

The Insider's Guide to Modern PPM

What other guides won't tell you about how to
evolve portfolio management approaches and
the technology to get there

planview® 

“Notice that the stiffest tree is most easily cracked, while the bamboo or willow survives by bending with the wind.”

- Bruce Lee

PMOs have long been a mighty oak, standing firm to ensure projects are delivered on time and on budget. This rigidity is becoming a liability. [Gartner predicts that by 2025](#), 75 percent of all PMO value measures will be based on strategic business value, rather than on project execution efficiency.

Today, PMOs are guiding organizations successfully through the development of innovative products and services, digital and Agile transformations, constant disruptive events, changes in priorities, shifting customer demands, and more.

This more strategic role requires becoming more dynamic and flexible – bending like the willow in the wind to address new challenges and support all the ways organizations and teams are approaching work today. This is limited with traditional PPM approaches and tools.

To perform at this level, amidst the complexity and uncertainty in business today, PMOs need adaptive solutions.

A modern PPM approach and the software to elevate those capabilities are essential to the evolution. [Gartner advises PMOs](#) to: “Modernize their use of enabling technology by introducing new technologies for portfolio management and execution – ones that promote strategic portfolio management decision making and promote adaptive project and work execution.”

[While PPM fundamentals are necessary](#), these basic competencies (e.g., project management basics, time reporting, project prioritization, and other legacy capabilities) are just one part of a PMO’s charter. This Insider’s Guide covers four dimensions of modern PPM and the capabilities for PMOs to adopt to drive more value to the business and transform their role toward delivering enterprise agility:



Four Dimensions to Modernize PPM

Modern PPM Critical Capabilities

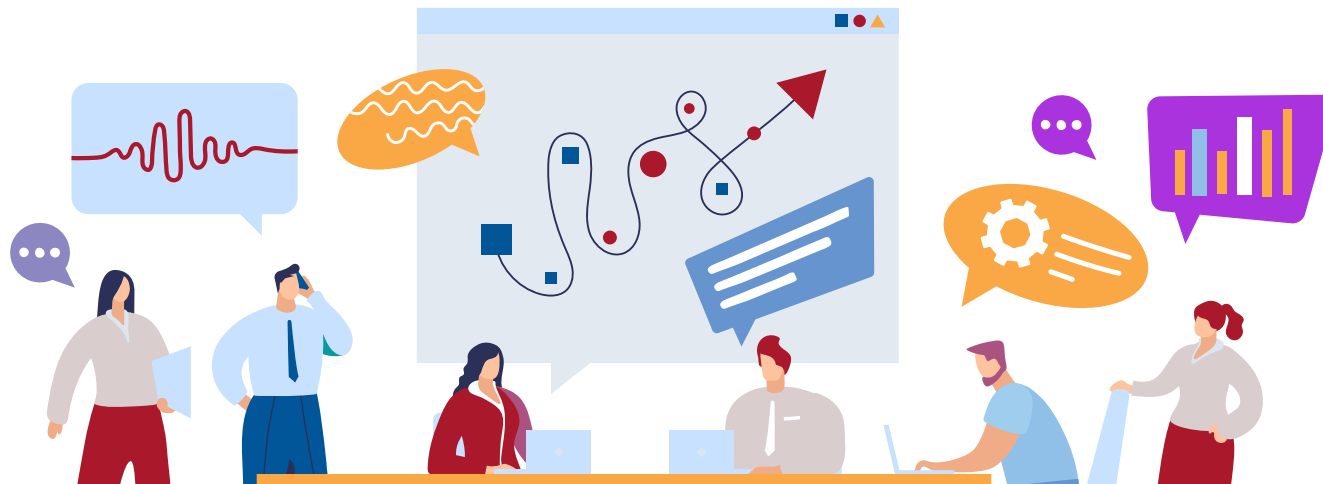
Organizations tackle work, change, and new demands differently. This variability, along with different stages of the process make the journey to modern PPM unique for each company. The four dimensions of modern PPM take these hybrid approaches into consideration.

Empowered Teams

WHY IS THIS IMPORTANT AND HOW CAN THE PMO EMPOWER TEAMS?

- Today's teams use a mix of execution methods such as waterfall projects, as well as iterative, collaborative, and Lean-Agile work delivery
- Different capabilities for the different ways that teams work, for example, a modern project team focused on tasks and project plans has different needs than Agile teams focused on flow and throughput
- Today's teams are taking on more responsibility for the delivery process, owning more of the planning and how to execute: with more autonomy, teams choose the best methods for delivering projects, programs, or products that achieve greater value for the business
- Modern PPM considers that the PMO focus will shift from managing basics of on-time delivery and resource utilization to becoming more outcome-driven - enabling teams to deliver business value faster
- PMOs support these teams and their work methods of choice, ensuring that they have the right tools/processes to deliver. For example:
 - ♦ Project delivery teams need tools combining collaboration and iterations, Gantt, milestones, and scheduling
 - ♦ Agile teams need tools that focus on flow and throughput
- With more of the planning and day-to-day delivery done by teams, PMOs play a more strategic role
- PMOs elevate their role by managing the interdependencies, constraints, and risks of strategic outcomes delivered by interrelated teams with an adaptive approach to program management

Modern PPM software enables PMOs to connect the portfolio to hybrid delivery realities. All types of work can be tied back into the integrated strategy and portfolio plans, ensuring that stakeholders retain visibility into status, dependencies, and strategic alignment, adjusting as needed.



Modern PPM: Critical Capabilities for Empowering Teams

TEAM-CENTRIC WORK DELIVERY

- User experience built for how today's teams actually work that promotes engagement and adoption
- Clear ownership and visibility into the phases and/or elements of work delivery
- Connectivity back to portfolio management for reporting, progress, financials, and governance

PROJECT TEAM EXPERIENCE

- Workspaces that allow teams to plan, deliver on work, communicate and collaborate with team members, and store documents
- Collaborative and integrated task management with Kanban boards to visualize progress
- Connectivity to enterprise collaboration tools, including Microsoft Teams and Slack

AGILE TEAM EXPERIENCE

- Visualization and robust, configurable Kanban to maximize flow and throughput
- Metrics for measuring progress (burndown) and promoting improvement (speed)
- Connectivity with third-party agile team delivery tools, allowing teams to use their Agile team tool of choice
- Flexible approaches to work costing and feeding downstream capitalization needs that reduce manual time entry, including the automated capture of actuals

PROGRAM MANAGEMENT

- Coordinate across and connect teams to deliver higher impact initiatives that drive business results
- Dedicated user experiences and capabilities for program managers to synchronize to establish targets, schedules/timelines, financials, and capacity that link to team-level work delivery experiences
- Visualize dependencies across programs, projects, and work to collectively understand relationships or impacts, resolve risks, and optimize delivery
- Manage, coordinate, and synchronize Agile teams with multi-level Kanban boards, allowing teams of teams to work toward the achievement of strategic objectives

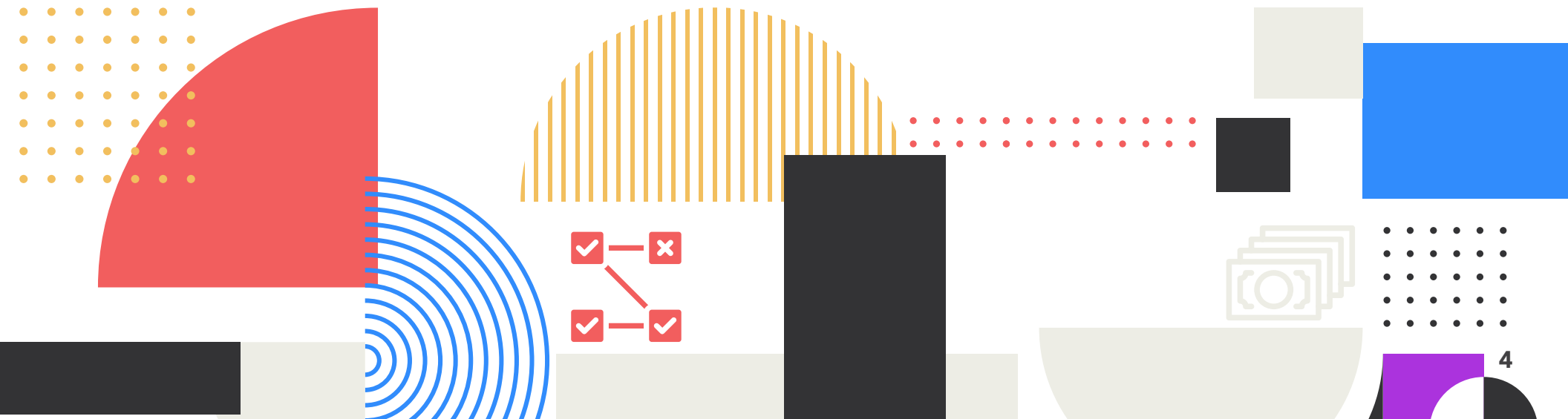


Portfolio Planning and Funding

WHY IS THIS IMPORTANT AND HOW CAN THE PMO ELEVATE PORTFOLIO PLANNING AND FUNDING?

- Annual planning and budgeting limits the flexibility needed to accommodate shorter delivery cycles, take calculated risks, fail fast, and quickly capitalize on opportunities
- In modern PPM, portfolio planning moves away from a debate about specific projects to one focused on outcomes and benefits, and leads to funding of programs, product roadmaps, or value streams
- Making the move from projects to programs and product-centric delivery enables PMOs to realign quicker as priorities shift and funding aligns with sources of value: the products, services, and customer experiences your organization delivers
- Align funding with priorities to focus portfolio value on desired outcomes
- For programs, use stage- or phase-gates as quarterly checkpoints to ensure that deliverables are on target, make go/no-go decisions, and approve incremental funding
- Assess impact of investment decisions on capabilities, applications, and technology landscape
- Prioritize program investments based on measure of return (ROI, NPV, IRR, etc.)
- With the focus on outcomes, funding becomes more flexible and shorter term - PMOs and stakeholders can evaluate progress and make changes as needed, depending upon how the investment is doing

Modern PPM software supports continuous planning and flexible funding to adapt swiftly as priorities change and new opportunities surface. Leaders can make fast, educated decisions, and focus teams quickly on new work, create an environment for experimentation and learning, all while staying on strategy.



Modern PPM: Critical Capabilities for Portfolio Planning and Funding

PROGRAM-CENTRIC PLANNING

Define funding at multiple levels to support both enterprise funding of strategic initiatives and organizational funding of programs and projects

Fund incrementally to evaluate progress and adjust based on changing internal and external factors

Establish time-based and/or stage-driven processes to guide approval decisions

Combine financial and non-financial measures of value to prioritize the right investments

PRODUCT-CENTRIC PLANNING

Define funding by products and/or capabilities to evaluate new epics and features

Associate funding with defined business outcomes and associated epics

Decentralize specific prioritization decisions down to teams-of-teams and their aligned business owners based on ability to drive desired objectives and key results (OKRs)

SCENARIO MODELING AND COMPARISON

Evaluate and prioritize funding, investments, and timeframes without interfering with day-to-day execution

Model reallocation of funding and capacity within and between portfolios to understand impacts and balance trade-offs

Create and compare scenarios to evaluate the impact on outcomes of alternative funding approaches and prioritization trade-off

Understand and compare impacts across business capabilities, applications, and technology

ROADMAPPING

Connect strategy, investments, projects, and resources with roadmaps to ensure the organization is on track to deliver epics, initiatives, technology, and applications

Coordinate across schedules, milestones, releases, and financials of each outcome with key information about the associated programs and epics

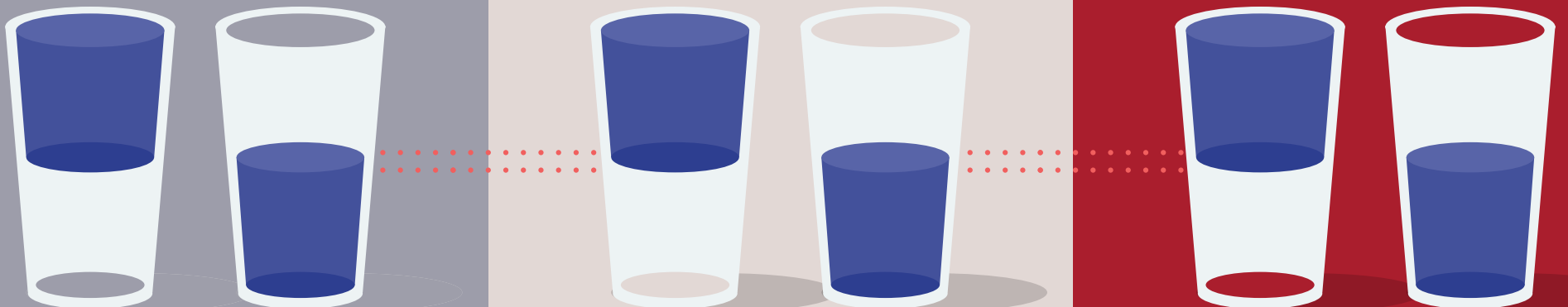
Visualize and manage dependencies across outcomes, timelines, programs, epics, and technology to anticipate issues, mitigate risk, and optimize flow

Capacity Planning

WHY IS THIS IMPORTANT AND HOW CAN THE PMO EVOLVE CAPACITY PLANNING FOR THE CHANGING WORLD OF WORK?

- Teams are changing from role-based, project-driven teams toward cross-functional empowered teams – bridging silos
- Modern PPM solutions provide the flexibility to plan capacity based on the types and variety of teams, today and into the future
- Managing resource capacity in fluid environments requires understanding the impacts of proposed changes and balancing trade-offs of reallocating teams and evaluating alternative staffing for achieving portfolio objectives
- Support planning across all types of teams – project, Agile, and shared services
 - ♦ Configure for team structure and people today and in the future, across a mix of work methods
- Advocate for capacity and funding to be managed in tandem to:
 - ♦ Analyze resource availability during the project/work selection and prioritization process and make informed investment decisions
 - ♦ Adjust staffing levels and sequencing of programs and investments to balance against capacity
 - ♦ Evaluate and adjust funding based on strategic objectives against resource constraints

Modern PPM software with flexible capacity planning capabilities can help to select the right people and teams and assign them to the appropriate work and therefore maximize the organization's value. With empowered teams managing their own capacity and work, capacity planning focuses on supporting these teams and managing the constraints and dependencies across teams, shared resources, and teams-of-teams.



Modern PPM: Critical Capabilities for Capacity Planning

MULTIPLE APPROACHES TO PLANNING CAPACITY

Plan and staff by any type of team, as well as individual and role

Model all types of teams, whether defined by functional roles or skills in a matrixed organization or dedicated teams in an Agile one (project, Agile, shared services, etc.)

RESOURCE MANAGEMENT

Balance assignments, priorities and interruptions for the current week, month, and quarter

Team and individual assignments ensure everyone is working on the right priorities to deliver the right outcomes

SCENARIO-DRIVEN CAPACITY PLANNING

Evaluate and prioritize the current quarter and beyond by team, role, skill, department, etc. without interfering with day-to-day execution

Model reallocation of teams, groups, and associated funding across the portfolio to understand impacts and balance trade-offs

Create and compare scenarios to evaluate alternative staffing and funding approaches for achieving portfolio objectives; investment and capacity planning working together

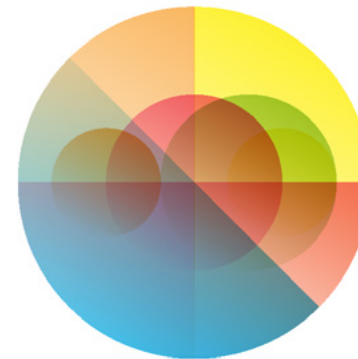


Visibility and Governance

WHY IS THIS IMPORTANT AND HOW CAN THE PMO ENHANCE VISIBILITY AND STREAMLINE GOVERNANCE?

- ♦ Complex governance and approval processes slow organizations down. A more flexible, streamlined approach to governance and approvals enables faster decision-making and delivery of products and services that add value
- ♦ The answer is “just enough” governance that ensures teams are delivering on strategy, and that the work is achieving the right outcomes. Traditional command and control governance impedes the very teams that the PMO should empower. An adaptive approach to governance instead focuses on outcomes and results, not tactics
- ♦ Teams need guidance on what decisions they can make and which to escalate to management, PMOs increase speed with clear guidelines
- ♦ The actual metrics associated with measuring progress change with each approach: PMOs actively work with stakeholders to capture KPIs that can quickly identify the need to pivot, adjust funding or capacity, or pull back
- ♦ PMOs must develop ways to measure desired results frequently and implement tools that provide visibility to progress, and must also establish guardrails that everyone agrees to so teams know what and when to escalate to the leadership team

Modern PPM software establishes a single source of truth with executive line of sight into all work being done across the business. This visibility, along with more adaptive governance approaches, facilitates fast, effective decision-making in the context of the entire portfolio and timely course corrections to accelerate on-strategy delivery.



Modern PPM: Critical Capabilities for **Visibility and Governance**

ANALYTICS AND VISIBILITY

Incorporate accurate, timely data, such as status, spend, interdependencies, KPIs, and other measures (e.g., risk, strategy, benefits, projections, forecasts) in one place

Provide high-level visibility to KPIs and progress with reports and dashboards spanning strategy, value streams, initiatives, programs, epics, projects, products, and resources

Emphasize an outcome-focus with objectives and key results (OKRs) to share goals, communicate expectations and measure success

Gain deeper insights with interactive, self-service analytics to identify trends, remove obstacles, and drive business alignment

FLEXIBLE “JUST ENOUGH” GOVERNANCE

Adapt governance to the different ways of delivering, giving program managers and teams more autonomy on how to deliver as long as cost and schedule forecasts are within guardrails

Define workflow processes to empower teams to deliver more value, quicker while still satisfying organizational risk and compliance needs

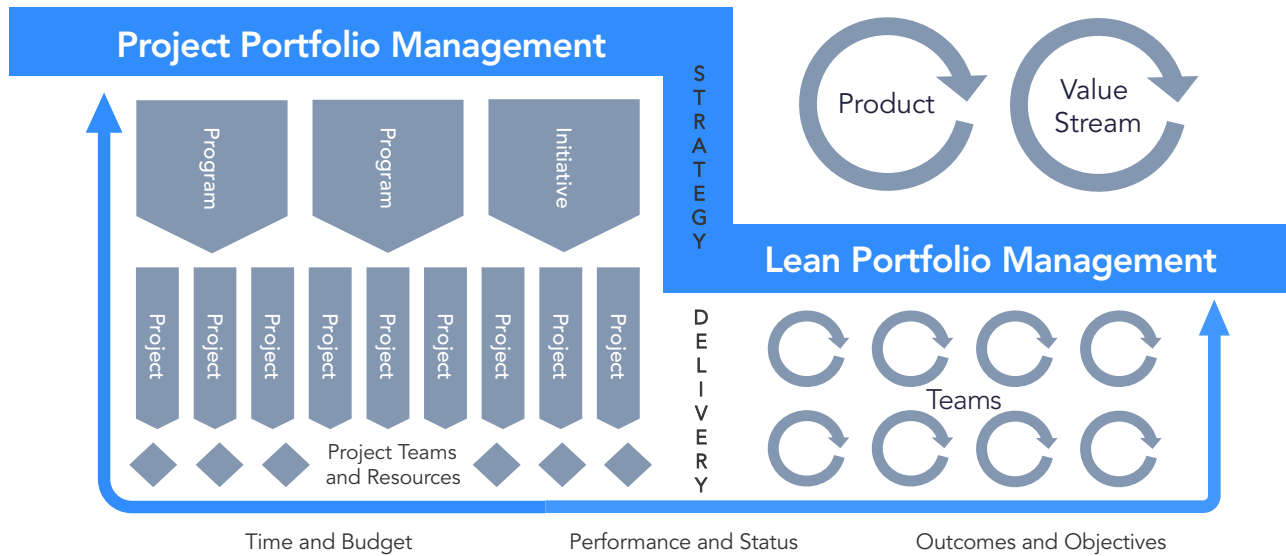
Focus governance on measuring progress on business outcomes and mitigating risk with dashboards and reports, rather than on top-down control of specific projects and phases

CONTINUOUS IMPROVEMENT

Identify improvement opportunities based on leading indicators of desired business outcomes as well as trends in work delivery

Modify process across portfolio, program, and team levels to streamline decision-making and optimize value delivery

Navigate Your PMO's Journey with Modern PPM



A Modern PPM solution helps you achieve the right mix of project, program, agile, and lean approaches across your organization for your strategy-to-delivery journey.

Modern PPM positions your PMO for success in navigating change – to both realign to shifting priorities and adapt to new ways of working. Modern PPM software offers a flexible platform to increase agility and speed:

- **Improve speed of delivery:** focus on what matters; empower teams
- **Achieve value sooner:** customer satisfaction; cost savings; achieve revenue growth quicker
- **Realign quicker as priorities shift:** a must in today's business climate
- **Reduce wasted spend:** flexible funding with shorter work increments; test and learn/fail fast; be better stewards of budget
- **Improve effectiveness:** continuous improvement; enhance capacity and flow; increase team member engagement

The journey starts with the PMO's own evolution. Moving away from strict command and control and towards becoming a more strategic business advisor, enabler of teams, and driver of value. When this is your goal, traditional PPM tools and methodologies simply don't suffice.

Planview: Your Transformation Journey Partner

Technology that supports Modern PPM will have integral, robust capabilities that are necessary to keep and [accelerate your organization's ability to deliver on strategy, and the flexibility to pivot quickly when needed](#) – for today and the future.

The transition is easier with the right partner. Beyond software, look for a partner that can help you:

- Understand where you are today, the key components that need to change, and achievable steps in that journey
- Adapt when different parts of your organization are in different stages
- Create a roadmap to successfully guide your transformation journey through today's hybrid reality

“Planview's project delivery tools absolutely supports collaboration in real-time. We gave it to everybody in the team to have one single platform to have conversations and tell them who is responsible for what. It helped me bring accountability back into a project.”

- **Project Manager, Manufacturing**

“Our journey into a multi-modal delivery methodology wouldn't been possible without the collaboration and support from Planview. Planview's willingness to work with us and be a strategic partner has truly enabled us to gain not only more ROI from our software investment but also drive greater flexibility in how we deliver work.”

- **Program and Portfolio Management Professional, Healthcare**

“Lean-Agile work delivery allows us to create flow and manage the steps to vet and make decisions through the multiple processes we use to bring new work into the portfolio. It supports linking together the multiple boards and the workflow of cards between the boards we use to manage our work.”

- **Applications Analyst, Healthcare**

“Planview's PPM solution has helped with the prioritization of projects through alignment with the strategic objective in terms of strategy, outcomes, and capabilities.”









- **IT Architect, Healthcare**

“We achieved all of our goals and the benefits [that] we realized [by using Planview] have exceeded our expectations. We finally have a grip on our data regarding financials, resource demand, and supply. We can see where our total portfolio is, the program and project view, where our resources and financial spends are, who has them and who is hoarding them, all in one place. This is the type of data transparency that leaders need to make decisions and help us achieve our goals to reduce costs.”

- **Program Manager, Financial Services (Journey spanning between 2017 and 2021)**

Planview Checks the Boxes

Planview is a [leader in both PPM and Lean-Agile markets](#), and experienced in transformation and increasing agility across an enterprise. Empower your organization to evolve at its own pace.

<p>Makes user adoption easy </p> <p>Planview provides accessibility and a user interface that is simple to master, not just for technical experts but also non-IT business users.</p>	<p>Grows and adapts with your organization </p> <p>Planview not only delivers the functionality and configurability, but also flexible licensing, tailored training options, and fixed-price implementation that fit your business needs for today and into the future.</p>	<p>Fosters a culture of innovation </p> <p>Enable your organization to tap into the collective wisdom and creativity of employees, customer, and partners with Planview Spigit. Nurture innovation and deliver the right work with the greatest potential impact.</p>	<p>Creates a single source of truth </p> <p>Consolidate and integrate with tools and services that employees and teams are already using with the Planview platform.</p>
<p>Brings together PPM and Enterprise Architecture </p> <p>Align enterprise architecture to the strategic goals of your organization with Planview modern PPM solutions. Manage cross-portfolio and applications dependencies and communicate the technology roadmap to ensure risk is mitigated and you have a clear path to deliver business outcomes.</p>	<p>Links strategy to delivery enterprise-wide </p> <p>Planview offers a holistic picture into the complex connections between strategies, outcomes, work, financials, technology, and resources for your organization to make data-driven decisions and accelerate on-strategy delivery at speed.</p>	<p>Supports all work methodologies </p> <p>From Agile to iterative to collaborative and beyond, the Planview platform supports a hybrid approach to portfolios and ways of working.</p>	<p>Rapidly reallocate, reprioritize, and realign </p> <p>Disruption and change are the new reality, and planning can't be an annual process anymore. Planview's Dynamic Planning equips your organization to quickly shift strategies, priorities, funding, and resources without missing a beat.</p>

Modern PPM: Your Roadmap to Accelerate Agility

With a focus on bringing together leading technologies spanning Agile and PPM, Planview's solutions are designed to support the different styles of work that exist in a large organization, while providing line of sight across the entire organization.

No matter what stage your organization is in, Planview® will partner with you on your journey. With 30+ years in the market, Planview has gained the knowledge and experience from working with thousands of PMOs who have been in your shoes. With Planview's support and spectrum of enterprise portfolio management and work management solutions, PMOs are improving their ability to connect strategy to delivery across the business and achieve strategic objectives.

Partner with Planview for the journey.

**To see Planview's modern PPM solution in action,
[watch a demo.](#)**

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