Driving Successful Innovation with PPM

Neil Leblanc
Product Management - PPM
nleblanc@ca.ibm.com

Innovate2010
The Rational Software Conference

Let's build a smarter planet.

The premiere software and product delivery event.
June 6–10 Orlando, Florida

"We have been on this journey – as a team
in Rational – and we can tell this story"

Neil Leblanc, PPM Product Management
May 2010

Where we have been…

In the beginning…

- In late 2008/early 2009, we embarked on a journey to bring a new, innovative product to market – Rational Project Conductor v1.0, also known as "RPC"

- Initially, the focus was on the Development team and their efforts to understand the requirements, as well as completing coding and testing

- And the Development team used a set of collaborative lifecycle management capabilities in support of their efforts and helped them be more agile –
  - They used work items and developed iteration plans
  - Individual component teams were set up
  - They delivered stakeholder demos as well as retrospectives at the end of each iteration

Collaborative Lifecycle Management
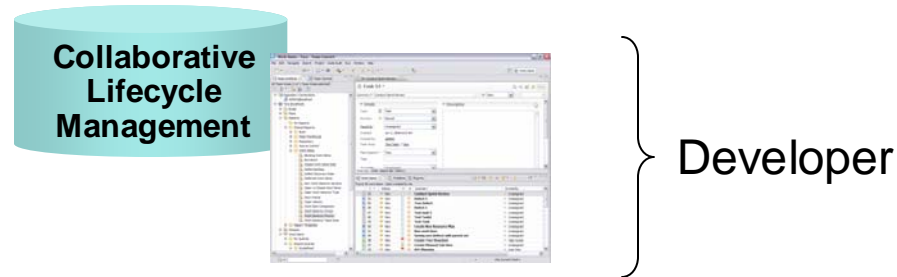
Developer

But, but, but…

- Rational was (and still is) not a pure agile shop

- While the Development team had access to capabilities that supported their efforts to be more agile, the rest of the team did not
  - ▶ Product management
  - ▶ Project management
  - ▶ Enablement teams
  - ▶ Go-to-Market
  - ▶ …

- In fact, we did not have integrated tools or capabilities that would allow the larger team to collaborate and manage the project or link to the work the Development team was doing
  - ▶ Promoted silo behavior
  - ▶ No single source of the truth

Just one example…

- Project plans are pulled together from different functional areas involved in the launch process – GTM, enablement, Development – and these all need to be coherent and the team members need to collaborate

- As we approached the product release, we knew there were a lot of activities (enablement, beta, documentation, sales collateral) that needed to be performed in order to ensure a successful launch

- We created both a typical WBS project plan and our Development team used work item management

- We effectively ended up with two project plans – one for the launch activities and one for Development
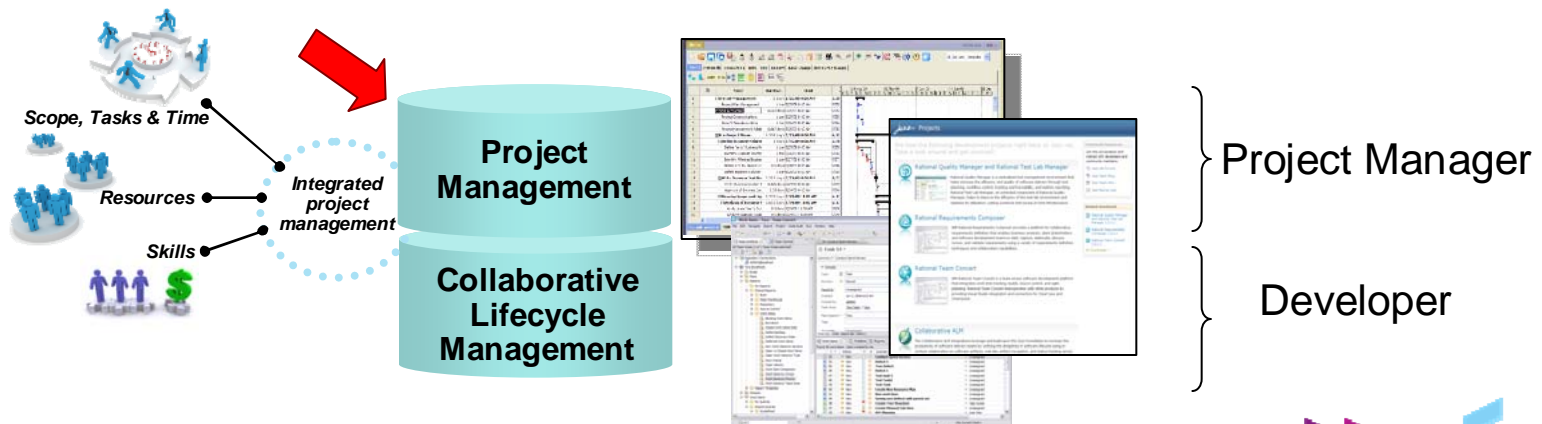
- These needed to be merged – *oh no!*

Taking small steps

As development on Rational Project Conductor progressed, we gained a significantly better understanding of how project management and Development capabilities should be integrated in an agile environment– because we were living it!

We needed capabilities that would –

- Bridge the project management view and the development view without the need to "link" the tools or the data

- Provide "real" and believable data because stakeholders are working on the same artifacts regardless of their role – so the data comes from a single solution rather than being strewn across multiple tools

In RPC 1.0!

- Get real-time updates – when the developer updates their work items, the updates are seen instantly by the project manager

Scope, Tasks & Time

Resources

Skills

Integrated project management

Project Management

Collaborative Lifecycle Management

Project Manager

Developer

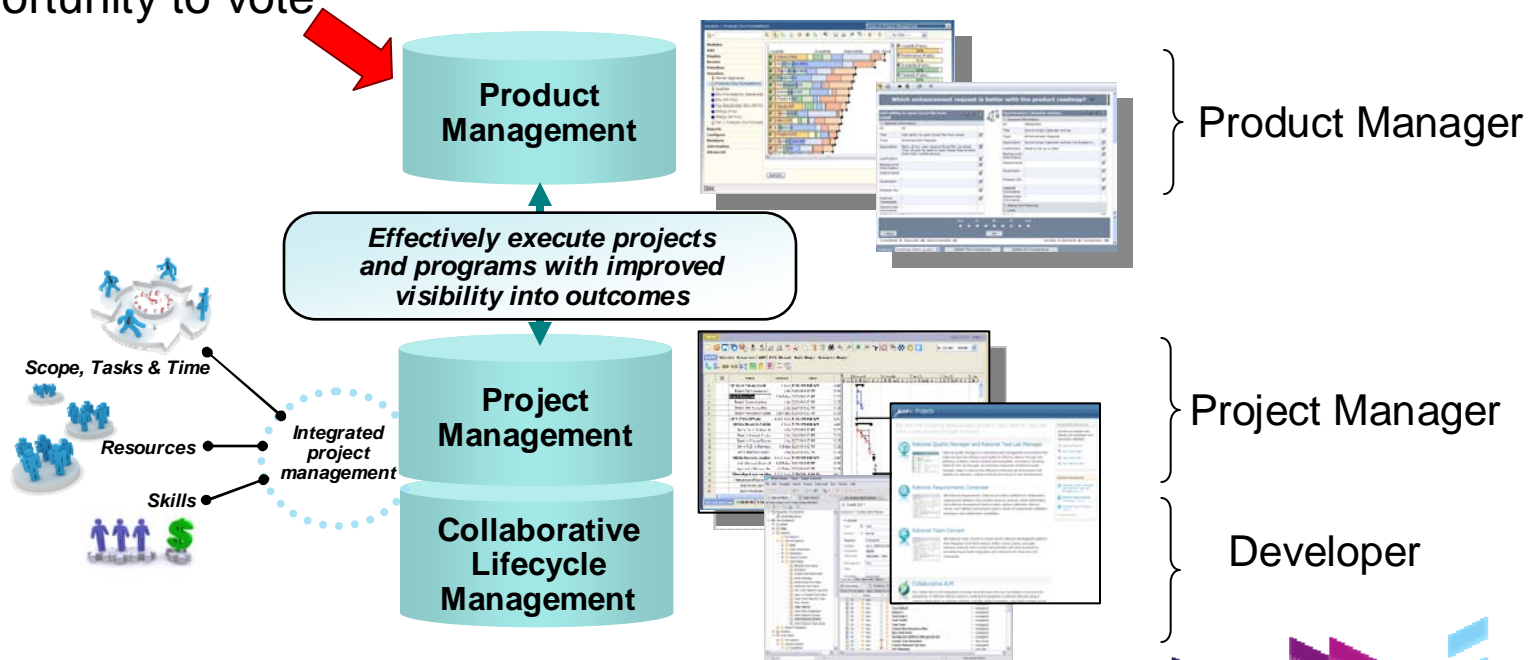# So what about the rest of the team?!

- Addressing the needs of the project manager was key, but what about the other roles on the team, such as the *product manager*?

- As we started creating plans for future releases, we needed a way to prioritize what we were going to deliver and have this be visible to all the key stakeholders

  - Defects

  - Customer-requested enhancements

  - Competitive enhancements

- However, our product managers did not want to deal with the minutiae of work items…
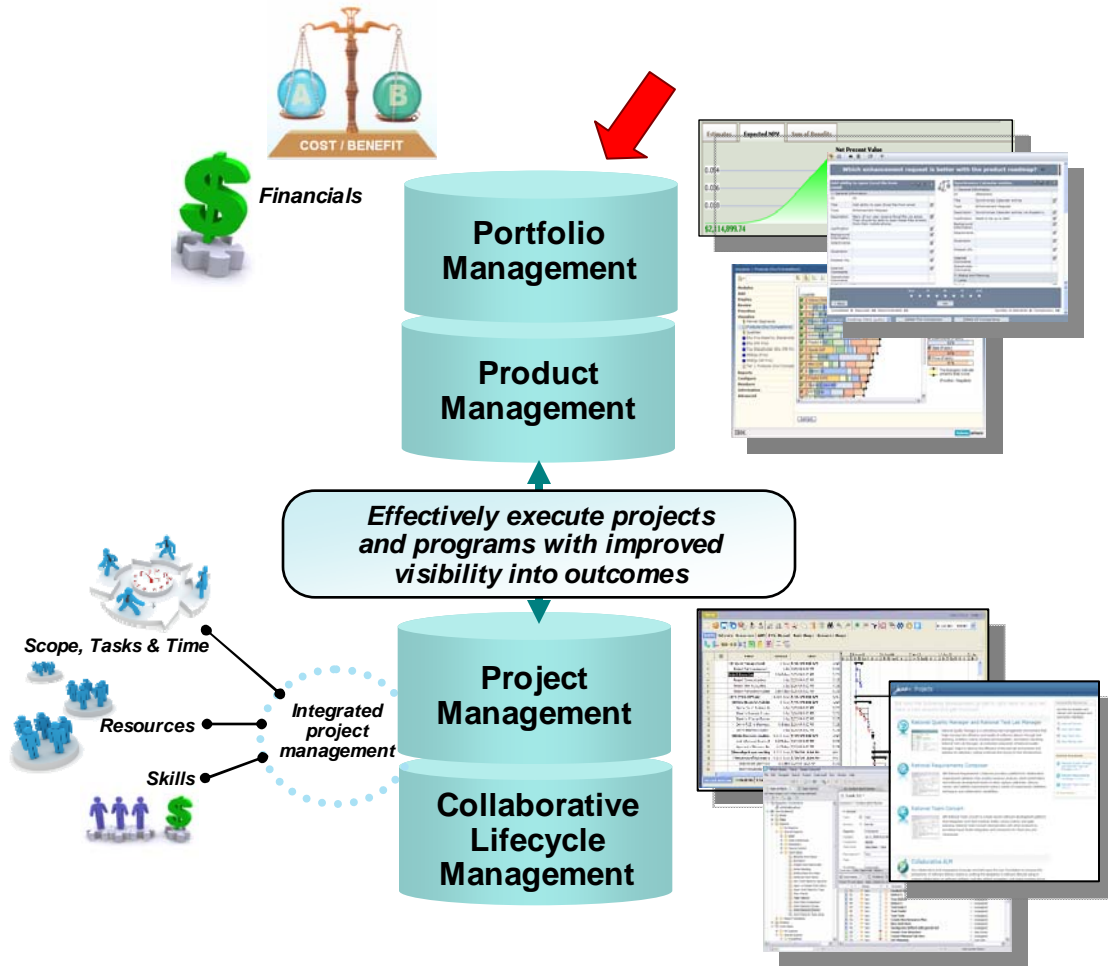
So what about the rest of the team?! – continued

- Rather, product management wanted to prioritize the higher level themes and stories and allow the developers to prioritize which work items were required to deliver those stories

- As we moved forward with the follow-on release to RPC v1.0, we took advantage of product management capabilities in our solution to prioritize the defects and enhancements and get stakeholder feedback by giving them an opportunity to vote

Product Management → Product Manager

Effectively execute projects and programs with improved visibility into outcomes

Scope, Tasks & Time

Resources

Skills

Integrated project management

Project Management → Project Manager

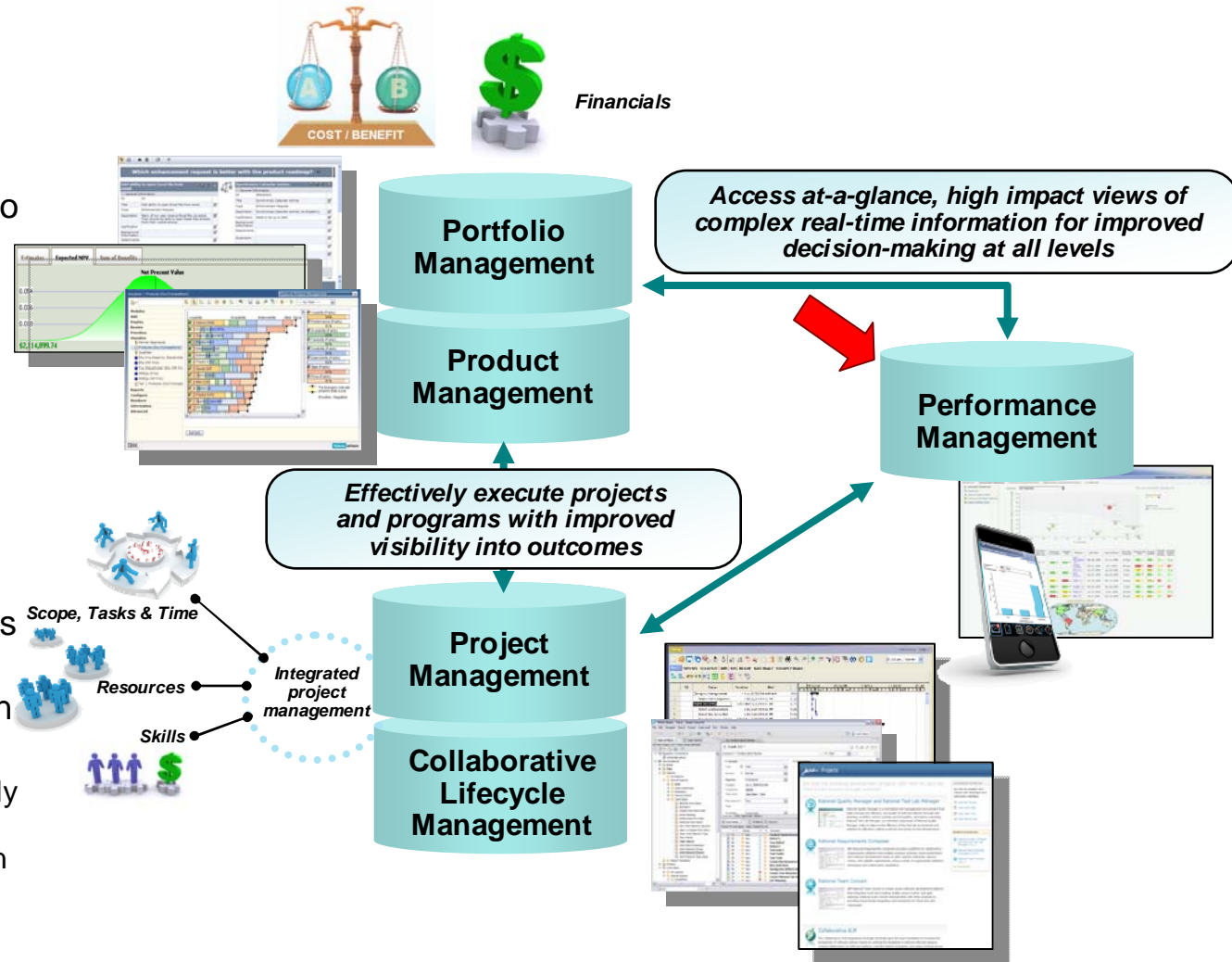**Collaborative Lifecycle Management** → Developer

All while keeping an eye on the portfolio

- The work the RPC team was doing was similar in many ways to other teams in Rational delivering products to the marketplace

- But there was little overall governance – our senior executives wanted to ensure they had the "big picture"

- We mapped our products into portfolios and assessed their value to the brand based on a number of agreed criteria

- The plan is that our teams will manage their segments this way and that our executives will use it to support their portfolio decision-making

- The pain points for us are identical to those many of our customers face —

  ▸ We need to ensure our investments are aligned with our business objectives

  ▸ …and that our portfolio planning is synchronized with project scheduling and execution

COST / BENEFIT

Financials

Portfolio Management

Product Management

Effectively execute projects and programs with improved visibility into outcomes

Scope, Tasks & Time

Resources

Integrated project management

Skills

Project Management

Collaborative Lifecycle Management

But how did we know how we were doing?

- The work the RPC team was doing was similar in many ways to other teams in Rational delivering products to the marketplace

- But how could we measure our performance – and thereby ensure we were improving over time?

- We now track our performance on a regular basis through our Executive Dashboard, applying business analytics and metrics across our Development organization

  ▸ Provides a top-down view of projects across geographically distributed Rational development teams based on bottom-up data

  ▸ Based on new KPIs, reports, and dashboards

Financials

Portfolio Management

Product Management

Access at-a-glance, high impact views of complex real-time information for improved decision-making at all levels

Performance Management

Effectively execute projects and programs with improved visibility into outcomes

Scope, Tasks & Time

Resources

Integrated project management

Skills

Project Management

Collaborative Lifecycle Management

So what did we learn?

- We chose to tell the Rational story because in many ways it reflects what our customers are experiencing

- We recognize that we are still "traditional" in our approach to our products and projects
  - We would assemble all of our projects in a big bucket at the beginning of every year
  - Decisions about what projects to execute would be made at that time
  - The teams would then deliver on those projects over the course of the year – *come what may!*
  - Our Development teams were set up to use waterfall methodologies (or iterative at best)

- And our Development team members were moving more and more to "agile"
  - But not everyone on the larger team understands agile
  - In many ways, our infrastructure didn't (and still doesn't) support agile

- We needed capabilities that allowed us to –
  - Bridge the gap between agile and traditional and therefore **better manage the impact of agile**
  - **Support the growing role of the product manager**
  - **Leverage the ground-breaking ecosystem** of capabilities critical to our success

Where we are today –

- Manage the impact of agile

- Support the growing role of the product manager

- Leverage the ground-breaking ecosystem

Achieving software investment management
Connecting business value to delivery outcomes

Financials

Align investments with business objectives to maximize business value

- **Automate request capture**
- **Make value-based selections and trade-offs**
- **Increase investment visibility**

Access at-a-glance, high impact views of complex real-time information for improved decision-making at all levels

Portfolio Management

Product Management

Performance Management

Effectively execute projects and programs with improved visibility into outcomes

Manage the impact of agile

Project Management

Collaborative Lifecycle Management

Better alignment of enterprise objectives and solution efforts can result in a
17% productivity improvement

Manage the impact of agile

- Planning and project management capabilities that support time-boxed, iterative development

  - Create iteration plans for teams and individual plans for developers

  - Track the progress during an iteration and to balance the work load of the team

  - Ensure plans are accessible to everyone on the team, especially since they can change dynamically over the course of the iteration to reflect the team's position and direction

  - 24 x 7 visibility of project status with increased transparency!

- The need for more and better collaboration across boundaries

  - Accommodate daily meetings for a geographically distributed team (i.e. across continents and time zones)

  - Create discussions on work items to clarify requirements and resolve issues across many stakeholders without time consuming meetings

  - The ability to easily and quickly gather feedback from stakeholders across the Development team

- Product management capabilities that support iterative-driven development

  - Prioritizing the backlog with input from relevant stakeholders

  - Elaborating the use cases with input from relevant stakeholders

Achieving software investment management
Connecting business value to delivery outcomes

Financials

Align investment ... **objectives to max...**

- **Automate req...**
- **Make value-ba...**
- **Increase inves...**

Support the growing role of the product manager

Portfolio Management

Product Management

Access at-a-glance, high impact views of complex real-time information for improved decision-making at all levels

Performance Management

Effectively execute projects and programs with improved visibility into outcomes

Scope, Tasks & Time

Resources

Integrated project management

Skills

Project Management

Collaborative Lifecycle Management

Better alignment of enterprise objectives and solution efforts can result in a
17% productivity improvement

Support the growing role of the product manager

- The need to understand and be able to prioritize the requests coming in from key constituents

- Building business cases including gaining clarity on the costs and benefits

- Making value-based selection and trade-offs based on the changing priorities of the organization and customers

- Allowing customers, communities, and internal stakeholders to vote on the value of features or products

  - Analyzing the results to determine which products will be the "winners" (based on adoption and fit, for example)
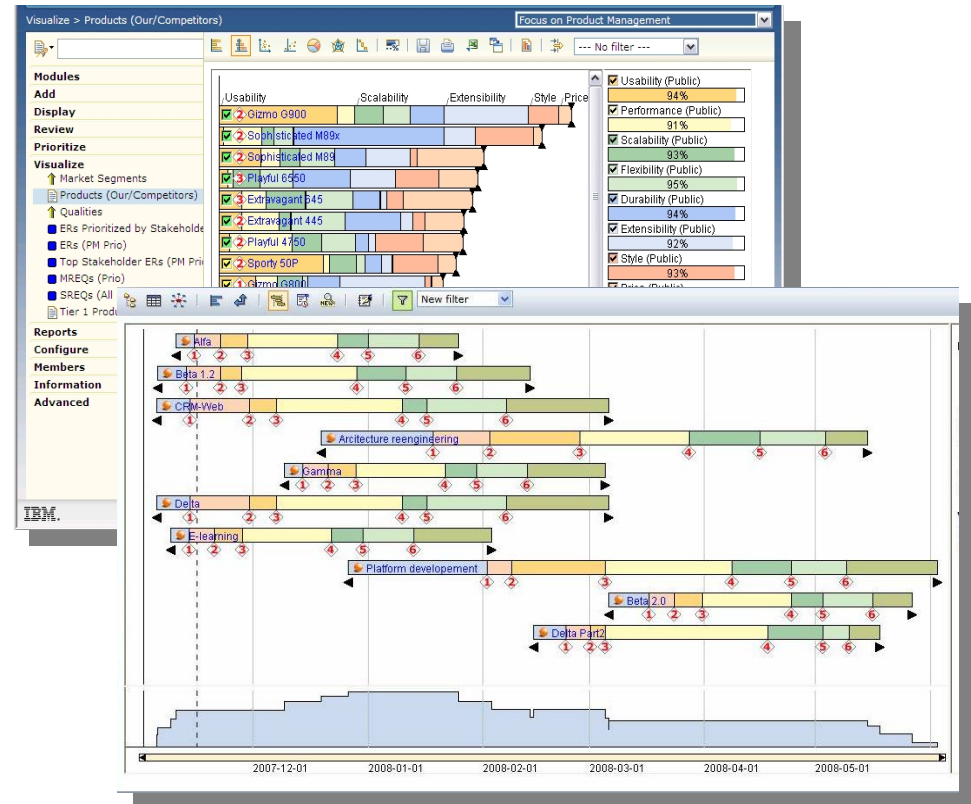
Leverage the ground-breaking eco-system

- There is an extensive eco-system of capabilities that we and our customers can leverage to successfully deliver innovative products and projects

- It includes partners, ISVs and capabilities from other parts of the Rational brand

- We are just one small part…

- High-end estimation capabilities through QSM and Galorath

- Idea capture capabilities through BrightIdea

- Enterprise Architecture and application management integrations
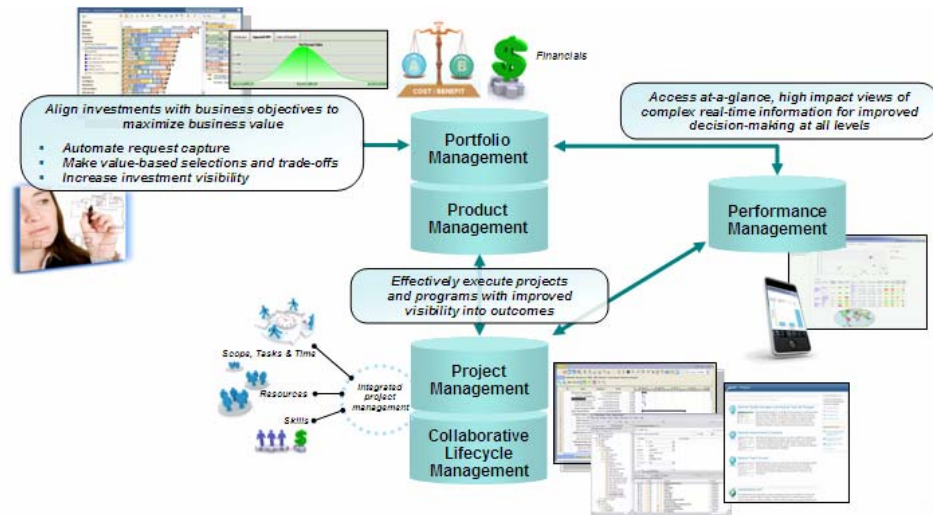
SLIM
Estimation integration to Focal Point

Determine the feasibility of proposal assumptions and likelihood of meeting desired schedule, effort, and quality
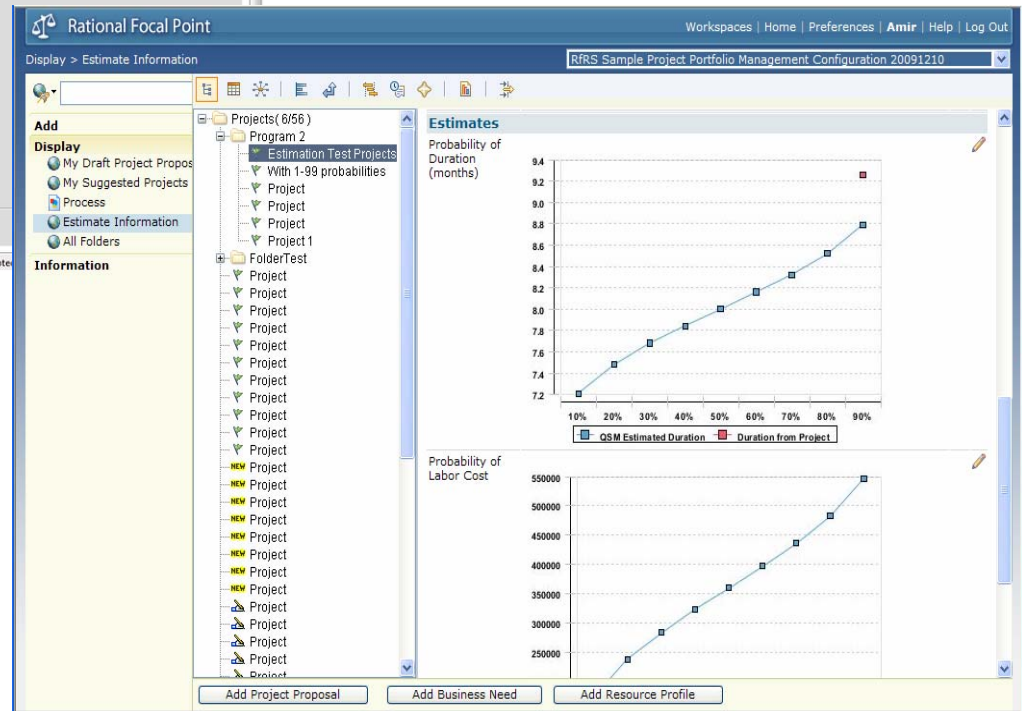
Visit QSM at Booth 419

Let's build a smarter planet.

SEER

Software estimation integration to Focal Point

Get credible estimates of schedule and cost risk in your Focal Point business case
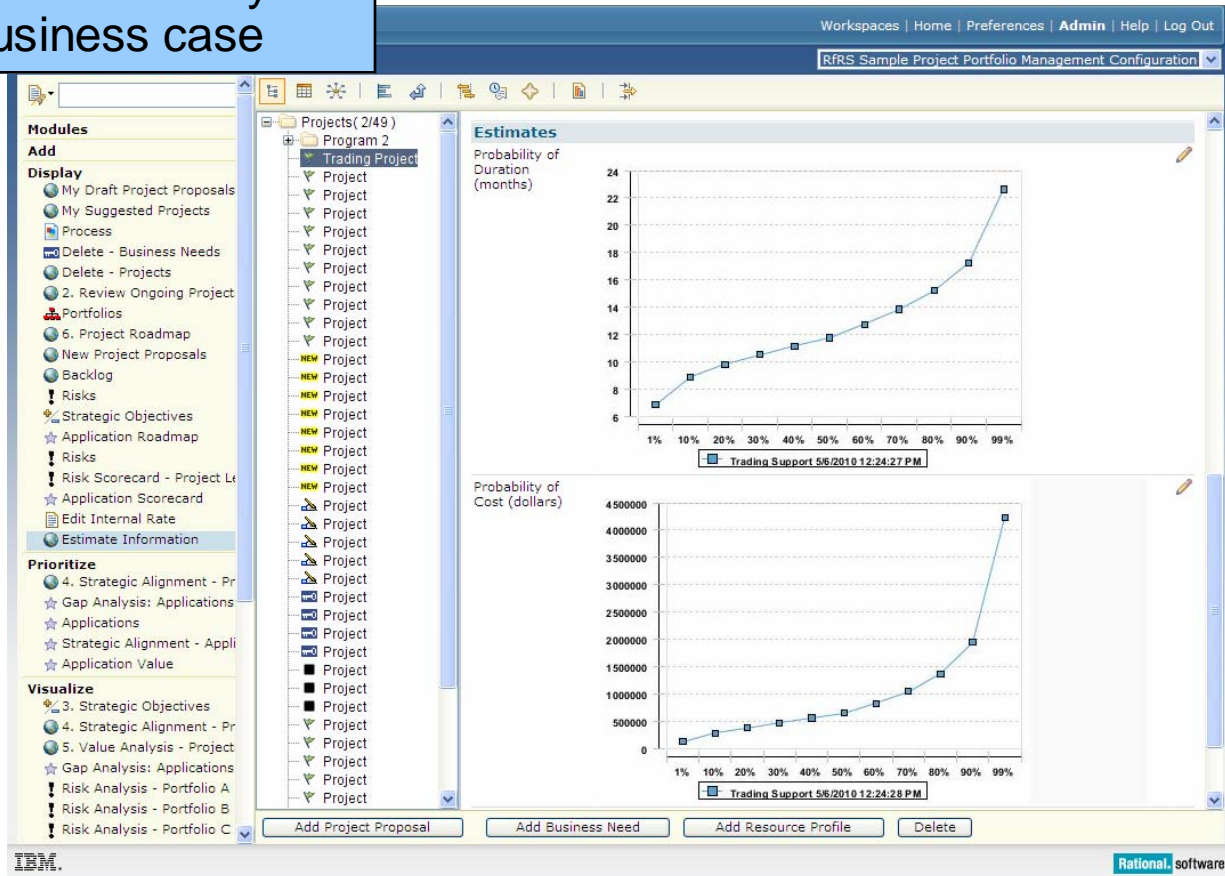
Brightidea Switchboard and Focal Point
Integrated idea management

Turning Ideas into Innovation has become a process that can be managed by integrating the Brightidea Switchboard with Focal Point

1

2

3

It starts with crowd-sourcing ideas…

Then crowd-ranking those ideas in Brightidea Switchboard……
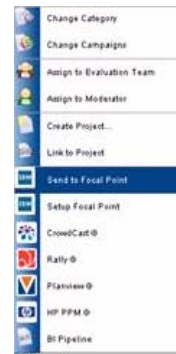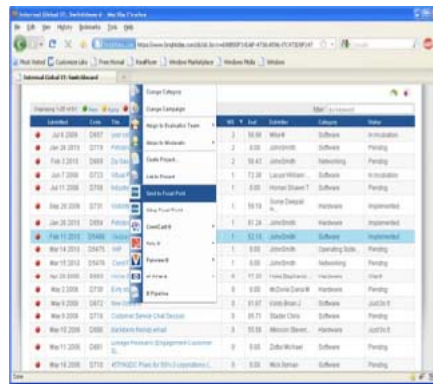
Then selecting ideas to send to Focal Point for portfolio evaluation and management
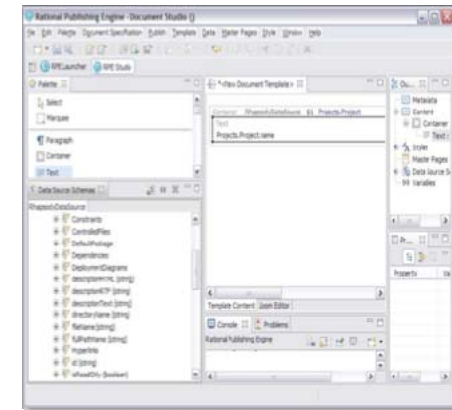
Starting with the big picture
An enterprise view is required for enterprise planning

Enterprise blueprinting with interactive visualization and analysis

- Link, consolidate and analyze IT architecture information in blueprints

  ▸ Strategies, goals and organization

  ▸ Applications, services and data

  ▸ Systems, networks and components

- Take advantage of simplified modeling with robust support for standards

  ▸ Create a common and consistent information resource to guide enterprise planning

  ▸ Multiple modeling standards in one tool

  ▸ Changes are propagated throughout the data blueprint, simplifying maintenance
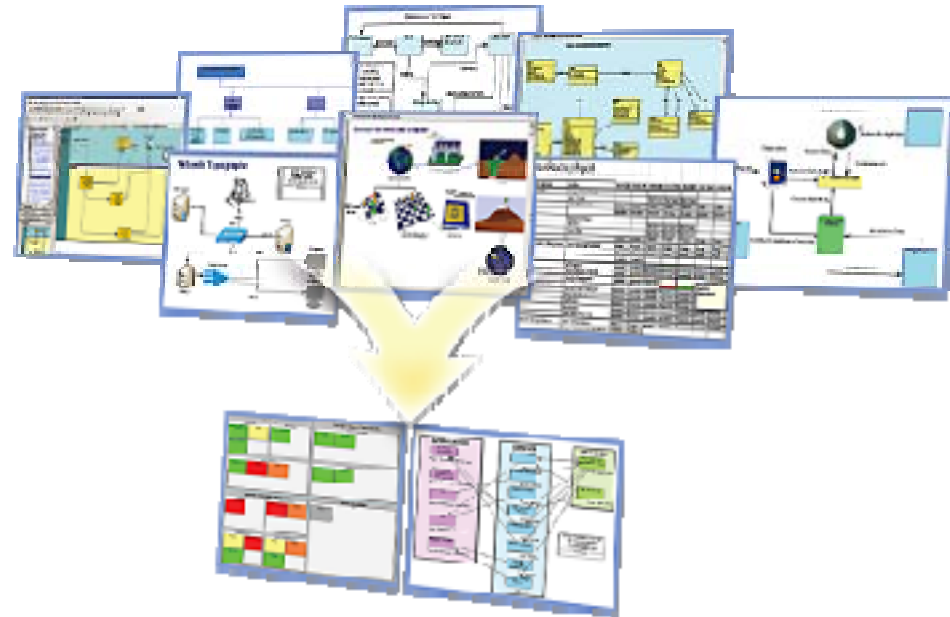
Enterprise Architecture identifies corporate systems, their key properties, and their interrelationships, and plans for and guides the evolution of the enterprise systems to support and enable the evolution of the enterprise in its pursuit of strategic advantage

Soliciting feedback for organizational enhancements

- Export architecture objects and assets for prioritization

  ▶ Perform cost/benefit analysis, weight user importance against factors such as cost, development times, and resources available

- Take user feedback to help guide decisions to –

  ▶ Build, buy, and/or implement the right assets

  ▶ Build and implement assets in the right manner

  ▶ Maintain and operate assets in the right manner

  ▶ Retire or replace assets at the right time
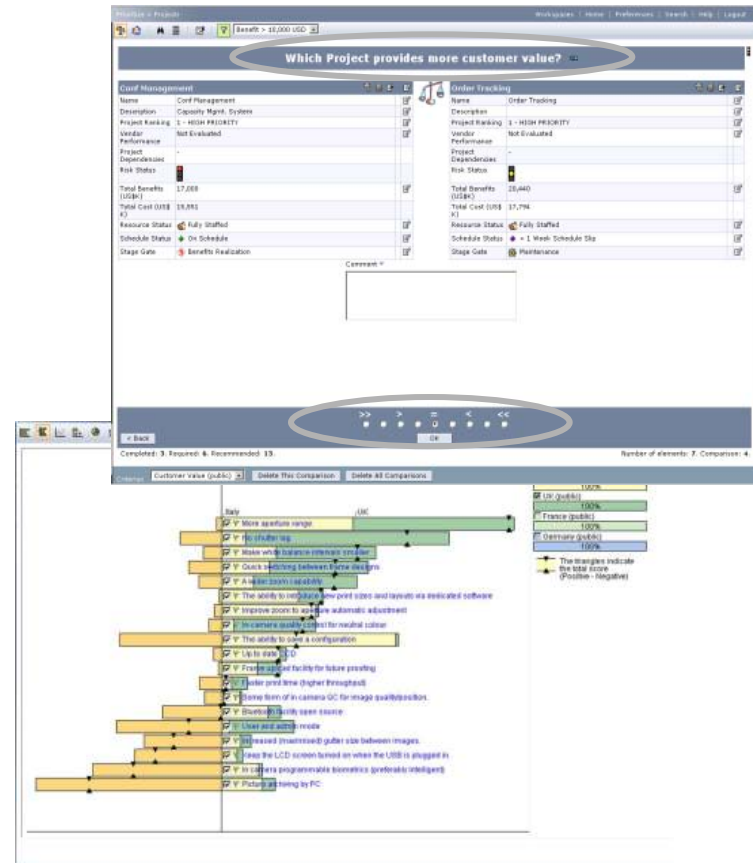
"Everything that can be counted does not necessarily count; everything that counts cannot necessarily be counted.

Albert Einstein

Adding value with application portfolio health metrics

C A S T

ACHIEVE INSIGHT. DELIVER EXCELLENCE.

Rational.

Insight

Rational.
ClearQuest

Rational.
RequisitePro

XML

Rational.
Measured Capability Improvement Framework (MCIF)

Best Practice Guidance

Open Lifecycle Service Integrations

Rational.
ClearCase

Rational.
Quality Manager

Rational.
Team Concert

Powered by
Rational. software
jazz

3rd Party

HP Quality Center

MS Project

CAST Application Intelligence Adapter for Rational Insight

Complete View into each project for Performance Management

Ready for
IBM. Rational.
software

Our next steps on the journey…

"Unless we can get teams working together across an organization, regardless of industry, they won't see the productivity gains or the cost savings"

Mike O'Rourke, Rational VP of Product Delivery
May 2010

Project management at Rational
Optimized for software and systems delivery

We are firmly on the path of Trajectory 1
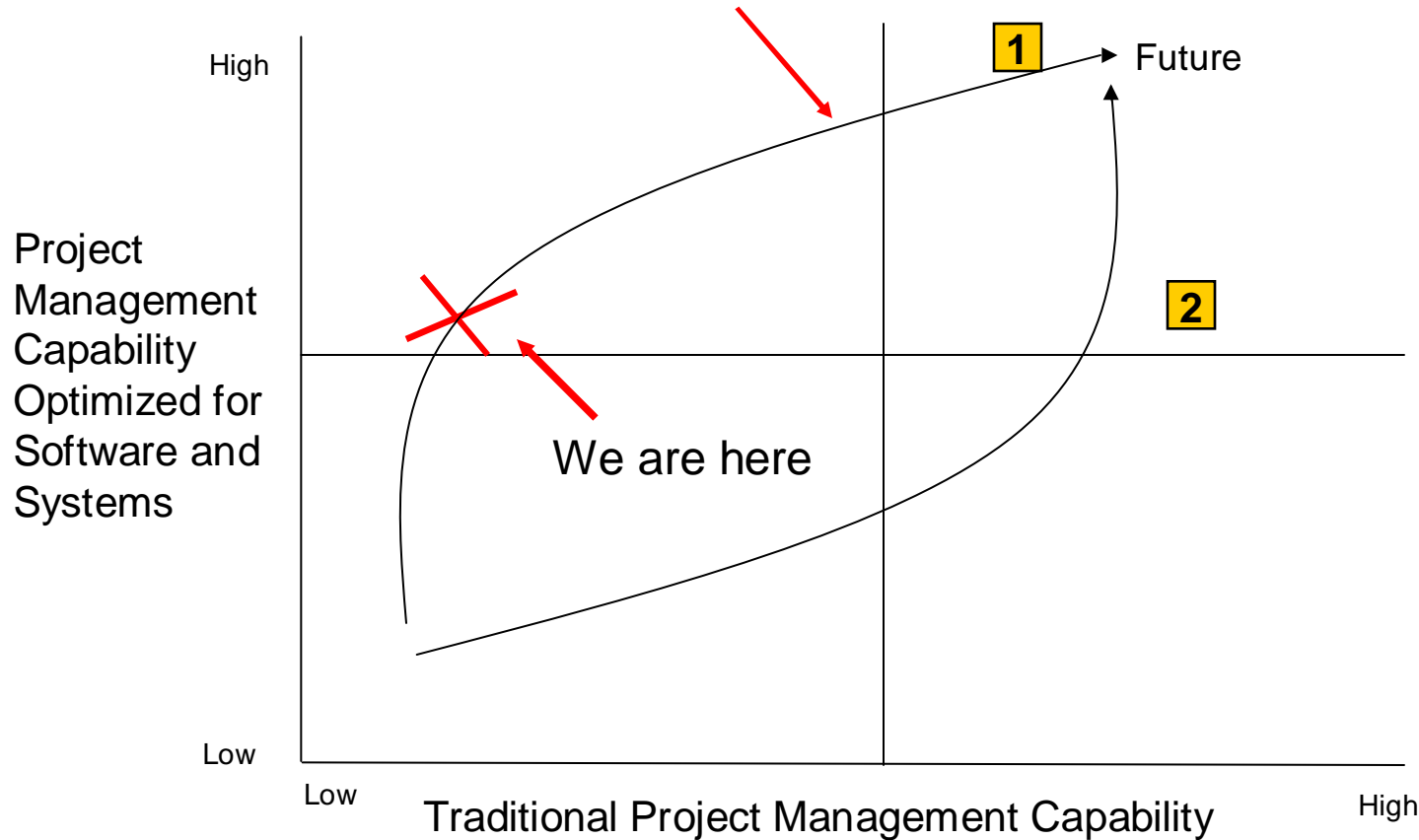
Markets Addressed –

Systems

Software

IT

Buildings

Bridges

Project Management Capability Optimized for Software and Systems

High

Low

1 Future

2

We are here

Low ——— Traditional Project Management Capability ——— High

Marrying traditional and agile
Bridging the gap for teams and organizations

- Senior managers want their teams to use the most current methodologies – including agile – but they still need oversight and control

- Project and program managers find themselves managing both traditional and agile projects

- Everyone wants a consolidated view of the projects
  - ▶ For current status
  - ▶ To understand resource allocations
  - ▶ To be able to monitor costs across all the projects

| Traditional project management | + | Agile project management | — | Hybrid project management |

What's next for Rational Project Conductor

- Support for hybrid projects that combine traditional and agile project management including orchestration of projects across tools and repositories
    - Driving requirements and constraints down
    - Reporting status and cost information up
- Open platform support with OSLC
    - ▶ Drive new OSLC specifications for project schedules, financials, timesheets and human resource data
    - ▶ Estimation and measurement services based on OSLC specification
- Usability and consume-ability
    - ▶ WBS improvements
        - Allowing configurable filtering and sorting
        - Reducing clicks to create and manipulate the WBS
    - ▶ Improved support for process templates
    - ▶ OOTB reporting based on Rational common reporting component
    - ▶ Distributed cooperating servers
- And across PPM
    - ▶ Exchange additional data with Focal Point
    - ▶ Microsoft Project synchronization

Rational Project Conductor "next"
Main user interface and Gantt view

RPC 1.0 ⟶ WBS enhancements ⟶ RPC 3.0
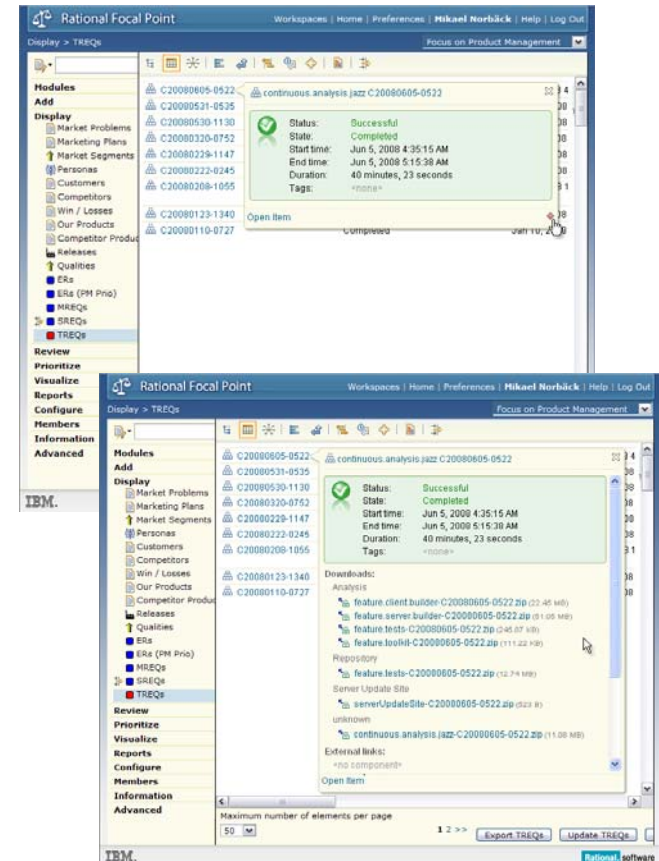
Portfolio Management and Rational Team Concert
Providing portfolio management to smaller teams

- Users will be able to access Rational Focal Point and Rational Team Concert for a comprehensive planning, execution, and management solution for small-to-medium sized software delivery organizations, particularly those looking to leverage agile development practices

- In the Product Management context, users will be able to define release content in Focal Point and use RTC to support development
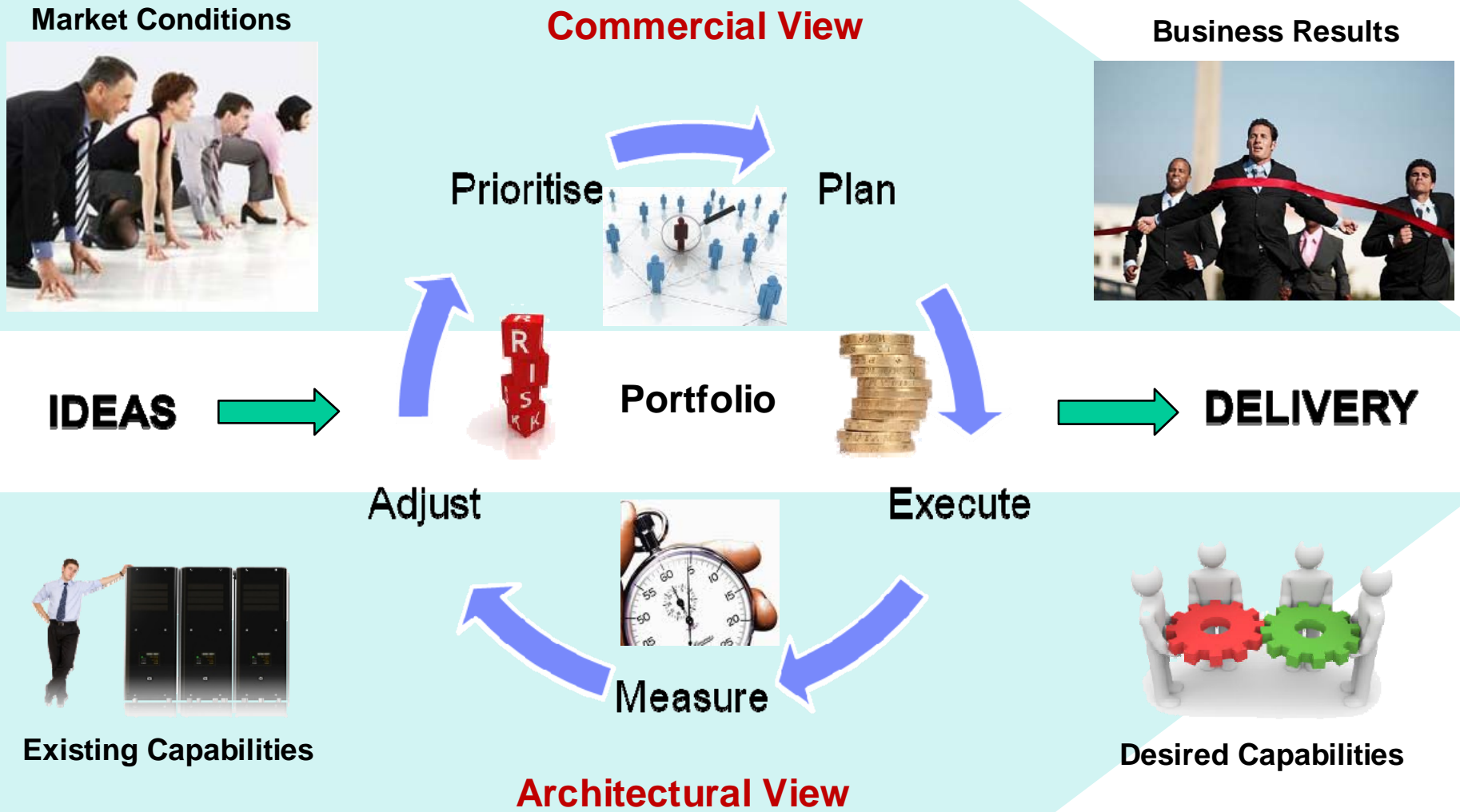
Providing portfolio management to smaller teams

- Create work items in RTC from Focal Point
  - Elicit release content candidates in Focal Point by collecting input from different stakeholders
  - Evolve, analyse and plan release content in Focal Point
  - Create approved business needs as work items in RTC

- Create links to existing work items in RTC from Focal Point
  - When existing business needs (such as Plan Items, Stories or Epics) already exist in RTC, from Focal Point be able to link those to the proposal in Focal Point
  - Through a search dialog be able to find and create a link to existing items

- View information from a linked work item in RTC with rich hover capability
  - Hover over the link and display information about the linked RTC work item
  - Expand the frame or click on a link to open the related RTC element

- View roll-ups of effort from linked RTC work items
  - Users enter estimated effort and actuals in RTC work items
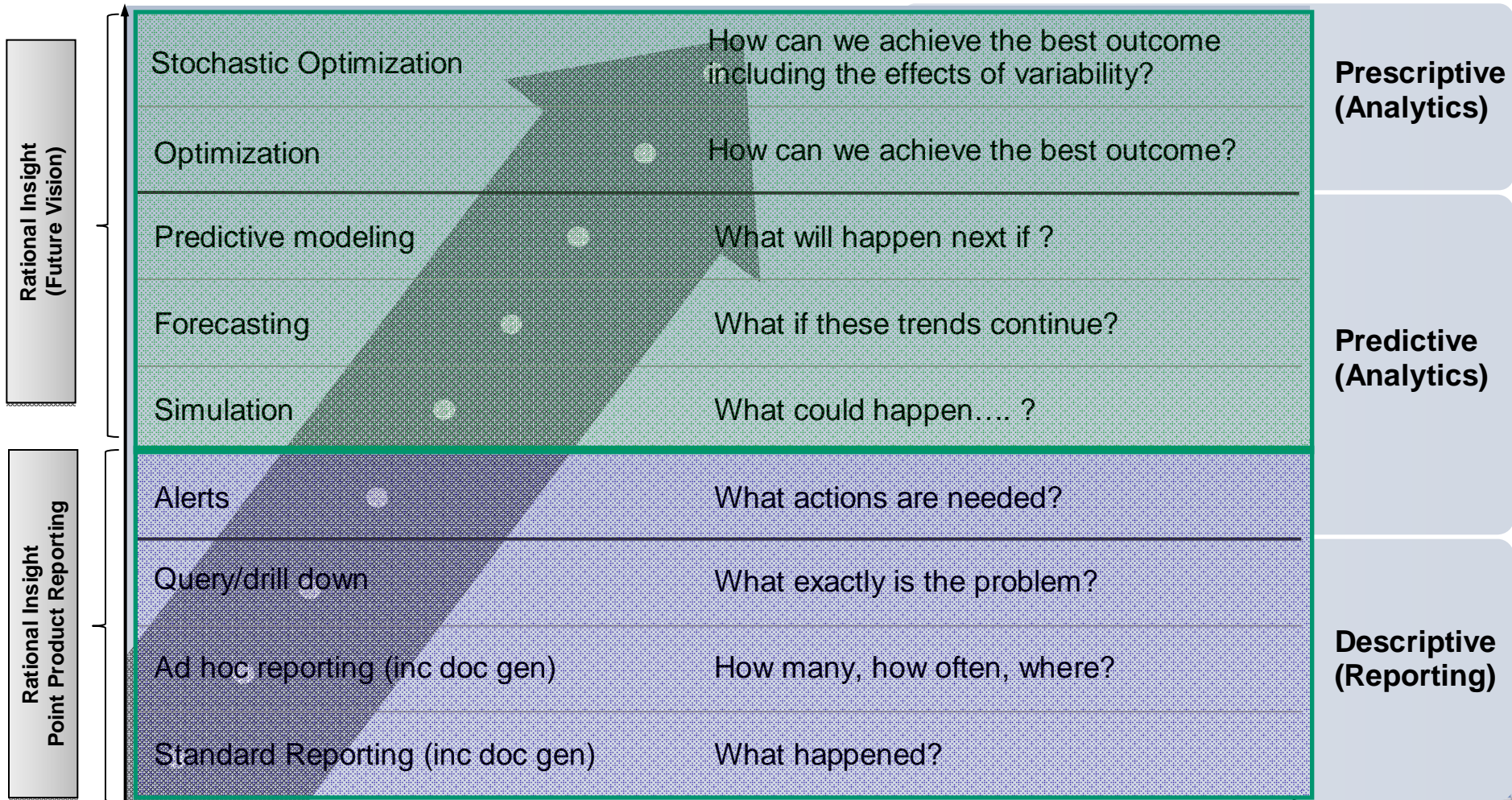 - By leveraging the OSLC links in Focal Point users can roll-up the effort of all related RTC work items

Portfolio management and the larger organization
Orchestrating transformation

Market Conditions

Commercial View

Business Results

Prioritise → Plan

IDEAS → Portfolio → DELIVERY

Adjust — Execute

Measure

Existing Capabilities

Desired Capabilities

Architectural View

Performance Management Tomorrow
Advanced Analytics

Rational Insight (Future Vision)			
	Stochastic Optimization	How can we achieve the best outcome including the effects of variability?	**Prescriptive (Analytics)**
	Optimization	How can we achieve the best outcome?	
	Predictive modeling	What will happen next if ?	**Predictive (Analytics)**
	Forecasting	What if these trends continue?	
	Simulation	What could happen…. ?	
Rational Insight Point Product Reporting	Alerts	What actions are needed?	**Descriptive (Reporting)**
	Query/drill down	What exactly is the problem?	
	Ad hoc reporting (inc doc gen)	How many, how often, where?	
	Standard Reporting (inc doc gen)	What happened?	

"You have to know where you're going and
you have to be able to do it well"

Richard Knaster, PPM Community of Practice Lead
May 2010

Daily iPod Touch giveaway

SPONSORED BY

AllianceTech
Intelligent EVENTS

- Complete your session surveys online each day at a conference kiosk or on your Innovate 2010 Portal!

- Each day that you complete all of that day's session surveys, your name will be entered to win the daily IPOD touch!

- On Wednesday be sure to complete your full conference evaluation to receive your free conference t-shirt!

www.ibm/software/rational