

Planview
HORIZONS®

The Planview Customer Conference

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Planview is Live! Now What?

Planning an Adoption Strategy That Builds Enduring Value

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Implementation Does Not End on Launch Day

- You are likely to be on a **change management journey** for the first 6-months on the platform.
- Successful organizations PLAN post Go-Live enablement activities that are designed to **support** their employees through a typically steep learning curve.
- Planview can provide sustained, guided support during the first few months in production that will significantly **accelerate adoption** and proficiency, and quickly enable Sponsors and administrators to manage the platform and their Planview community.
- With appropriate planning, customers can realize and **demonstrate early value** from their investment, and establish a foundation for long-term success and growth on the platform

Managing Change – At a Glance



- LEAD** Users understand why the organization is implementing a Planview Enterprise One Solution

- MOTIVATE** Users understand what this change will mean to them, with value 'teasers'

- PREPARE** Users are prepared for the upcoming changes, understanding the timeline, and how the change will be managed; e.g. what training will take place, when, and by whom. (Consider also sharing key milestones / successes of the upgrade project along the way). Users will also be made aware of 'relevant' upcoming process changes

- TRAIN** Users learn how to navigate the new solution to undertake their designated responsibilities, and understand any 'internal' process changes

- SUPPORT** Users feel supported in their use of Planview Enterprise One (PRM)

- EVALUATE & CELEBRATE** Business successes/improvements (or challenges) are reviewed and evaluated. Appropriate comms to users are targeted, reinforcing the reasons Planview Enterprise One PRM is being used, ... (and what's next) ...

Four Phases Post Go-Live



- Establish best practice administrative guidelines.
- Provide high-touch foundational support to end-users.
- Enable Sponsors and Management teams to demonstrate early value and fully support their Planview community.

- Deliver in-depth follow-on coaching and mentoring to targeted end-user groups
- Conduct formal training evaluations to assess end user aptitude.
- Establish Baseline - leverage assessment results to inform an action plan and recommended refresher training.

- Assess overall health of the implementation post-go-live.
- Comprehensive adoption assessment to measure end-user performance.
- Conduct Executive-level session to measure value attainment.

- Original core team review to confirm that solution meets expectations, and inform configuration fine-tuning.
- Adoption assessment to measure improvements from the baseline.
- Roadmap review and planning begins.

Launch

***Objectives:** establish best practice administrative guidelines, while Planview experts mentor/coach end-user groups through the fluid first few weeks in production. This is a high-touch engagement model that provides foundational support to end-users as they settle into their roles and ramp up through the learning curve. Enables Sponsors and Management teams to demonstrate early value and fully support their Planview community.*

What You Should Do	Target Audience	How Planview Can Help
Go-Live Support	Administrators	Guide Administrator through best practice steps and processes to manage the platform.
Office Hours / Production Labs	End Users	Provide real time subject matter expertise to address questions during critical first weeks in production.
Progression Party	Project & Resource Managers	Assemble the morning after Progression runs to address resource and scheduling changes; reinforce training and best practices; coach and mentor end-users.
Management Quick Start	Management / Sponsors	Assist Director/Manager level employees with portfolio, landing page and customized tile setup to provide the insights needed to manage their teams, demonstrate early value and raise adoption.

Launch continued...

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What You Should Do	Target Audience	How Planview Can Help
Reporting 101	Management / Sponsors	Conduct tutorial on how to access, configure and run the most common canned reports, and/or access and extract data sets (PBI) from the tool to support custom reporting.
Integration Check-In	Administrators	Assess whether integrations are meeting expectations and delivering desired outcomes. Address questions, concerns, open tickets, etc.
Connect with Established Customers	Sponsors	Identify customer with similar profile, now STABLE on the platform, to share 'ah ha' moments, lessons learned, and what they would do differently during the first 30/60/90 days post go-live.

Stabilize

Objectives: deliver in-depth follow-on coaching and mentoring to targeted end-user groups (either by role or product) facilitating the assimilation of Planview into daily business practices. Planview can conduct formal training evaluations to assess how well users understand the tool and their comfort level navigating Planview features and functionality. Baseline assessment results inform an action plan and recommended refresher training if needed.

What You Should Do	Target Audience	How Planview Can Help
Role-Based Day-In-The-Life Coaching & Mentoring	End Users by Role	Facilitate Day-In-The-Life sessions, provide subject matter expertise, demonstrate appropriate use of tool.
Training Evaluation (features, functionality and navigation)	End Users	Conduct evaluation, assemble results and define recommended refresher training.
Product Spotlight sessions to address questions, challenges, new use cases, etc.	End Users	Coach and mentor end-users through best practice use of specific products; assist with setup and process alignment.

Operationalize

Objectives: assess overall health of your implementation post-go live, including a comprehensive adoption assessment to measure end-user performance in the tool (sign-on rates, task execution, standard report utilization, etc.). Also includes Executive-level session to measure value attainment.

What You Should Do	Target Audience	How Planview Can Help
Reporting Reality Check	Sponsors	Confirm best use of out-of-the box reporting tools; recommend enhanced reporting and analytics capabilities.
Quarterly Adoption Assessment I	End Users	Conduct comprehensive review to identify improvement opportunities, training efficacy, general aptitude and challenges. Create recommended action plan.
Value Attainment	Sponsors / Executives	Planview Regional VP check-in w/ Executives to discuss perceived value of Planview products and services. Precursor to Roadmap planning and review.

Optimize

Objectives: assemble original core team to confirm that solution meets expectations. Identify areas requiring configuration fine-tuning. Conduct a second Adoption assessment to measure improvements from the baseline, and inform additional corrective actions as needed. Roadmap review and planning begins.

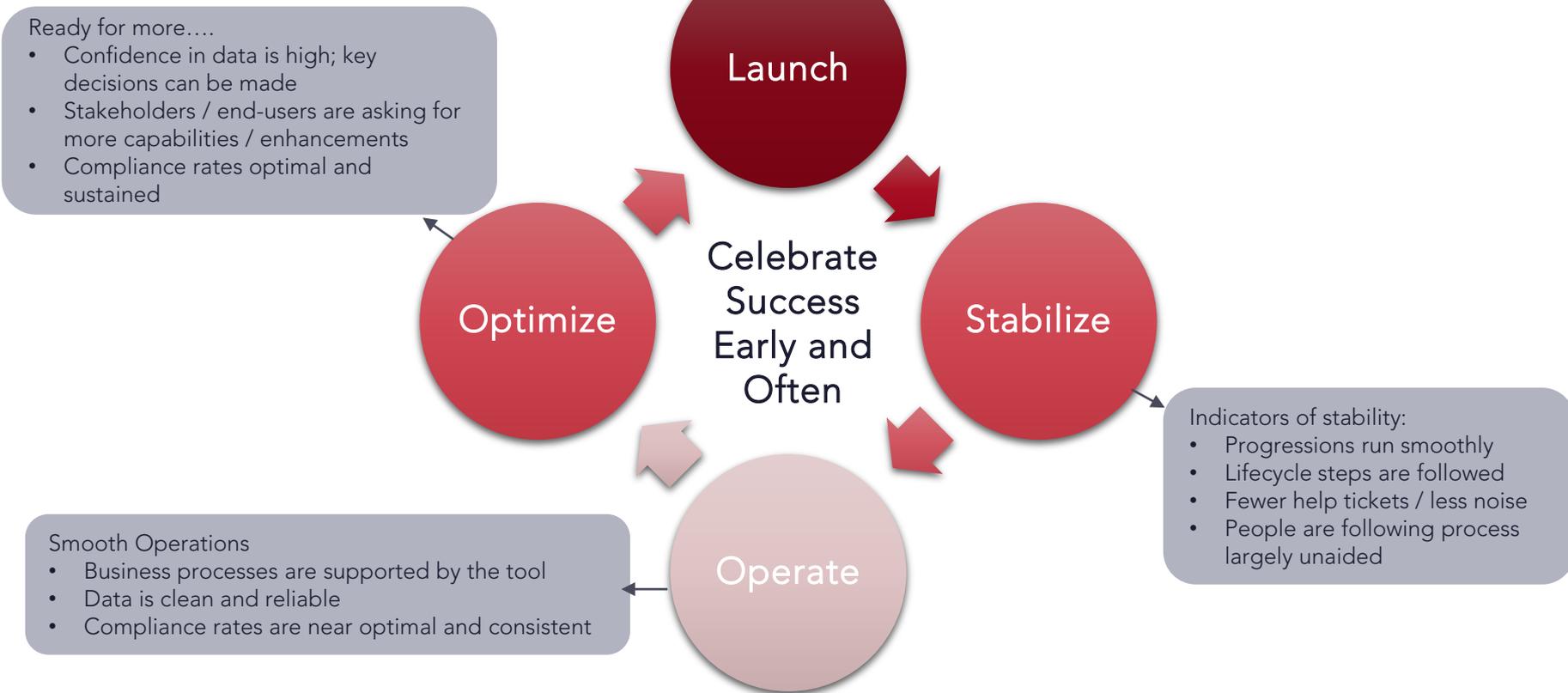
What You Should Do	Target Audience	How Planview Can Help
Quarterly Adoption Assessment II	End Users	Conduct 2 nd organizational review to compare results to Q1 baseline and measure improvement. Document findings and action plan.
Configuration Review	Core Team	Conduct 6-Month review with original core team to confirm that solution meets expectations. Gather and discuss potential adjustments/enhancements.
Roadmap Review	Sponsors / Executives	Facilitate formal Roadmap review and planning session. Should incorporate Launch Support Services action plan, and customer's future state business needs / desired outcomes.

Additional Activities

Objectives: deploy additional activities that can be leveraged to accelerate team performance levels in Planview

What You Should Do	Target Audience	How Planview Can Help
Coaching Through Execution	Sponsors / Teams	Coach and oversee development of team strategy, portfolios, programs, LeanKit boards, Projectplace collaboration space, Spigit, etc. Ensure team members get off to a great start by following best practices to setup, populate and use the tool.
Evaluate & Celebrate	Core Team	Provide "Facts & Figures" that can be shared with your end-user community to demonstrate growth and progress on the platform. Can be used to celebrate adoption milestones, recognize engaged individuals and teams, etc.

How do you Know you are Ready to Advance?



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Thank you!

For more information about Planview's launch support services, please contact your Customer Success Manager, or Managing Consultant.