Outcome Realization

- Capabilities
- Outcome Realization

Outcome Realization

The Outcome Realization capability supports the realization of outcomes within an organization (deliverables such as products, services, technologies, or applications). Each capability within the Planview Capability Framework has a distinct set of features and functionality, business processes, best practices, and analytics and reports that deliver value to customers in the form of specific business outcomes.

Outcome Realization Business Outcomes

We can define the outcomes required by our organization to realize our strategic plan and we can describe and categorize these outcomes.

We can estimate the costs, benefits and revenue associated with each outcome.

We can define a roadmap for realization of the outcome, in terms of the planned dates for delivery of the outcome.

We can monitor delivery of the outcome, comparing to the baseline and taking actions to bring delivery back on track.

We can monitor and manage the costs of delivery of our outcomes (including ‘keep the lights on’ / operational costs) and the revenue and benefits that the outcome is forecasted to deliver.

Outcome Realization Processes

Select your product

- Planview Enterprise One
- Planview Clarizen

Manage your organization’s key strategic deliverables, whether created, supported, or enhanced by your organization.

Outcome Realization Process Steps
Outcome Realization: Initial Planning Process Flow

<table>
<thead>
<tr>
<th>Process Step</th>
<th>Description</th>
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</thead>
<tbody>
<tr>
<td>Create outcome</td>
<td>Outcomes in Planview Enterprise One are the deliverables of your investments (such as, projects and programs). These deliverables are typically products, applications, and services. See Getting Started - Outcomes for more detail on Outcomes. For more information on creating outcomes, see Creating an Outcome.</td>
</tr>
<tr>
<td>Describe and categorize outcome</td>
<td>Creating a new product will likely include the population of a small amount of (configuration-specific data points) for the description and categorization attributes as determined by the data and information needs of the organization.</td>
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<tr>
<td>Create initial outcome financial plan</td>
<td>The purpose of this step is to capture a high-level estimate of the outcome costs and benefits/revenue in the financial planning detail screen. Additionally, financial data can be rolled up from work to strategy or from work and strategy to outcome. See Editing a Financial Plan for more information.</td>
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<tr>
<td>Baseline outcome financial plan</td>
<td>Following the input or roll up of financial planning budgeting and target data, a financial baseline should be taken of the product financial plan in order to compare and track variances on the product financials through time.</td>
</tr>
<tr>
<td>Create outcome roadmap</td>
<td>The Outcome Roadmap helps you plan and communicate the launching of outcomes. The outcome roadmap graphically represents the outcome schedule, stages, milestones, and releases, along with associated programs and allocated work.</td>
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<tr>
<td><strong>This step covers the basics of setting up and managing an Outcome Roadmap. See Outcome Roadmap, Showing or Hiding Elements of the Outcome Roadmap, and Changing the Timescale of the Outcome Roadmap’s Timeline.</strong></td>
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</tbody>
</table>
| **Baseline outcome roadmap**          | This step covers capturing a roadmap baseline to use in a comparison exercise to track the variance at a later date in the outcomes lifespan. The purpose of this step is to use the information provided to make well informed decisions about your outcome portfolio, and to make any appropriate corrective actions as required.  
See Outcome Baselines and Saving a Baseline of All Outcomes in a Portfolio. |
<p>| <strong>Teams execute/deliver on work</strong>     | Teams deliver on their assigned work. See Project Team Delivery and Agile Team Delivery capabilities for further information.                                                                                       |</p>
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| Review financials against baseline               | Financial baseline information can be used for comparison with the current plan. The purpose of this step is to monitor the realization of the product financials via a comparison against the baseline in order to track any variance. Users should harness this information to make well informed decisions on the portfolio of products and/or to make any appropriate corrective actions.  
See Comparing Versions of Financial Plans for more information. |
| Manage ongoing outcome financials                | As outcome financials continue to be monitored and compared against the baseline, both actual and forecast information can be managed going forward by the appropriate outcome manager.  
For more information, see Editing a Financial Plan and Managing a Financial Plan. |
| Project/program dates updated                     | As programs and projects are executed and work is delivered; status, progress and date information is captured. This information is monitored and managed by the relevant program and project manager but can also be consolidated and viewed on the outcome roadmap. See Outcome Roadmap for more information. |
| Review roadmap against baseline                  | The purpose of this step is to show a comparison of the dates stored in an outcome baseline with the current dates of an outcome plan in order to track any variance that has occurred in dates, milestones, etc. and associated entities.  
See Comparing a Baseline’s Dates to the Current Dates of an Outcome Plan for more information. |
| Manage ongoing outcome roadmap                   | Based on the review against the baseline, the purpose of this step is to make any necessary updates to the outcome roadmap going forward.  
See Changing Target Dates of an Outcome or Editing or Deleting Outcome Milestones for more information on managing an ongoing outcome roadmap. |
| Enhance/retire outcome                           | This step represents a decision point. Based on the outcome information captured to date and compared against baselines, a decision should be made on whether the outcome should continue to be enhanced and funded or whether it should be retired. |
| Closure                                          | If an outcome is retired, the status of the outcome should be updated to reflect the status.  
See Reviewing or Modifying an Outcome’s Details for how to change the outcome status. |

**Outcome Realization Process Steps**

This allows the organization to manage the outcomes that will realize its strategic objectives.

Outcomes are defined as any deliverable the organization’s programs and work creates, enhances, and supports. Deliverables include products, services, technologies, applications, etc.
Outcome realization process flow

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<td>Configure and define the outcome type</td>
<td>Outcomes are items that an organization creates that can be measured and tracked. Outcomes are typically products or product lines like software or retail items, but they could also be learning courses, television shows, or any other type of offering an organization may have. The first step in outcome realization is to create a place for your outcomes, which must be created by an admin as a custom object. In this step, you will label your outcome type (e.g., products), and add descriptors relevant for managing, measuring, and tracking your outcome. For more information, see the following articles:</td>
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<tr>
<td>Process Step</td>
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<tr>
<td>Create, describe, and categorize outcome(s)</td>
<td>Once the outcome type is configured, you will start creating your outcomes. This is an opportunity to ensure that the outcomes are well-defined and categorized for management and tracking. You may also bring in other users, who will be notified via Discussions and/or email.</td>
</tr>
<tr>
<td>Create project(s)</td>
<td>Once outcomes have been created and defined, you will create projects that add, effect, update, or remove affected outcomes in order to execute on strategy. These projects will drive the realization of an outcome, such as making a change to a product, increasing the adoption of features, or phasing out a product line. For more information about setting up projects, See Creating a Project.</td>
</tr>
<tr>
<td>Relate project to outcome</td>
<td>Once projects have been created within Clarizen, they will need to be related to the relevant outcomes, so that projects affecting the outcome to be tracked together. This can be done in the Relations panel of the outcome’s Details view or from the project’s Details view. For more information, see Relating Items.</td>
</tr>
<tr>
<td>Continuously manage outcome realization</td>
<td>This step represents the continuous management and tracking of outcomes as related products affect them in order to realize the strategy around the outcomes. This is an organizational feedback loop of reporting, adapting strategy, and executing. For more information, see the following capabilities:</td>
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<td>• Project Portfolio Planning</td>
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<td>• Program Portfolio Planning</td>
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<td>• Work Management</td>
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**Related Capabilities**

- Outcome Realization
Project Portfolio Planning

This capability supports a clearly defined process for the initiation of business requests into a single repository and provides a consistent demand management process for all new projects. It ensures an appropriate governance structure is applied throughout the project lifecycle.

Read more

• Program Portfolio Planning

This capability supports a clearly defined process for the initiation of business requests, and the tracking of programs and related projects through planning, categorization, and review. It ensures an appropriate governance structure is applied throughout the program lifecycle.

Read more

• Work Management

This capability provides managers the ability to develop a work plan, view and manage all work details, define and classify risks, issues, and change requests, track and manage project delivery, and provide reports on the overall status and health of projects.

Read more

Supported Solutions

• Project Portfolio Management

With a line of sight from strategy to delivery, Planview's Project Portfolio Management solution enables leaders to optimize program and project portfolios, balance capacity against demand, prioritize work, focus resources, and empower teams to deliver.

Read more