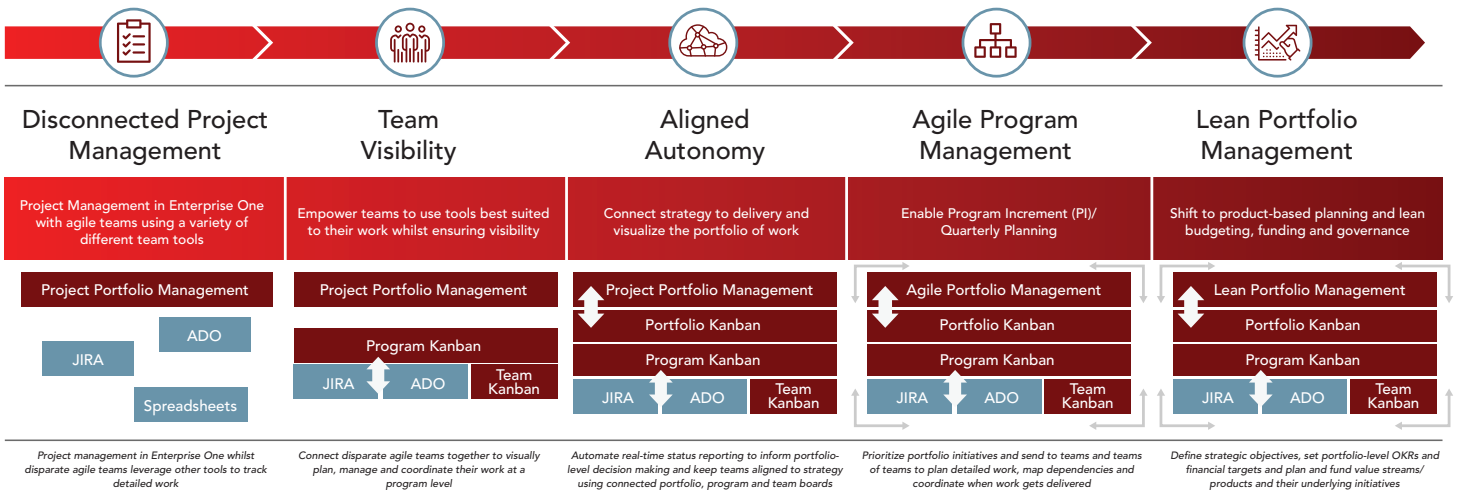


Enterprise Agile Planning Capabilities Guide

WHAT IS A CAPABILITY?

Capabilities are the foundational building blocks of the Planview Adoption Framework, a focused series of customer journeys and associated guidance designed to lead our customers through adopting Planview's solutions.



Your Enterprise Agile Planning journey

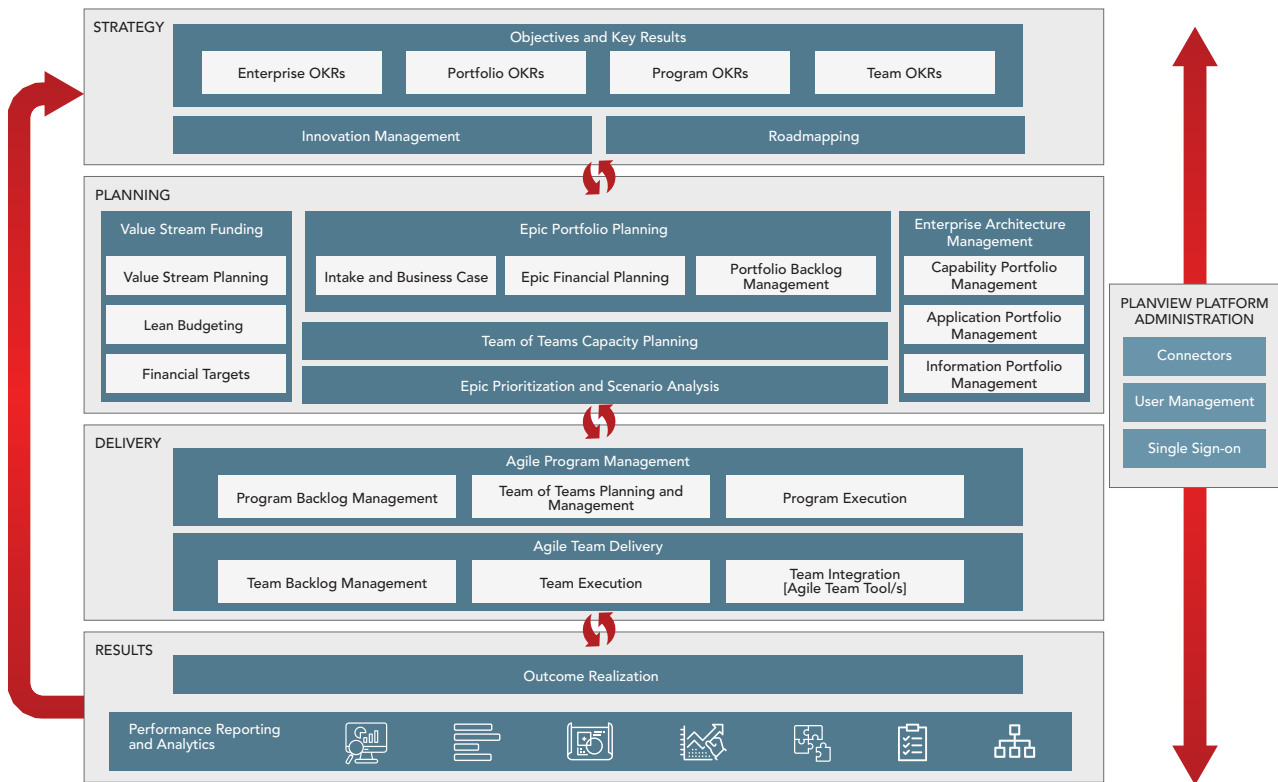
As you begin to explore the capabilities within your solution, remember that you don't have to use all of them right away – our framework is deliberately modular, so that you can continuously build and improve upon your solution. Each capability contains a selection of business processes, best practices, analytics, and other resources to guide you towards achieving value in the form of specific business outcomes.



How our capabilities are used to achieve business value

ENTERPRISE AGILE PLANNING CAPABILITIES

The Enterprise Agile Planning solution's capabilities extend across four critical areas for success within your organization- strategy, planning, delivery, and results.



STRATEGY CAPABILITIES

Objectives and Key Results

OKRs are a framework for defining, aligning around, executing, and measuring progress toward key organizational goals. OKRs answer the questions:

- Where do we want to go?
- How will we measure our efforts to get there?

Defining and aligning around OKRs helps to link organizational and team goals in a hierarchical way to measurable outcomes. This is around defining the hierarchical structure.

The Objectives and Key Results capability's enablers include:

- Enterprise OKRs – define the company-level objectives. These are informed by your long-term strategy for the organization.
- Portfolio OKRs – crystallize your strategic themes and investment objectives. OKRs owned by the Portfolio should demonstrate the contribution of epics towards desired outcomes and help you with investment decision-making.
- Program OKRs – assist with vision setting and provide context as epics are unpacked, looking for features that will contribute to the defined objectives.
- Team OKRs – align with features and provide discipline when articulating outcomes rather than solutions.

Innovation Management

- Supports an organizational culture of innovation. It allows for the submission of ideas from across an organization's entire ecosystem and centralizes them for evaluation and development.
- Helps drive solutions to crowd-generated challenges and opportunities, providing a structure for team collaboration.

Roadmapping

- Allows business leaders, product and program managers, and others to translate strategy into a timeline of business outcomes and deliverables.
- Roadmaps can be used to set direction and expectations, as well as maintain clear communication throughout delivery.

PLANNING CAPABILITIES

Value Stream Funding

The Value Stream Funding capability's enablers include:

- Value Stream Planning – supports organizations that have made the product shift. It allows them to organize their funding model around value streams that develop and operate their products, systems, and services.
- Lean Budgeting – set time-phased financial budgets for each value stream, against which planned and current investments can be analyzed and approved.
- Financial Targets – set time-phased financial targets for value streams in the form of benefits and revenue, against which planned and current investments can be analyzed.

Epic Portfolio Planning

The Epic Portfolio Planning capability's enablers include:

- Intake and Lean Business Case Development – supports the creation, initial planning, and Lean business case development of epics that will deliver and operate our products, services, and systems and their corresponding business outcomes.
- Epic Financial Planning – supports planning and management for all financial information associated with an epic, including:
 - High-level estimates
 - Approved or baseline budgets
 - Actual costs to date
 - Forecasts to complete costs
 - Variance reporting
- Portfolio Backlog Management – supports portfolio backlog management, visualizing all work on a portfolio Kanban board aligned to a preferred work methodology and process.

Team of Teams Capacity Planning

- Provides the mechanism to set time-phased resource capacity targets.
- Provides a framework to analyze demand and make assessments on the ability to continue with or take on new epics.

Epic Prioritization and Scenario Analysis

- Provides a mechanism to collect all potential and existing epics to carry out prioritization and assessment before approval of the overall portfolio plan.
- As part of this, planners can create and compare various what-if scenarios.

Enterprise Architecture Management

The Enterprise Architecture Management capability's enablers include:

- Application Portfolio Management – provides insight into the impact of application changes, business demand, and strategic priorities on your application portfolio while increasing business value through portfolio optimization and reduced cost and complexity.
- Technology Portfolio Management – allows you to proactively understand and address the business impact and risk of aging technologies and improve compliance to meet your preferred standards.
- Capability Portfolio Management – this planning and analysis function aligns investment and technology portfolios with enterprise strategic priorities to drive optimal performance and advance business capability maturity.

DELIVERY CAPABILITIES

Agile Program Management

The Agile Program Management capability's enablers include:

- Program Backlog Management – supports program backlog management, visualizing all work on program Kanban boards aligned to a preferred work methodology and process.
- Team of Teams Planning and Management – provides a structure to carry out quarterly planning. It provides teams and teams of teams with a way to visualize, plan, and coordinate organizational initiatives quickly, effectively, and with clarity into the value delivered.
- Program Execution – supports Agile team of teams' ability to execute and track the program plan.

Agile Team Delivery

The Agile Team Delivery capability's enablers include:

- Team Backlog Management – provides Agile teams with the structure within which to manage their team backlog, allowing them to visualize, prioritize and plan work activities that align to strategic priorities.
- Team Execution – supports Agile teams to deliver on their team plans; using Kanban boards that match their preferred work methodology and processes.
- Team Integration – supports the connection of one or more Agile team tools, as well as multiple federated instances of a given team tool, into LeanKit. This enables Agile teams to visualize, plan, coordinate, and deliver their work together, no matter where their work is tracked or how it's managed.

RESULTS CAPABILITIES

Outcome Realization

- Allows the organization to manage the outcomes that will realize their strategic objectives.
- Outcomes are defined as any deliverable the organization's programs and work creates, enhances, and supports. Deliverables include products, services, technologies, applications, et al.

