



How to Go from Doing Agile to Being Agile with Planview

Patrick Tickle, Chief Product Officer

Ronnie Pinkerton, Director of Solution Architecture

Steve Wolfe, Enterprise Agile Coach & Evangelist

Agenda

- How Planview became an Agile organization
- An Introduction and Overview of Planview's Agile solutions – from Lean Portfolio Management to Agile Program Management to Agile Team Delivery
- How Planview FLEX licensing is the gateway to changing your current ways of working
- Why Planview is the ideal partner for your Agile transformation journey

Housekeeping



- This webinar is being recorded
 - The recording will be sent to you via the email provided for registration



- Use the Q&A box to enter your questions throughout the presentation
 - Think of something later? Email us at lean-agile@planview.com



- Tell us what you think
 - Please complete the post-webinar survey after the webinar ends

Presenters



Patrick Tickle
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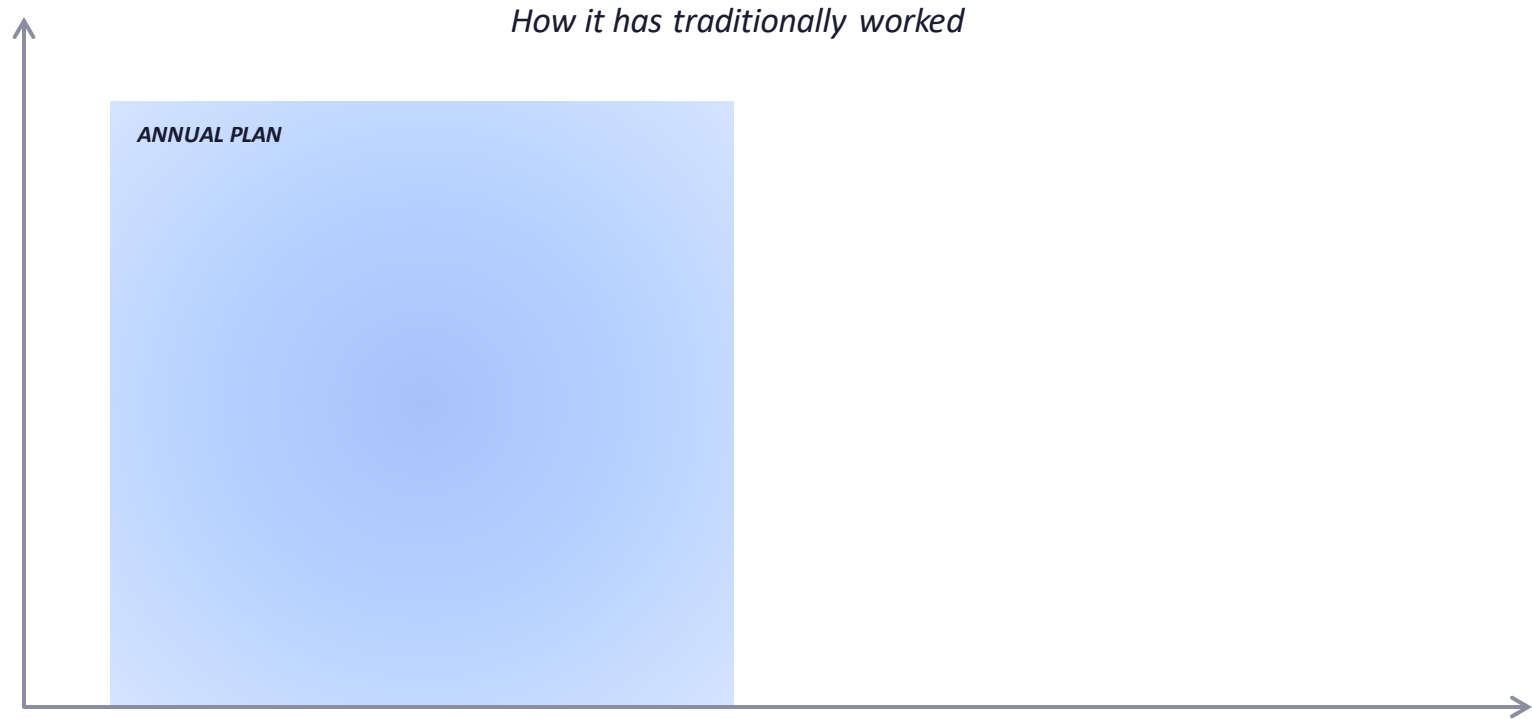
Steve Wolfe
Enterprise Agile Coach
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Strategy to Delivery is Transforming

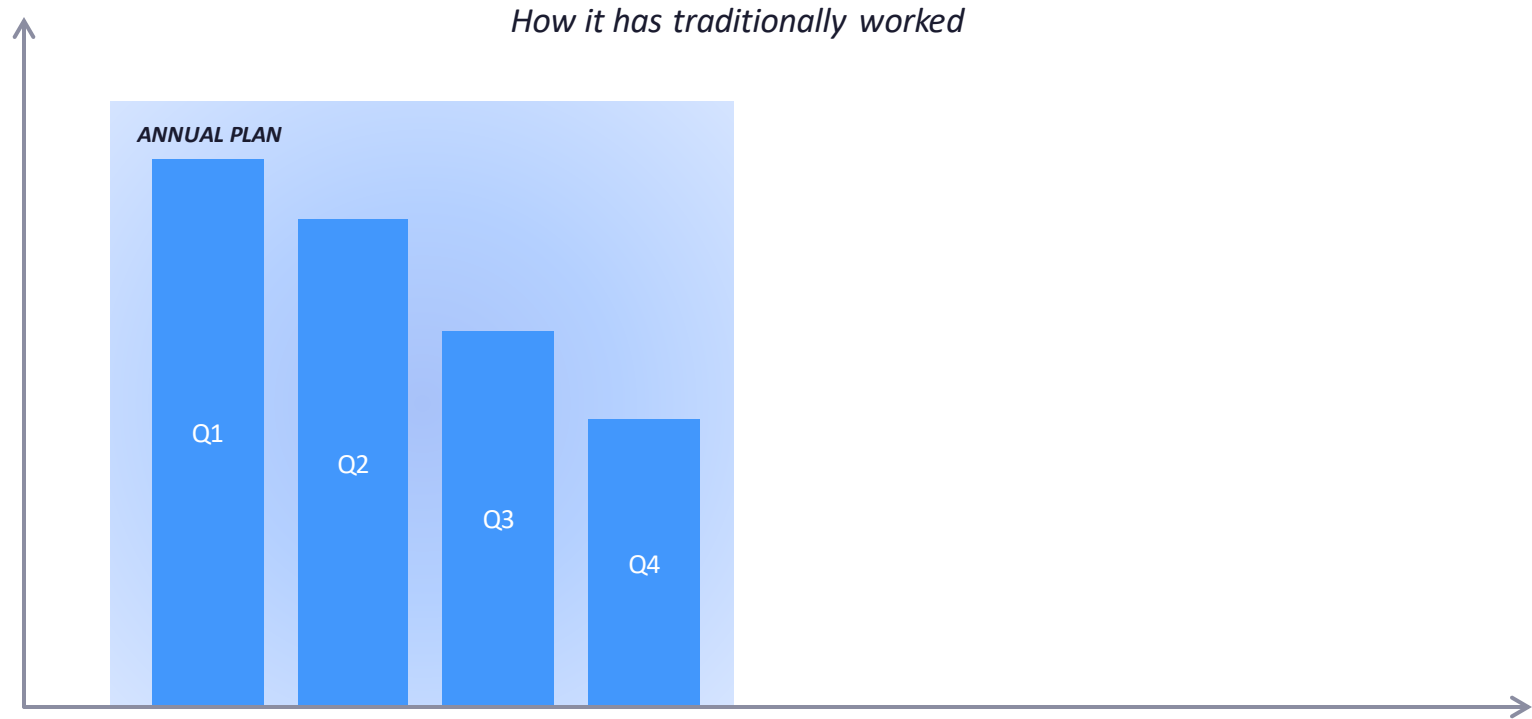
Today's disruptive markets are driving organizations to rewire



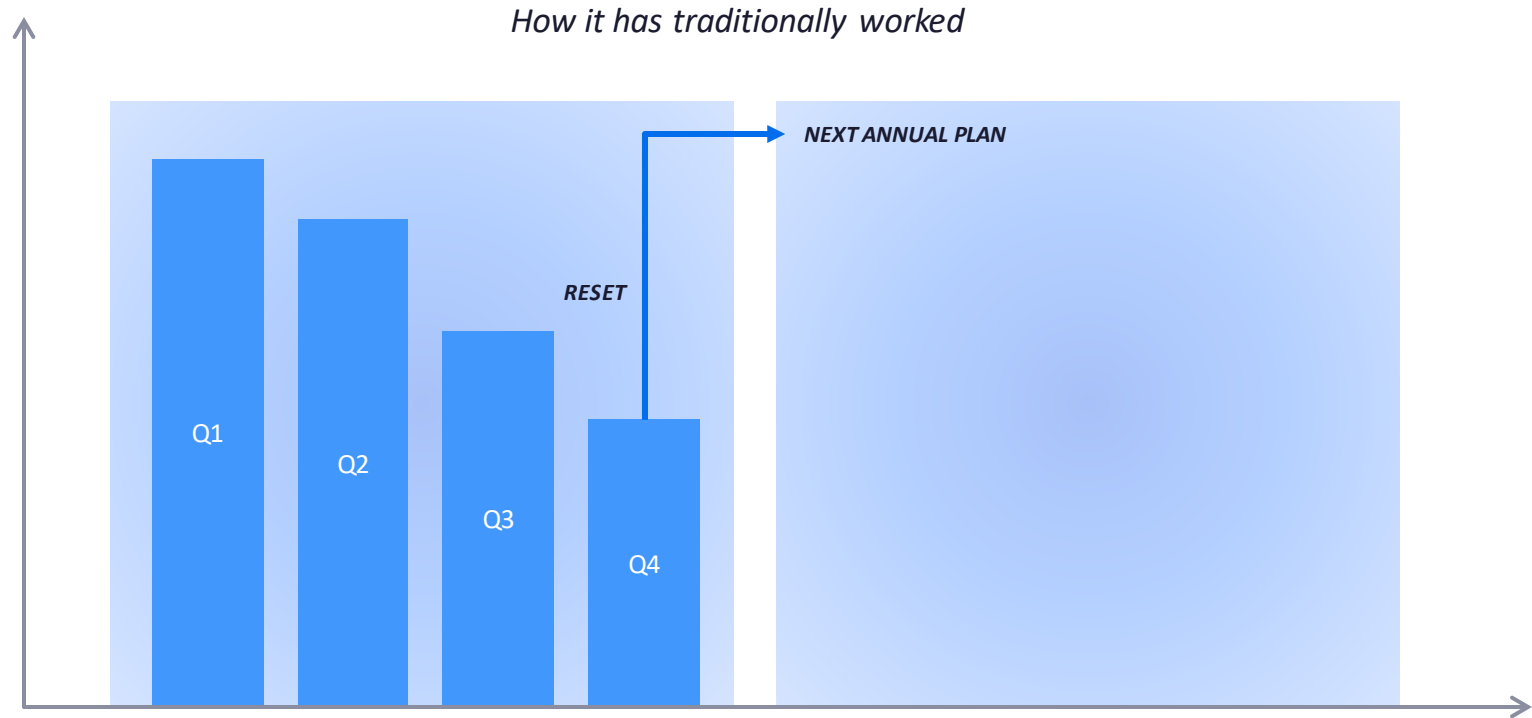
Rewiring Strategy to Delivery for Today's World



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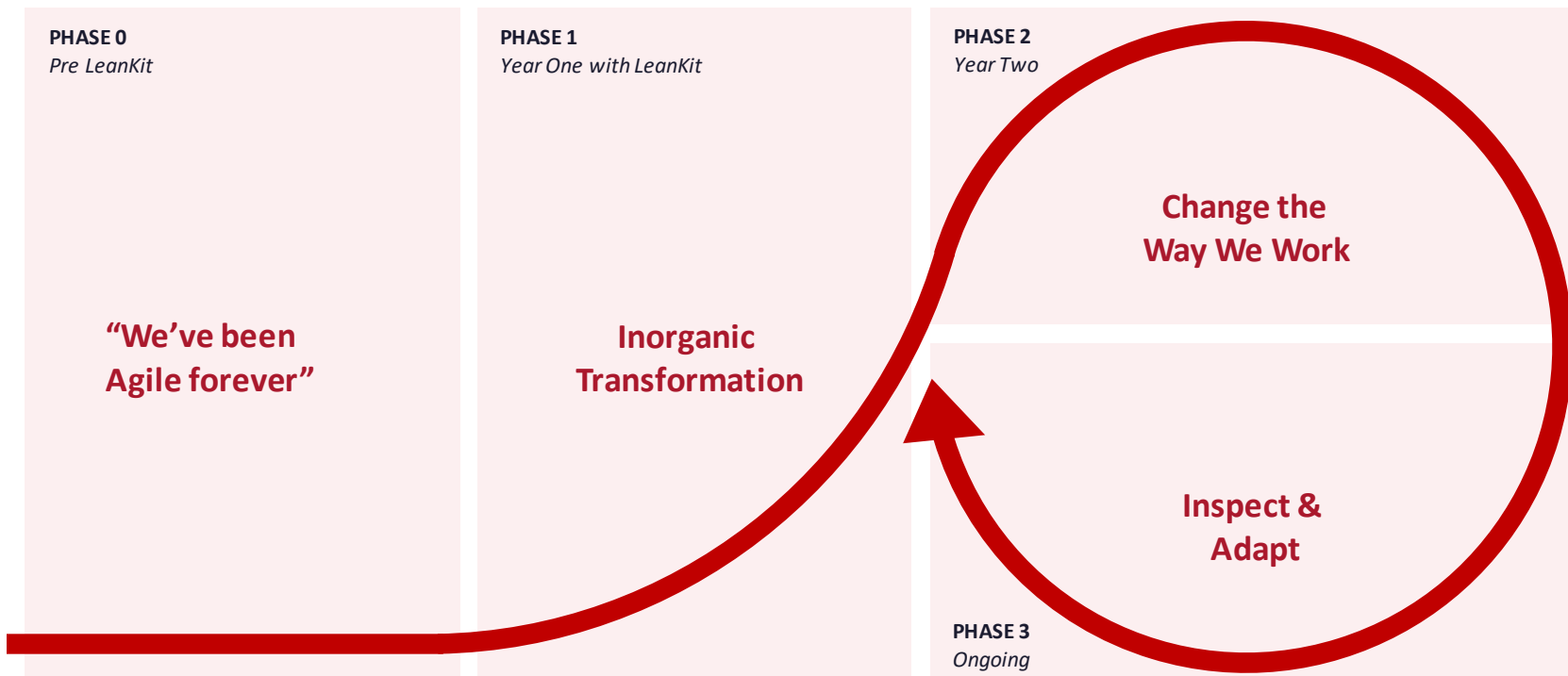
Rewiring Strategy to Delivery for Today's World





Our Journey – Planview's Transformation

Our Agile Transformation Journey



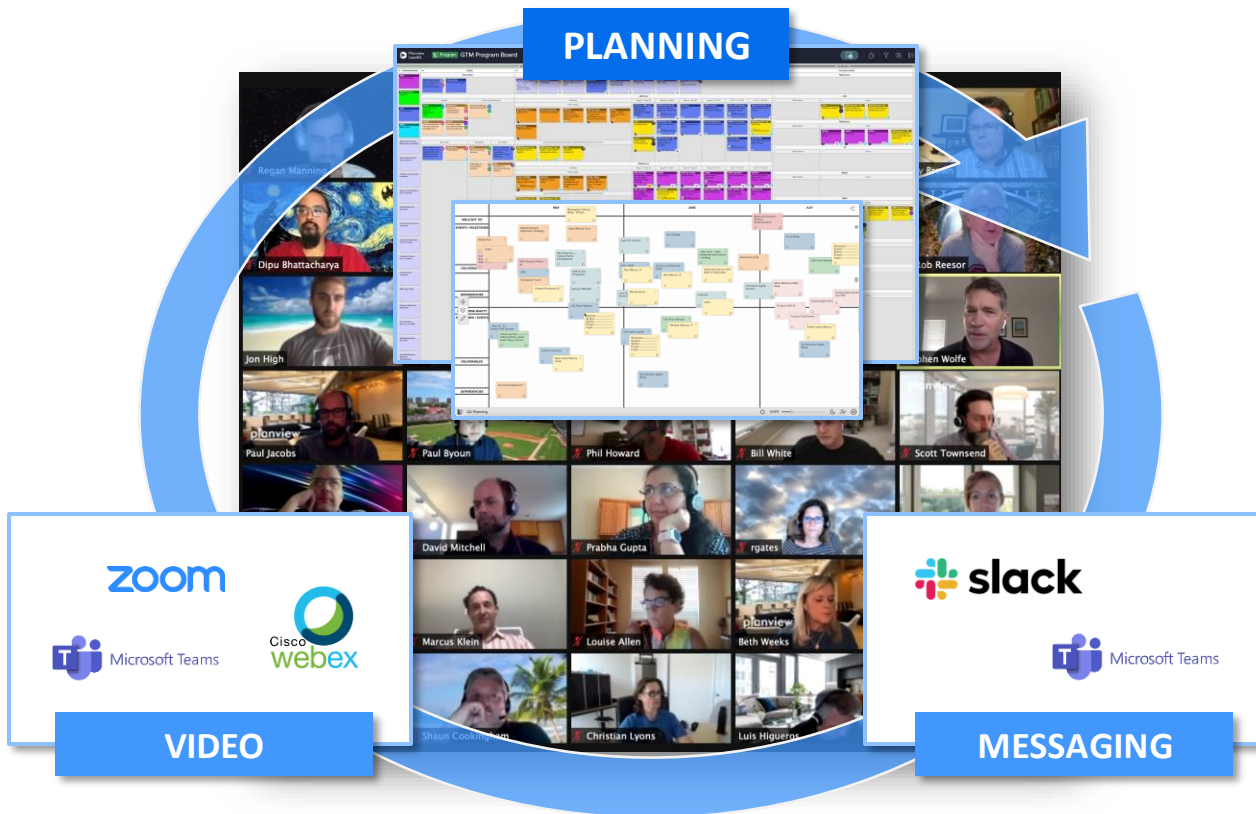
Working Today



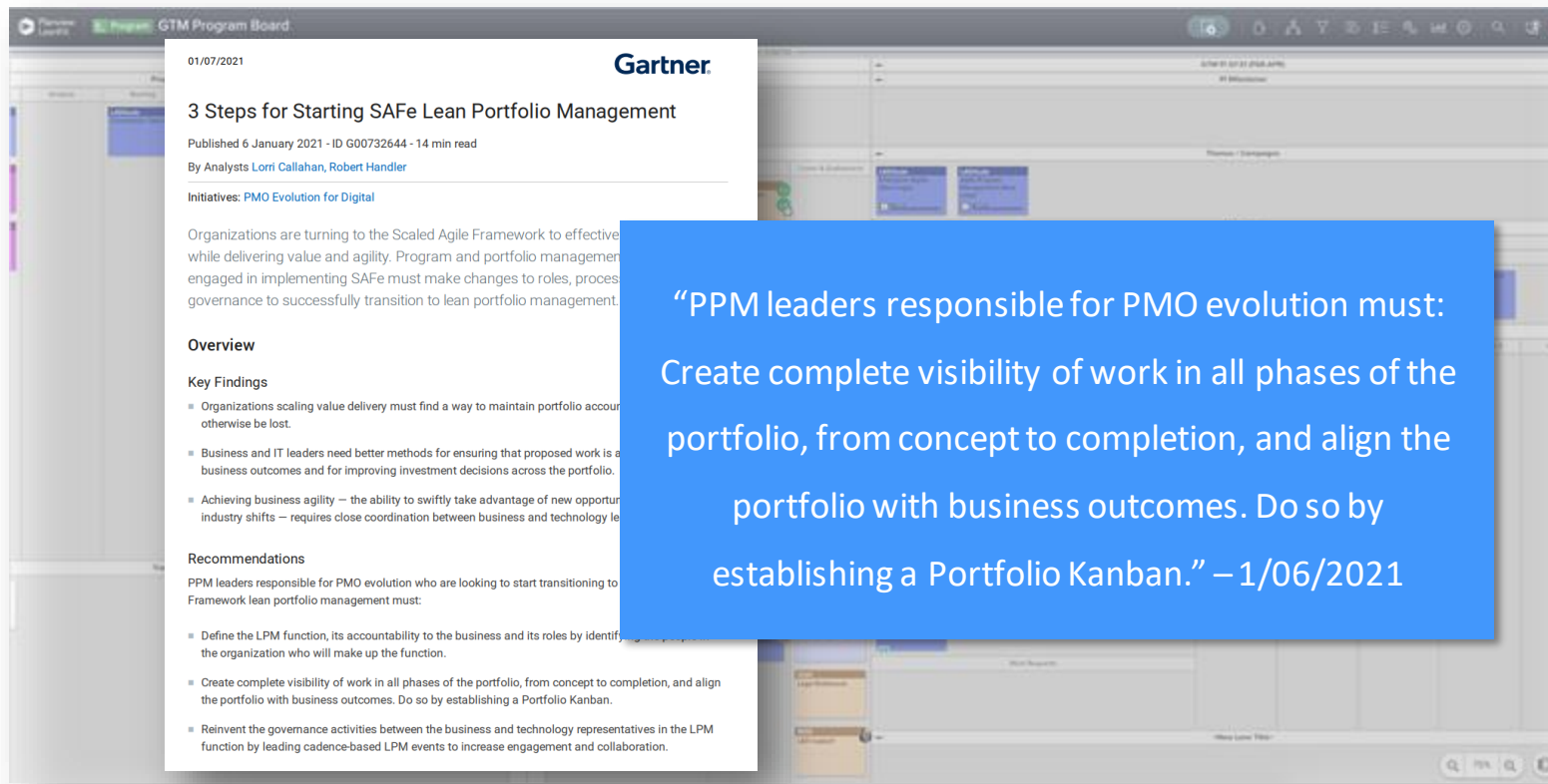
Planning and Delivering Today



Planning and Delivering Today



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01/07/2021

Gartner

3 Steps for Starting SAFE Lean Portfolio Management

Published 6 January 2021 - ID G00732644 - 14 min read

By Analysts Lori Callahan, Robert Handler

Initiatives: PMO Evolution for Digital

Organizations are turning to the Scaled Agile Framework to effectively deliver value and agility. Program and portfolio management engaged in implementing SAFe must make changes to roles, processes, and governance to successfully transition to lean portfolio management.

Overview

Key Findings

- Organizations scaling value delivery must find a way to maintain portfolio accountability otherwise be lost.
- Business and IT leaders need better methods for ensuring that proposed work is aligned with business outcomes and for improving investment decisions across the portfolio.
- Achieving business agility – the ability to swiftly take advantage of new opportunities and industry shifts – requires close coordination between business and technology leaders.

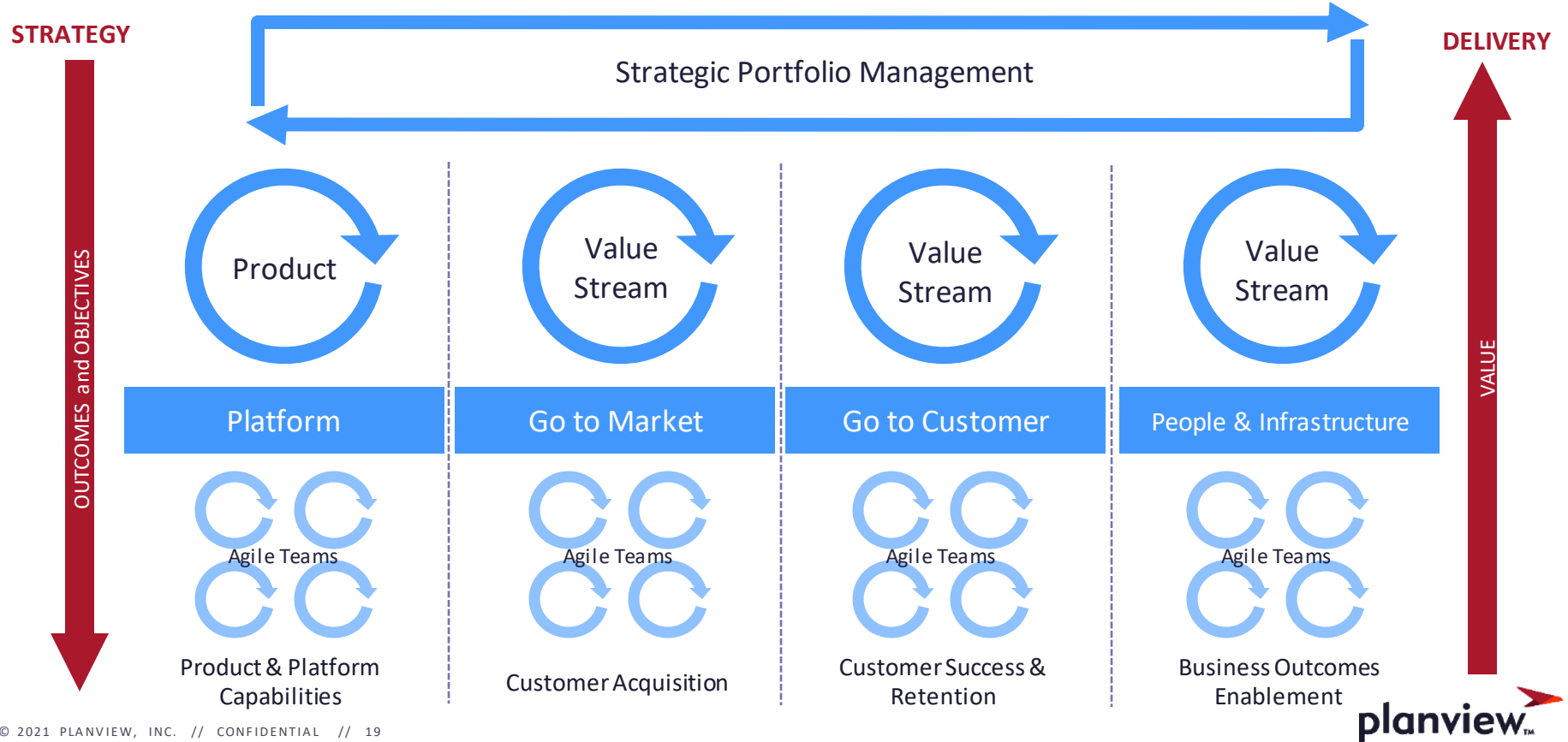
Recommendations

PPM leaders responsible for PMO evolution who are looking to start transitioning to the Scaled Agile Framework lean portfolio management must:

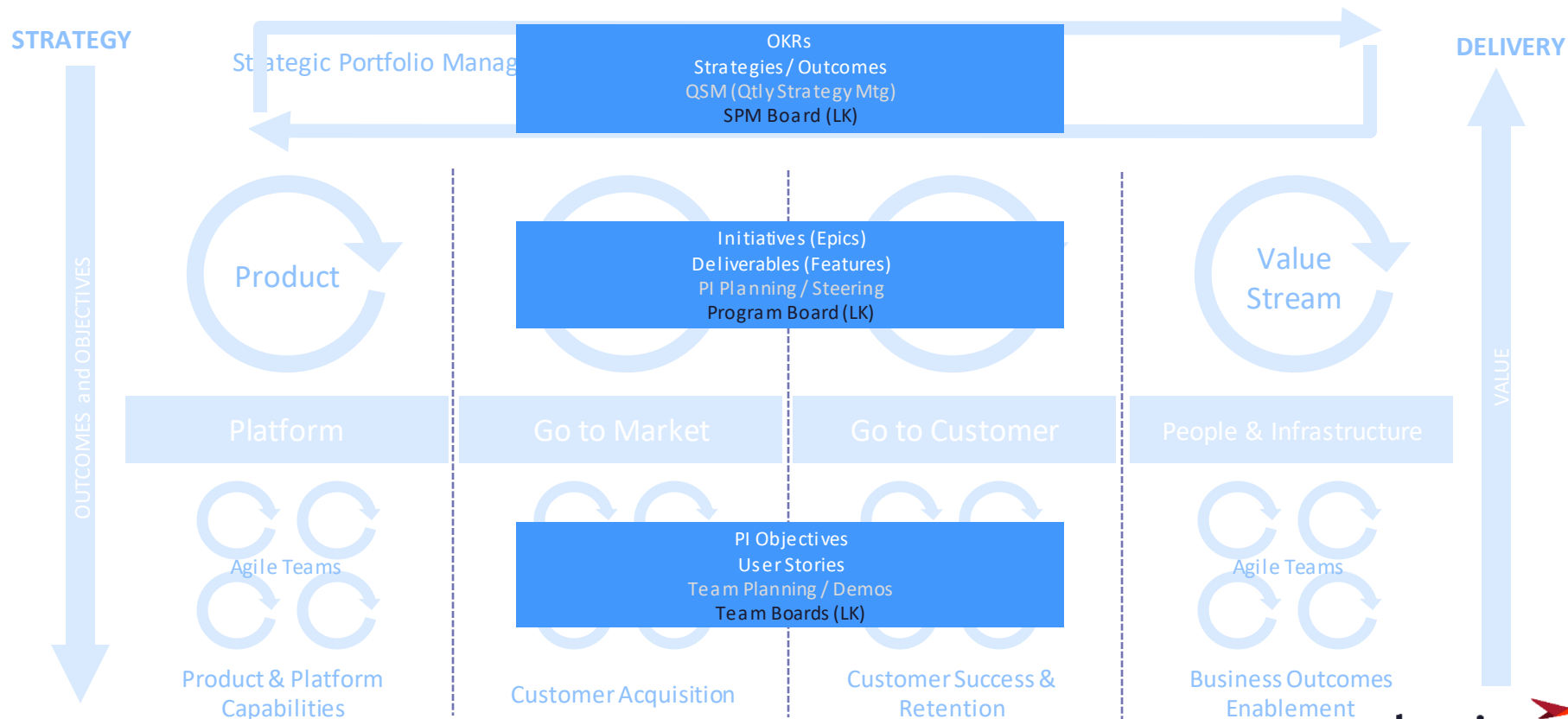
- Define the LPM function, its accountability to the business and its roles by identifying the organization who will make up the function.
- Create complete visibility of work in all phases of the portfolio, from concept to completion, and align the portfolio with business outcomes. Do so by establishing a Portfolio Kanban.
- Reinvent the governance activities between the business and technology representatives in the LPM function by leading cadence-based LPM events to increase engagement and collaboration.

“PPM leaders responsible for PMO evolution must: Create complete visibility of work in all phases of the portfolio, from concept to completion, and align the portfolio with business outcomes. Do so by establishing a Portfolio Kanban.” – 1/06/2021

Organized for Agile Delivery

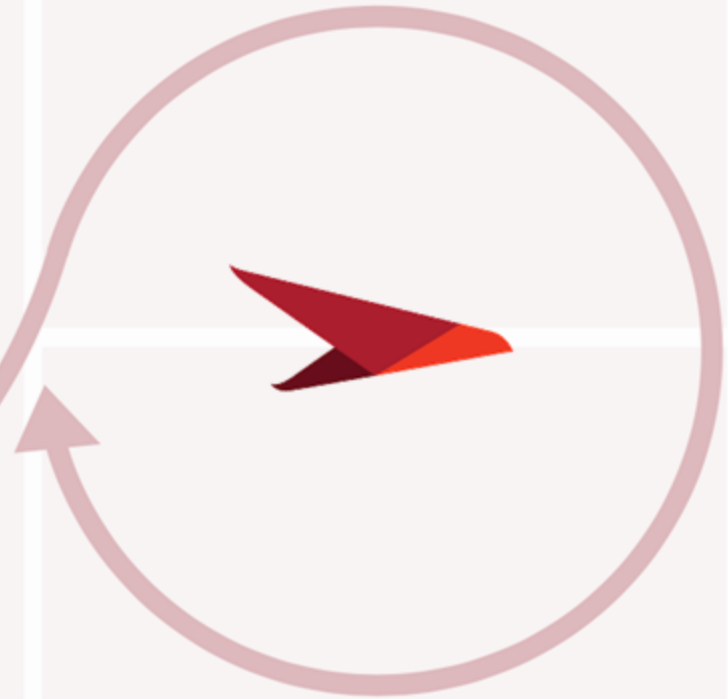


Value Delivery – Outputs/Ceremonies/Boards



Agile Transformation Insights

- A clear vision on where we are going
- Trusted core of change agents
- New DNA – throughout the organization
- Value stream mindset to build from
- PI Planning creates a visceral shift
- Train and coach constantly
- Passion and persistence pay off



Planview Enterprise Agile Planning Solution

LEADERSHIP TEAMS



LINE-OF-BUSINESS TEAMS

TECHNOLOGY TEAMS

Getting Started

Get FLEX'D!

“Standardize the use of modern portfolio management technology...”

- Starting in 2020 your Enterprise One or PPM Pro users have been FLEX'D at no additional charge
- Unlocks exciting, easy-to-use work management capabilities for every PPM user – standalone and integrated

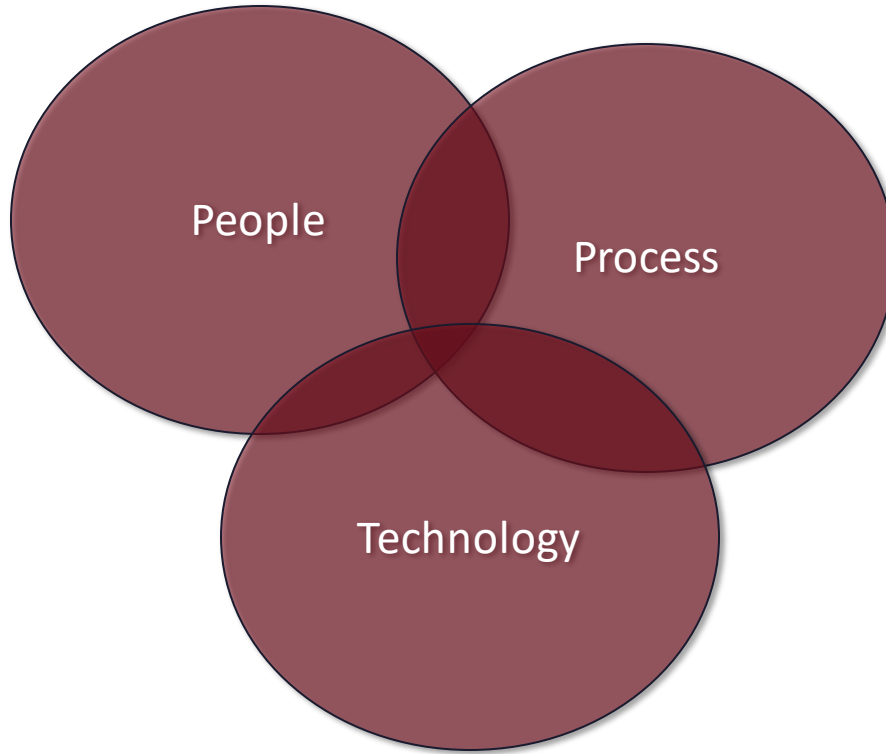


“Diversify the use of modern work and continuous delivery technologies...”

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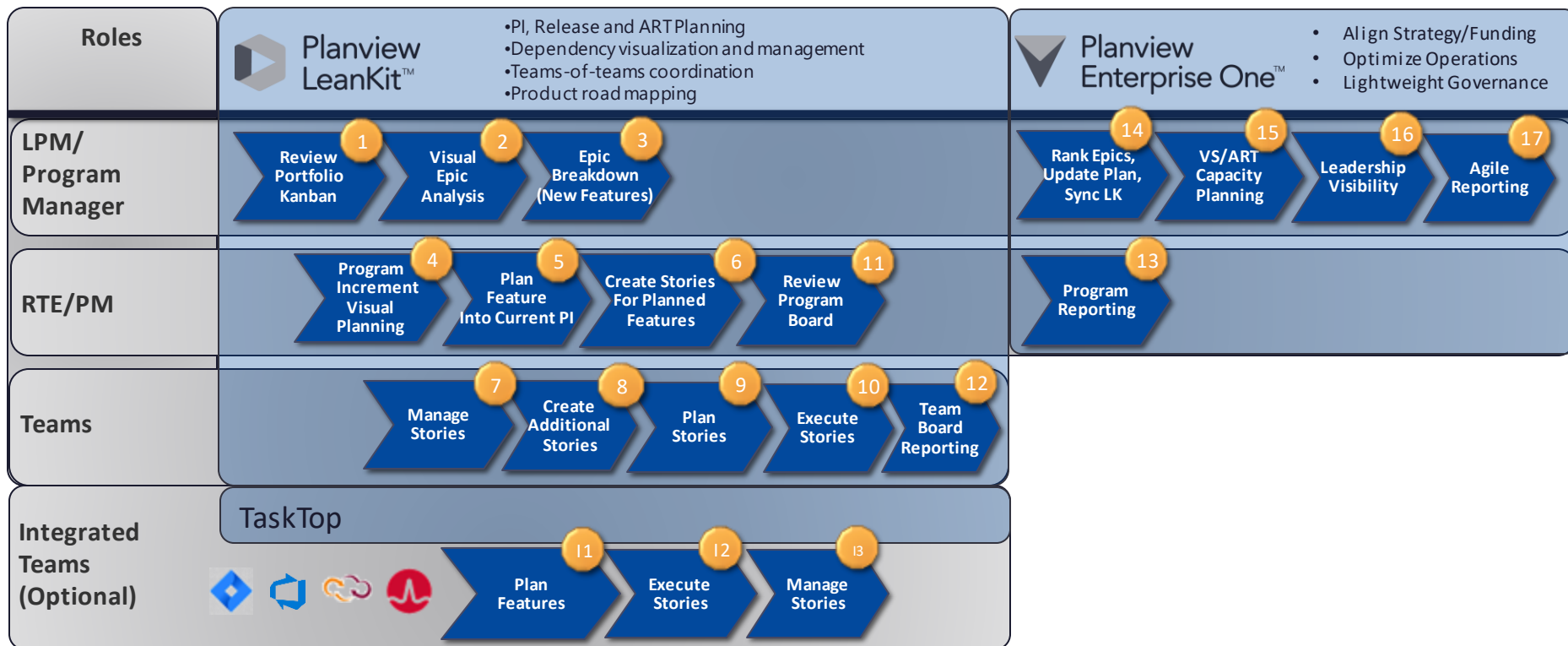
Gartner Beware of One-Size-Fits-All PPM Software Systems, Daniel Stang, 30/7/19

What Next? Let's Get Rolling (and Iterate)



- Identify “good” candidate, thin vertical slice of organization
- Plan a workshop
- Train people
- Run an iteration
- Inspect and adapt
- Ready production
- Replicate to others

Enterprise Agile Planning Use Cases



Uniquely Positioned to Partner for the Journey

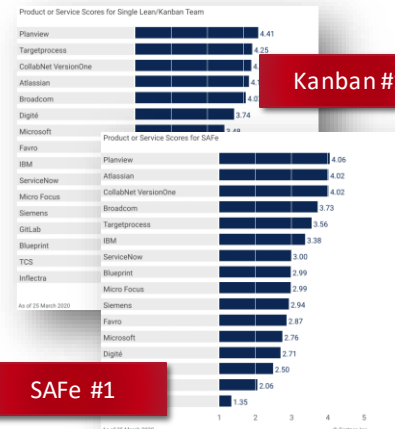
2019 Gartner Magic Quadrant for Project and Portfolio Management



2020 Gartner Magic Quadrant for Enterprise Agile Planning Tools



2020 Gartner Critical Capabilities Enterprise Agile Planning



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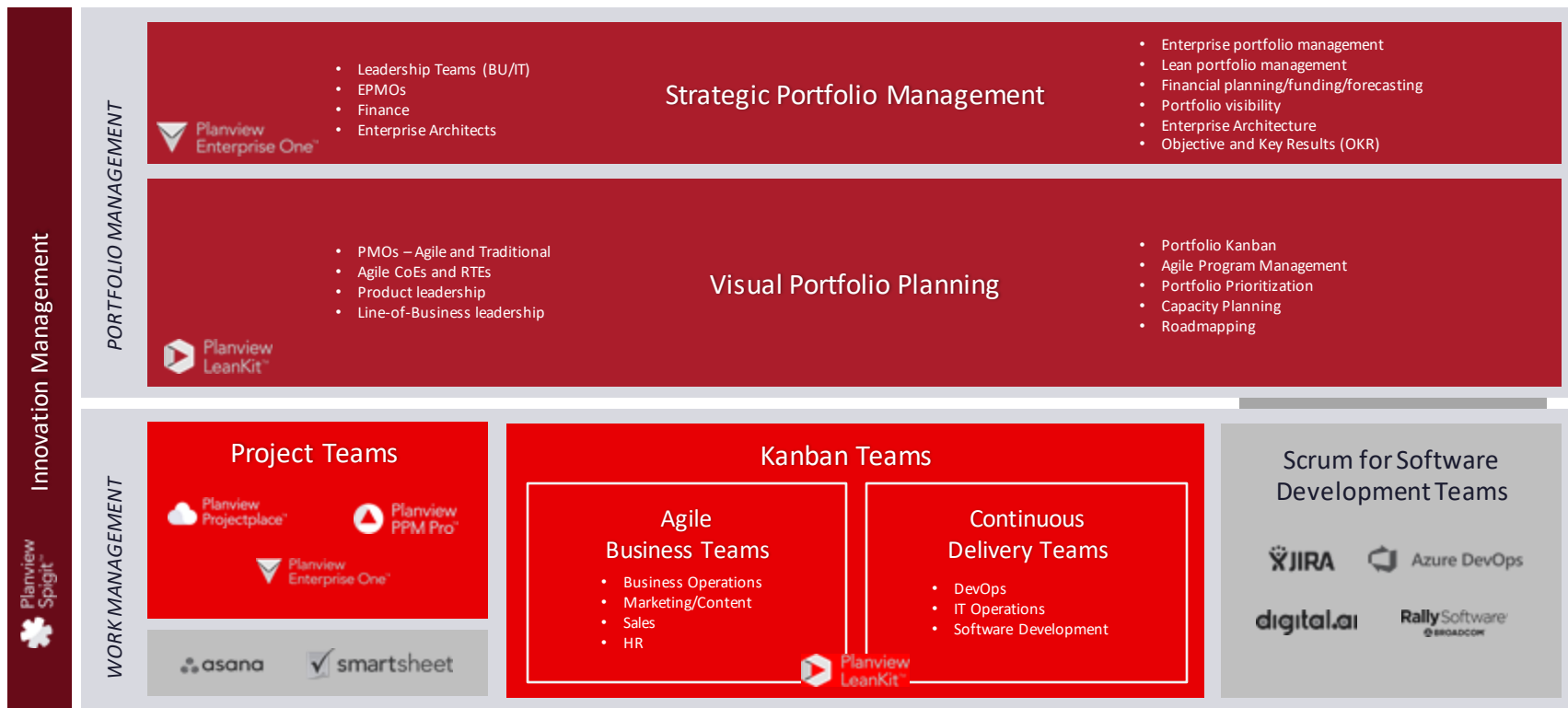
*Gartner Magic Quadrant for Project and Portfolio Management, Daniel Stang, Mbula Schoen, Anthony Henderson May 2019

*Gartner, Magic Quadrant for Enterprise Agile Planning Tools, Keith Mann, Mike West, Thomas Murphy, Nathan Wilson, April 2020

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Your Platform and Where We are Heading in 2021



Thank You!

Contact your Customer Success Manager, or reach out to customer@planview.com if you do not have a CSM or know who yours is.

Ask about your next steps and if an Agile Workshop might be right for your organization.