cost, Risk, Communications	Metrics, financials, feedback loops, and continuous improvement.
 RESPECT	Human Resources, Stakeholder, Communications	Psychological safety, honoring commitments, and inclusive engagement.
 VALUE	Integration, Lessons Learned, Procurement	Stewardship of resources, celebrating progress, and learning from outcomes.
 EXECUTE	Integration, Time, Quality, Procurement	Purposeful delivery, iterative progress, and aligned execution.



Mapping SERVE™ to Agile Principles

SERVE™		
Guidepost	Agile Principle Alignment	Why It Aligns
 SOLVE	<p>“Welcome changing requirements,”</p> <p>“Business people & developers work together daily”</p>	Emphasizes co-creation, alignment, and collaboration across systems.
 EVALUATE	<p>“Working [outputs] measure of progress,”</p> <p>“Continuous attention to technical excellence”</p>	Focus on feedback, metrics, and iterative learning.
 RESPECT	<p>“Build projects around motivated individuals,” “Give them the environment and support they need”</p>	Fosters psychological safety, inclusion, and stakeholder respect.
 VALUE	<p>“Simplicity—the art of maximizing the amount of work not done is essential”</p>	Encourages stewardship, learning, and meaningful progress.
 EXECUTE	<p>“Deliver working [output] frequently,”</p> <p>“Sustainable development”</p>	Drives fast, aligned, and purpose-driven delivery.

(Dweck, 2001a)

