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September 13-14, 2022

Your Path to Becoming a Modern PMO: Where are you on the journey?

Geoff Cuddy | Platform Adoption Strategist
Planview

Hello!



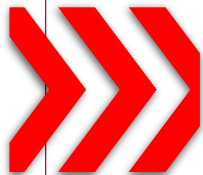
Geoffrey Cuddy
Planview
Platform Adoption Strategist

This Session's Purpose and Objectives

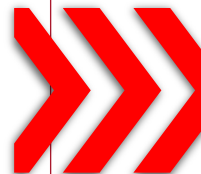
What characterizes a Traditional PMO from a Modern PMO and beyond? More importantly, where is your organization today, and what's the best way forward? While many customers face similar challenges, the modernization journey may not look the same for every organization.

The PPM journey mapping tool outlines the breadth, depth, and maturity of Planview's PPM solutions and the value they bring to our customers. Join this session to learn about the tool's journey stages and discover the steps you need to take to modernizing your current and future portfolio and work management capabilities.

Why Modernize?



Today's PMOs need a modern PPM approach to address new challenges and support all the ways organizations and teams work today. Taking the journey from traditional to modern PPM offers agility and adaptability.



Organizations, and PMOs specifically, are having to respond to change and uncertainty in ways they never have before. The PMO is also no longer an IT-only function. As strategic drivers of the organization, they ensure alignment, mentoring, and continuous improvement.



Modern PPM follows the trend in the industry – which is to modernize your approach to PPM – doing so, organizations empower their teams to take on more of the planning as well as the execution around the work. That, in turn, shifts the focus of the PMO to the portfolio level, ensuring the right teams are working on the right work at the right time; orchestrating across teams to deliver value to the organization.

Why Modernize?

Being adaptive is the answer to this question, but how do we get an organization on a journey from traditional to modern PPM?

#1:

Commit to the journey from Traditional to Modern.

#2:

Embrace HYBRID as the new norm.

#3:

Increase agility at the portfolio level.

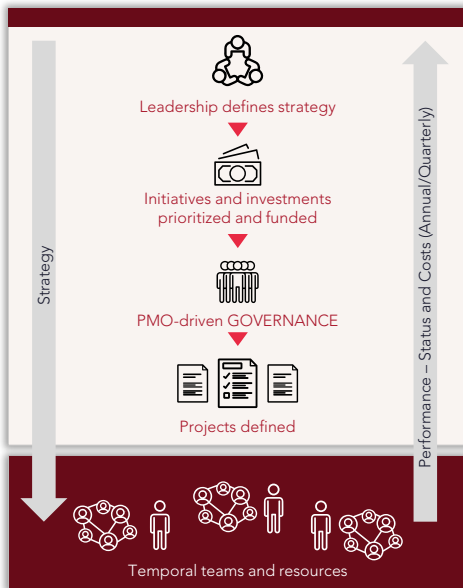
#4:

Become adaptive and change the mindset.

Modernization Journey for Every Enterprise

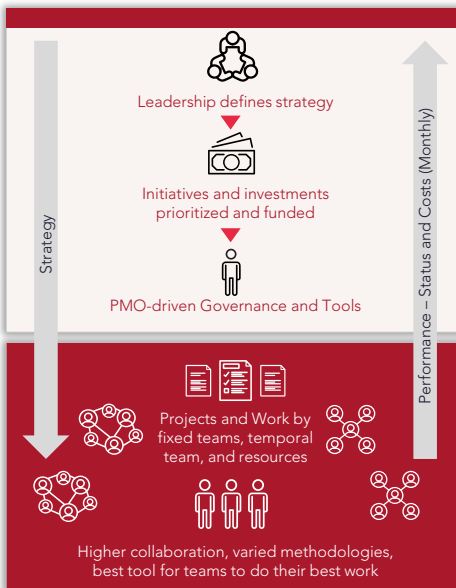
TRADITIONAL PPM

Top-down decision-making and funding with several rigid layers and process checkpoints

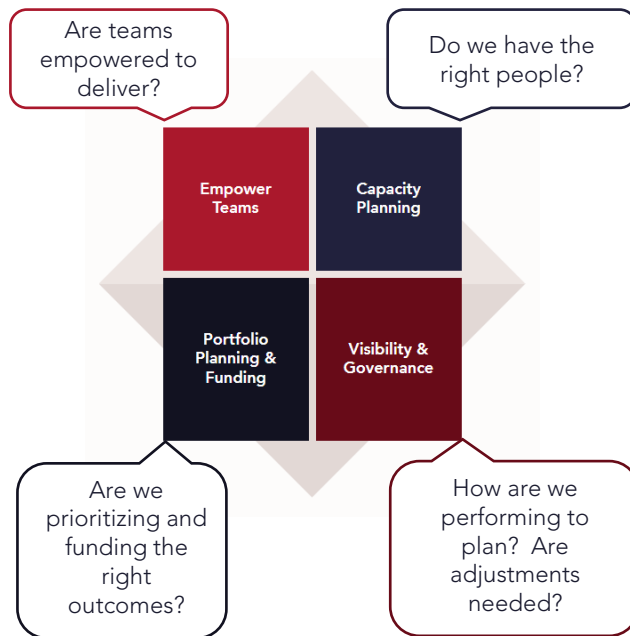


MODERN PPM

Top-down decision-making and funding but frequent collaboration and performance monitoring

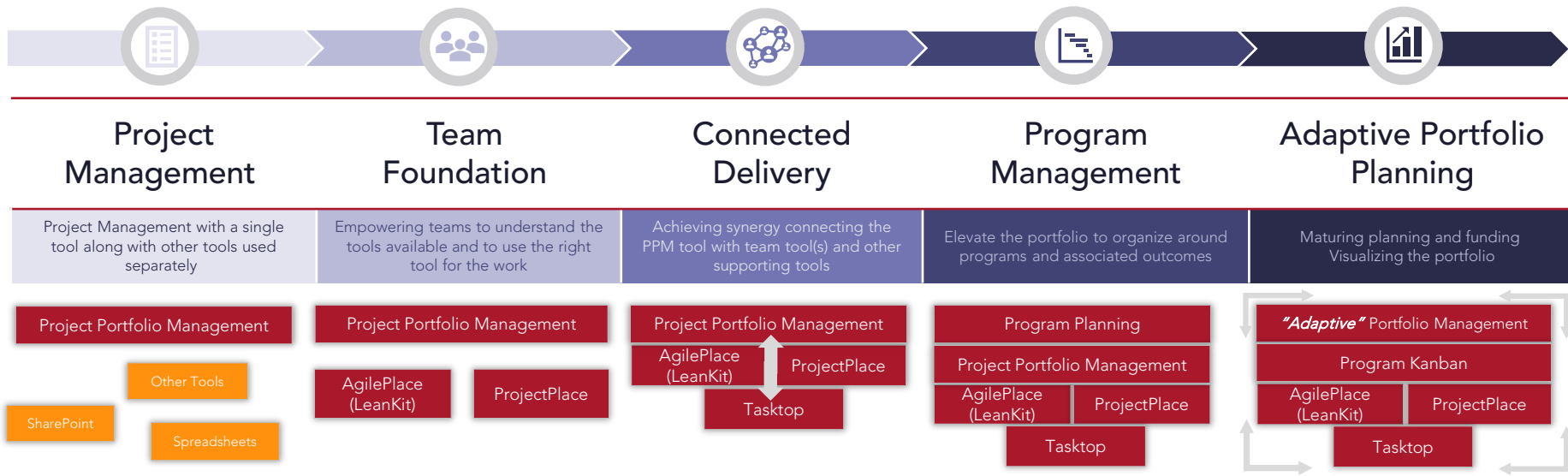


Modern PPM Dimensions



What does it mean to make the arrow real?

Your Path to Modern PPM

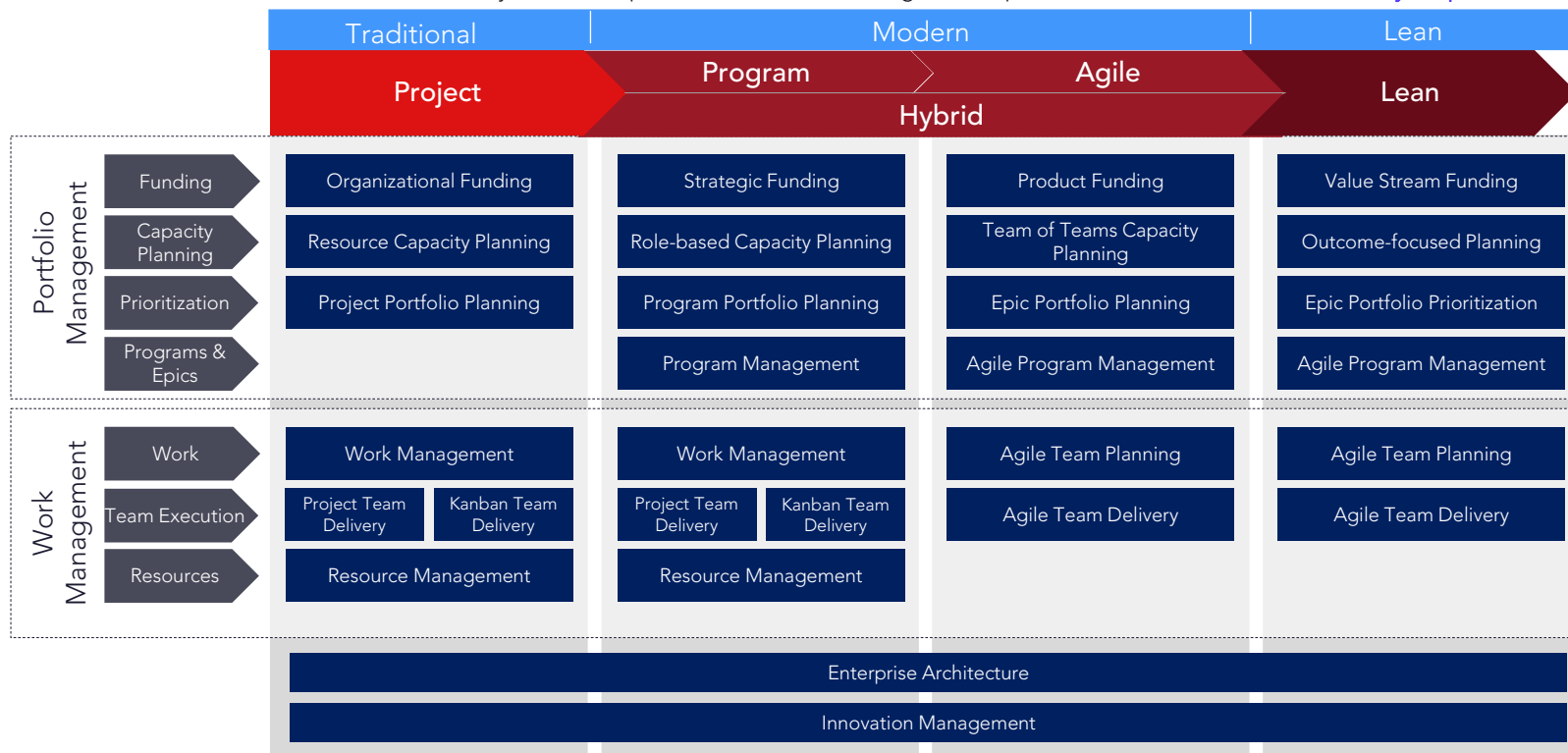


What is a Capability?






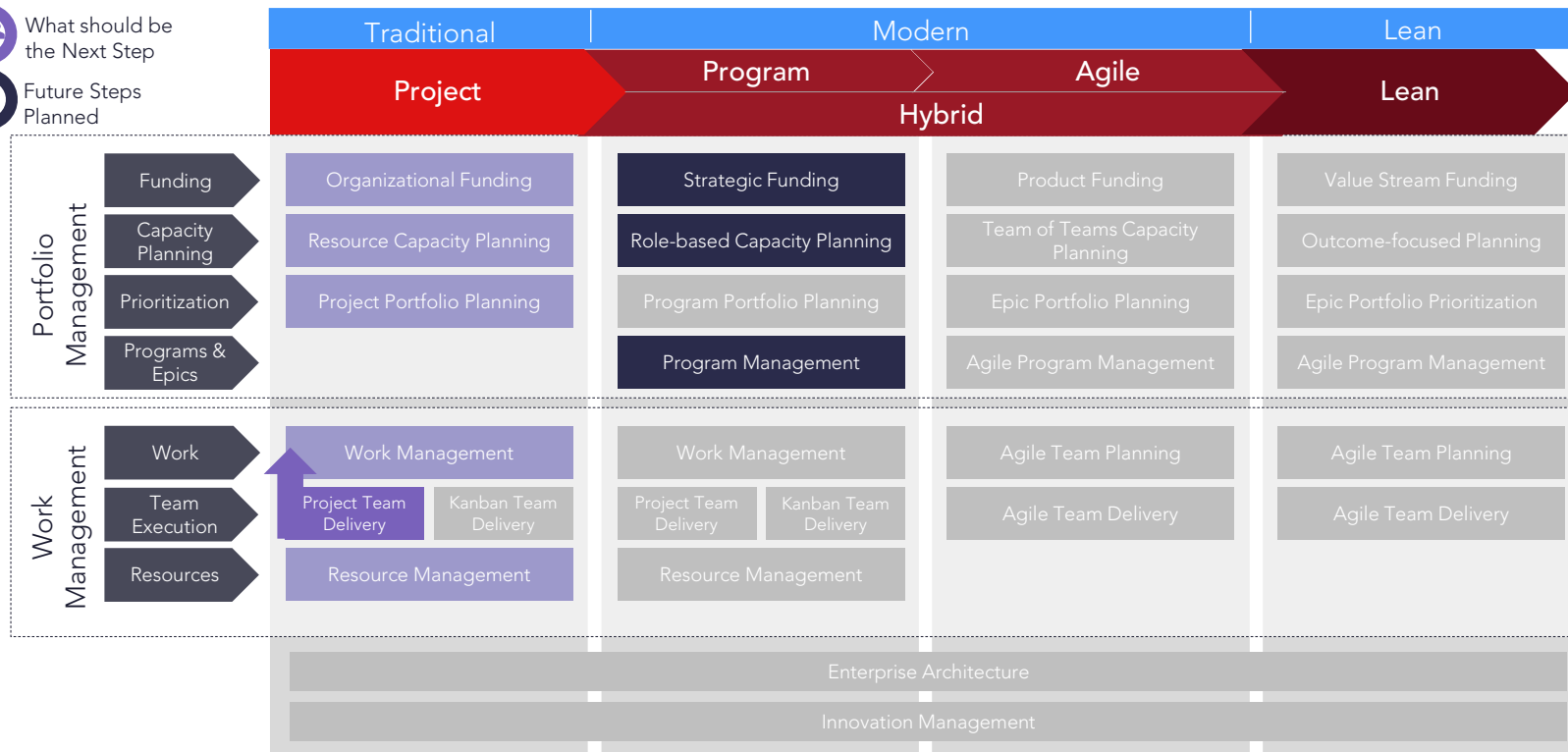
What is Your Journey

Use this modernization journey map to mark off where you are today, your next steps, and your future aspirations. For more details into any of these capabilities, use the following link to open the CSC: [Modernization Journey Map](#)



Modernization Journey Example



-  Where you are Today
-  What should be the Next Step
-  Future Steps Planned



Customer Journey Assessment

The following assessment provides a both a visual as to where you are on your modernization journey and fosters discussion in what areas you want to 'move the needle' next.

Use the blue drops for where you are today for each questions and green on ones where you want to start to modernize in the near-term.

-  Where are You Today
-  What are Your Next Steps

	TRADITIONAL	MODERN	LEAN
Are your teams autonomous?	Limited / Not	Flexibility In Execution	Self-Managed Teams
Do you have varied tools for execution?	Told What To Use	Multiple Tools, Some Discretion	Fully Team-Driven Decisions
How often do you deliver work?	Single Large Release / Infrequent	Phased Releases	Incremental
How do you deliver work?	Projects	Both Project and Process	Process
What is the smallest unit of work?	Detailed Activities (WBS)	Visual Task (Cards)	User Stories (Value)
What are your KPIs?	Utilization and Compliance	Cost and Schedule	Return on Investment
What is your level of governance?	Top-down (Heavyweight)	Reactive Flexible	Adaptive
Do you have templates for work?	Detailed Templates	Light-Weight Templates	Minimal or No Templates
How do you manage your tools?	Stand-alone Solutions	Limited Integration	Bi-directional Integration
That type of reporting is used?	Out of the Box	Centralized Reporting	Interactive Dashboards
How often is your planning cycle?	Fixed (Annual)	Dynamic (Quarterly)	Continuous
Do you track forecasts and actuals?	Actuals Only	Project Forecasting	Program Forecasting
What do you prioritize?	Projects	Programs	Epics
Where does funding come from?	Individual Business Areas	Strategic Initiatives	Product
How do you track capacity?	Named Resources	Roles	Teams

What's Next...

Actions to Take for Your Modernization Journey

- Fill out your own [Customer Journey Assessment](#) and explore the capabilities with the [PPM Journey Mapping Tool](#).
- Engage with your Customer Success Manager or Account Manager to ensure you are maximizing your available capabilities.

To Learn More

- [Self-Serve Modern PPM Journey Content](#) in the Customer Success Center.
- [Your starting point for all PPM Solution Capabilities content](#) in the Customer Success Center.
- [Insider's Guide to Modern PPM eBook](#)
- [Watch the Modern PPM Webinar Series on demand!](#)
 - Demonstrate how PMO's must shift to become strategic drivers of the organization - ensuring alignment, mentoring, and continuous improvement. To move away from the traditional PPM world and to a more Hybrid and adaptable approach.
- [PPM Solution webpage Planview.com](#)
- NEW! [Gartner Magic Quadrant for Adaptive Project Management and Reporting](#)



Get Help Along the Way

If you need additional support as you make this transition, Planview offers two options that can help throughout the process.

Planview Premium Support Program

The Planview Premium Support program offers customers extra support from a Customer Care Consultant to expedite care issues, a sandbox environment to test new features and configurations, and a Customer Success Manager to help you plan, prioritize and optimize your ongoing Planview solution journey.

Remote Advisory Service (RAS) Hours

These are specialized hours designed to help address specific customer needs, bridging the gap between Customer Care and on-site Planview Consulting, allowing you to receive quick and cost-effective enablement.

Thanks for Attending! To Continue the Conversation...

Check out the variety of
“Modernizing PPM” customer
sessions and hear from your peers
how they are elevating their
organizations!

Visit the Learning Lounge following
the presentation or anytime during
event hours. Get more information,
chat with subject matter experts to
assess your path, and answer your
questions!



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Thank you!