Canadian
Planview Virtual Customer Forum

# Rewiring Strategy to Delivery

## Enabling the transformation journey

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# Strategy to Delivery is Transforming

Today's disruptive markets are driving organizations to Rewire

# Accelerate On-Strategy Delivery at Enterprise Scale

CHANGING WORLD OF WORK

REALIZING AGILE-AT-SCALE

CREATING AN INNOVATION CULTURE

MAKING THE PRODUCT SHIFT

# Full Spectrum of Portfolio and Work Management Solutions

CHANGING WORLD OF WORK

REALIZING AGILE-AT-SCALE

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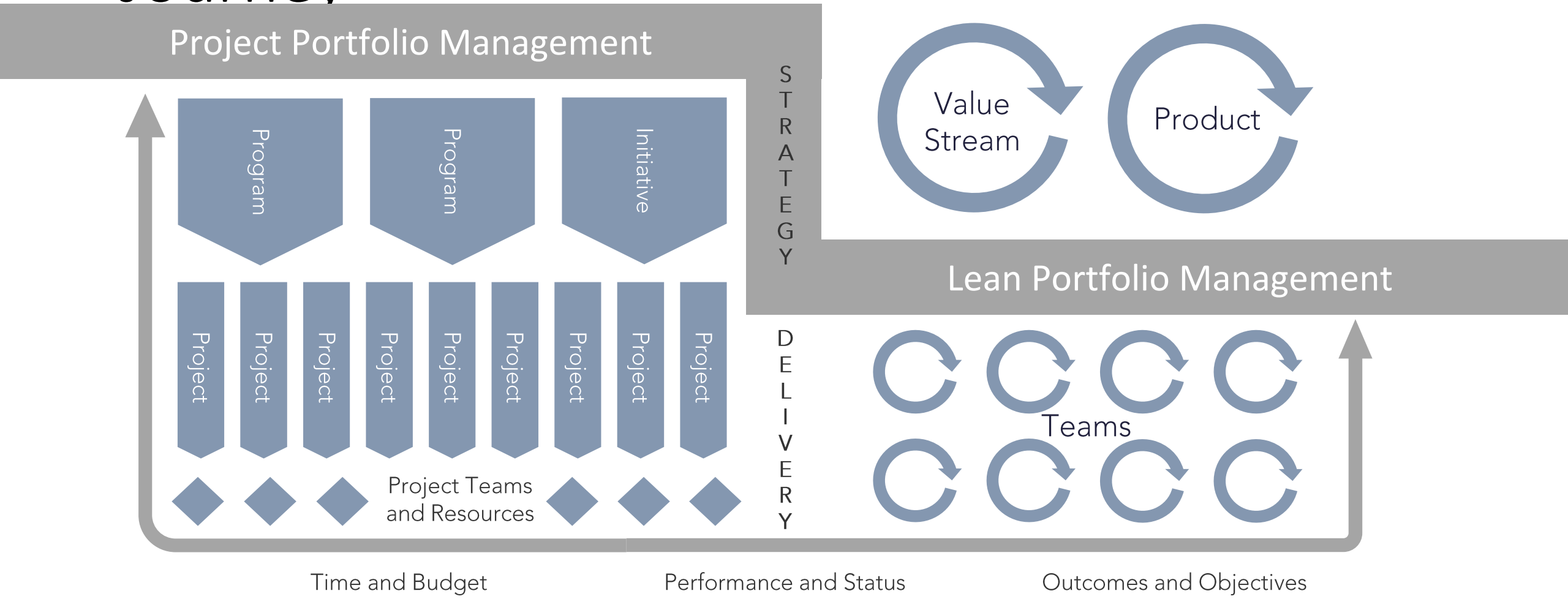
# Uniquely Positioned to Partner for the Journey



# Uniquely Positioned to Partner for the Journey

**2019 Gartner Magic Quadrant for Project and Portfolio Management**

**2020 Gartner Magic Quadrant for Enterprise Agile Planning Tools**

*Gartner Magic Quadrant for Project and Portfolio Management, Daniel Stang, Mbula Schoen, Anthony Henderson May 2019
*Gartner, Magic Quadrant for Enterprise Agile Planning Tools, Keith Mann, Mike West, Thomas Murphy, Nathan Wilson, April 2020

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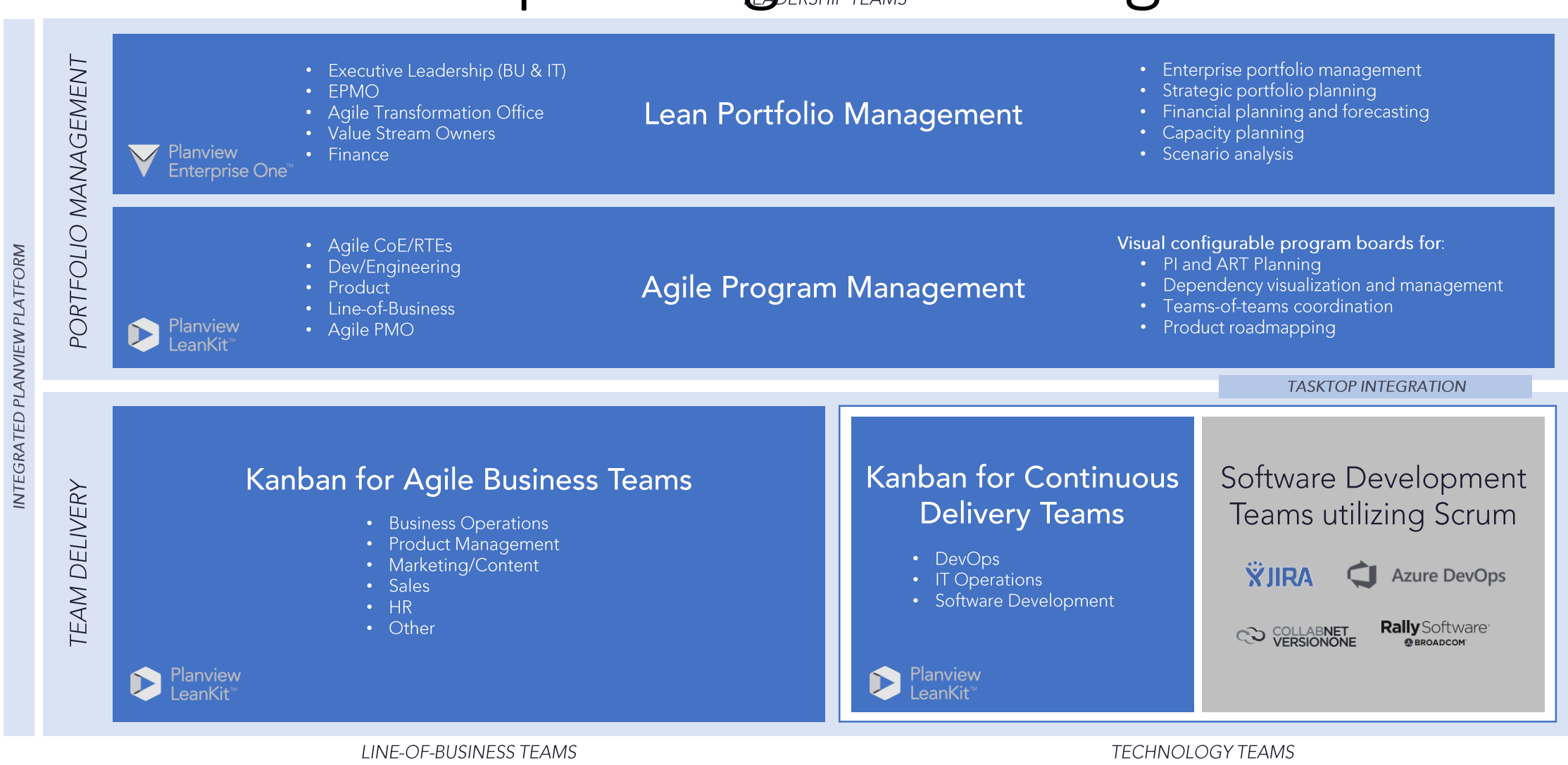
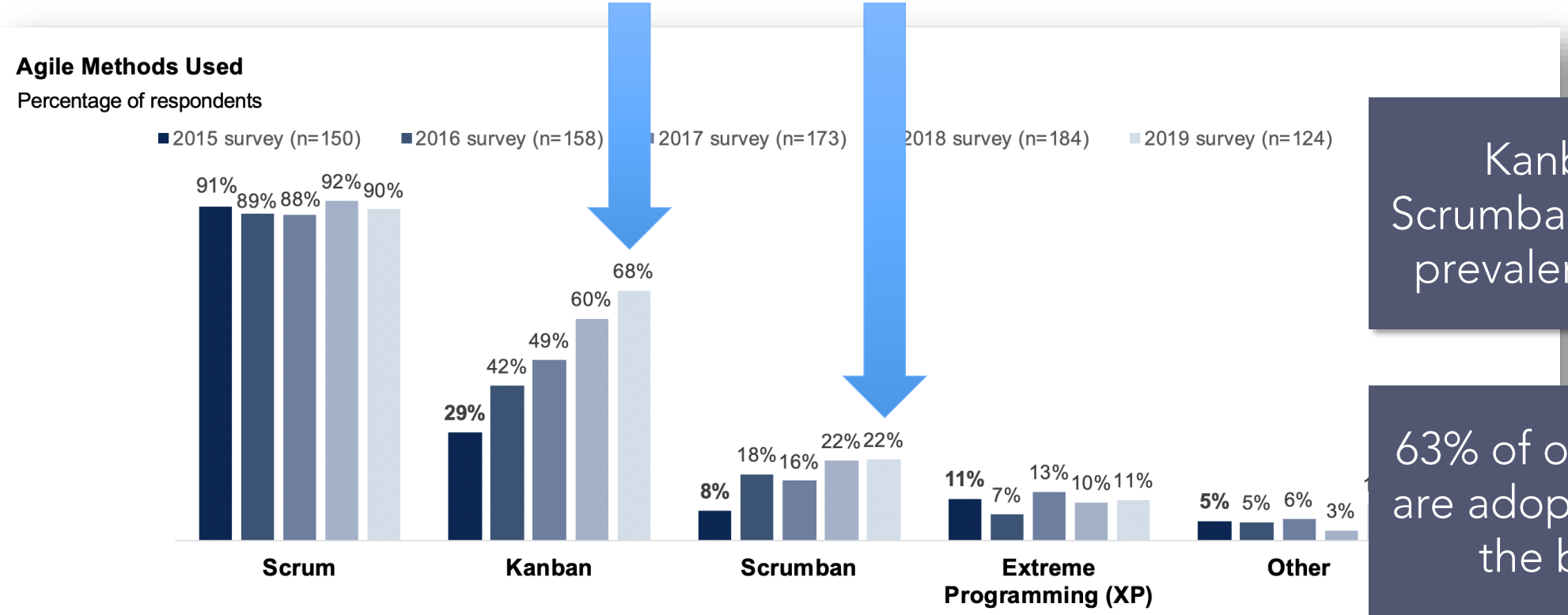
# Planview Enterprise Agile Planning Solution



# Kanban Adoption is Accelerating!




Kanban and Scrumban are now as prevalent as Scrum

63% of organizations are adopting Agile in the business

Base: Gartner Research Circle Members. Base: Organization's development is based on "Agile", "Iterative" or "Lean IT" methodologies(Q02)
Q03A. Which of these agile methods are planned for use/used in your organization? (Multiple responses allowed)
SOURCE: Gartner Research Circle Agile in the Enterprise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Gartner

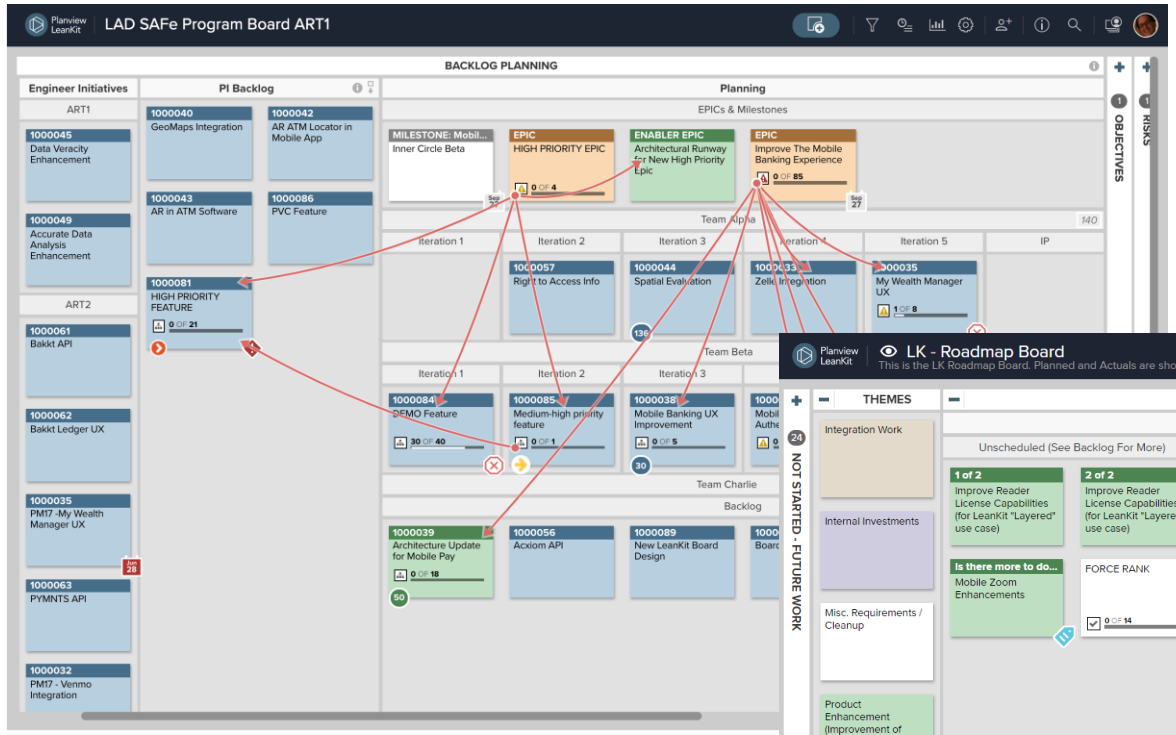
# Enterprise Agile Management - Product Leadership

Gartner

Gartner 2020 Enterprise Agile Planning Critical Capabilities

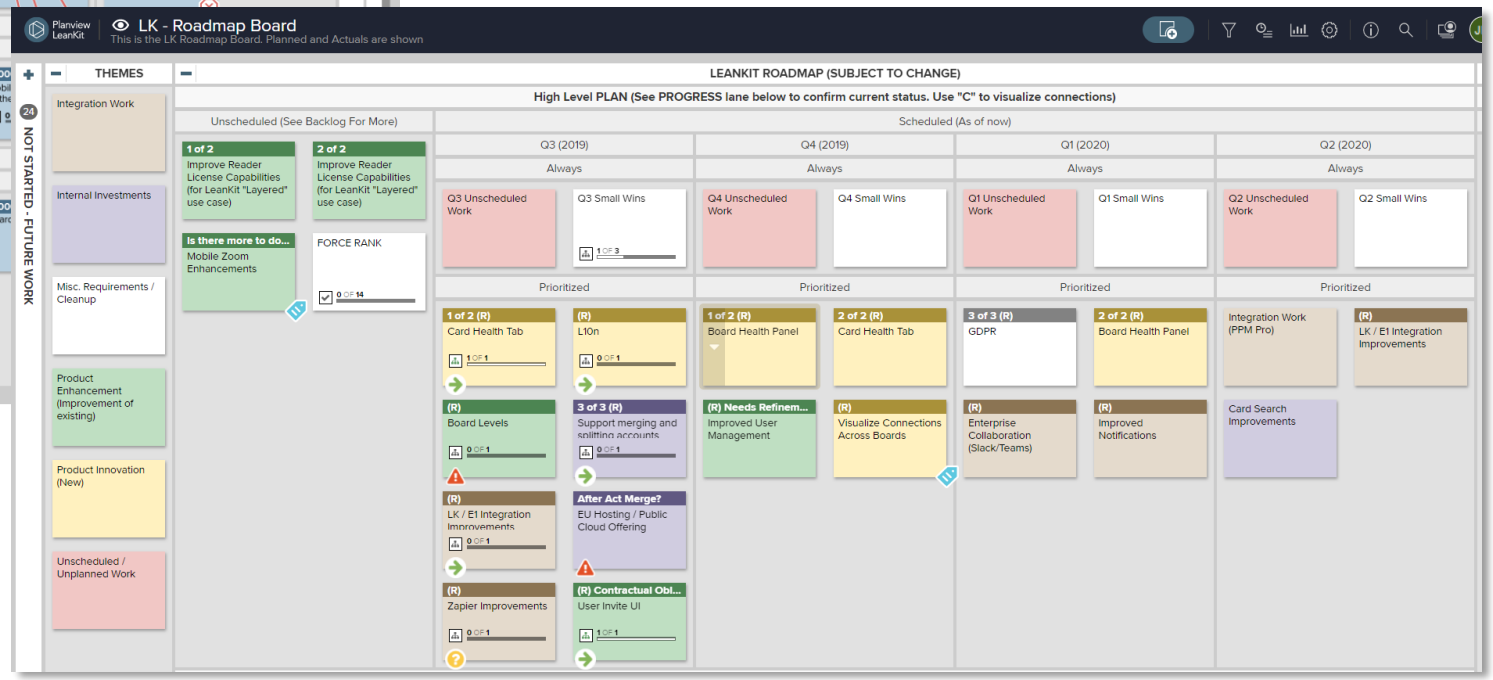
*Gartner, Critical Capabilities for Enterprise Agile Planning Tools, Mike West, Keith Mann, Bill Blosen, Akis Sklavounakis, Deacon D.K Wan, 29 April 2020This graphic was published by Gartner, Inc. as part of a larger research document and should be evaluated in the context of the entire document. The Gartner document is available here https://www.gartner.com/doc/3984344. Gartner does not endorse any vendor, product or service depicted in its research publications, and does not advise technology users to select only those vendors with the highest ratings or other designation. Gartner research publications consist of the opinions of Gartner's research organization and should not be construed as statements of fact. Gartner disclaims all warranties, expressed or implied, with respect to this research, including any warranties of merchantability or fitness for a particular purpose.*

# Agile Program Management




TEAMS-OF-TEAMS PLANNING

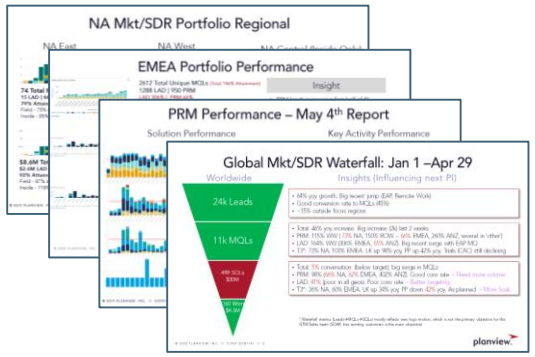
ROADMAPPING

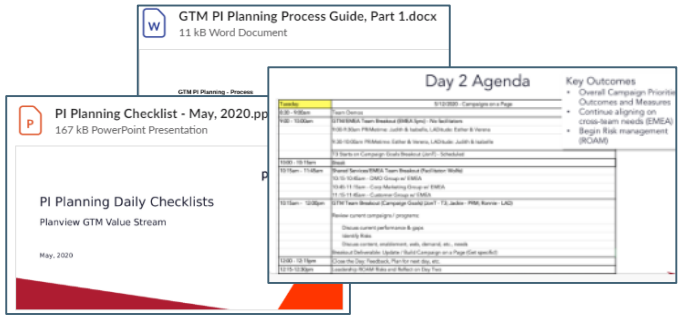



Planview LeanKit™

# Virtual PI Planning at Planview

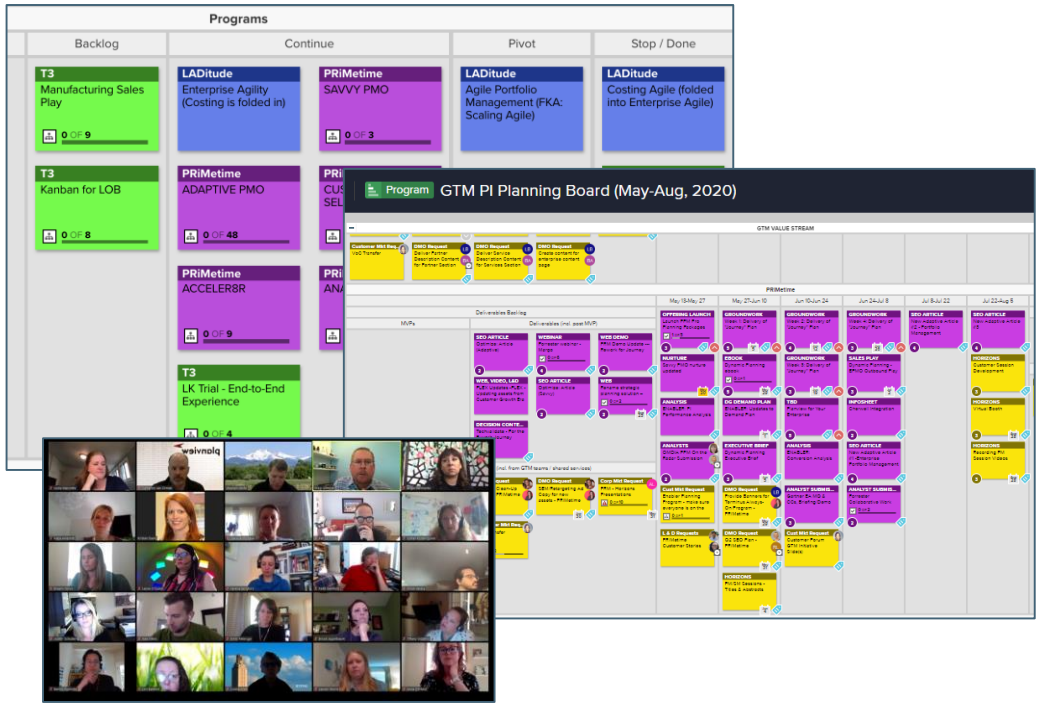
## Metrics & PI Prep



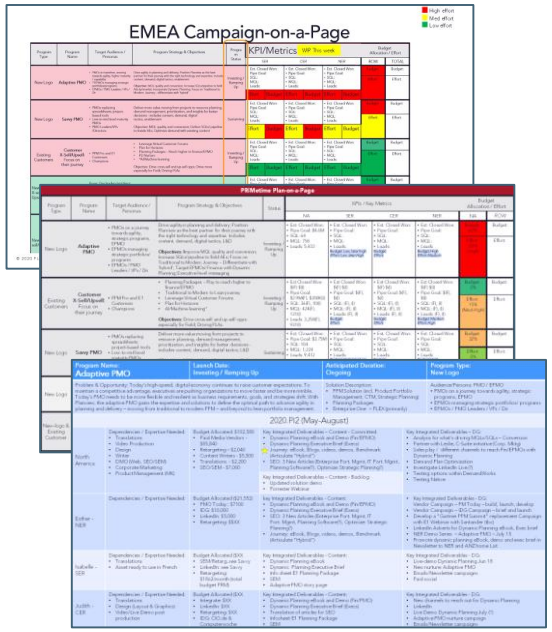

- Metric reviews
- Structured agenda
- Context videos as prep for teams
- Lots of virtual PI preparation

## Planning

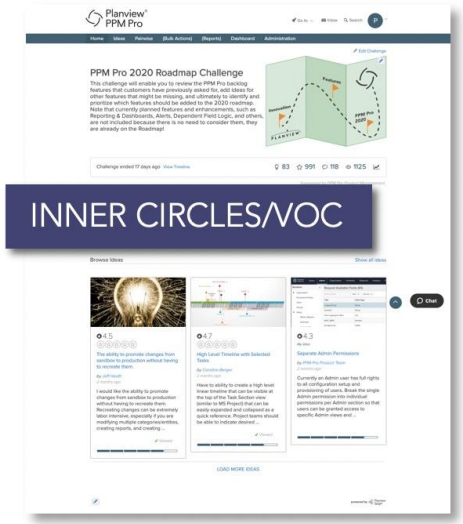



- 5th PI Planning (1st all virtual); 4 mornings
- Entire process managed and executed in LeanKit
- Reviewed key programs; Start, Continue, Pivot, or Stop
- Teams built/revised Campaign and Program plans with key deliverables

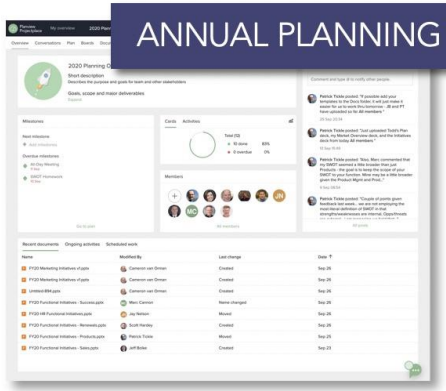
## Outputs



# Rewiring at Planview – How We Work




INNER CIRCLES/VOC

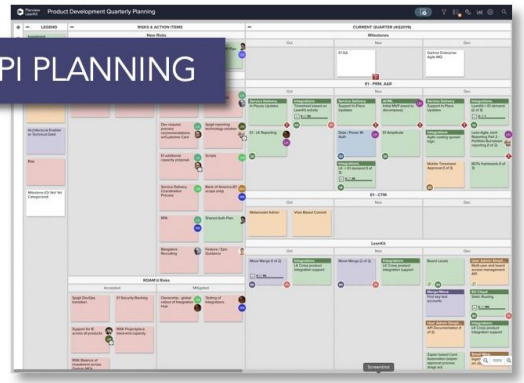


ANNUAL PLANNING

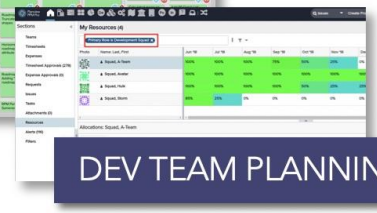
PRODUCT ROADMAPS

PROFESSIONAL SERVICES

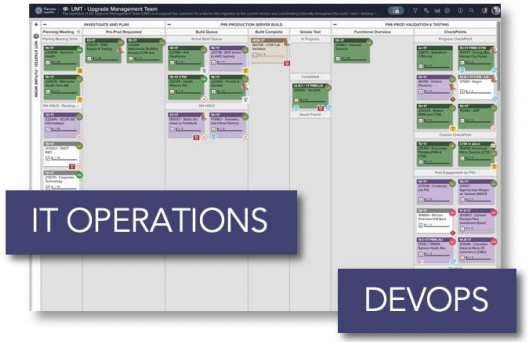
DEV TEAMS-OF-TEAMS



PI PLANNING

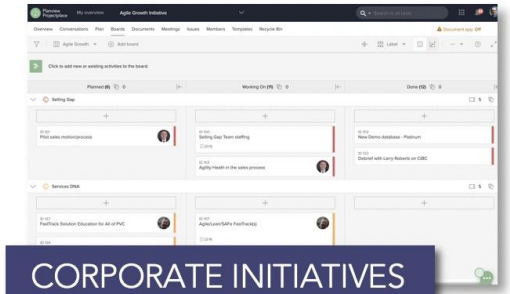


DEV TEAM PLANNING

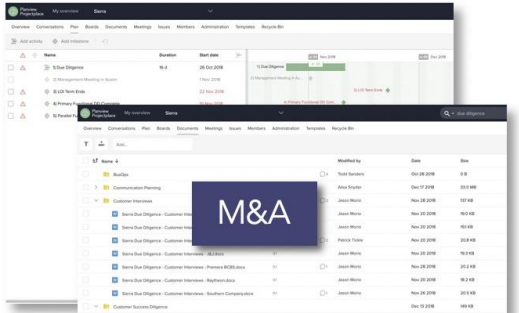


IT OPERATIONS

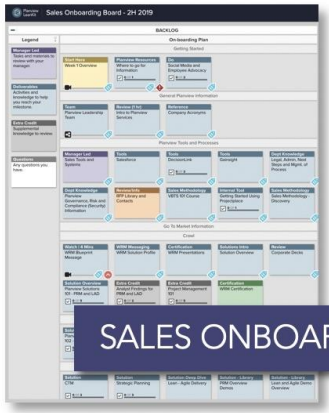
DEVOPS



CORPORATE INITIATIVES



M&A



SALES ONBOARDING

MARKETING TEAMS

MARKETING EVENTS

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# Resilience Amid Disruption

Strategic and Investment Planning

# Portfolio Re-planning Amid Disruption

How are we investing to position our company for both today's new reality and for future growth?

How are we ensuring we are not risking long-term success with short-term cost cuts?

How will we re-align the organization to deliver on new priorities?

"It's important to reevaluate priorities, shift resources, and track progress. Companies that take a slash-and-hold approach fare worse than those that both prune and thoughtfully invest."

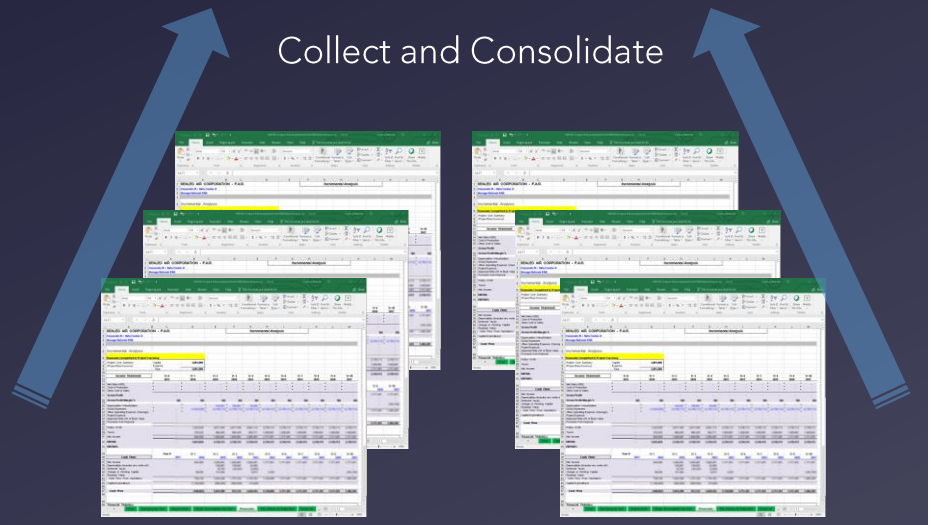
McKinsey Digital, March 2020

# Current Processes Don't Work

No Strategy, No Agility, Slower Delivery

- Intake of New Demand
- Schedules Shifting
- Conflicting Priorities
- Pivoting Priorities
- Adjusted Targets
- Capacity Changes
- Advancing Technology
- Market and Competition Impacts

- DISRUPTION



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+DISRUPTION

*“Processes That Were Just Inefficient Last Month Don't Work At All Today”*

- Forrester

*COVID-19 Remote Work Just Broke Your Processes: Here's What To Do About It*

# Capital Planning Across the Enterprise

**Portfolio Management**

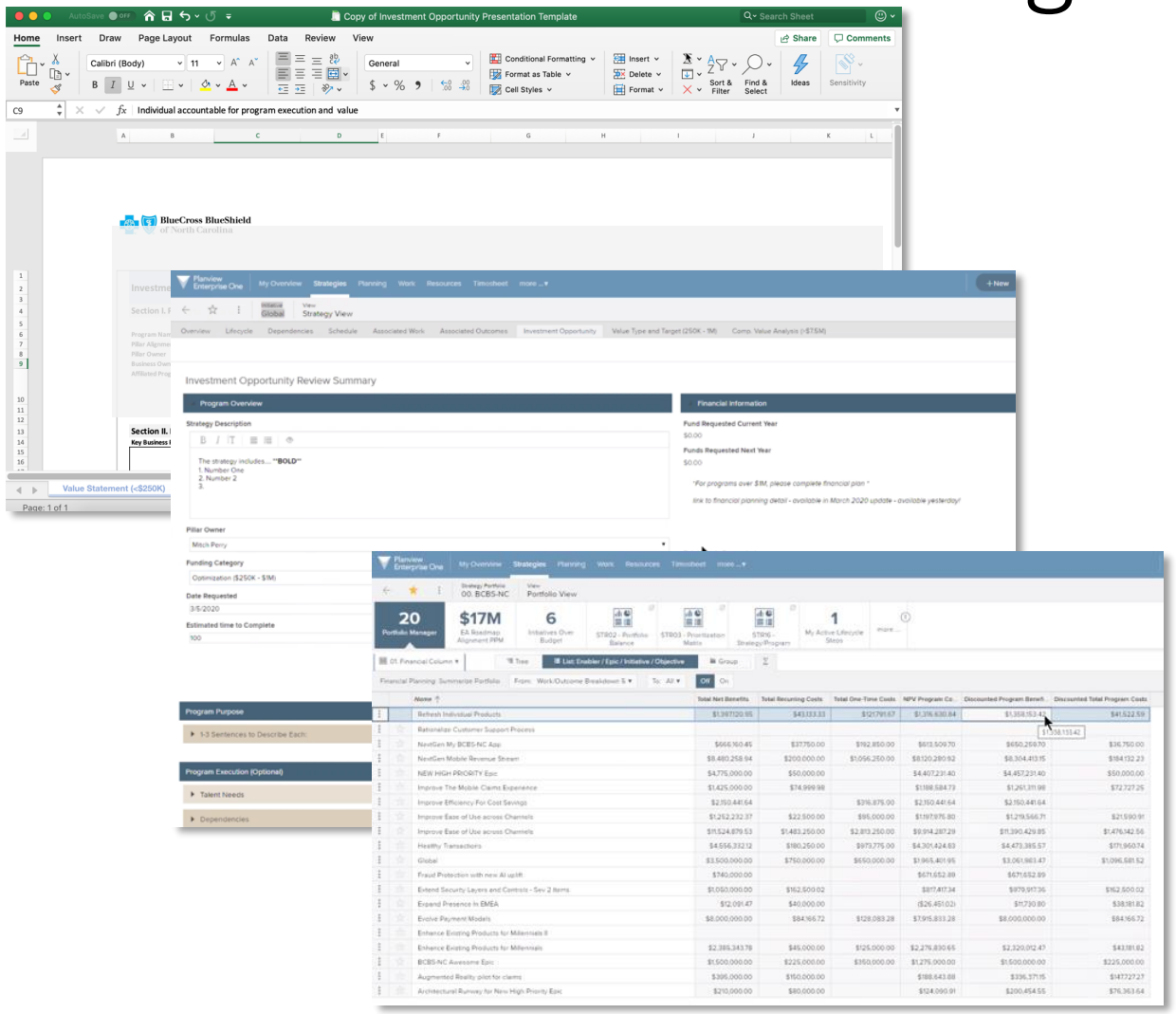
- $3B in capital spend
- 5,000 initiatives
- Leveraging Investment and Capacity Planning for monthly evaluation and performance management

**Key Results**

- Goal: Reduce $1B spend by 2021
- Result: Reduced $1B for 2020 plan
  - Assume 5-year depreciation schedule: savings of $200M for 2020

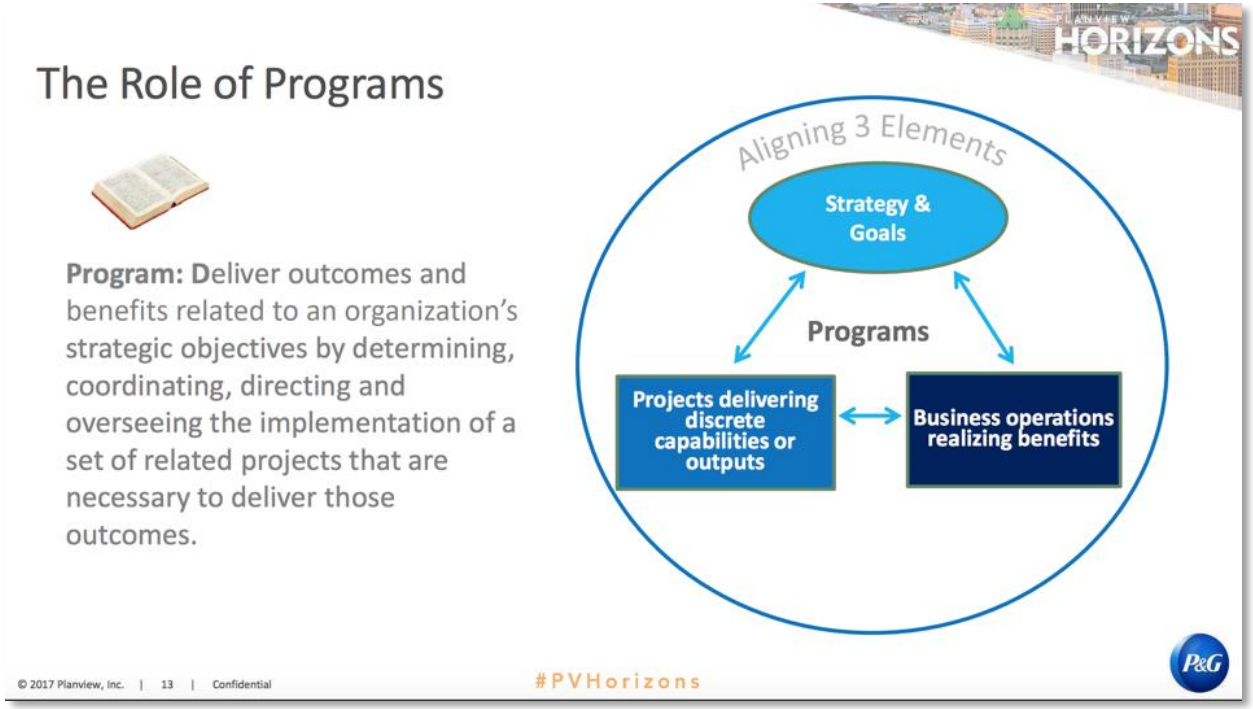
Currently using Enterprise One to to model different scenarios for the disruption of COVID-19

# Business Case Management




- Finance wanted to replace manual business case management in Excel
- Very few vendors in the market
- Needed to tie business cases with strategy, product pillars, business capabilities, funding, and delivery (which is all managed in Enterprise One)
- Review of capabilities revealed excel based business cases could be created, managed, and connected within Enterprise One

# Procter & Gamble Already has Portfolio Agility




- Annually budget strategic programs
- Iteratively fund work to deliver incremental value
- Measure benefit realization
- Enables quarterly funding that supports re-prioritization
- Improved portfolio agility

# Thank You