



PLANVIEW DAY 2022 ROADSHOW

LONDON | 16th June

Transformation to a Hybrid Portfolio

Johan Krüger, Solution Owner
Project & Portfolio
Management

Inter IKEA Group



This is IKEA





1943

A photograph of three children playing on a dark blue sofa in a living room. One child is sitting on the sofa, while two others are standing on it. The scene is brightly lit, and the overall atmosphere is warm and family-oriented.

Our vision

To create a better everyday life
for the many people

A hand is holding a bright yellow clock face with a black hand. The clock is positioned in the center-left of the frame. The background is a soft-focus indoor setting with a white wall, a green plant in a glass vase, and a white surface.

Our business idea

To offer a wide range of well-designed,
functional home furnishing products at
prices so low that as many people as
possible
will be able to afford them

IKEA Franchise system and value chain



The first store was opened in Älmhult, Sweden 1958



IKEA Museum Älmhult

Visit us →



Open today 10:00-18:00

IKEA Museum Digital

Explore now →

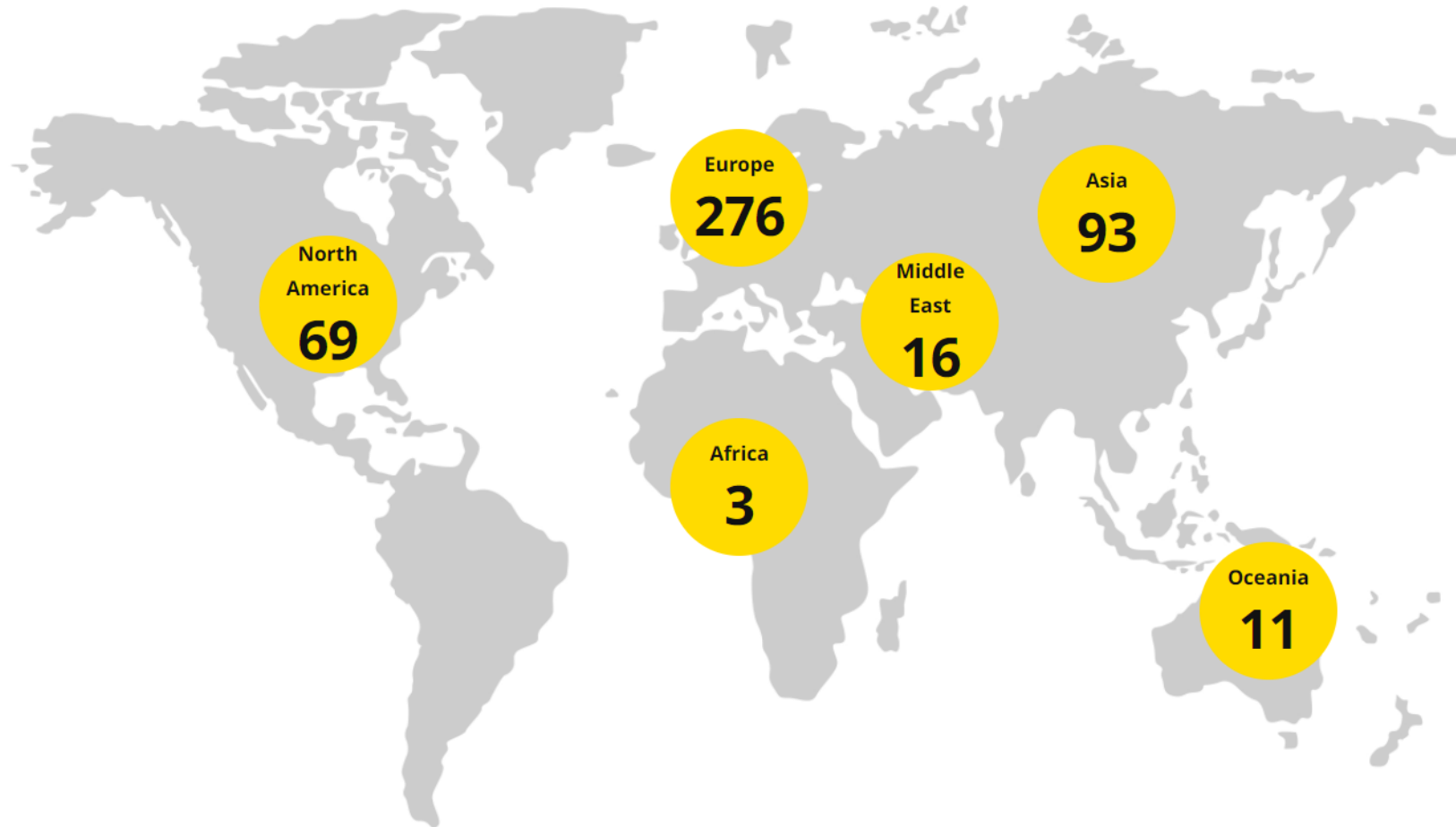


Always open

<https://ikeamuseum.com/en/>

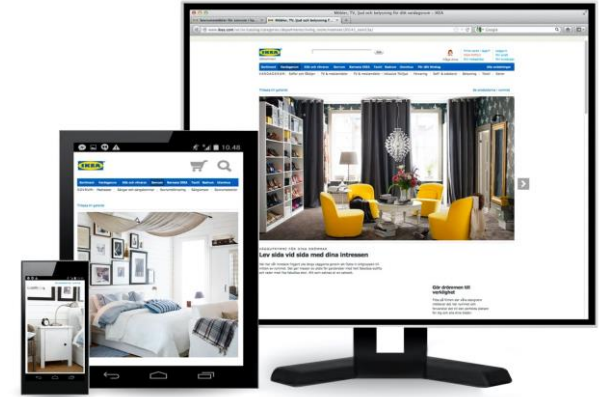
468 IKEA stores in 63 markets

Updated: 25 May 2022.



- **The first** IKEA store opened in 1958 in Älmhult, Sweden.
- **The latest** IKEA store to open is Toronto (Aura), Canada.
- Germany has **the most** IKEA stores in the world.
- **The biggest** IKEA store is Pasay City, Philippines.

“Total market approach” across all IKEA markets

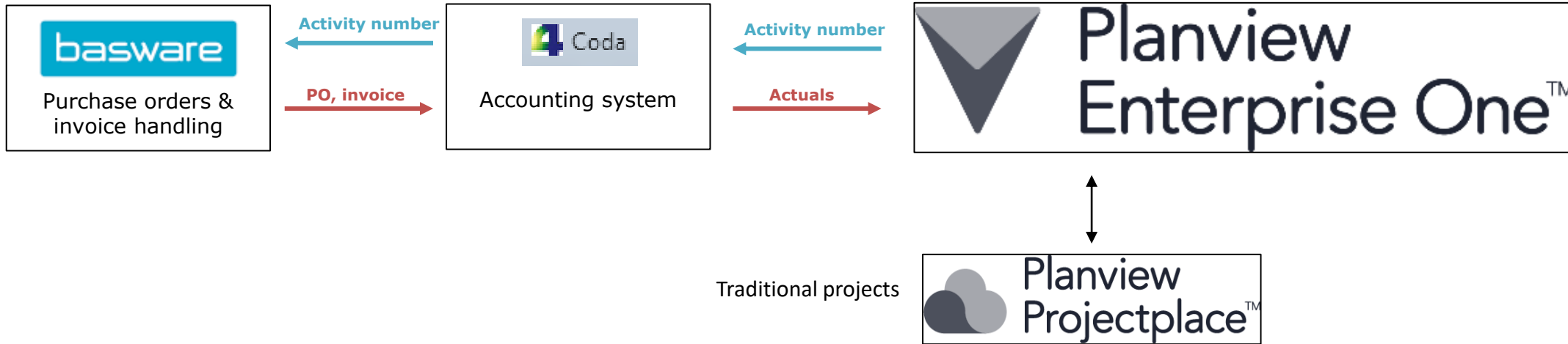




Our Planview journey

- 2012 implemented Planview Enterprise
- 2017 Planview on-premise -> SaaS
- 2017 integrated Planview E1 with Projectplace
- 2017 integrated Planview E1 with CODA (Accounting system)

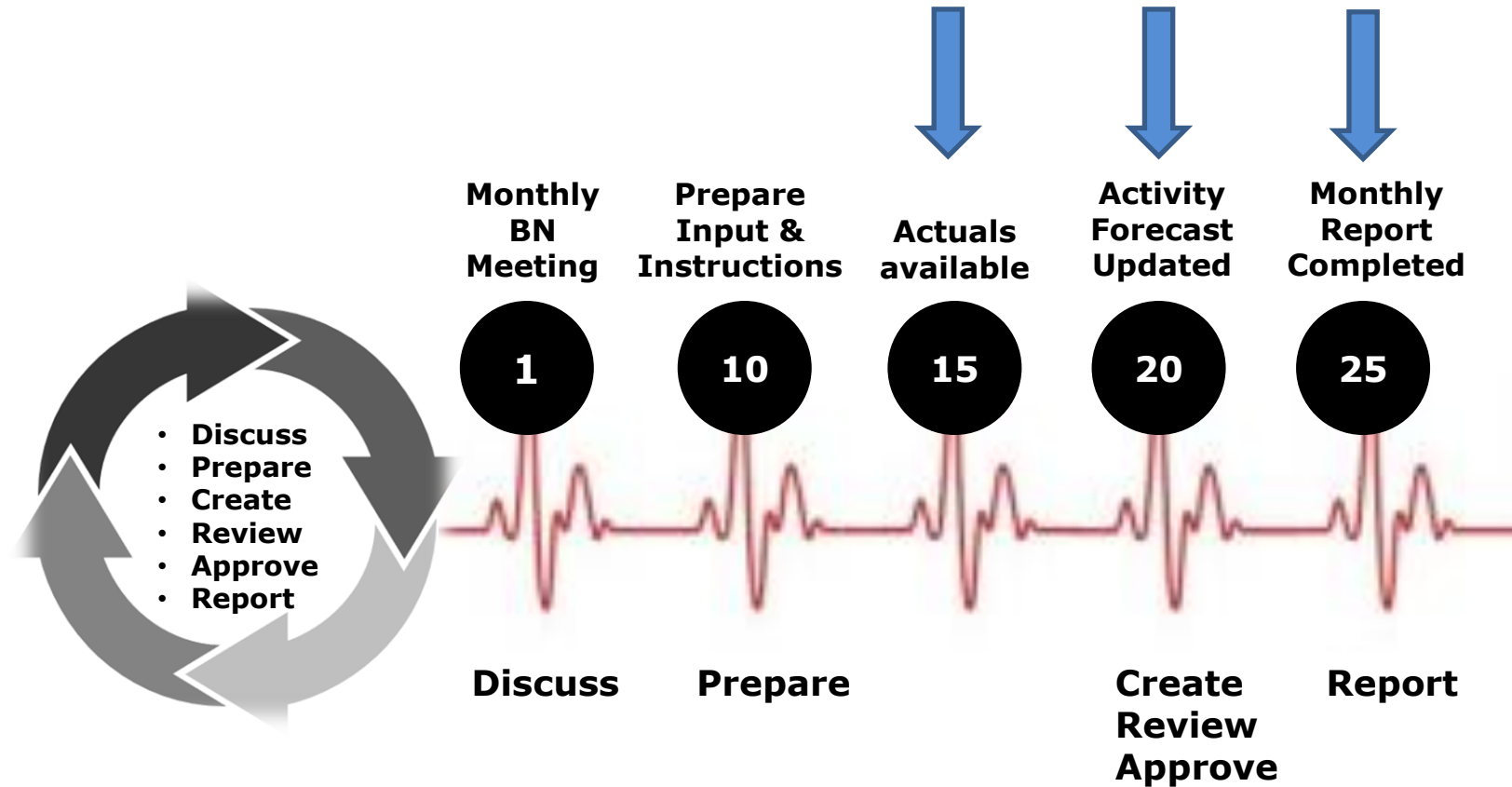
Integrated solutions



400 Excel sheets – One management report



Monthly Forecasting & Reporting - Heartbeat Model



		Financial screen												
		Actuals / Forecast (forecast)												
		Financial Planning Model												
		Activity Financial												
		Working Version												
		Actuals / Forecast (forecast)												
		Display Variance with Comparison Version												
		<input type="checkbox"/> Off <input checked="" type="checkbox"/> On												
		Comparison Version												
		FC FY21 #08 APR												
		FC FY20 #10 JUN												
		FC FY20 #11 JUL												
		FC FY20 #12 AUG												
		FC FY21 #01 SEP												
		FC FY21 #02 OCT												
		FC FY21 #03 NOV												
		FC FY21 #04 DEC												
		FC FY21 #05 JAN												
		FC FY21 #06 FEB												
		FC FY21 #07 MAR												
		FC FY21 #08 APR												
Activity: Payment IJHK	EUR				-€11K	€11K				-€2K	-€3K	-€3K	-€3K	-€3K
Benefit	EUR													
Labour	EUR													
Expense	EUR				€11K	-€11K			€2K	€3K	€3K	€3K	€3K	
Marketing & Communication	EUR													
Business Consultants	EUR													
IT Consultants	EUR													
IT Services	EUR				€11K	-€11K			€2K	€3K	€3K	€3K	€3K	€
4101 IKEA of Sweden AB	EUR				€11K			€2K						
5100 IKEA Supply AG	EUR								€3K	€3K	€3K	€3K	€	
Production and print	EUR													
Software & licenses	EUR													
External services	EUR													
Rental property & maintenance	EUR													
Other operating expenses	EUR													
Other	EUR													
Travel	EUR													
Capital	EUR													
IT Hardware	EUR													
Equipment	EUR													
Receiving cost	EUR													
Recurring cost	EUR													

4101 IKEA of Sweden AB
5100 IKEA Supply AG

Actuals / Forecast per Company

€11K

We have an integration with our accounting system and import actuals via the Expenditures on a daily basis.
Actuals is loaded once per month into this financial

- FC FY20 #10 JUN
- FC FY20 #11 JUL
- FC FY20 #12 AUG
- FC FY21 #01 SEP
- FC FY21 #02 OCT
- FC FY21 #03 NOV
- FC FY21 #04 DEC
- FC FY21 #05 JAN
- FC FY21 #06 FEB
- FC FY21 #07 MAR
- FC FY21 #08 APR

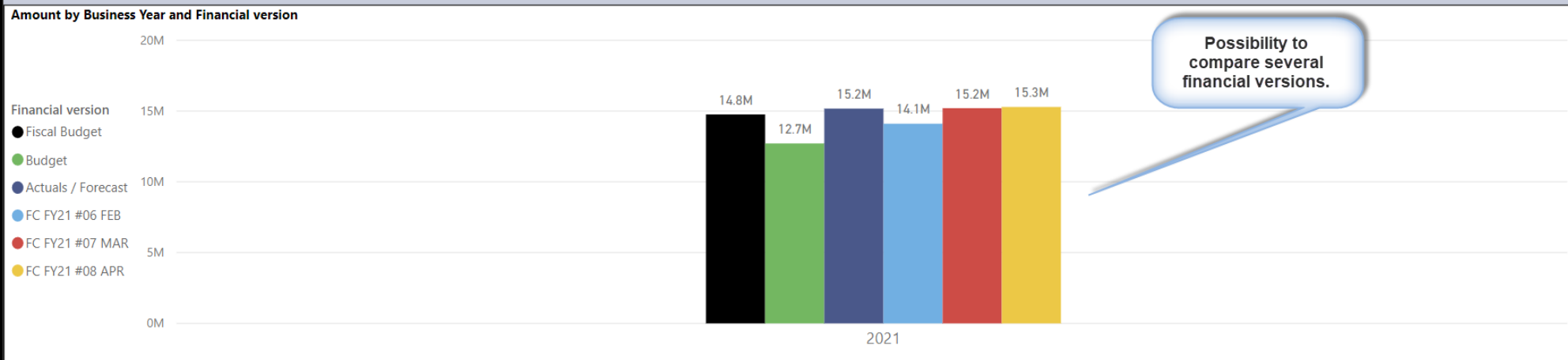
We save a monthly forecast version

Digital dev cost | more ... |

This report is updated 05:00, 09:00, 13:00, 17:00, 21:00

Program financial comparison

Reset | Access the filter pane to the right ->



Filters

Search

Filters on this page

- Financial version**
is Fiscal Budget, Budget, Actuals / Forecast, FC FY21 #06 FEB, FC FY21 #07 MAR, or FC FY21 #08 APR
- Business Year**
is 2021
- Ordering Organisation
is (All)
- Ordering Unit
is (All)
- Decision Forum
is (All)
- Strategy
is (All)
- Three Roads
is (All)
- Program Name
is (All)
- Program Status
is (All)
- Program Phase
is (All)
- Company
is (All)
- Account Group
is (All)
- Account
is (All)
- Tertial
is (All)
- Month
is (All)

Ordering Unit	Account Group	Fiscal Budget	Budget	Actuals / Forecast	FC FY21 #06 FEB	FC FY21 #07 MAR	FC FY21 #08 APR
Total		14,762K	12,712K	15,173K	14,106K	15,204K	15,290K
Marketing & Communication	Total	2,250K	2,250K	3,968K	2,250K	3,451K	3,968K
	Expense	2,250K	2,250K	3,968K	2,250K	3,451K	3,968K
RPD P&ITT	Total	2,104K		1,101K	1,545K	1,221K	1,101K
	Expense	2,104K		1,091K	1,536K	1,212K	1,091K
	Labour			10K	9K	10K	10K
SCD Area Intralogistics	Total	6,334K	6,388K	6,178K	6,190K	6,297K	6,295K
	Expense	6,334K	6,388K	6,178K	6,190K	6,297K	6,295K
SCD Area Sourcing	Total	3,380K	3,380K	3,141K	3,233K	3,432K	3,141K
	Expense	3,380K	3,380K	3,141K	3,233K	3,432K	3,141K
SCD Technology	Total	694K	694K	786K	888K	804K	786K
	Expense	694K	694K	786K	888K	804K	786K

Digital dev cost | more ...

Analyze

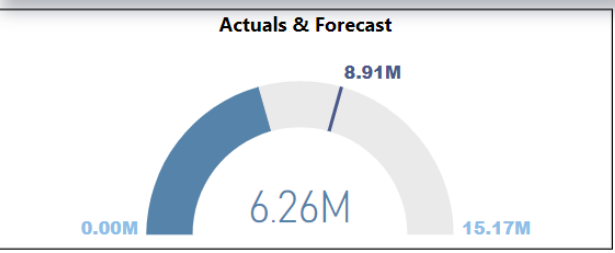
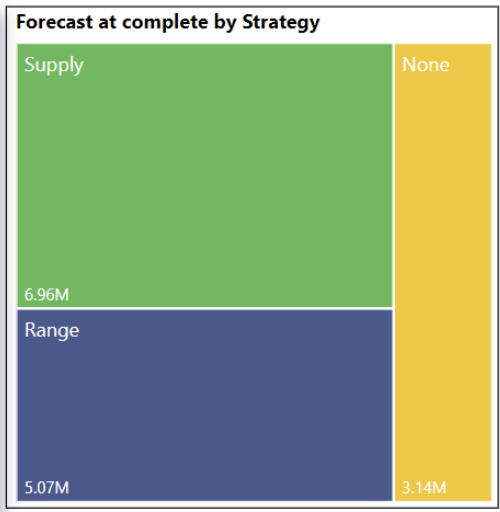
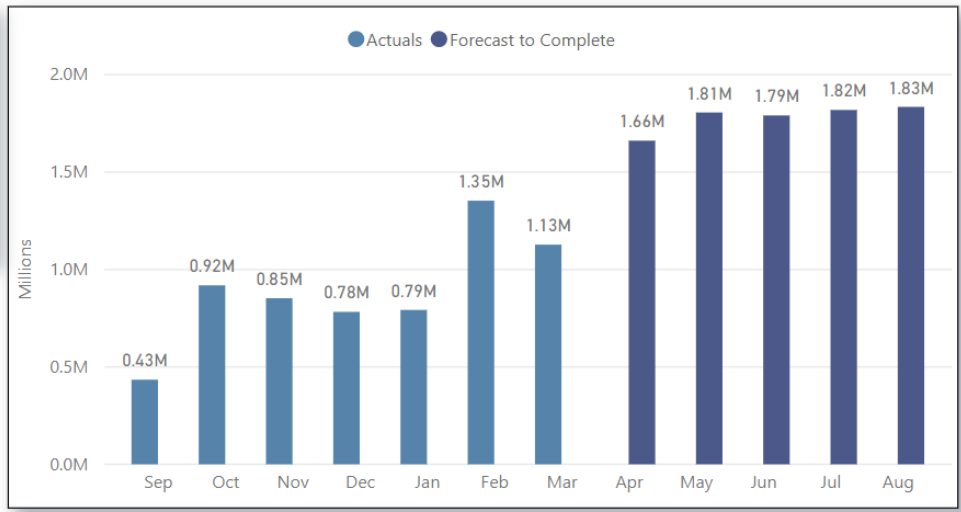
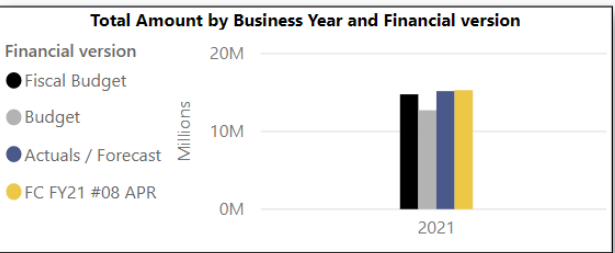
This report is updated 05:00, 09:00, 13:00, 17:00, 21:00

Programs - Month view

Reset

Access the filter pane to the right ->

Filters | Search



- Filters on this page
- Financial version is Fiscal Budget, Budget, Actuals / Forecast, or FC FY21 #08 APR
 - Business Year is 2021
 - Ordering Organisation is (All)
 - Ordering Unit is (All)
 - Decision Forum is (All)
 - Strategy is (All)
 - Three Roads is (All)
 - Program Name is (All)
 - Program Status is (All)
 - Program Phase is (All)
 - Company is (All)
 - Account Group is (All)
 - Account is (All)
 - Tertial is (All)
 - Month is (All)

Ordering Unit	Program	Company	Account Group	Account	Fiscal Budget	Budget	Actuals / Forecast	FC FY21 #08 APR
Total					14,762,190	12,711,934	15,173,383	15,290,383
Marketing & Communication	Total				2,250,000	2,250,000	3,968,190	3,968,190
	3D Initiative	4101 IKEA of Sweden AB	Total		2,250,000	2,250,000	3,968,190	3,968,190
			Expense	IT Consultants	2,250,000	2,250,000	2,271,826	2,271,826
				IT Services			1,027,453	1,027,453
				Marketing & Communication			356,402	356,402
				Other operating expenses			312,509	312,509
RPD P&ITT	Total				2,104,000		1,100,681	1,100,681
	Type C		Total				2,223	2,223
			Labour	Labour			2,223	2,223
		4101 IKEA of Sweden AB	Total		2,104,000		1,098,458	1,098,458
			Expense	External services			140,000	140,000
				IT Consultants	95,000		187,123	187,123
				IT Services	2,009,000		461,386	461,386
				Software & licenses			302,277	302,277
				Travel			238	238
			Labour	Labour			7,433	7,433

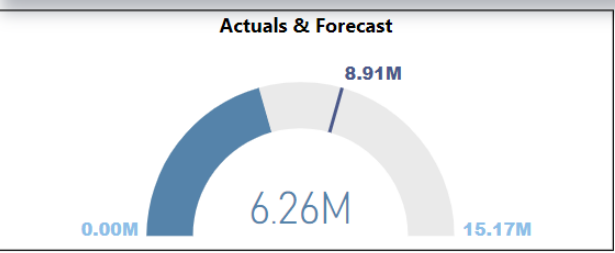
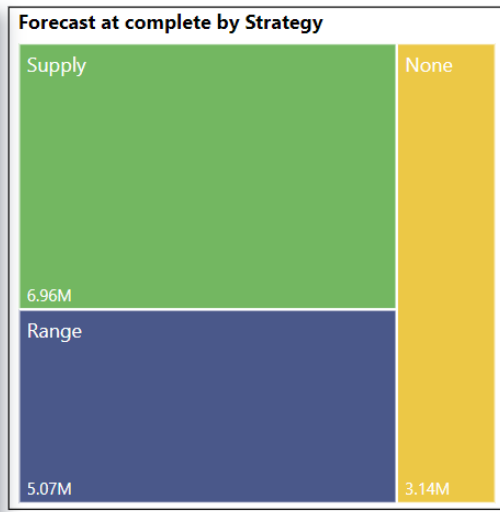
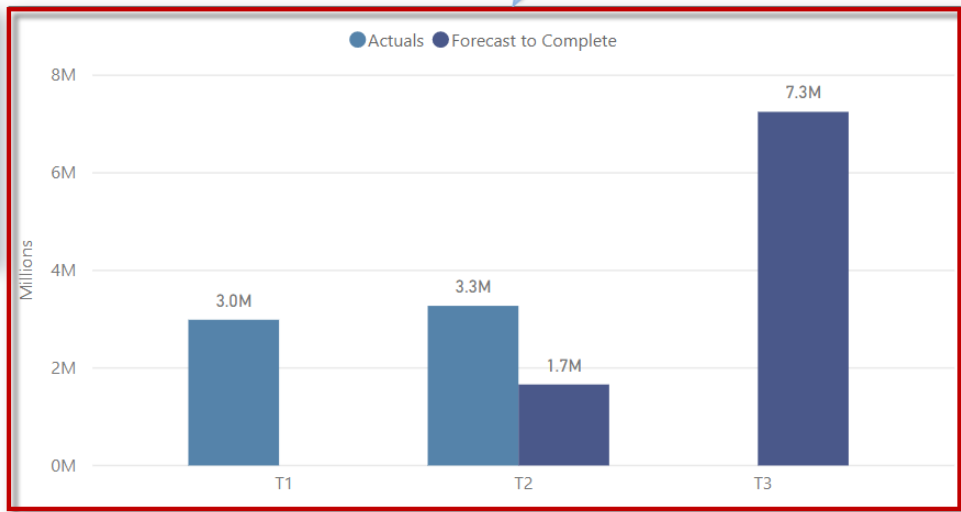
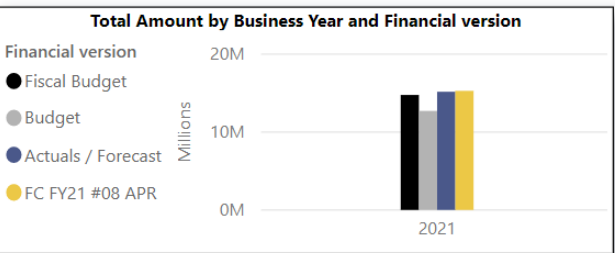
Digital dev cost | more ...

Analyze

This report is updated 05:00, 09:00, 13:00, 17:00, 21:00

In IKEA we do not work with quarters, we use Tertials

[Reset](#) Access the filter pane to the right ->



Filters

Search

Filters on this page

- Financial version is Fiscal Budget, Budget, Actuals / Forecast, or FC FY21 #08 APR
- Business Year is 2021
- Ordering Organisation is (All)
- Ordering Unit is (All)
- Decision Forum is (All)
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- Program Name is (All)
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- Account Group is (All)
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Digital dev cost
more ...

Count of Program by Overall status



5
Count of Program

[Reset](#)

For more details:
Right click on the name of one Program and select: **Drill through -> Program details**

Filters

Search

Filters on this page

- Overall Status is (All)
- Program Status is (All)
- Reporting Period is (All)

Program Name	Program Responsible	Overall Status	Reporting Period	Cost	Schedule	Results	Resources	Benefits	Program Status Comment
3D Initiative	Jonatan Citron	▲	Mar 2021	●	▲	●	●	●	Lorem ipsum dolor sit amet, consectetur adipiscing elit, Aliquam ornare wisi eu metus, Etiam dui sem, fermentum vitae, sagittis id, malesuada in, quam.
Logistics D	Christian Nordström	▲	Apr 2021	●	▲	▲	▲	▲	Lorem ipsum dolor sit amet, consectetur adipiscing elit, Aliquam ornare wisi eu metus, Etiam dui sem, fermentum vitae, sagittis id, malesuada in, quam.
Sourcing B		◆	Apr 2021	▲	◆	◆	◆	▲	Lorem ipsum dolor sit amet, consectetur adipiscing elit, Aliquam ornare wisi eu metus, Etiam dui sem, fermentum vitae, sagittis id, malesuada in, quam.
Technology A	Dan Carlsson	●	Apr 2021	▲	●	●	●	●	Lorem ipsum dolor sit amet, consectetur adipiscing elit, Aliquam ornare wisi eu metus, Etiam dui sem, fermentum vitae, sagittis id, malesuada in, quam.
Type C	Steve Baxter	●	Apr 2021	●	●	●	●	●	Lorem ipsum dolor sit amet, consectetur adipiscing elit, Aliquam ornare wisi eu metus, Etiam dui sem, fermentum vitae, sagittis id, malesuada in, quam.

- Show as a table
- Drill through ▶ **Program details**
- Copy ▶

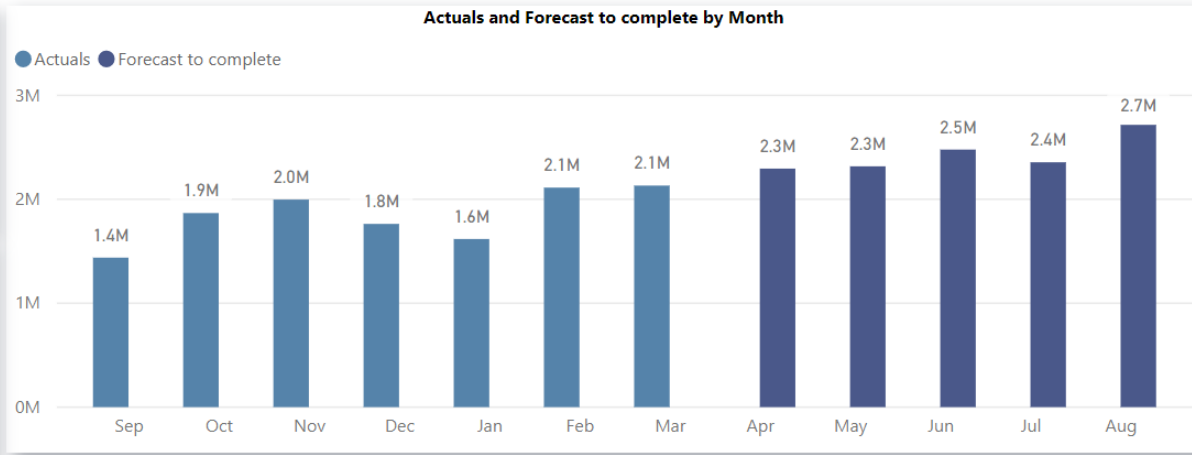
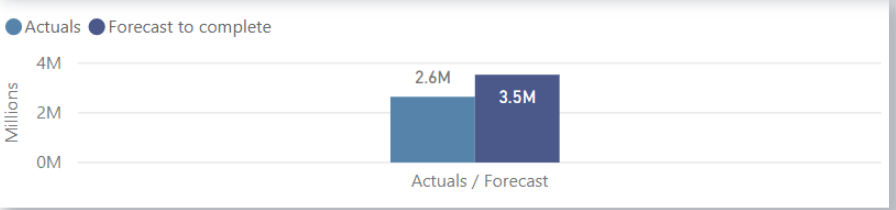
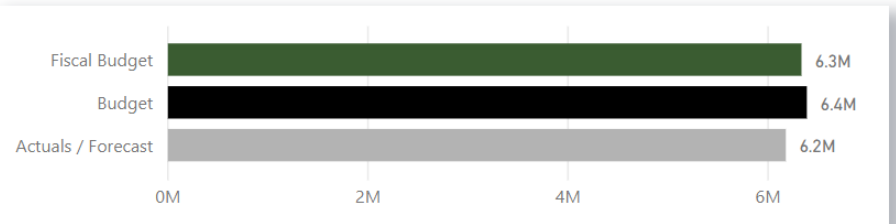
Right-click and drill through for further details

Digital dev cost | more ...

Program details

← Click here to go back

Program Name	Program Description	Program Status	Business Case Owner	Program Responsible	Overall status	Reporting Period	Cost	Schedule	Results	Resources	Benefits
Logistics D	SCD Intralogistics D Frame	Approved	T.B.C	Christian Nordström	▲	Apr 2021	●	▲	●	▲	▲

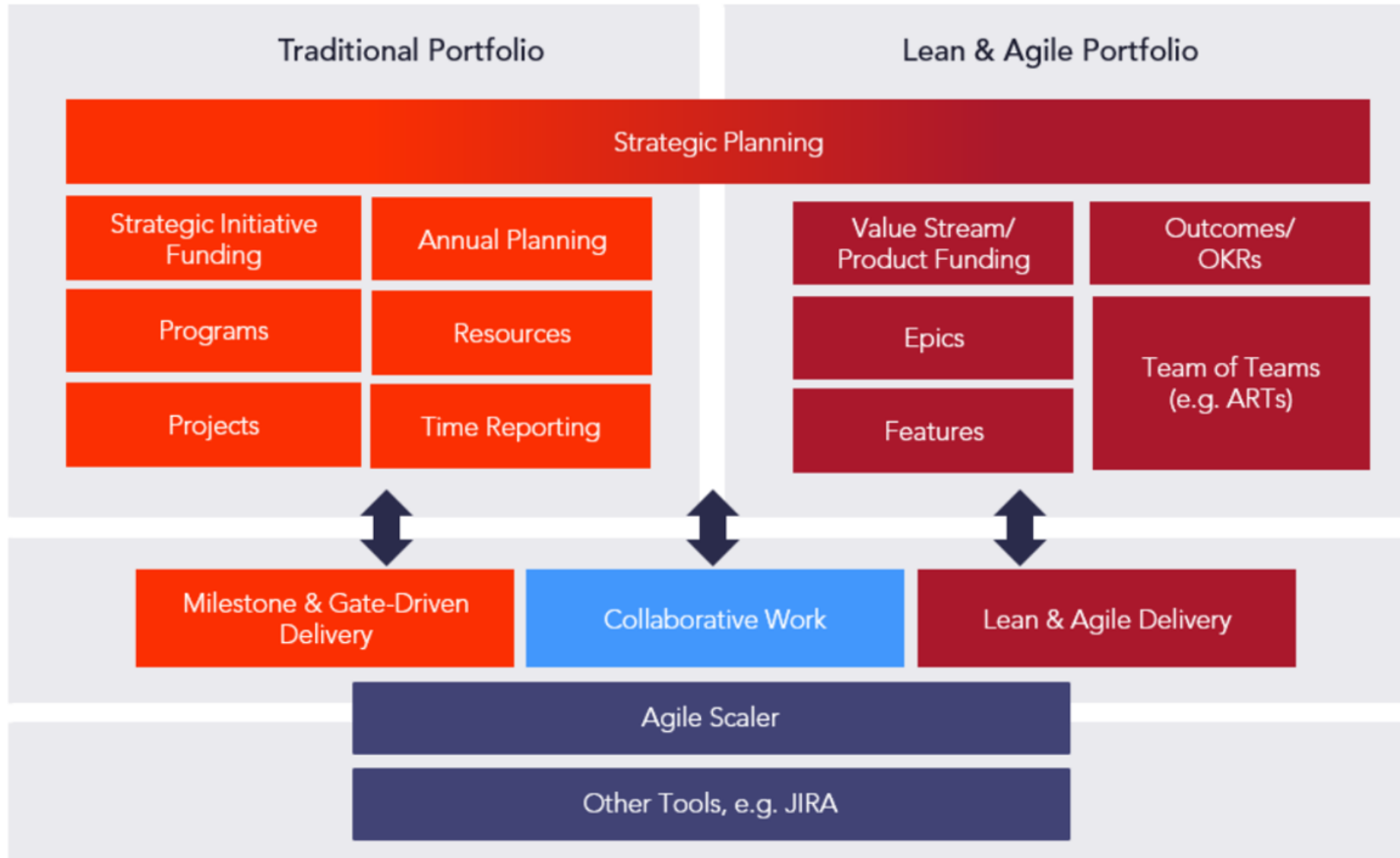


Program status comment	What has happened, deliverables?	What happens next?	What does not work, help needed?
<p>Lorem ipsum dolor sit amet, consectetur adipiscing elit, Aliquam ornare wisi eu metus, Etiam dui sem, fermentum vitae, sagittis id, malesuada in, quam.</p>	<p>Lorem ipsum dolor sit amet, consectetur adipiscing elit, Aliquam ornare wisi eu metus, Etiam dui sem, fermentum vitae, sagittis id, malesuada in, quam, Lorem ipsum dolor sit amet, consectetur adipiscing elit, Aliquam ornare wisi eu metus, Etiam dui sem, fermentum vitae, sagittis id, malesuada in, quam,</p>	<p>Lorem ipsum dolor sit amet, consectetur adipiscing elit, Aliquam ornare wisi eu metus, Etiam dui sem, fermentum vitae, sagittis id, malesuada in, quam, Lorem ipsum dolor sit amet, consectetur adipiscing elit, Aliquam ornare wisi eu metus, Etiam dui sem, fermentum vitae, sagittis id, malesuada in, quam,</p>	<p>Lorem ipsum dolor sit amet, consectetur adipiscing elit, Aliquam ornare wisi eu metus, Etiam dui sem, fermentum vitae, sagittis id, malesuada in, quam, Lorem ipsum dolor sit amet, consectetur adipiscing elit, Aliquam ornare wisi eu metus, Etiam dui sem, fermentum vitae, sagittis id, malesuada in, quam,</p>

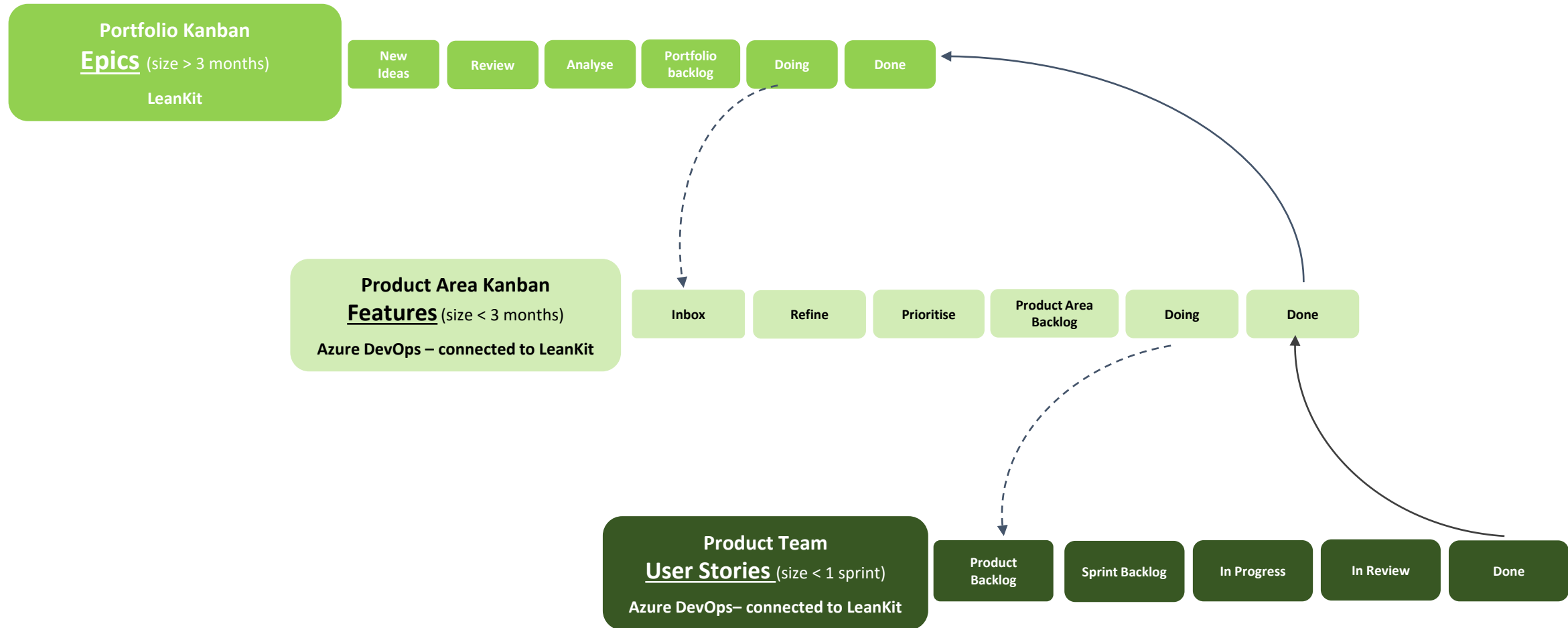
A person is holding a dark grey, 3D printed object with a complex, faceted, bowl-like shape. In the background, a laptop is open on a desk, displaying a CAD software interface with a 3D model of the same object. The interface includes various toolbars and a central workspace. A person's hands are visible, one on the laptop keyboard and the other on a mouse. The scene is set in a bright, modern office environment with a large green plant in the background.

Become more Agile

Hybrid Portfolio



One process – 3 levels



Planview® Enterprise One

Portfolio

Epic
Priorities
Target Dates

Status
Work Metrics
Exceptions & Blockers

Planview® LeanKit

Portfolio "Epics"

Portfolio - OKR

Product area "Features"

Team Board "User Stories"

Team Board "User Stories"

Product Area - OKR

Team - OKR

Azure DevOps

Features & Stories
Priorities

Lane - Workflow State
Comments & Attachments

LeanKit – Portfolio (traditional projects & Epics)

The screenshot displays the LeanKit software interface for a project portfolio. The top navigation bar includes the LeanKit logo, 'Portfolio', and 'CSF Portfolio'. A 'New Card' button is visible on the left. The main workspace is divided into several columns:

- TO-DO:** A vertical list of project cards on the far left.
- REVIEW:** A large central area containing a grid of project cards, organized into sub-columns like 'Traditional (APL One-Page)' and 'Agile (1st part Le...'. Each card features a title, a progress indicator (a circle with a percentage), and a color-coded status.
- ANALYZE:** A column on the right of the REVIEW section, containing cards for 'Business Prop 10', 'Business Prop 11', and 'Business Prop 12'.
- BACKLOG (APPROVALS):** A column on the far right, showing a list of project cards with status indicators such as 'Pending AP approval'.

The interface is densely packed with information, using various colors (green, orange, purple) and icons to represent different project states and priorities. A search bar and other utility icons are located in the top right corner.

Product Area (Features)

The screenshot displays a Kanban board in Planview LeanKit, organized into three main columns: **NOT STARTED** (TO-DO), **STARTED** (DOING), and **FINISHED** (DONE). The board is divided into two horizontal sections for different product teams.

Product Team: New People Line

- TO-DO:** Tasks are categorized into 'New / Inbox', 'Refine', 'Prioritize', and 'Product backlog'. Tasks include 'Multiple approach to develop qualitative research', 'Create Range Determining based Business Planning', 'Consumer-centric product category definitions', and 'Test new approach to value streams and product value'.
- DOING:** Tasks are in progress, including 'NPI, Nonclinical Study second phase', 'Healthy & Sustainable Living J122', 'Health and healthy living research', 'Open Home platform development', 'Open Home platform rollout', 'NPI, insight proof of concept', 'NPI, insight narrative', and 'NPI product definition'.
- DONE:** Tasks are completed, such as 'Secure 3rd perspective in the', 'Working L&A on Home Insights', 'Future using a continuous approach to research', 'Software approach to quantitative panel research', 'New People Line Product Definition', and 'Agile Transformation'.

Product Team: Brand Pulse

- TO-DO:** Tasks include 'Define the relationship CR and brand health data (with Pulse/CI)', 'Brand & Marketing Communication Testing Frameworks', 'Developing IP dashboard in Power BI', 'Assess value of social listening data in', 'Assess value of search data in', 'Prepare for incoming survey data (P/C)', 'Develop QC Dashboard in', 'Develop Range Deep Dive method', 'Define consumer metrics for Range Performance Frameworks', 'Activate Brand & Range perception', 'Recurring Brand & Range perception insights delivery', 'Insights from Social & Search analytics capabilities', 'Breakthrough L&A support', 'Range Perception P/C2', 'Support exploration of B2B brands Swedish heritage', 'Brand Capital P/C2', and 'Brand & Marketing Review'.
- DOING:** Tasks include 'Brand Capital P/C2', 'Range Perception P/C2', 'Insights for Brand Performance review', 'Developing Brand Only Insights for P/C', and 'Design & Launch Proof of Concept of'.
- DONE:** A task 'Design Proof of Concept for product' is listed under 'Started but not Finished'.

The interface includes a top navigation bar with 'Planview LeanKit', 'Product Area', and 'Brand & Range'. A 'New Card' button is visible in the top left. The bottom right corner features a search bar, a '100%' zoom level, and a play button icon.

Team board (User stories)

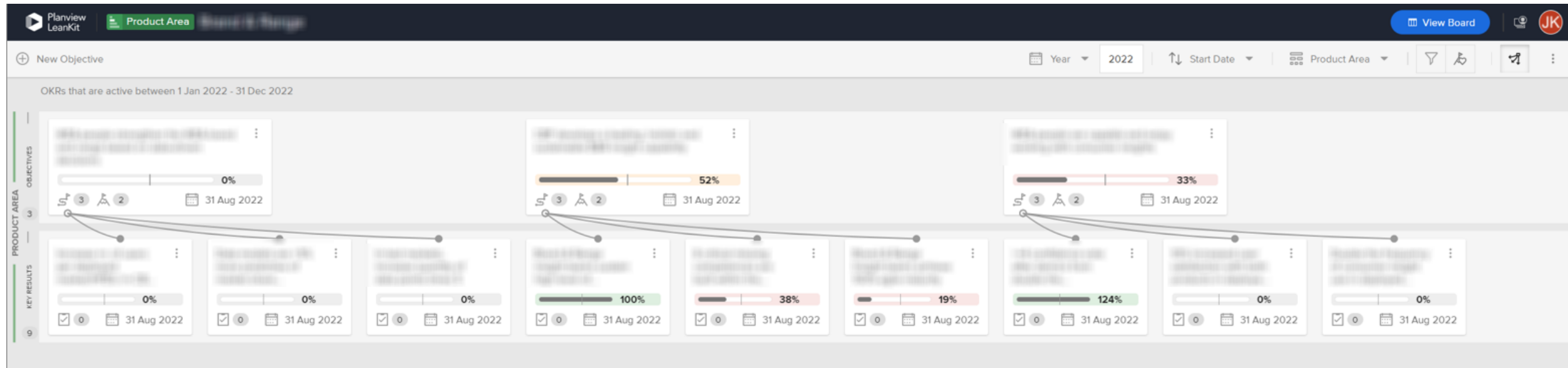
The screenshot displays a Kanban board from Planview LeanKit. The board is organized into three main columns: 'NOT STARTED' (TO-DO), 'DOING', and 'FINISHED' (DONE). The 'TO-DO' column is further divided into 'Product Backlog' and 'Sprint Backlog'. The 'DOING' column is divided into 'In Progress' and 'In Review'. The 'FINISHED' column is labeled 'Finished As Planned'. A separate section at the bottom is labeled 'Started but not Finished'. Each card represents a user story, with a title, description, and a progress indicator (a circle with a number). The board is populated with numerous user stories, each with a unique ID and a detailed description of the task. The interface includes a top navigation bar with the Planview LeanKit logo, a 'Team' dropdown, and a 'How People Live' header. A search bar and various utility icons are also present in the top right corner. The bottom right corner features a search bar with '100%' and a play button icon.

Connections

Epic – Feature
Feature – Feature in different teams

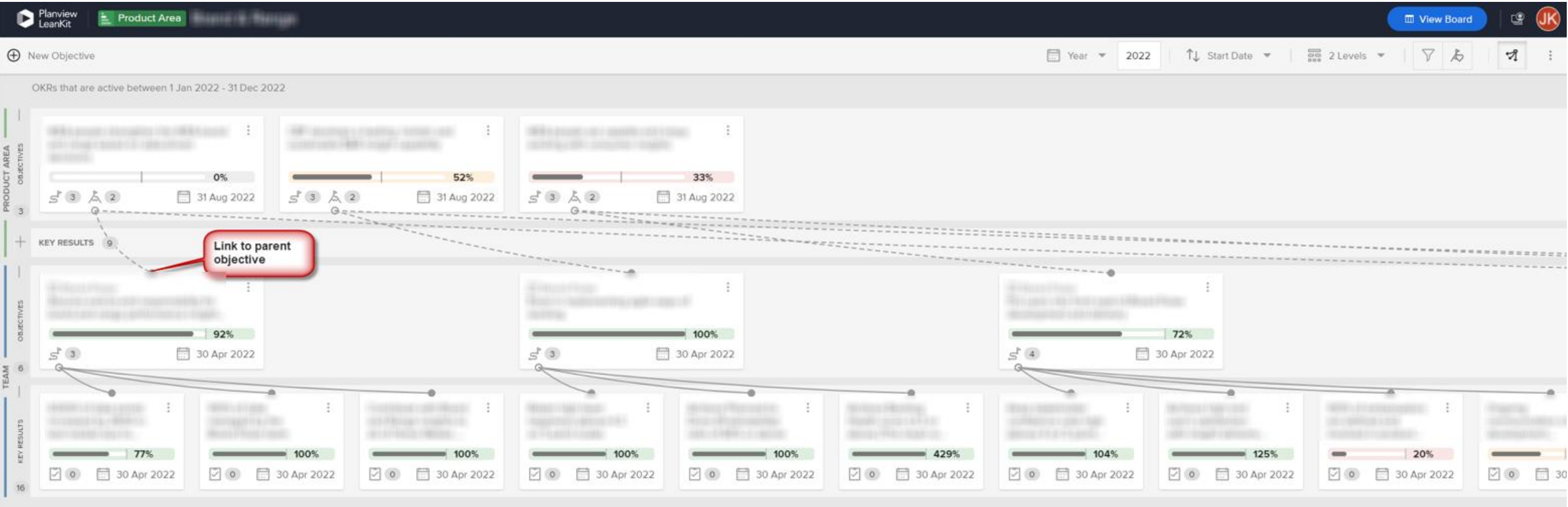
The screenshot displays a Planview LeanKit Kanban board for a 'Product Area'. The board is organized into columns: 'TO - DO', 'STARTED', and 'FINISHED'. The 'TO - DO' column is further divided into 'Product Team' lanes, including 'Refine', 'Prioritize', and 'Product backlog'. The 'STARTED' column is divided into 'Product Team' lanes and a 'Started but not Finished' lane. The 'FINISHED' column is divided into 'Finished As Planned' and 'Started but not Finished' lanes. Red lines connect cards across these lanes and columns, illustrating dependencies or relationships between tasks. A 'Filters' sidebar on the right lists various filter criteria such as 'Card Title and Header', 'Search Card Descriptions', 'Activity', 'Assigned Users', 'Blockers', 'Card Type', 'Custom Fields', 'Dates - Range', 'Dates - Relative', 'Parent Cards', 'Not Assigned', 'WIP More relevant range + content', 'Consumer-centric approach in product marketing', 'Design Proof of Concept for product MVP', 'Error', and 'New Brand Performance Measurement'. The top navigation bar includes 'Planview LeanKit', 'Product Area', and user profile 'JK'.

Objectives & Key Results



- Objectives are color coded accordingly based on their progress percentage:
 - **Green** - 70% or higher
 - **Yellow** - between 40-69%
 - **Red** - 39% or lower

OKR on Product Area and Team



OKR Health

Planview LeanKit | Product Area | Brand & Range | View Board | JK

New Objective | Year: 2022 | Start Date: | 2 Levels | Filter | Accessibility | Search

OKRs that are active between 1 Jan 2022 - 31 Dec 2022

PRODUCT AREA

OBJECTIVES

- OKR: Increase sales by 10% in Q3 2022. Progress: 0%
- OKR: Improve customer satisfaction scores. Progress: 52%
- OKR: Reduce operational costs by 5%. Progress: 33%

KEY RESULTS

- Key Result: Increase sales by 10% in Q3 2022. Progress: 0%
- Key Result: Improve customer satisfaction scores. Progress: 0%
- Key Result: Reduce operational costs by 5%. Progress: 0%
- Key Result: Increase sales by 10% in Q3 2022. Progress: 100%
- Key Result: Improve customer satisfaction scores. Progress: 38%
- Key Result: Reduce operational costs by 5%. Progress: 19%
- Key Result: Increase sales by 10% in Q3 2022. Progress: 124%
- Key Result: Improve customer satisfaction scores. Progress: 0%
- Key Result: Reduce operational costs by 5%. Progress: 0%

TEAM

OBJECTIVES

- OKR: Increase sales by 10% in Q3 2022. Progress: 92%
- OKR: Improve customer satisfaction scores. Progress: 100%
- OKR: Reduce operational costs by 5%. Progress: 72%

KEY RESULTS

- Key Result: Increase sales by 10% in Q3 2022. Progress: 77%
- Key Result: Improve customer satisfaction scores. Progress: 100%
- Key Result: Reduce operational costs by 5%. Progress: 100%
- Key Result: Increase sales by 10% in Q3 2022. Progress: 100%
- Key Result: Improve customer satisfaction scores. Progress: 100%
- Key Result: Reduce operational costs by 5%. Progress: 429%
- Key Result: Increase sales by 10% in Q3 2022. Progress: 104%
- Key Result: Improve customer satisfaction scores. Progress: 0%
- Key Result: Reduce operational costs by 5%. Progress: 0%

OKR Health

Objective progress
6 active, 3 finished objectives
39% vs. 59% target average

In progress	0 Ahead	0 On Track	6 Behind
Finished	2 On Target within 10%	1 Below Target by over 10%	

Key result progress
15 active, 10 finished key results
45% vs. 65% target average

In progress	2 Ahead	0 On Track	13 Behind
Finished	3 Over Target	4 On Target within 10%	3 Below Target by over 10%

Key result updates
Progress updated within days

OKR Health - focus

The screenshot displays the Planview LeanKit OKR Health dashboard. The main view shows OKRs for the Product Area and Team, with progress bars and completion percentages. A right-hand sidebar provides a detailed 'OKR Health' summary.

Product Area OKR Progress:

- Objective 1: 0% (3 sub-obj, 2 ahead)
- Objective 2: 52% (3 sub-obj, 2 ahead)
- Objective 3: 33% (3 sub-obj, 2 ahead)
- Objective 4: 0% (3 sub-obj)
- Objective 5: 0% (3 sub-obj)
- Objective 6: 0% (3 sub-obj)
- Objective 7: 100% (3 sub-obj)
- Objective 8: 38% (3 sub-obj)
- Objective 9: 19% (3 sub-obj)
- Objective 10: 124% (3 sub-obj)

Team OKR Progress:

- Objective 1: 92% (3 sub-obj)
- Objective 2: 100% (3 sub-obj)
- Objective 3: 72% (4 sub-obj)
- Objective 4: 77% (3 sub-obj)
- Objective 5: 100% (3 sub-obj)
- Objective 6: 100% (3 sub-obj)
- Objective 7: 100% (3 sub-obj)
- Objective 8: 429% (3 sub-obj)
- Objective 9: 104% (3 sub-obj)

OKR Health Summary:

- Objective progress:** 6 active, 3 finished objectives. 39% vs. 59% target average.
- Key result progress:** 15 active, 10 finished key results. 45% vs. 65% target average.

Category	Ahead	On Track	Behind
In progress (Objectives)	0	0	6
Finished (Objectives)	2	2	1
In progress (Key Results)	2	0	13
Finished (Key Results)	3	4	3

Key result updates: Progress updated within days. (11, 0, 1, 11)



Key take aways

- One single source of master data
- Hybrid portfolio
- Flexibility – Teams can choose which tool is best suited for them
- OKR – new way to follow up and measure value

Thank you

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