



## PLANVIEW DAY 2022 ROADSHOW

# The Shift from Project to Product & VSM

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Chief Technology Officer





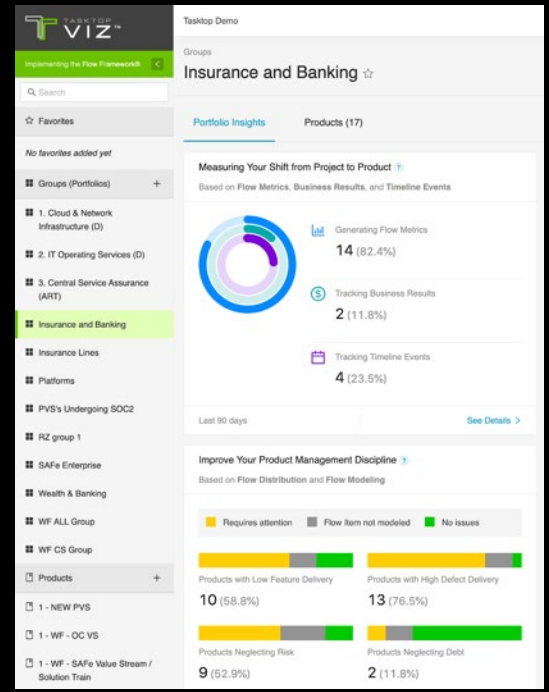
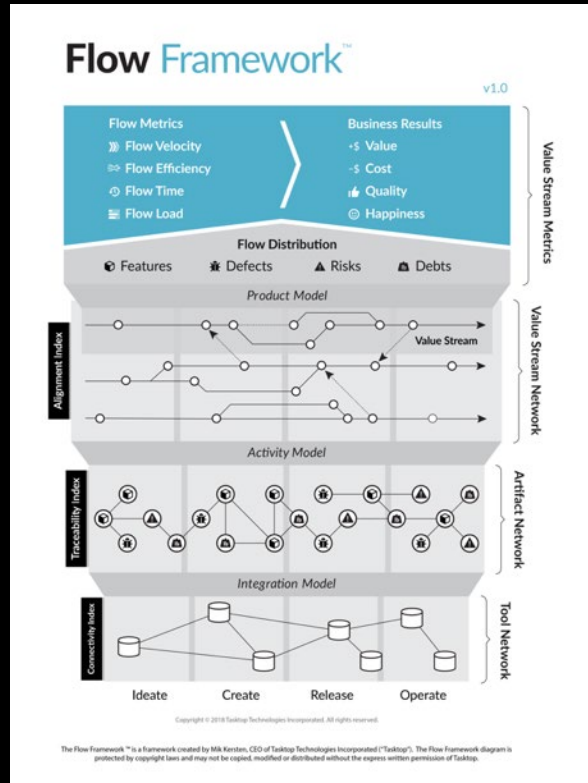
planview®



TASKTOP®

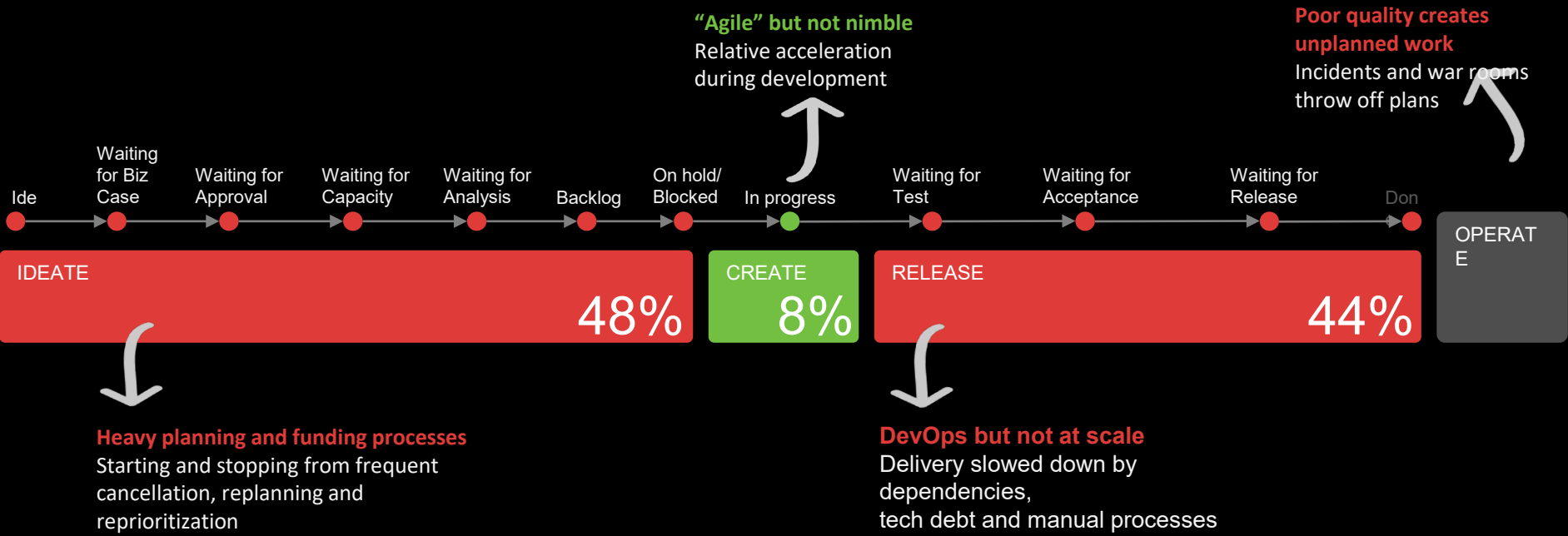


# Movement, Framework & Technology





# Every enterprise is a software company... But most struggle to perform like one





# The key constraints are unknown and unmeasured



**8%** of what's planned by Agile teams gets delivered



**20%** of features are cancelled after code has been written



**35%** of products have zero capacity for new work for 12+ months



**85%** of products under-invest in security and debt



**95%** of value streams do not know what their flow efficiency is

*Findings from value streams data collected via Tasktop Viz®*

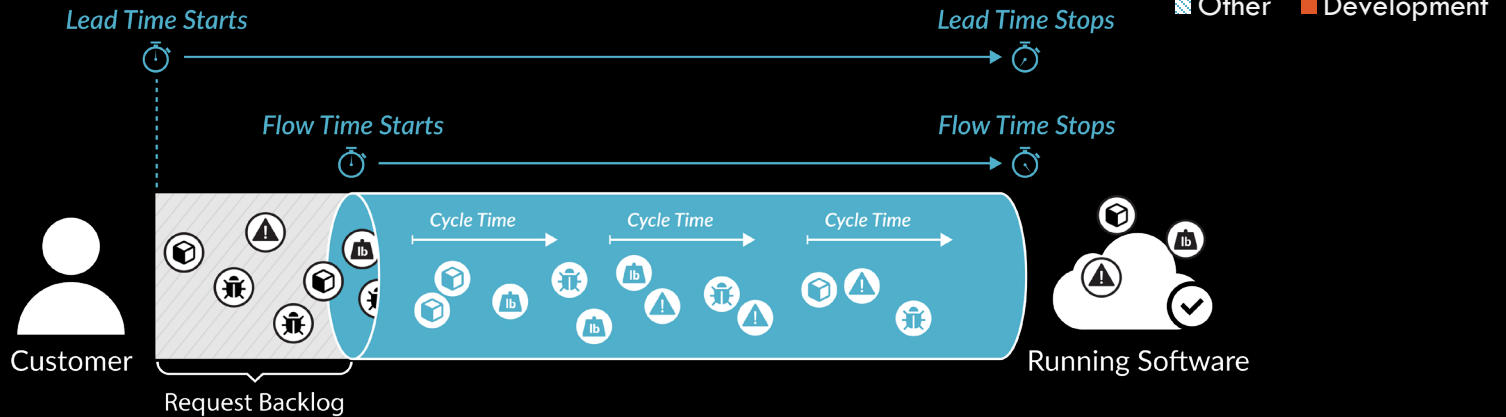
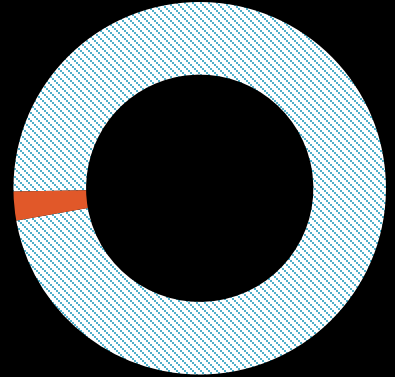


# FLOW TIME



## Why does it take 120 days to deliver value to customers?

Only 2.5% of time was spent in development





# What flows in software delivery?



## Features

*New business value, pulled by customer*



## Risks

*Security, availability, compliance, pulled by risk officers*



## Defects

*Quality improvements, pulled by customer*



## Debts

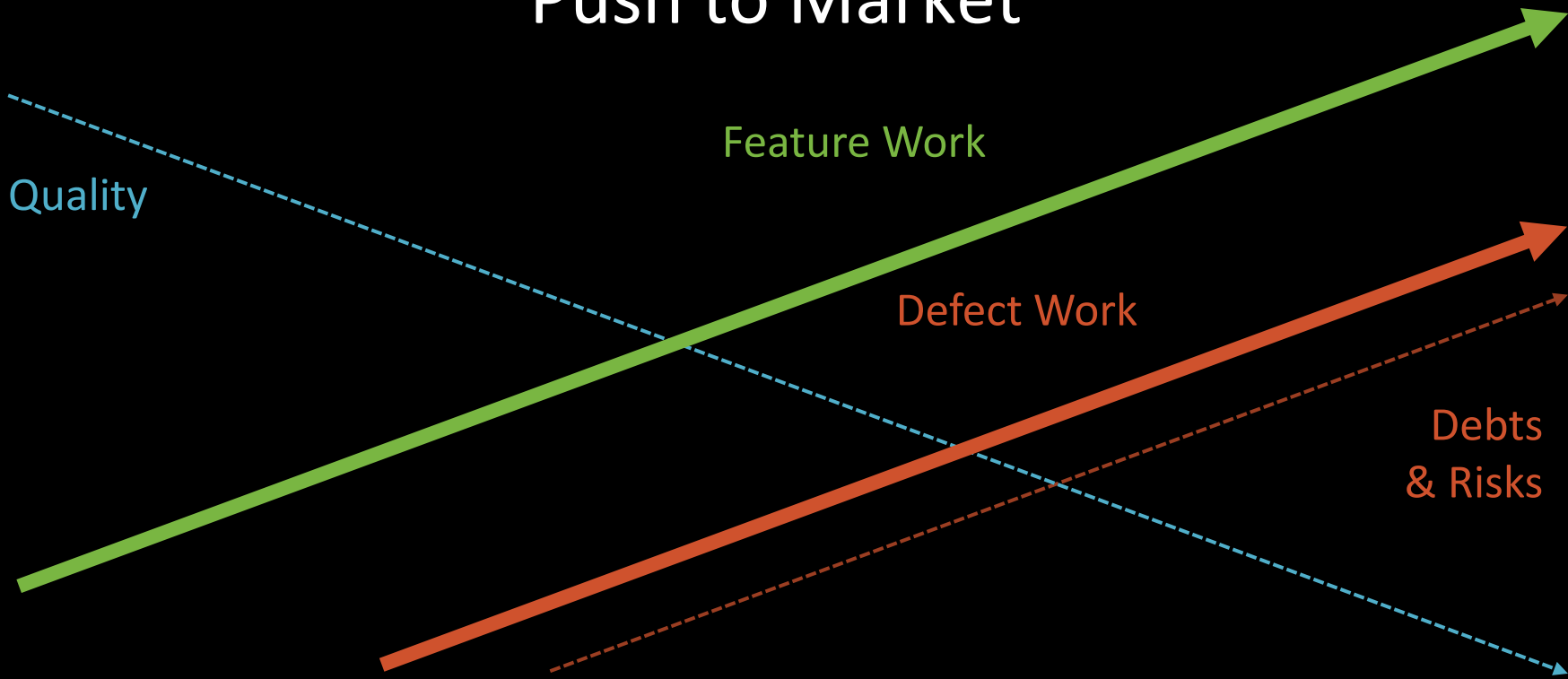
*Technical debt improvements, pulled by teams*

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Flow Items are MECE\*



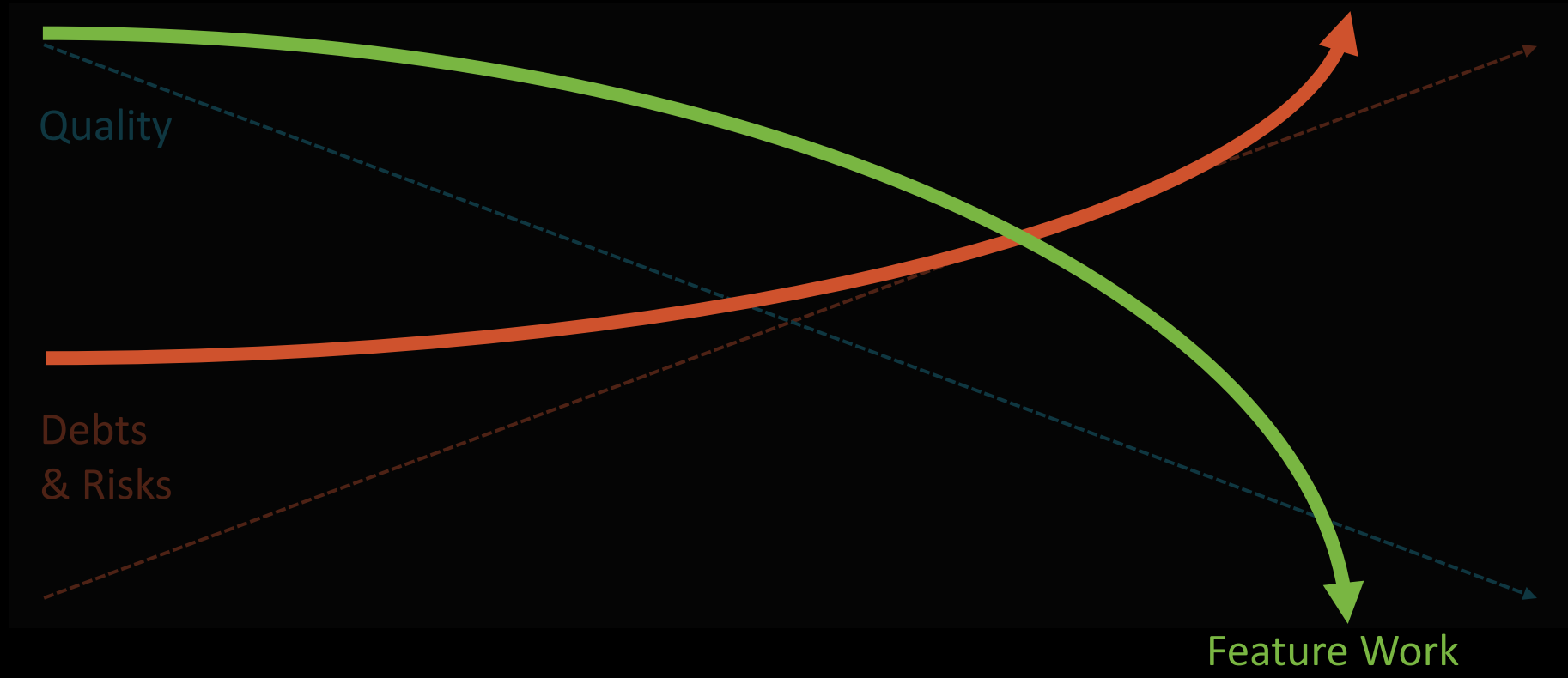
# Push to Market



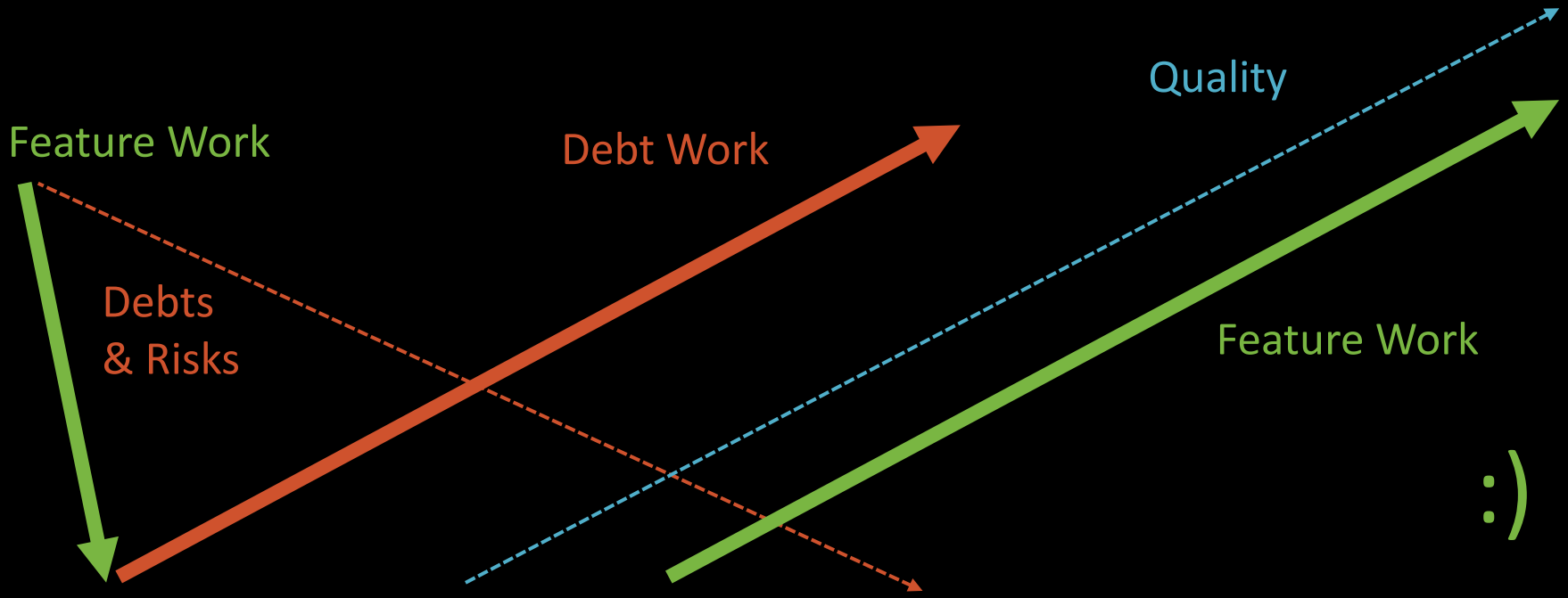




# Death Spiral

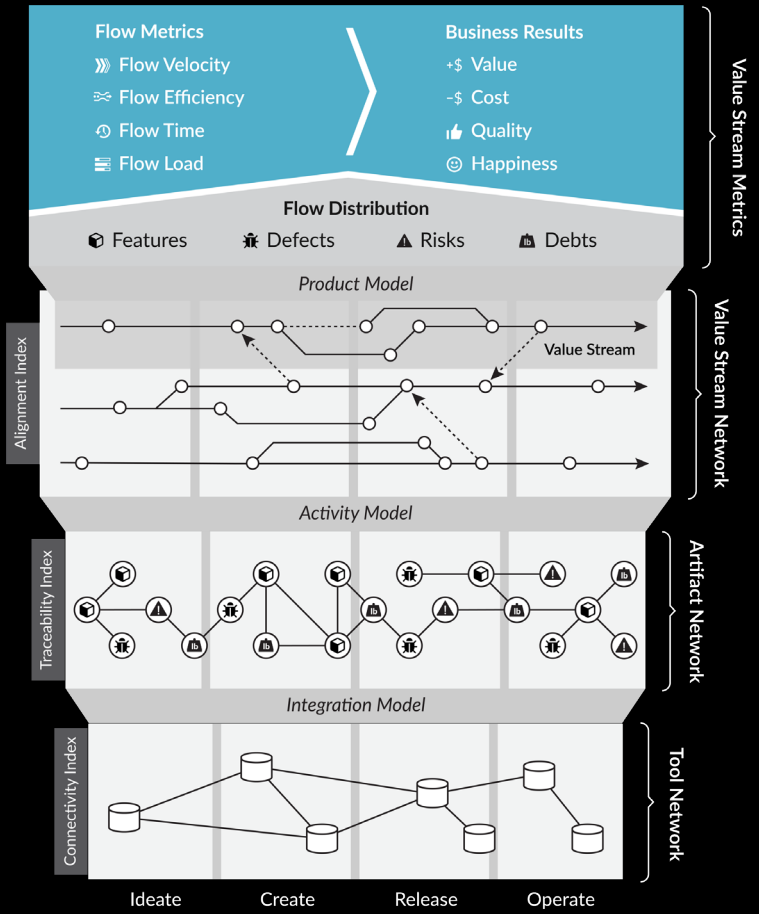


# Debt & Risk Reduction





# Flow Framework®

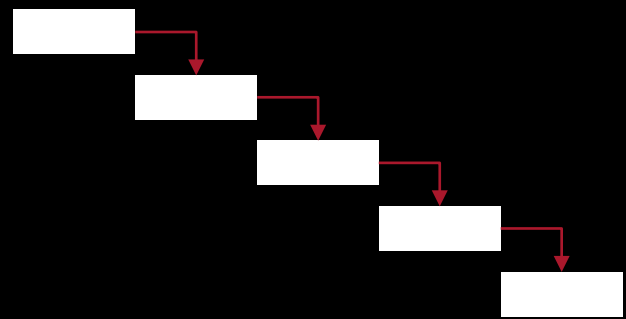


The Flow Framework™ is a framework created by Mik Kersten, CEO of Tasktop Technologies Incorporated ("Tasktop"). This diagram is licensed under the Attribution-NonCommercial Creative Commons License, accessible at <https://creativecommons.org/licenses/by-nc/4.0/legalcode>.



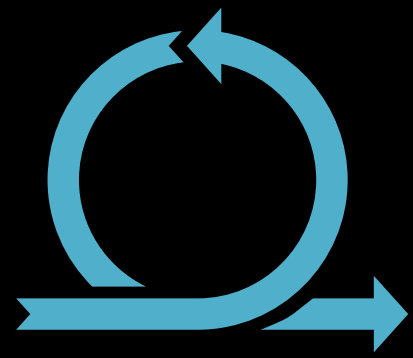
# Project to Product: Planning

Project



Waterfall orientation

Product

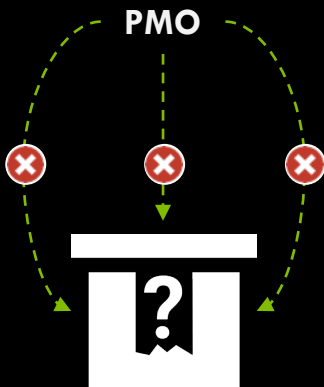


Flow orientation



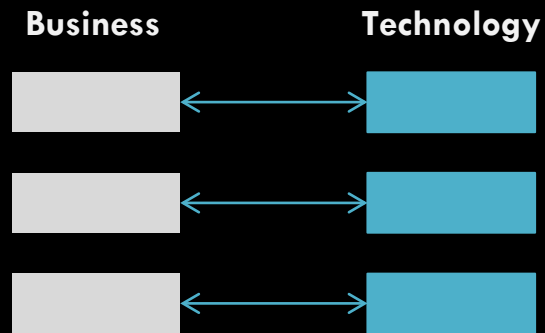
# Project to Product: **Visibility**

Project



Production is a black box

Product

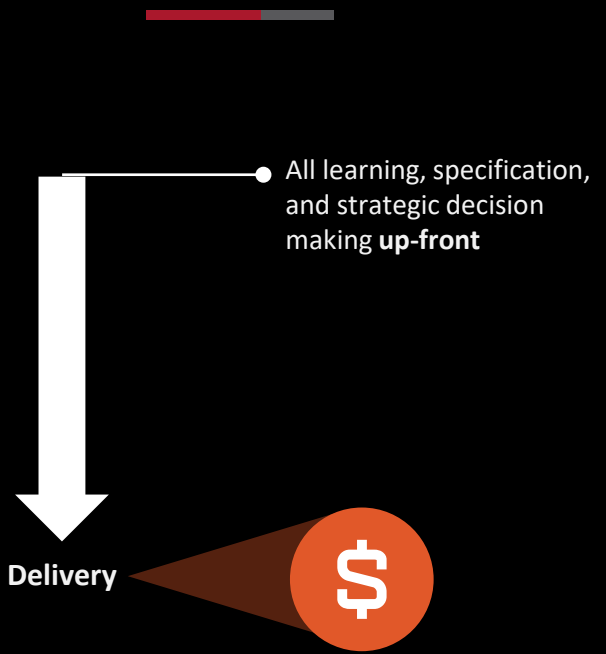


Direct mapping to business strategy

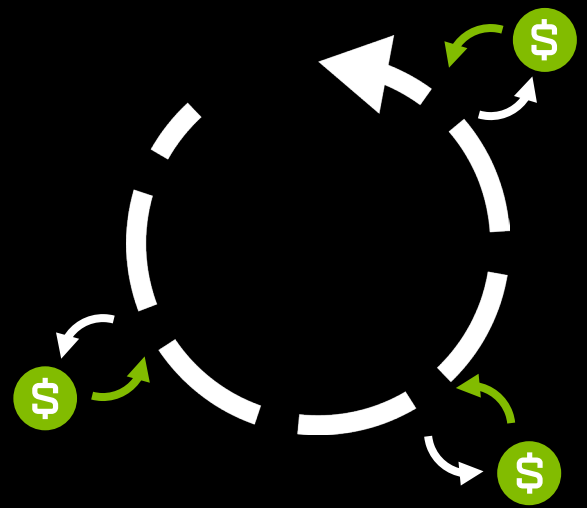


# Project to Product: Budgets

## Project



## Product

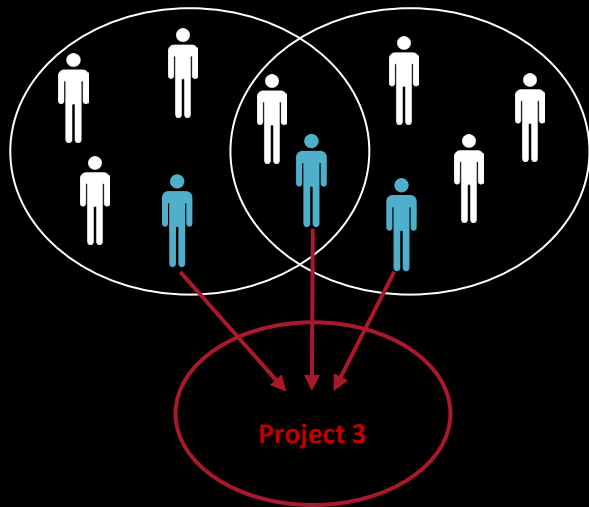




# Project to Product: People

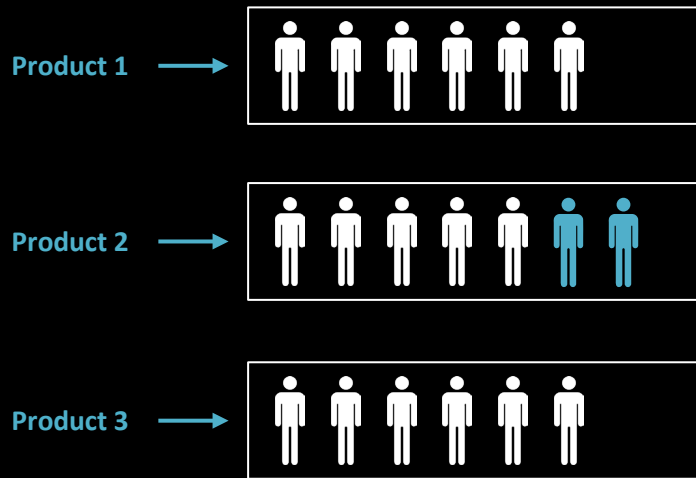
## Project

People are brought to work



## Product

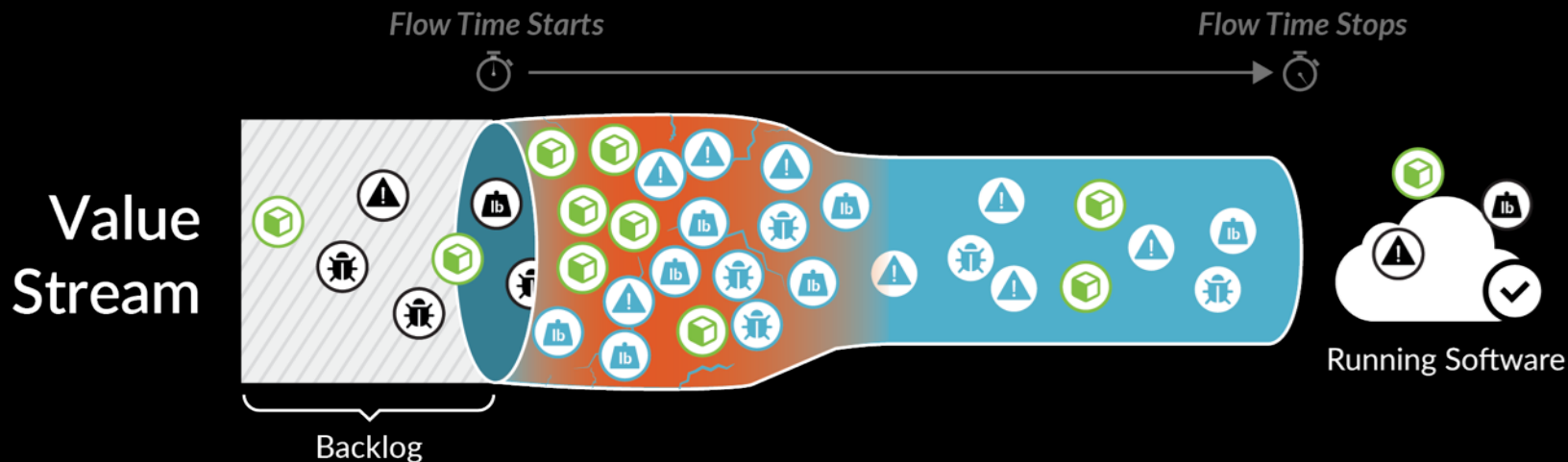
Work is brought to People





## Bad OKRs

- Micromanage teams & deliverables & dates
- Do not account for flow & bottlenecks
- Ignore capacity, increase WIP



## Good OKRs

- Cascade business goals to value streams
- Measure flow of value, surface bottlenecks
- Prioritize learning and improvement





# Example: Insurance LOB

*Become the most innovative insurer in our industry*



*30% Market share growth*



*50% Reduction in time to provision policy*



*10% Flow Efficiency improvement*

# Example: Mobile Apps

*Customers love our mobile experience*



*20% Mobile customer NPS improvement*



*30% Flow Time reduction for features*

- Flow Efficiency experiments with process improvement
- Verification turned out to be the bottleneck
- Team targeted “0 days wait state on business input”
- Flow Time reduced by 70%, NPS started climbing
- Helped company KR of 50% less time to provision policy



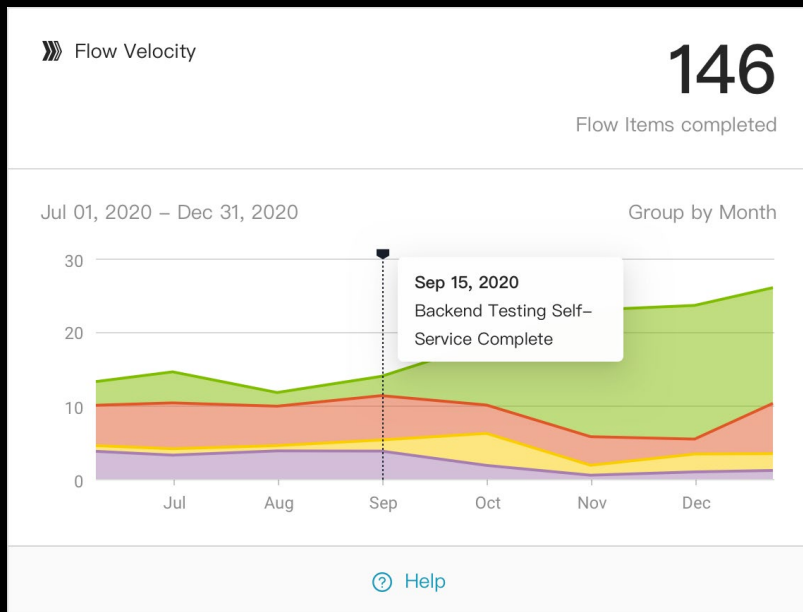


# Unlocking Capacity



Securities

\$3.15B Revenue (2020)



In a highly competitive market, Flow Metrics exposed that time-to-market for digital channel value streams had nearly doubled, up from 22 days to 40 days, with a Flow Efficiency of only 20%.

Tasktop Viz identified the bottleneck in a legacy core backend component, where self-service testing was not possible due to technical debt. The huge investment the firm was making in digital channels would have no ROI until this debt was paid down.

Rebalancing investments to modernize the backend services will accelerate capabilities in revenue-generating digital channels.

**45%**

Feature acceleration capacity after tech debt reduction

**+\$150M**

Top line growth potential from revenue pull forward



# Value Stream Management

## Shared Visibility

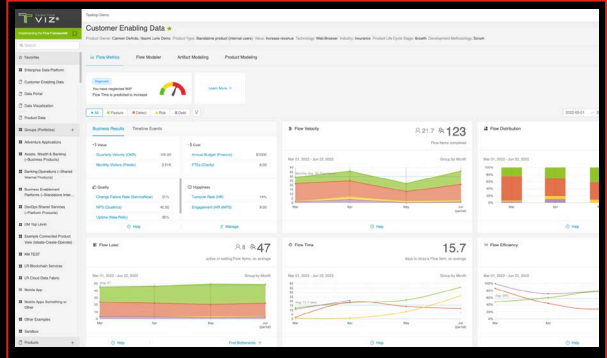
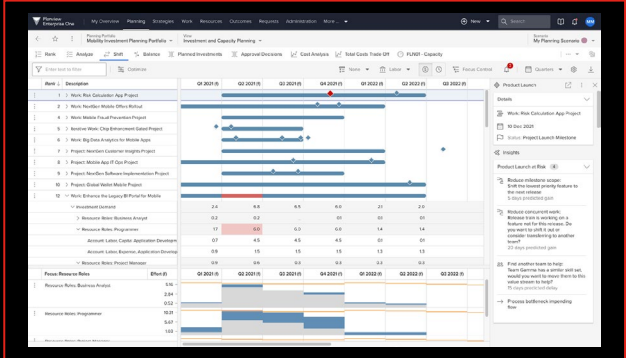
Single pane of glass across Strategy, Planning, Process and Delivery

## Closed Loop Planning

Insights into outcomes, flow and deliverables to accelerate time to market & drive confidence

## Business Value Streams

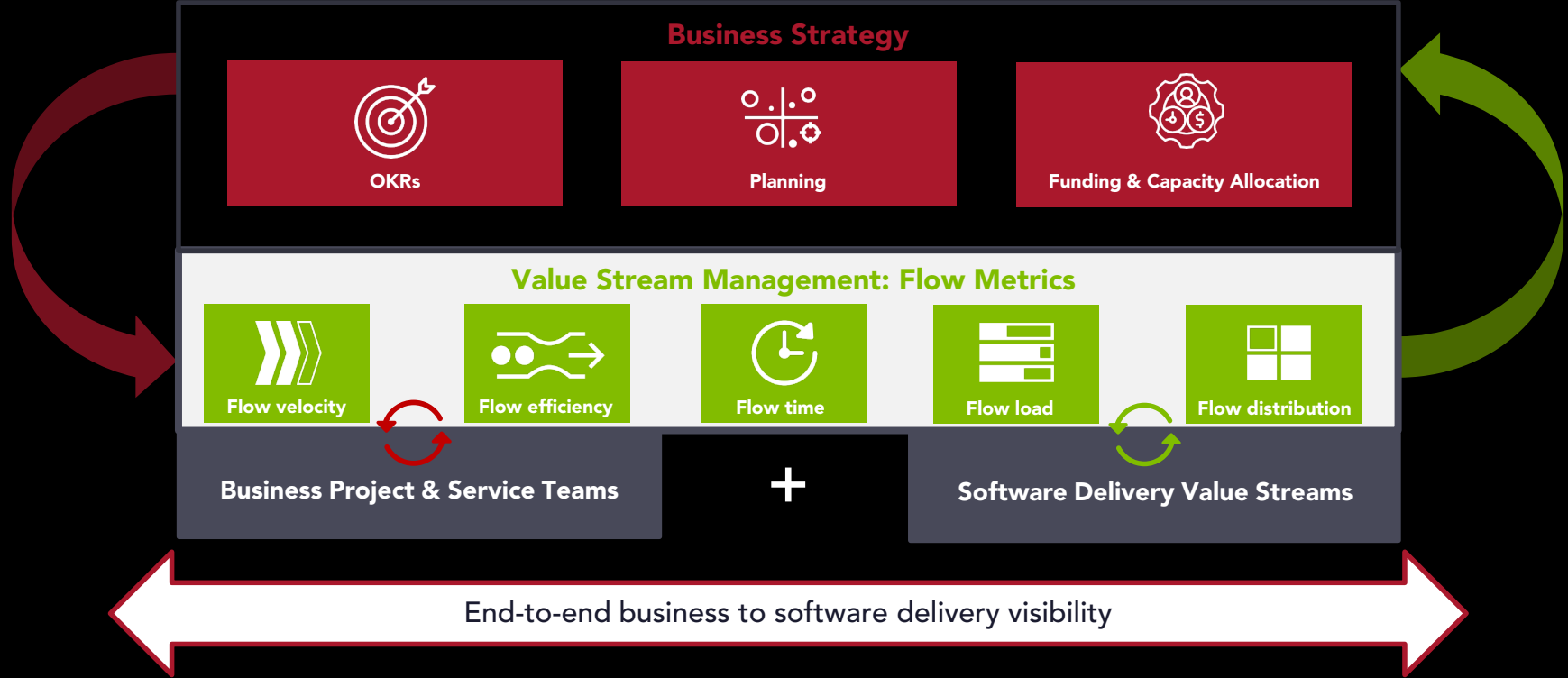
Broaden visibility and insights to business domains and supporting work management applications





# Transformations Realized

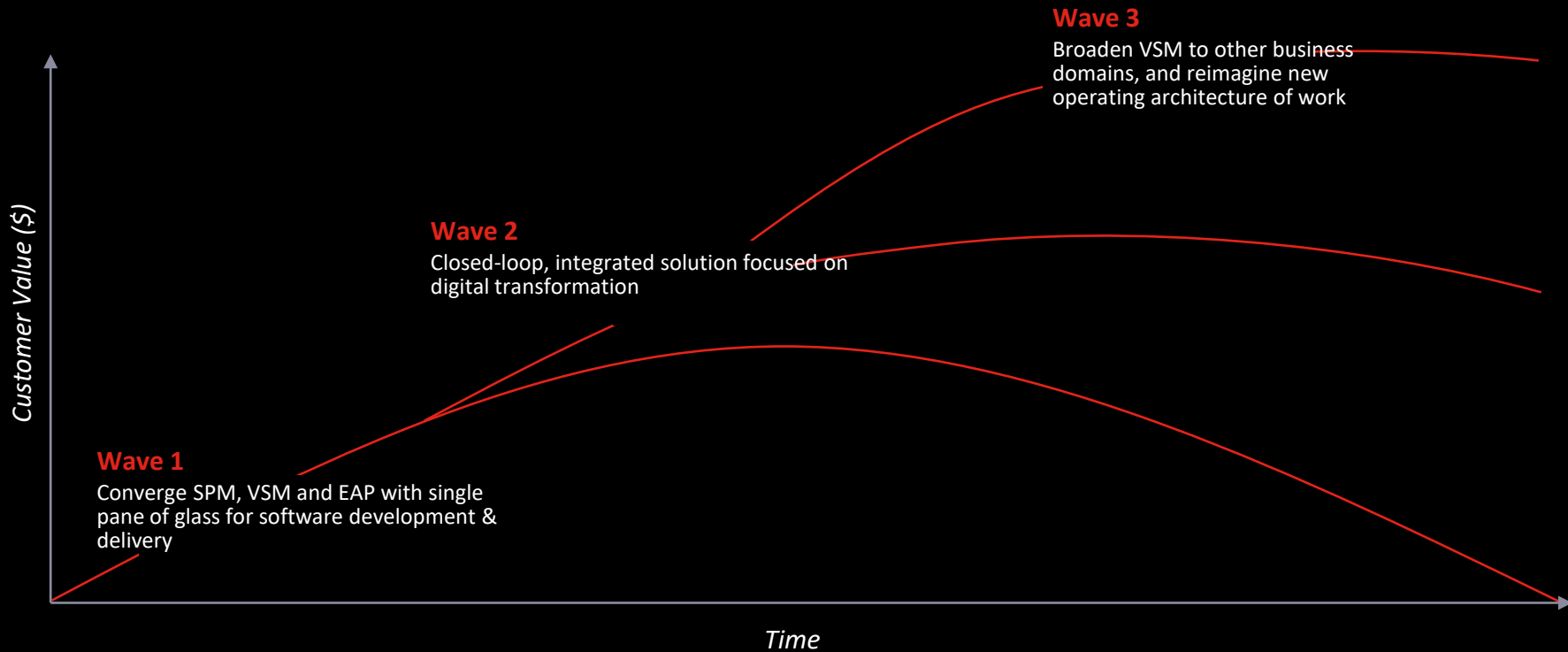
Accelerate time to market, improve efficiency & drive investment confidence.





# Planview + Tasktop Vision

Helping our customers build the digital future of connected work





## PLANVIEW DAY 2022 ROADSHOW

Thank you!



Join us at Planview Accelerate 2022

*Global Virtual Event*

Sept. 13-14, 2022

[www.planviewaccelerate.com](http://www.planviewaccelerate.com)