



# Investment & Capacity Planning

Customer Community Meeting: March 24th, 2016



# Agenda

- Welcome
- Reminders
- New in the LinkedIn Planview Customer Community
- Horizons – The Planview Customer Conference
- Investment & Capacity Planning – Cengage Learning
- Investment & Capacity Planning – Planview Experts

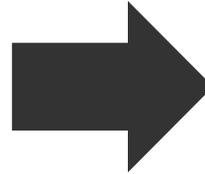
# Audio Options

For those seeing this screen  
but not hearing me...

Select - Mic & Speakers

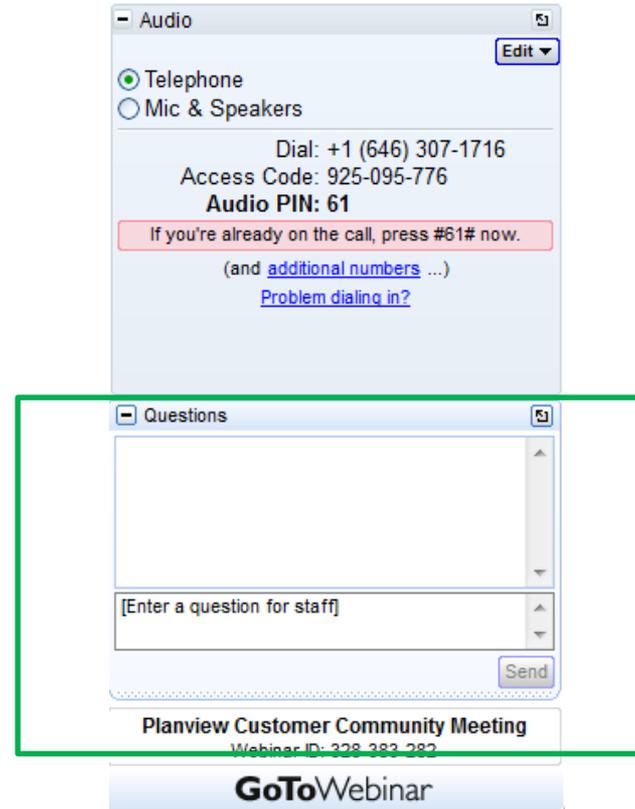
- or -

Dial in using your telephone



# To Submit a Question

- Using the meeting console
  - Type your question any time
  - Hit "send"
  - Q&A at the end



# Planview Customer Community presentations available on the Customer Success Center

<https://success.planview.com/?cid=community>

# Open Discussions On **LinkedIn**

 **Deborah Ferretti** 22h  
Resource Planning Analyst, Information Technology, Texas Dept of Publ...

## Has anyone migrated from v11.3 to v11.5?

Did you use the Migration Enablement Interactive PDF Guide, the Interactive eLearning, or did you purchase the interactive slide show and do your own training? Your experience with either of the above? Recommendations?

[Like](#) [Comment](#)

 **Richard Mayo** 46m  
Delivery Management Office, Center of Excellence Lead at Meritain Heal...

## Planview 11.3 baseline strategy for iterative lifecycle?

What is a good strategy for baselining - schedule vs. financial when using an iterative development lifecycle?

[Like](#) [Comment](#)

 **Abhishek Malik** 4d  
Sr. Project Reporting Analyst

## Capturing CapEx cost and effort based on Project Schedule

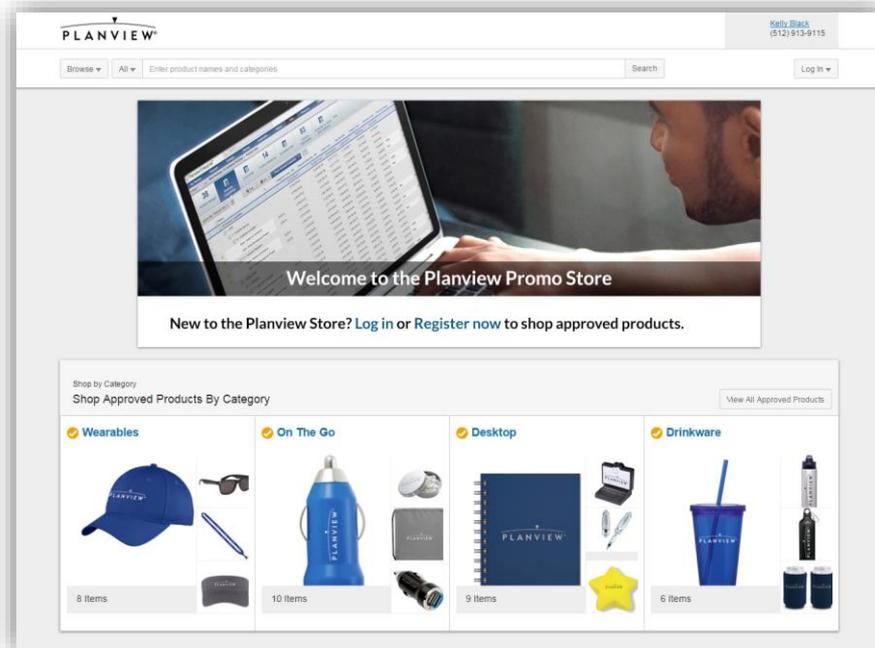
Hi,  
Can anyone suggests the best way to capture CapEx cost and effort based on Project Schedule. Maybe using some flags or any innovative solution? Also, how do you keep control check on that solution?  
Thanks,  
Abhishek

<https://www.linkedin.com/groups/1845802>

# Planview Store

- Planview Branded Merchandise

<http://portal.boundlessnetwork.com/planviewpromostore>



# HORIZONS

The Planview Customer Conference



Horizons 2016 - Registration now open!  
September 21-23, 2016  
JW Marriott in Austin, Texas  
[horizons.planview.com](http://horizons.planview.com)

Super Early Bird Registration  
\$995 until April 15<sup>th</sup>!



Horizons Europe 2016 - Registration now open!  
16-17 November 2016  
Park Plaza Victoria in London, England  
[horizons.planview.com/europe](http://horizons.planview.com/europe)

*Call for Presentations* now open



Planview Enterprise®



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# Resource Management and Capacity Planning Survey

- Benchmark against your peers
  - Trends on best practices
  - Pain points and risk factors
  - Tools in use
  - Benefits of enterprise software to improve capacity planning and resource utilization
  - And more
- <https://www.surveymonkey.com/r/RMCPVCA1>
- Survey closes next Thursday, March 31st

# Presenter



Amber Meryman

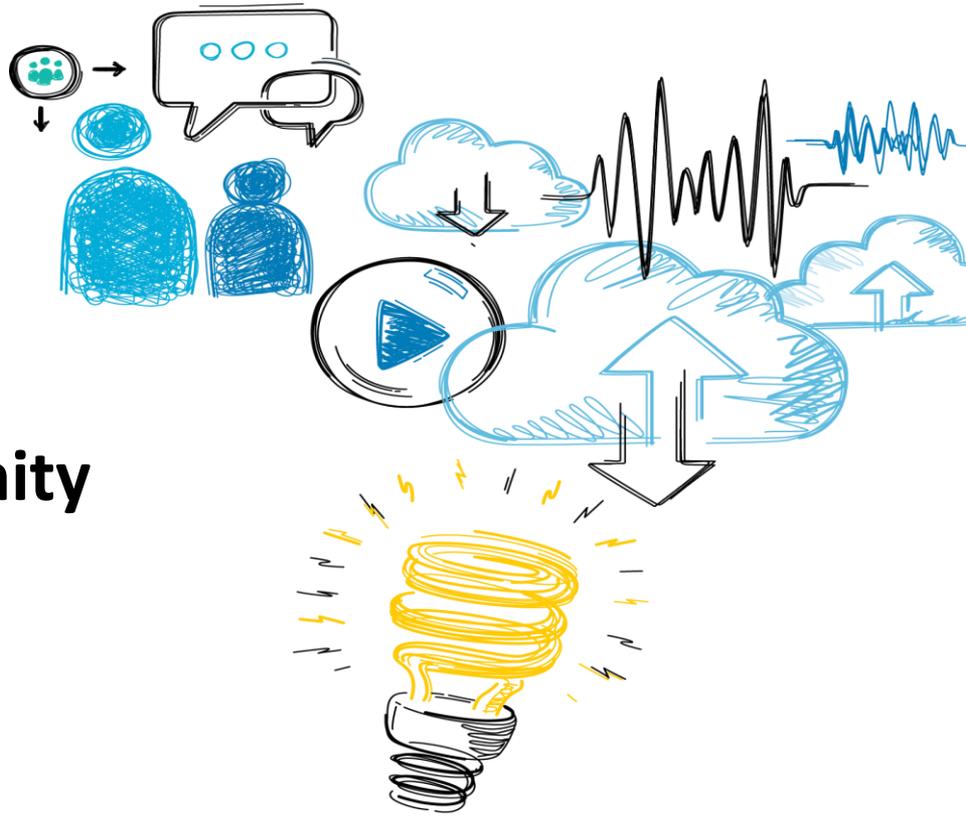
Director of Portfolio Planning  
GPT Planning & Operations

Cengage Learning

# Planview Customer Community

## Investment & Capacity Planning

March 24, 2016

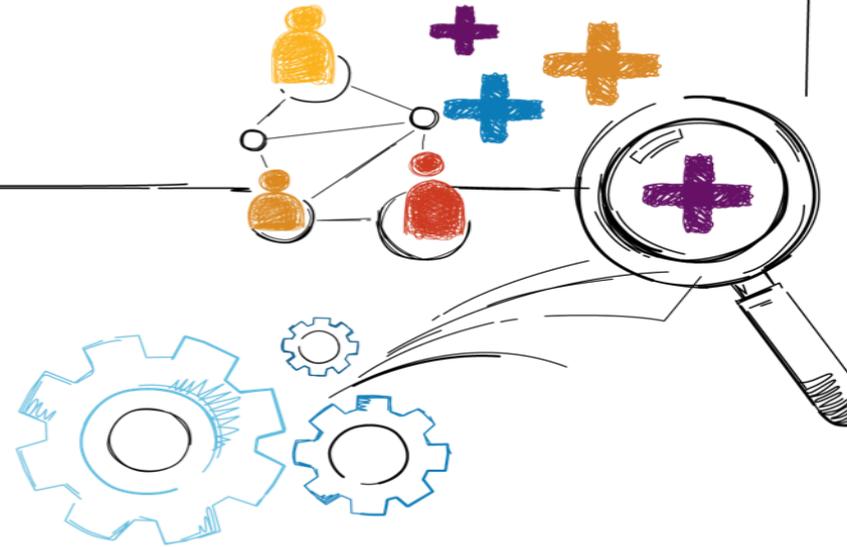


# Overview of today's session



- Background
- Results and Benefits from Investment & Capacity Planning
- Lessons Learned Along the Way
- Updates since Horizons
- Additional Resources
- Questions and Answers - save for the end

# Background



# Our Story



Cengage Learning believes that engagement is the foundation of learning...engagement is at our core and our focus is engaging with learners, both in the classroom and beyond, to ensure the *most effective product design, learning solutions and personalized services* - all to help people learn.

We understand that an engaged learner is a successful one and we are *leading the transition to digital with a unique faculty and student perspective* to transform learning through engagement.

A screenshot of the Cengage Learning Higher Education website. The header includes the Cengage Learning logo, 'Higher Education', 'Educator/Student Resources', 'Quick Links', and a 'Sign In' button. Below the header is a navigation bar with 'Browse by Discipline', a search bar, and links for 'Engagement Services' and 'Rep/Learning Consultant'. The main content area features a banner for training webinars and two featured articles: 'Digital Tools Improve Learning Outcomes' and 'MindTap General Chemistry Leads to Higher Grades at Texas Tech'. Each article includes a small image, a title, a brief description, and a call-to-action link.

**CENGAGE Learning** Higher Education Educator/Student Resources Quick Links Sign In

Browse by Discipline Search by Title, Author, ISBN Engagement Services Rep/Learning Consultant

JUST IN TIME ... FOR FALL AND BEYOND  
Hit the ground running with your Cengage Learning digital solution! Learn from your peers with live, Faculty Partner-led training webinars.

**Digital Tools Improve Learning Outcomes**  
Instructors report higher levels of student engagement in course materials when at least 20% of their course grade is tied to their digital learning solution.  
[Check out the blog »](#)

**MindTap General Chemistry Leads to Higher Grades at Texas Tech**  
Students using *MindTap* outperformed their peers and overwhelmingly saw *MindTap* General Chemistry's positive impact on their learning.  
[Download the Case Study »](#)

# Our Story



## Global Product Technology's Planning and Operations Group

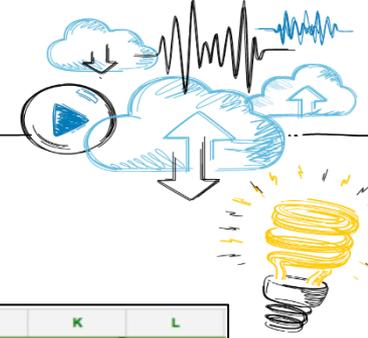
- After a re-org in April 2013 our group was created to help guide the new *centralized* technology organization through a variety of new and emerging processes, re: planning for resources, projects etc.
- Six people supporting Planview Enterprise, and planning and project processes, for a Technology Product Development Organization of over 1350 people
- My role is to coach other leaders in GPT and to guide them, *and the projects* through the various planning processes, so we're set up for success
- Our use of ICP involved me and my boss, Gordon Kent - VP of Planning & Operations
- *(You, too, can do this with one or two people!)*



We branded Planview Enterprise internally as PLANit so I may use those terms interchangeably!



# How We Used to Plan



Spreadsheets,

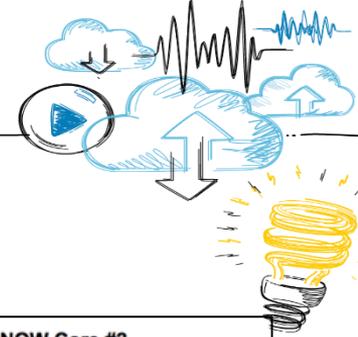
A	B	C	D	E	F	G	H	I	J	K	L
	Project ID	PLANit ID	Date Added	Product Project	Delivery Model Phase	Current Step	Next Step	CS to GM for Approval	Date CS Approved	Concept Summary Approved	Budget request (less than \$25k)
Arnold+2e—Practice-Test-Generator	HED-R14-0175	n/a	5/6/2014		Rejected	Rejected	Approve-Concept-Summary	5/6/2014			
Artifact Management (ePortfolio, PathBrite)	HED-R14-0038	1000281			Plan	Business Case Submitted	Business Case Challenge				
Asia-Storefront	HED-P14-0006	n/a			Rejected	Rejected	N/A	4/21/2014			
ASP-Improved PSP-ALS-PSP	HED-R14-0089C	1000235		OWL 2015	Build	In Development	Product Validation				
Authoring/Workflow Tool in Aptia for Customizing Learning Outcomes Taxonomy	HED-R14-0010	don't need			Ideate					Y	
Automatic Recurring Billing, Direct to Consumer, Subscription Model	PRO-R14-0003	1000382	7/1/2014		Plan	CER in Progress	Sign CER	7/1/2014	7/1/2014	Y	
Automation Project	HED-P14-0041	1000311	6/5/2014		Plan	Business Case in Progress	Submit Business Case	6/6/2014	7/7/2014	Y	
Basic Robotics	K12-R15-0001	1000291	6/2/2014		Plan	Business Case Submitted	Business Case Challenge	6/2/2014	6/5/2014	Y	
Batch-Enrollment-for-Aptia	HED-R14-0163	n/a	4/8/2014		Rejected	Rejected	Approve-Concept-Summary	4/9/2014			
Bb Integration Improvements: Westwood Career College	HED-P14-0046	1000324	6/26/2014		Plan	Business Case in Progress	Submit Business Case	6/26/2014	7/7/2014		Y
Big Data Phase I	HED-P14-0007	n/a			Support	Project Complete	N/A			Y	
Blank Sheet of Paper (BSOP) - Journal Entry	HED-R14-0011	1000224		BSOP	Build	In Development	Product Validation			Y	
BLAW - Worksheet Enhancements	HFD-R14-0130	1000259			Build	In Development	Product Validation	1/21/2014	1/21/2014	Y	
Branching	HED-R14-0012	n/a			Support	Project Complete	N/A				
Branching in CNOW MindApp	HED-R14-0013	n/a			Support	Project Complete	N/A			Y	

There were 67 columns

Over 300 rows

# How We Used to Plan

spreadsheets, and ...



ALS Concentric Sky Team				Aplia Platform Team				CNOW Core #1				CNOW Core #2			
HE-1				HE-2				HE-3				HE-4			
QuickPrep for Chemistry ; Chem PSP ; Accounting PSP ; Self-Assessment ; CSFI				Aplia Maintenance & Sustain, Reskinning				CXP Integration				Full CXP into CNOW			
9				15				15				13			
8				14				15				13			
1				1				0				0			
Role	Who	Allocation	Location/Vendor	Role	Who	Allocation	Location/Vendor	Role	Who	Allocation	Location/Vendor	Role	Who	Allocation	Location/Vendor
TPD	Jones, Michael		Rem-Am	TPD	Jones, Michael		Rem-Am	TPD	Jones, Michael		Rem-Am	TPD	Jones, Michael		Rem-Am
TPM	Grover, Matthew		CP	TPM	Miller, Christopher		SF	TPM	Hersey, Harold		Rem-Am	TPM	Hersey, Harold		Rem-Am
PL	Zukowski, Melody		FH	PL	Howland, Katherine	25%	SF	Dev Lead	Curb, Lisa	100%	Emberex	Dev Lead		100%	Emberex
Dev Lead	Nugent, Asia		C Sky	Dev Lead		50%	SF	SA	Hilt, Thomas		Rem-Am	SA			
QA Lead	TBD			Dev	Rahman, Arif	20%	SF	QA Lead	Vanama, Priyanka	20%	FH	QA Lead	Vanama, Priyanka	20%	FH
SA	Bolling, Shad		Rem-Am	Dev	Sohmer, Dan		Rem-Am	CIM	Butz, Timothy		Mason	Dev	EmberexDev4	100%	Emberex
Dev	Burke, Kahli		C Sky	Dev	Carroll, Dave		Rem-Am	UX	Raney, Scott		Emberex	Dev	EmberexDev5	100%	Emberex
Dev	Bennett, Jeff		C Sky	Dev	Chou, Jack		SF	Dev	EmberexDev1	100%	Emberex	Dev	EmberexDev6	100%	Emberex
Dev	Noda, Eiji		C Sky	QA Lead	Rengarajan, Balavar	100	SF	Dev	EmberexDev2	100%	Emberex	QA			offshore
				QA	Gegineni, Hime-B	100	SF	Dev	EmberexDev3	100%	Emberex	QA			offshore
				QA	Shnyder, Sam	100	SF	QA			offshore	QA			offshore

# How We Used to Plan

... more spreadsheets!



TEAM	Devs	2015			August				September			October 2015				November						
Week Starting (Mon)		7/20	7/27	8/3	8/10	8/17	8/24	8/31	9/7	9/16	9/23	9/30	10/7	10/14	10/21	10/28	11/4	11/11	11/18	11/25	12/2	
Platform Version		3.26			3.27																	
MindTap Gradebook	3	powered platforms (MightyPlay/Clue)																				
SPARTans (Bos/FH/SF)	8	MindTap Platform Performance/Maintenance/Enhancements																				
Joker (FH)	4	Platform Enhancements driven by MTQ Workflow																				
Nucleus	5																					
Team X	4																					
Push-to-Snapshot	1	p with SO																				
Stonefish	1																					
SugarGliders	3																					
CHiPs (FH)	5																					
Heisenberg (FH)	5																					
Tandem7	3																					

	May	June	July	August	September	October	November	December	January 2015	February 2015	March 2015
Progress (6 Devs) (HE-13)	ebook 2.0 (#2) [1-0064]		** MindTap Gradebook 2.0 (#2) continued?? [HEd-R14-0064]	** Placeholder for FALL RUSH Support **							
Core (6 Dev)	LTI support for Active Listening: viedge's guide	LTI support for OWL 2015	emDoc - R14-01	** Placeholder for FALL RUSH Support **		TEMP: Internationalize MindTap and select MindApps [INT-R14-0001]		TEMP: MindTap Enhancements for Cosmetology and other Skills Based, Seat Hour Programs (not covered elsewhere) [HEd-R15-0010]			
Builder (6 Devs) (HE-14)	n Management - Dates (Phase 1) [14-0079]		PLACEHOLDER: Westwood integration (change in activity locking when coming from some LMS, EULA, guest access) - Sept 15th								
Foundation (6 Devs) (HE-15)	Sustain / Small Projects as they come in										
	MT4 Gradebook Client (B. Gradebook Store / Cengage Gradebook Service API?)										
	MT4 Builder Modifications & Cengage Course Services (B. Support for: Cengage Content Publisher)										
	MT4 Client Modifications										
	MindTap Mobile APIs?										

# Our Story



## Why We Implemented Planview Enterprise

- PLANit is our end-to-end project and resource management solution that has enabled our organization the ability to integrate the planning and execution stages of product delivery. It is our system of record for our planning, forecasting, status, and time tracking.
- Version history in the 1+ year we've been live is below
- But now we're on 11.5.something!

Horizons

July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept
	<b>Training, resource &amp; project management</b>								<b>Lots of planning activity for Sept-June</b>					
11.1					11.2			11.3					11.4	
Go Live								ICP!						

# Expectations



Using Investment and Capacity Planning (ICP) within Planview Enterprise was going to allow us to:

- Leverage **one** canonical list, and source of, projects for capacity planning
- Use a real Capacity Analysis via roles-based requirements input as part of our planning process
- Maximize **resources** to bring the most value to our customers
- Force the hand of product to **rank** (prioritize) projects
- Automatically include maintenance and enhancements and “**other**” work when accounting for capacity
- Use **one** system for all of that!

# What I Thought We'd Use ICP For:



## The LINE(s)

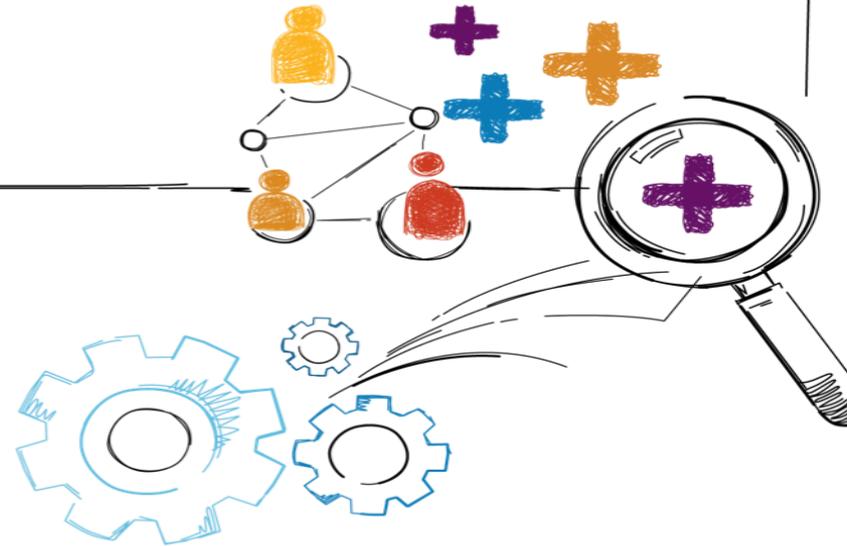
- Projects below the line, we cannot do

Rank	PROJECT	Net Present Value (NPV)	Capital Costs	Expense Costs	Labor Cost	Priority Score	Regulatory	Strategic
1	Digital Imaging Core Marketing Project	23,668,817	390,384	5,330,364	29,517,811	72	Yes - Absok	Excellent
6	Digital Recording System Prototype	2,811,452	462,174	1,318,097	1,846,374	57	Yes - Absok	Excellent
7	Improve Speed Project	7,686,394	244,836	1,872,274	8,485,437	54	Yes - Absok	Excellent
8	Camera Product Line Marketing Launch	7,843,269	585,552	1,296,192	1,237,362	25	No	No Algor
9	Consumer Software Project	4,372,627	105,093	5,757,744	1,238,220	54	Yes - Absok	Excellent
10	Recording Time Expansion	2,246,942	224,132	4,258,028	725,046	51	Yes - Absok	Moderate
11	VuC Requirements	17,092,096	223,272	5,248,719	5,664,723	47	Yes - Absok	Good Alg
12	Modeling Project	8,206,412	161,364	127,838	6,882,228	49	Yes - Absok	Moderate
13	Automatic Online Updates	9,186,921	190,128	1,968,632	8,172,963	49	Yes - Absok	Good Alg
14	Zoom Prototype Project	6,377,827	332,328	2,345,879	1,389,845	49	Yes - Absok	Moderate
15	Screen Design Project	1,786,121	191,268	1,602,329	3,522,611	49	Yes - Absok	Moderate
16	Color Imaging Project	10,465,095	501,116	845,146	3,587,200	49	Yes - Absok	Excellent
17	Canecorder Sales Strategy Deployment Project	1,524,212	195,168	432,096	1,964,947	25	No	Poor Alg
18	Enhanced Email Capability	25,581,513	307,188	1,724,888	2,831,303	16	No	Excellent
19	Strength Testing Project	2,743,792	228,416	1,998,794	943,690	11	No	Good Alg
20	Revised Memory Technology Project	716,363	181,392	586,780	5,962,245	9	No	Poor Alg
21	62 Aperture Faster Lens	10,490,348	201,132	2,435,454	5,308,518	9	No	Moderate
22	Digital Photo Transfer - JIRA	14,096,981	148,079	2,935,306	4,003,936	7	No	Poor Alg
23	Photo Edit Software Project	5,458,845	324,292	3,283,736	2,716,863	6	No	Moderate
24	Commercialization Project	4,924,784	230,494	2,464,286	1,154,604	6	No	Good Alg
25	Color Resolution Prototype	6,433,680	134,635	243,144	15,681,480	5	No	Moderate
26	Wireless Technology Project	8,790,068	233,556	1,856,756	4,568,380		No	Good Alg

Alerts!

- Drawing attention to certain areas

# Results & Benefits



# What We Ended Up Using Most from ICP...



**Balance** view, which showed, by providing org and/or role,

Which groups were in **red**

And **when** they were in red

And because of which **projects**

# Over Capacity (Red), by Role



**Balance** pivot showing lots of red ~ numbers here are FTE

PLANit Search... My Account Help Sign Out

My Planview Resources Administration Analytics & Reporting Content Work Products Planning more ... + New ...

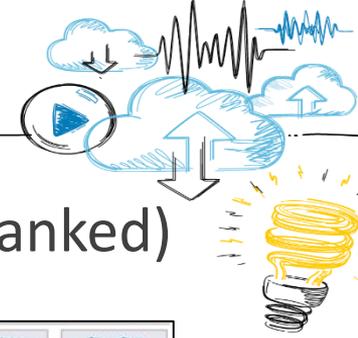
« Back Planning Portfolio: Higher Ed Fall Dev Cycle Planning Investment and Capacity Planning Scenario: Alternate Scenario ▼

Pivot: Balance ▼ Category: Labor Currency: Effort Enter text to filter grid Export As... ▼

Focus: Resource Role Providing Organization Cost Center Resource Type Capitalization Flag Approved Vendor

Description	ID	Rank	Portfolio/Planned	Aug 2015 (f)	Sep 2015 (f)	Oct 2015 (f)	Nov 2015 (f)	Dec 2015 (f)	Jan 2016 (f)	Feb 2016 (f)
Resource Role: ***			Remaining Ca...							
Resource Role: Analyst			Remaining Ca...	1	-2	-1	1	2	4	5
Resource Role: Architect			Remaining Ca...	2	-2	-2		2	4	5
Resource Role: CIA			Remaining Ca...	-1	-4	-4	-3	-4	-1	
Resource Role: CIM			Remaining Ca...	-2	-3	-3	-1	1	4	5
Resource Role: Content Architect			Remaining Ca...	-1	-1	-1		1	2	3
Resource Role: Content Developer			Remaining Ca...							
Resource Role: Content Prog/Analyst			Remaining Ca...	3	7	7	7	5	9	
Resource Role: Content Suppl/Analyst			Remaining Ca...	1	3	3	3	3	3	
Resource Role: DBA			Remaining Ca...							
Resource Role: Developer			Remaining Ca...	9	-1	-1	2	9	17	18
Resource Role: Developer II			Remaining Ca...	-1	-9	-8	-5	-1	3	4
Resource Role: Developer III			Remaining Ca...	-2	-5	-5	-4	-2	4	7

# Over Capacity (Red), Expanded



Focus is first on providing org, then role, then project (ranked)

PLANit												
My Planview Resources Administration Analytics & Reporting Content Work Products Planning more ... + New ...												
« Back Planning Portfolio: Higher Ed Fall Dev Cycle Planning Investment and Capacity Planning Scenario: Planning Scenario ▼												
Pivot: Balance ▼ Category: Labor Currency: Effort Enter text to filter grid Export As... ▼												
Focus: Providing Organization Resource Role Approved Vendor Capitalization Flag Resource Type Cost Center												
Description	ID	Rank	Portfolio/Planned	Aug 2015 (f)	Sep 2015 (f)	Oct 2015 (f)	Nov 2015 (f)	Dec 2015 (f)	Jan 2016 (f)	Feb 2016 (f)	Mar 2016 (f)	
Providing Organization: Concentric Sky (Jones)			Remaining Ca...	17	-7	-2	3	4	13	14		
Resource Role: ***			Remaining Ca...									
Resource Role: Analyst			Remaining Ca...		-1	-1	-1	-1				
Resource Role: Architect			Remaining Ca...	3	1	1	2	2	4	3		
Resource Role: Content Specialist			Remaining Ca...	1								
Resource Role: Developer			Remaining Ca...	10	-2	2	5	6	10	10		
<b>Resource Role: Developer II</b>			Remaining Ca...	2	-4	-4	-4	-4	-1			0
Project: MTQ > Gradebook (Jan 2016)	1000926	2	Demand		1	1	1	1				
> Labor, ***, ***, ***, Capital			Line		1	1	1	1				
Project: MTQ > Analytics (Jan 2016)	1001703	3	Demand		2	2	2	2	1			
> Labor, ***, ***, ***, Capital			Line		2	2	2	2	1			
Project: CNOWv8 - Improving Student Outc...	1001533	45	Demand		1	1						
> Labor, ***, ***, ***, Capital			Line		1	1						

## In Addition to Showing Problems...



The *Balance* view showed, by providing org and/or role,

Which groups were just **fine**

So we could **commit** to some work  
early in the planning cycle

It's that **simple!**

# Under Capacity (Green)



- Shows that some entire providing orgs were fine
- Some roles were fine, even under an otherwise “red” providing org
- A different planning portfolio
- Manually added in the green highlights to prove a point

Pivot: Balance ▼		Category: Labor		Currency: Effort		Enter text to filter grid						⌵	⚙	Export A...
Description	ID	Rank	Portfolio/Planned	Sep 2015 (f)	Oct 2015 (f)	Nov 2015 (f)	Dec 2015 (f)	Jan 2016 (f)	Feb 2016 (f)	Mar 2016 (f)				
⊕ Providing Organization: CP Dev - MyNGConn (Nic...			⊕ Remaining Ca...	1	1	2	2	2	2	2				
⊕ Providing Organization: CP Dev - Skills (Abbru...			⊖ Remaining Ca...	1	3	4	4	4	4	4				
			Capacity	17	17	17	17	17	17	17				
			Out of Portfoli...	11	12	12	12	12	12	12				
			Portfolio Dem...	4	2	1				1				

# Outcomes

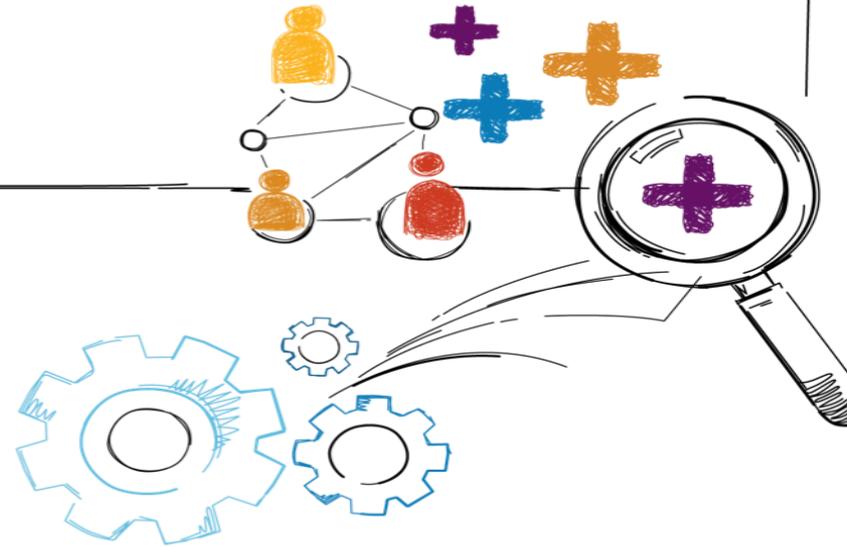


We had the data, and we were able to push out 5 large initiatives and about 12 other projects

We could see exactly which positions we needed to hire for, and in what groups

Earned trust for our operations and planning group with the other parts of the technology organization

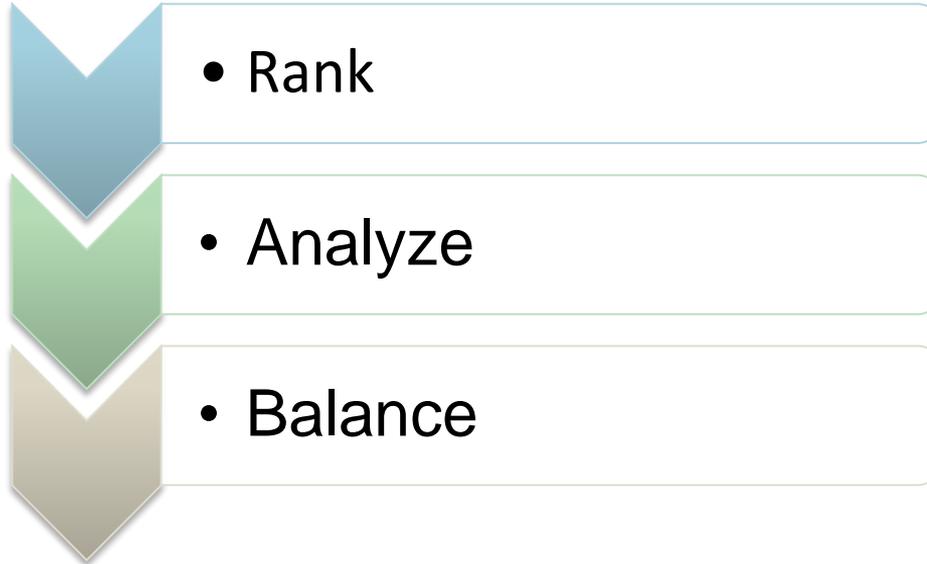
# Lessons Learned



# Major Takeaways



Give yourself *time* to become familiar with how Investment and Capacity Planning interacts with the admin settings and the data itself (*not just a few days, at least not for me!*)



- Don't forget to Rank & Analyze first - changing the investment approval is in Analyze and you don't want to miss out on some demand. (*Only conditional and accept are used in Balance.*)

# Major Takeaways

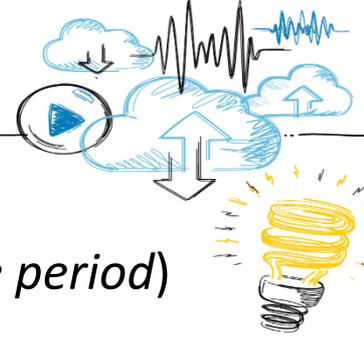


Understand how the Planning Portfolios are created and the impact of the definition

- For us, this was:
  - Capacity Structure
    - Cost center, selected providing orgs
  - Demand Structure
    - Work, almost always an existing work portfolio
  - Financials
    - Actual/forecast, and < 12 month planning

Capacity	
Capacity Structure	Cost Center ▾
Capacity Level	Leaf ▾
Select Capacity	Infr. Platforms (Bolgatz) Infrastructure (Santoro) Architecture (Mealing) CAS (Kunnath) Analytics (Sinha)
Capacity Financial Model	Cengage Capacity Supply ▾
Capacity Financial Version	Cengage Supply (forecast) (baseline) ▾
Demand	
Demand Structure	Work ▾
Demand Level	Project: ▾
Select Demand	<input type="radio"/> Based upon impact to selected Capacity <input checked="" type="radio"/> Existing Portfolio DOUG'S PROJECTS - ACCEPTED & CONDITIONAL
Demand Financial Model	Cengage Financials ▾
Demand Financial Version	Actual/Forecast (forecast) ▾
Planning Horizon Start	Aug 2015 📅 ✖
Planning Horizon Finish	Jun 2016 📅 ✖

# Major Takeaways



Projects must have the right demand (*matching the definition & time period*) to show up in Investment and Capacity Planning

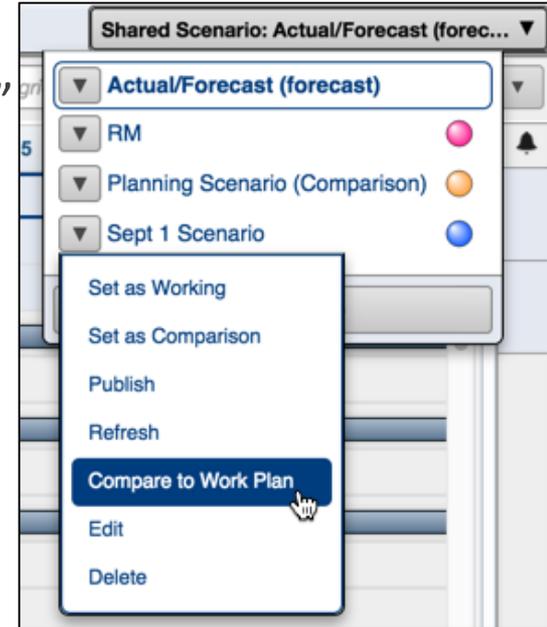
- ICP highlights problem areas in project planning
  - Schedules – either too short or too lengthy
  - Roles – overuse of some orgs or roles
  - Out of Portfolio – can see how much (FTE or \$) but not *what*
- Plan on lots of edits to your projects and assignments
  - ... unless you already have great, clean data for future projects!



# What Else Did We learn?



- Use Scenarios!
  - They don't impact each other, or the “real world” of Planview Enterprise
  - Shared automatically with the portfolio
  - Refresh them (11.4+) to pull in new work added to demand portfolios
  - Compare to work plan



# Major Takeaways



Create many planning portfolios as needed and keep them small

The screenshot displays the 'Planning Menu' interface. It is divided into three main sections: 'Show', 'Select', and 'Action'.

- Show:** Contains a 'Planning Portfolios' button and a '+ New Planning Portfolio' link.
- Select:** Features a dropdown menu currently set to 'Recently Visited Portfolios'. Below it is a list of portfolios, with 'Higher Ed Fall Dev Cycle Planning' selected and highlighted in blue. Other portfolios include 'Amber's Clifton Park Dev Planning Port', 'Doug's Planning Port', 'Accepted only Planning Port', 'Adelaide's Group Planning Portfolio', 'New Knowledge Center Planning Port', 'Fall 2015 Development', 'Amber's MindTap Planning Port by Provi...', and 'Amber's CNOW Planning Portfolio'.
- Action:** Lists various actions such as 'Investment and Capacity Planning', 'Capacity Portfolio Manager', 'Demand Portfolio Manager', 'Analytics and Reporting Portal', 'Portfolio Definition', 'Portfolio Members', 'Refresh Portfolio', and 'Delete Portfolio'.

Our organization views the development teams in two divisions, so we had planning for those two to start

# What Else Did We learn?



Focusing on FTE rather than dollars worked for us

- Seems tough to do both and we don't have top-down financial planning
- Our execs are (mostly) interested in FTEs and this related to hiring needs

Pivot: Balance ▼ Category: Labor Currency: Effort

Description	ID	Rank	Portfolio/Planned	Aug 2015 (f)	Sep 2015 (f)	Oct 2015 (f)	Nov 2015 (f)
Providing Organization: Assessment & Inst. Controls (Spears)			Remaining Ca...	2	-1	-1	
Providing Organization: Flex Pool & MindApps (Tony)			Remaining Ca...	3	2		
Providing Organization: Gradebook & Analytics (Yadav)			Remaining Ca...	1	1	-1	-1
Providing Organization: Instructor Tools (Holland)			Remaining Ca...	7	4	3	3

One button click and it changes! \$\$

Pivot: Balance ▼ Category: Labor Currency: Effort

Description	ID	Rank	Portfolio/Planned	Aug 2015	Sep 2015	Oct 2015	Nov 2015
Providing Organization: Assessment & Inst. Controls (S...			Remaining Ca...	13,638.92	(13,141.94)	(5,358.07)	2,817.92
Providing Organization: Flex Pool & MindApps (Tony)			Remaining Ca...	56,523.70	15,801.60	(8,222.44)	(25,291.21)
Providing Organization: Gradebook & Analytics (Yadav)			Remaining Ca...	5,662.23	12,141.74	(6,314.13)	(6,474.26)
Providing Organization: Instructor Tools (Holland)			Remaining Ca...	71,745.99	62,851.95	39,786.01	40,170.22

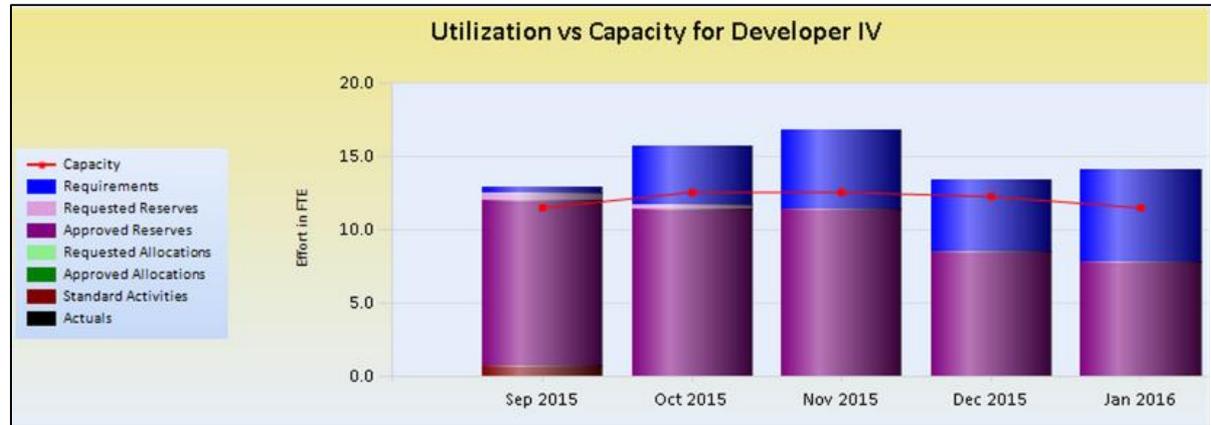
# What else did we learn?



Validate what you see with other parts of Planview Enterprise

## RES03 →

- Can also view by FTE or other ways
- Shows the requirements in addition to reserves or allocations



# What else did we learn?



Validate what you see with other parts of Planview Enterprise

Resource Portfolio: New Knowledge Centers - all		Resource Management and Assignments				
		Enter text to filter grid				
Name ^	Work Name	9/1/2015	10/1/2015	11/1/2015	12/1/2015	1/1/2016
[-] Bachala, Reagan		1f	1f	1f	1f	1f
[-] MindTap.General Maintenance	MindTap Maintenance	1f	1f	1f	1f	1f
[-] Baral, Sujan			1f			
[-] Build	SOA Cengage Course Services (incl Cor					
[-] Build iOS	Mobile Pronunciation App					
[-] Bochner, Harry		1f	1f	1f	1f	
[-] Build	MT4 > Gradebook	1f	1f	1f	1f	
[-] Build of C&SM Features in MT4 G...	MT4 > Course Section Administration-Me		1f	1f	1f	
[-] Bylenok, Greg		1f	2f	2f	2f	2f
[-] Build	MTQ > Workflow (Jan 2016)	1f	1f	1f	1f	1f
[-] Build	SOA Cengage Course Services (incl Cor	1f	1f	1f	1f	1f
[-] Caldwell, David		1f	1f	1f	1f	1f
[-] MindTap.General Maintenance	MindTap Maintenance	1f	1f	1f	1f	1f

- Resource management and assignments (11.4+) to show out of portfolio work assigned
- Or RAM if you don't have 11.4 yet

# More Nitty-Gritty Things...



- Understand what gets loaded (and when) into your:
    - Work plans
    - Financial plans
    - Capacity plans
    - and how to refresh them (including caching) ... lots of admin stuff
  - **Shift plan** (e.g. schedule) in scenarios to see the impact of changes, but **only if** you allow edit of your financial plans manually
    - We don't – we allow edit only on load
    - So we just moved the projects manually ~ not ideal
- Update** →
- We did eventually start shifting dates in ICP for planning purposes, but we still shifted dates manually after – unsure of how the

# More Nitty-Gritty Things...



- In 11.3, new work items added to the work portfolio were not added automatically as demand... fixed in 11.4, with refresh (for scenarios)
- New capacity or changes to capacity (resource re-orgs) will not be visible immediately either
- The dollars included in ICP are only for the timeframe included and not for the “life” of the project (even when the same columns are used)
- Be on the lookout for small things that have a big impact

# What's Next For Us?

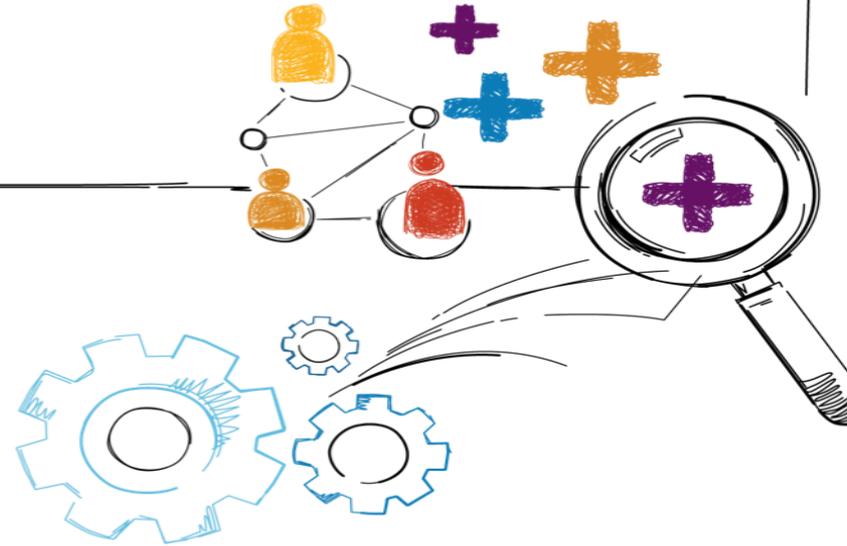


- Evaluate what we did this cycle that didn't work and stop doing it
  - Adding in "To Be Hired" may have caused open positions to be double-counted in the minds of the executives
  - We have already adjusted the providing org structure
- Ability to get a long-term picture of capacity vs. demand 
  - 12-18 month roadmap needed by product
- Interactive sessions with technology leaders using "shift plan"
  - Need to allow edit of financial plans on these days

Did this!

# Updates since Horizons

4 months!



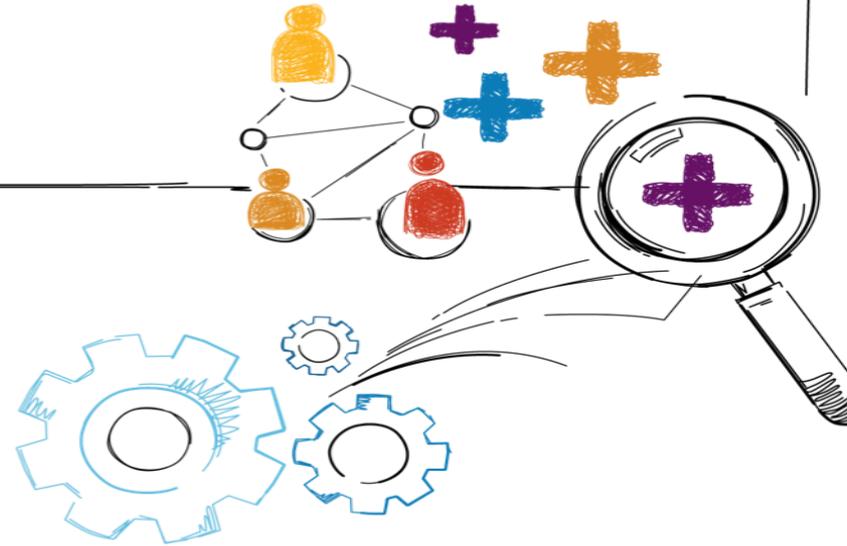
# Quick Tips

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- Single-purpose Portfolios
  - A single portfolio for investment decision updates
  - An umbrella portfolio for an entire business unit
  - Smaller ones for specific high-demand groups
  - Others probably have good use-cases that work for them!



# Additional Resources



# Available Resources for ICP info



- 11.3 videos
  - <https://new-release.planview.com/>
    - ➔ Resources ➔ 11.3 (4 videos)
- E-learning modules
  - ICP - Rank Pivot (11.3)
  - ICP - Analyze Pivot (11.3+)
  - ICP - Balance Pivot (11.3+)
- LinkedIn Community
- Support tickets (thank you Sarah!)
- RAS – this one hour was *invaluable*
- Intelligent Help
  - Note: I found I had to read, and re-read, and re-re-read these... Customer Success may be easier to understand?
- Webinar called "Planview Enterprise for Investment and Capacity Planning"



- What challenges have you had with implementing ICP?
- What successes have you had with implementation?
- What is keeping you from getting started?
- What questions would you look to ICP to answer for your organization?
- \_\_\_\_\_

# Contact Info

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- Amber Meryman - [amber.meryman@cengage.com](mailto:amber.meryman@cengage.com)
- Director of Portfolio Planning – GPT Planning & Operations
- Cengage Learning

# Presenters



**Carina Hatfield, CPA**

Product Manager – Planview Enterprise

Planview



**Malcolm Lea**

Director of Solution Architecture

Planview



# Investment and Capacity Planning

Planview Product Manager: Carina Hatfield, CPA  
Planview Consulting; Malcolm Lea



# Objectives

- Learn how to get ready for an Investment and Capacity Planning implementation
- Understand what is involved with an Investment and Capacity Planning implementation
- Get Ready, Set, Go!

# Ready? Identify the Who

- Identify the owner or champion
  - Preferably an executive (CIO or CFO)
- Identify those responsible for demand
  - The what!
- Identify those responsible for capacity
  - The when!
- Identify those responsible for dealing with changes to the plans
  - Usually is also one (or both) of the above
  - Attempt to understand the impacts on them when there are changes
  - Note: It's often a disruptive task!



# Set? Understand What They Do

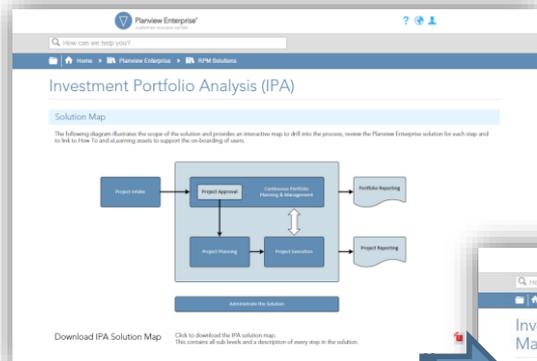
- Schedule meetings to understand what they do
  - What are they ultimately trying to accomplish?
- Learn about current processes and any challenges
  - Understand triggers that causes pain
  - Prioritizing their pain points
- What information:
  - Do they need that they can't get?
  - Is missing to set priorities?
  - Should be collected and updated to streamline processes?
  - Do they need to solve their pain?



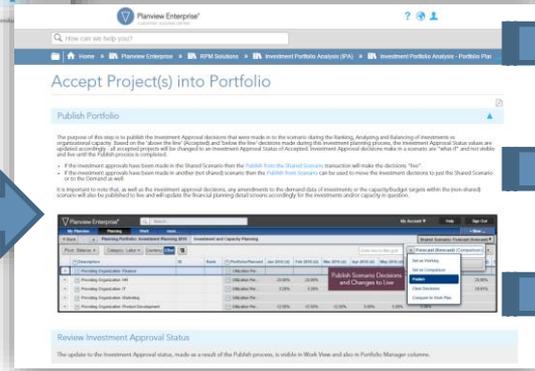
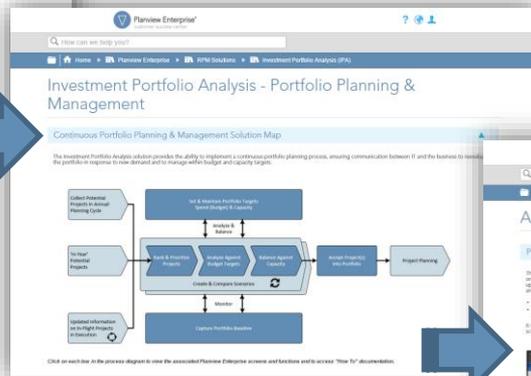
# Go! Next Steps

- Use the information gathered to define potential changes to:
  - Information collected about new projects
  - Information needed to be maintained and updated regularly
- Develop real time data driven processes across the portfolio
- Work with Planview to enable success
  - Contact your Planview Consulting Contact or your CSM to determine the right level of support
  - RPM Solution; Investment Portfolio Analysis (IPA): <https://success.planview.com/?cid=ipa>
  - Remote Advisory Services (RAS)
  - Customer Success Center: Investment and Capacity Planning Quick Start

# RPM Solution; Investment Portfolio Analysis (IPA)



- Customer Success Center content
- Interactive Solution Map defines the solution and best practice process



- QuickStart Guides
- How To Guides
- eLearning
- Best Practices



<https://success.planview.com/?cid=ipa>

# Implementation Approach

- Implemented execution first? This is slightly different
- Shorter implementation timeline
- Number of participants is smaller
- Time to value tends to be faster
- Start with where you are and mature with it
  - Bottoms up first
    - Understand what is in flight to assess and integrate demand management later
  - Top down first
    - Improve demand management and integrate execution later

# Summary

- Ready? Set. Go!
  - Identify the who
  - Learn what they do
  - Partner with us to help you
- Build an outward focus on business needs, not inward focus on process
- Leverage the tool you already have to be successful
- Let the proven 'process based pivot' guide you
- The model itself is not as important as the conversation you spark!



# Questions?

Next Meeting: April 21st, 2016 at 10:00 AM CDT