Keys to Successful Team Management in Micro Focus Project & Portfolio Management
September 24, 2020

Brought to You By

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SIG Leader PPM
Business Development Manager
PPMetrics

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Today's Speakers

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Micro Focus

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Pre-Sales SWAT Team
Micro Focus

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House Keeping

- This LIVE session is being recorded
  Recordings are available to all Vivit members

- <u>Session Q&A:</u>
  Please type questions in the Questions Pane

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Webinar Control Panel

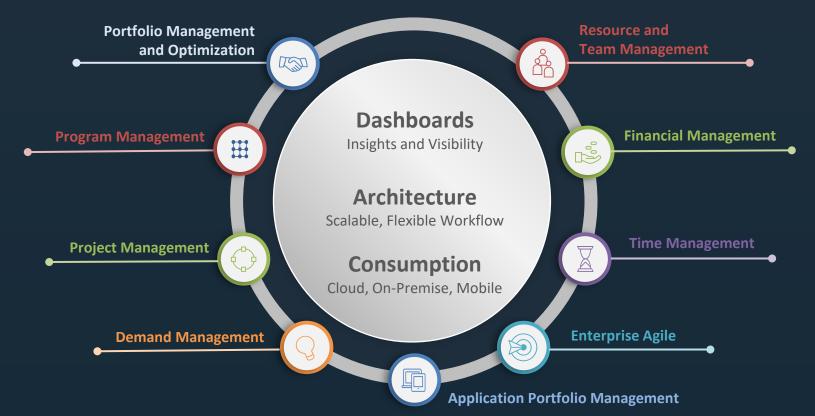Toggle View Window between Full screen/window mode.

Questions ➡️

Agenda

- **Why Team Management?**
- **Demo of current capabilities**
- **Next Steps**
- **Q&A**

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How is Resource Management changing?

Agile Planning & Execution

Agile work is delivered by Agile Teams. The allocation granularity changes from one individual at a time, to an entire Team

SAFe & Spotify Frameworks

Whether the organization adopts SAFe or Spotify, Teams are a core concept. From Squads and Tribes to Development Value Streams, we're talking about Teams
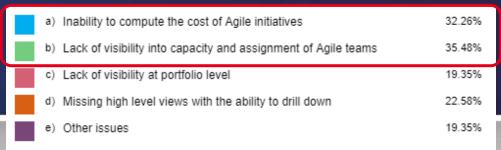
Simpler Resource Management
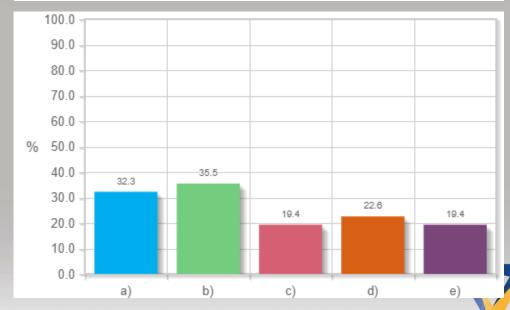
Regardless of methodology, Teams provide excellent visibility, and simplify the RM process, addressing the challenges of a Matrix Organization.

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PPM Virtual Customer Forum Polls:
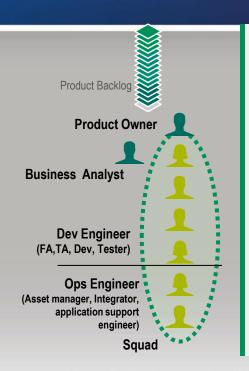
What are the main challenges you've seen in Agile adoption?

a)	Inability to compute the cost of Agile initiatives	32.26%
b)	Lack of visibility into capacity and assignment of Agile teams	35.48%
c)	Lack of visibility at portfolio level	19.35%
d)	Missing high level views with the ability to drill down	22.58%
e)	Other issues	19.35%

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Squads = Agile teams with Product focus

Product Backlog

Product Owner

Business Analyst

Dev Engineer
(FA,TA, Dev, Tester)

Ops Engineer
(Asset manager, Integrator, application support engineer)

Squad

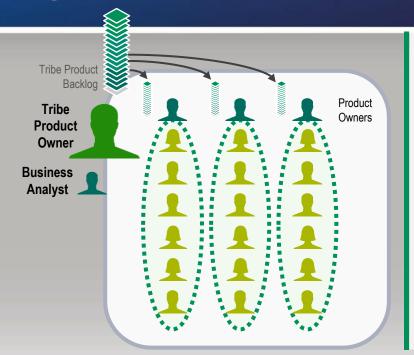## SQUADS

- Squads are Agile Teams (8 to 10 persons):
  - Cross functional long standing, self-organizing DevOps Teams (integration of Dev. Engineers(6) and Ops. Engineers(3))
  - Most teams will be working in an agile (scrum or kanban) way of working
  - Some squads might be working on supporting tasks (HR, Enablers, …)
- Can deliver working features (target: E2E / front to back)
- Has one clear product backlog and product owner
- Has a Scrum Master
  - Scrum master is a role that every team needs to pick up
- Has a Product Owner (*):
  - focus on specific product areas
  - take features from the Tribe Backlog and manage them in his Backlog
  - closely working with Squads

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Tribes = Collection of Squads logically grouped around a value stream

Tribe Product Backlog

Tribe Product Owner

Business Analyst

Product Owners
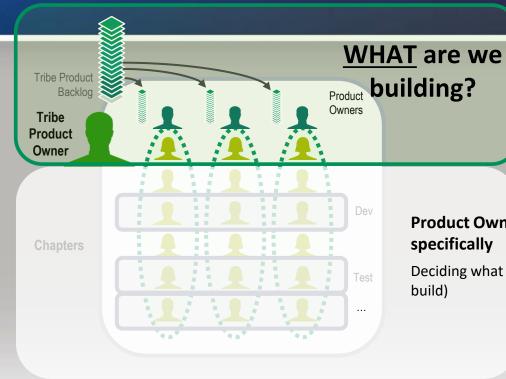
TRIBES

- Tribes are composed of multiple squads (7 to 15)

- One Tribe Product Owner, responsible for

  - prioritizing work (features) in Tribe backlog
  - preparation of next quarter planning jointly with Scrum Masters at program level
  - delivering value
  - roadmap alignment

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Tribes vs. Chapters: The "what" and the "how"

Tribe Product Backlog

Tribe Product Owner

Product Owners

Chapters

Dev

Test

...

WHAT are we building?
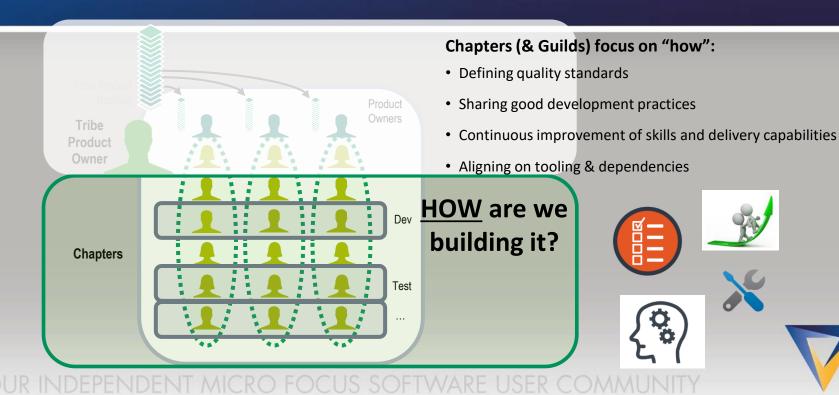
Product Owners focus on "what", specifically

Deciding what features to build (and not to build)
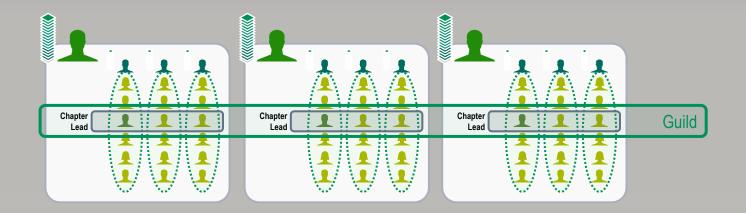
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Tribes vs. Chapters: The "what" and the "how"

Chapters (& Guilds) focus on "how":

- Defining quality standards

- Sharing good development practices

- Continuous improvement of skills and delivery capabilities

- Aligning on tooling & dependencies

HOW are we building it?

Tribe Product Backlog

Tribe Product Owner

Product Owners

Chapters

Dev

Test

...

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Guilds: collection of chapters from different tribes
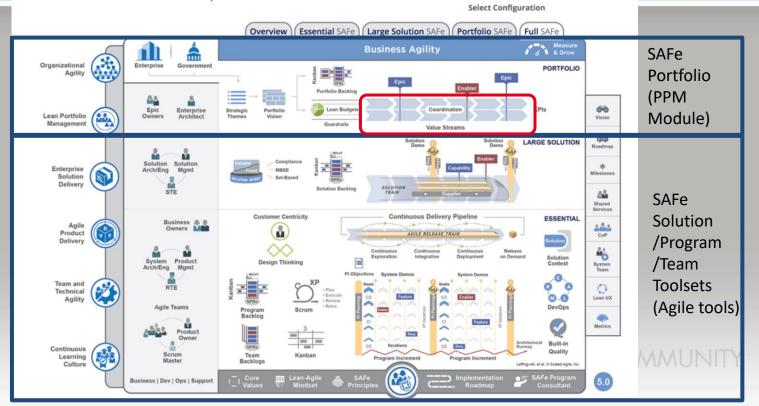
Guilds = Communities of Practice & Program view

SAFe 5.0

SAFe® for Lean Enterprises 5.0 Preview

SAFe Portfolio (PPM Module)

SAFe Solution /Program /Team Toolsets (Agile tools)
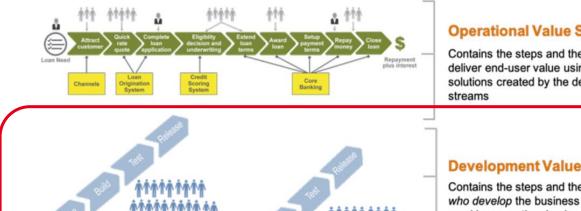
SAFe Development Value Streams

- **Operational value streams** – Contains the steps and the people who deliver end-user value using solutions created by the development value streams
- **Development value streams** – Contains the steps and the people who develop solutions used by operational value streams
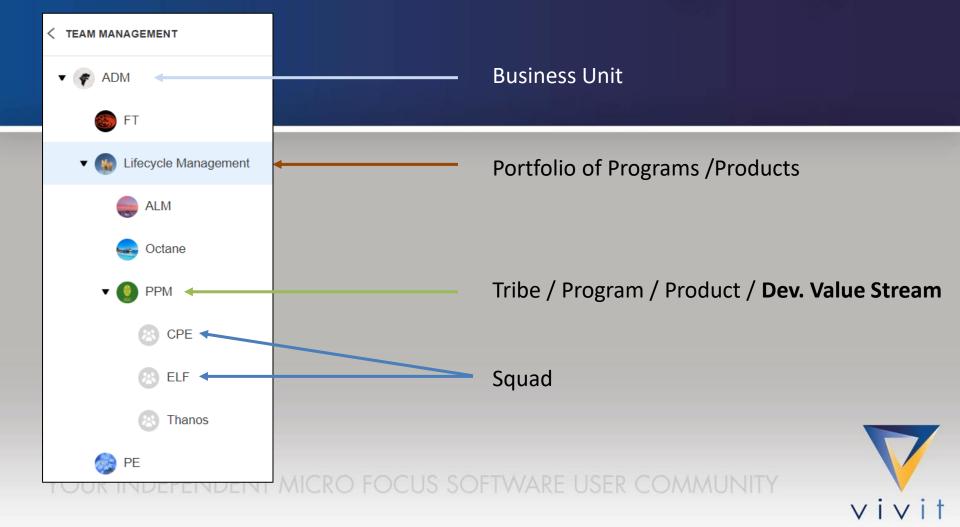
Operational Value Streams
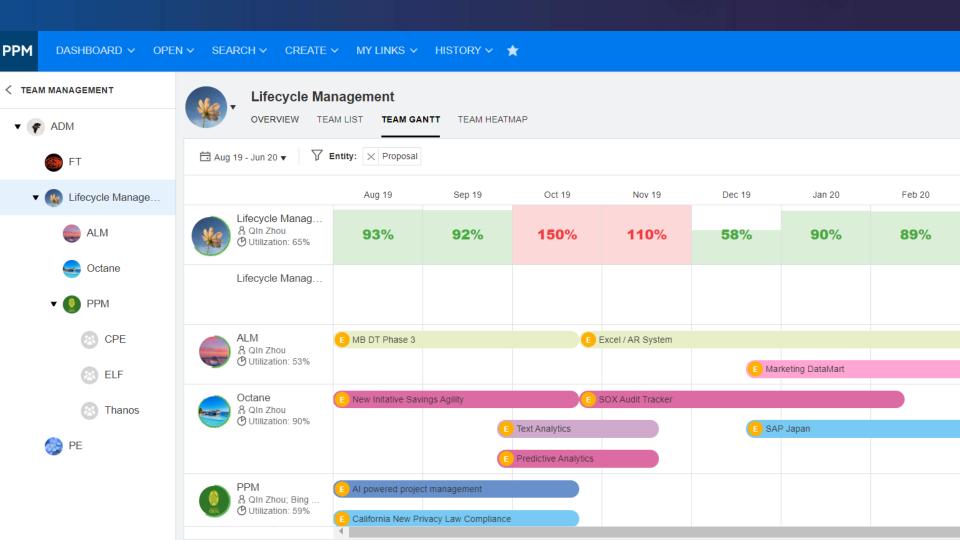
Contains the steps and the *people* who deliver end-user value using the business solutions created by the development value streams

Development Value Streams
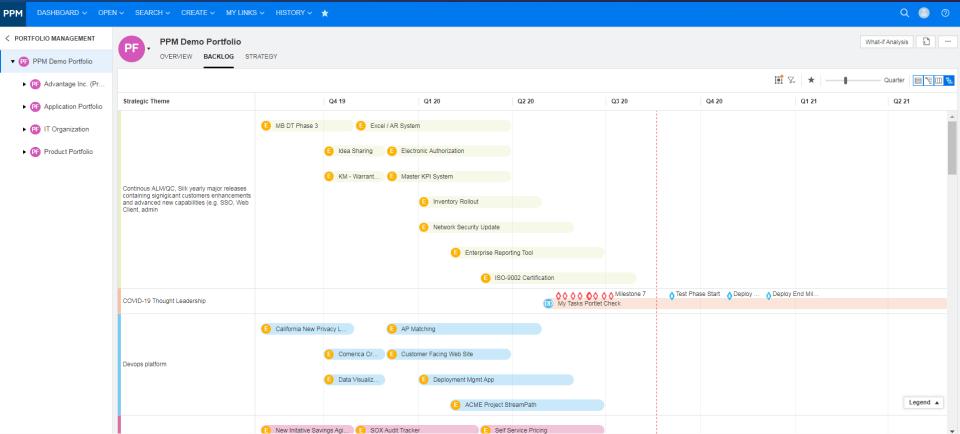
Contains the steps and the *people who develop* the business solutions used by *operational value streams*

TEAM MANAGEMENT

ADM → Business Unit

FT

Lifecycle Management → Portfolio of Programs /Products

ALM

Octane

PPM → Tribe / Program / Product / **Dev. Value Stream**

CPE

ELF → Squad

Thanos

PE

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‹ **TEAM MANAGEMENT**

- ⌄ 🌍 ADM
  - 🔴 FT
  - ⌄ 🌼 Lifecycle Manage…
    - 🌅 ALM
    - 🔵 Octane
    - ⌄ 🟢 PPM
      - 👥 CPE
      - 👥 ELF
      - 👥 Thanos
  - 🔵 PE

Lifecycle Management

OVERVIEW   TEAM LIST   **TEAM GANTT**   TEAM HEATMAP

📅 Aug 19 - Jun 20 ⌄   ▽ Entity: ✕ Proposal

	Aug 19	Sep 19	Oct 19	Nov 19	Dec 19	Jan 20	Feb 20
Lifecycle Manag… 👤 Qln Zhou ⏱ Utilization: 65%	**93%**	**92%**	**150%**	**110%**	**58%**	**90%**	**89%**
Lifecycle Manag…							

ALM 👤 Qln Zhou ⏱ Utilization: 53%
- Ⓔ MB DT Phase 3
- Ⓔ Excel / AR System
- Ⓔ Marketing DataMart

Octane 👤 Qln Zhou ⏱ Utilization: 90%
- Ⓔ New Initative Savings Agility
- Ⓔ SOX Audit Tracker
- Ⓔ Text Analytics
- Ⓔ SAP Japan
- Ⓔ Predictive Analytics

PPM 👤 Qln Zhou; Bing … ⏱ Utilization: 59%
- Ⓔ AI powered project management
- Ⓔ California New Privacy Law Compliance

Portfolio Backlog Roadmap View

Capacity-based Planning

Over capacity work will be carried into the next PI

Demand in #Teams

Capacity in #Teams

The Matrix Organization

Executive

Functional manager

Project manager

Project team

Chief Executive

Functional Manager

Functional Manager

Functional Manager

Manager of Project Managers

Staff

Staff

Staff

Project Manager

Staff

Staff

Staff

Project Manager

Staff

Staff

Staff

Project Manager

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Teams Management Overall Process

Team Setup - Set up the teams and specialties.

→

Initiative owner asks for resources from the teams.

→

Team Allocation - Allocate the squads to Initiatives.

→

Team Monitor - Monitor the team allocation and cost.

→

Project Monitor - Monitor the forecast cost of the initiatives.

Initiative Owner

Team Manager

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Team Management Current Capabilities

1. Team Administration	2. Team Allocation	3. Team Monitoring

1.1 Team Creation — 9.52

1.2 Team Cost Rules Setup — 9.53

2. 1Allocate via staffing profile — 9.52

3.1 Team demand pipeline view (Gantt) — 9.52

3.2 Team List View — 9.52

3.3 Team Cost View — 9.54

3.4 Team HeatMap View — 9.54

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Team Allocation

Team Manager

Summary	Details	Exceptions	Staffing	References

Staffing Profile: A/R Billing Upgrade

Change Header   More

+ **Statistics**

− **Allocations**

Send Resource Requests   Save

Ability to assign team to staffing profile

USD

	Position			Role	Status	Resource ...	Start Date		Q3 19				Q4 19		
								Jun 19	Jul 19		Aug 19	Sep 19	Oct 19		Nov 19
☐	+ Architect		⋯	Architect	Soft Booked	PPM	Nov 1, 2018	352.0	320.0	320.0	352.0	352.0	352.0	352.0	320.0	320.0	352.0	352.0	304.0	304.0
☐	− Infrastructure teams		⋯	Application...	Soft Booked	Infrastructure	Dec 1, 2018	112.0	1,600.0	56.0				
	🔗 Client Services				Soft Booked	Infrastructure			1,064.0				
	🔗 Data Center Services				Soft Booked	Infrastructure			320.0				
	🔗 Technical Service				Soft Booked	Infrastructure			160.0				
☐	Position with specific resource requested			CIO	New	PE							
☐	+ xOutsource Fill		⋯	xOutsourc...	Soft Booked	Commerci...	Oct 1, 2016							

| Forecast Total \| Unmet Total (4 positions) | | | | | | | | 464.0 | 1,920.0 | 376.0 | 352.0 | 352.0 | 352.0 | 352.0 | 320.0 | 320.0 | 352.0 | 352.0 | 304.0 | 304.0 |

ⓘ The positions with task IDs are synchronized from work plan. PPM suggests that you do not edit them since your edits will be lost after the next synchronization.

Team name

Project Monitor - the forecast cost of the initiatives

Project Owner

Summary	Details	Exceptions	Staffing	References

Staffing Profile: A/R Billing Upgrade

Change Header   More

+ Statistics

− Allocations

Send Resource Requests   Save

USD(x 1,000)   USD

	Position		Role	Status	Resource ...	Start Date	8	Dec 18	Q1 19 Jan 19	Feb 19	Mar 19	Q2 19 Apr 19	May 19
☐	+ Architect		Architect	Soft Booked	PPM	Nov 1, 2018	30.720	30.720	32.256	29.184	32.256	33.792	33.792
☐	− Infrastructure teams		Application...	Soft Booked	Infrastructure	Dec 1, 2018	0.000	307.200	327.936	297.216	322.560	337.920	225.024
☐	Client Services			Soft Booked	Infrastructure		0.000	107.520	118.272	107.520	112.896	112.896	107.520
☐	Data Center Services			Soft Booked	Infrastructure		0.000	76.800	112.896	102.144	112.896	118.272	84.480
☐	Technical Service			Soft Booked	Infrastructure		0.000	107.520	80.640	14.592	16.128	16.896	16.896
☐	Position with specific resource requested		CIO	New	PE		0.000	0.000	0.000	0.000	0.000	0.000	0.000
☐	+ xOutsource Fill		xOutsourc...	Soft Booked	Commerci...	Oct 1, 2016	0.000	46.080	48.384	43.776	48.384	50.688	0.000
	Total Costs (4 positions)						30.720	384.000	408.576	370.176	403.200	422.400	258.816

ⓘ The positions with task IDs are synchronized from work plan. PPM suggests that you do not edit them since your edits will be lost after the next synchronization.

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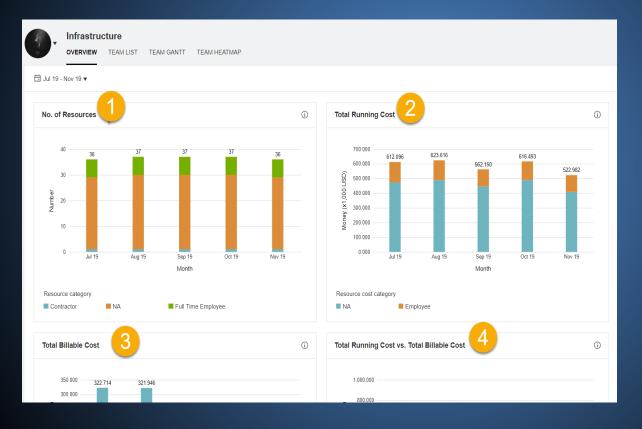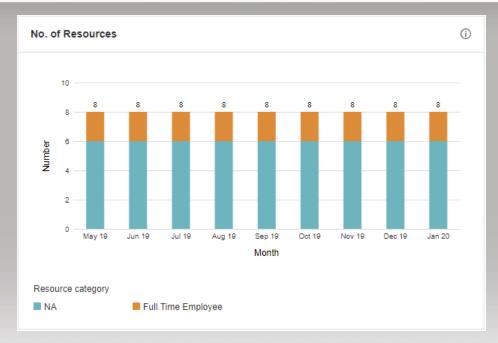# Team Monitor – Team Cost (9.54)

Team Overview Charts

- Share the same time range

- Money displayed in team region's local currency

- Help text for each chart

Team Overview Charts – No. of Resources

No. of Resources

- Direct resources + resources from sub-teams

- Named + Unnamed

- Group by resource category

- Staff turnover

Team Overview Charts – Total Running Cost

Total Running Cost

- What's Running Cost?

  The amount of money to cover the payment of every resource in the team.

- Calculation

  Payment of a resource = Resource participation in the team * resource cost rate.

- Running cost per category

Team Overview Charts – Total Billable Cost

Total Billable Cost

- What's Billable Cost?

  The amount of money to gain from assigning the team to projects

- Calculation

  = assigned effort of team/team resource * cost rate of team/team resource
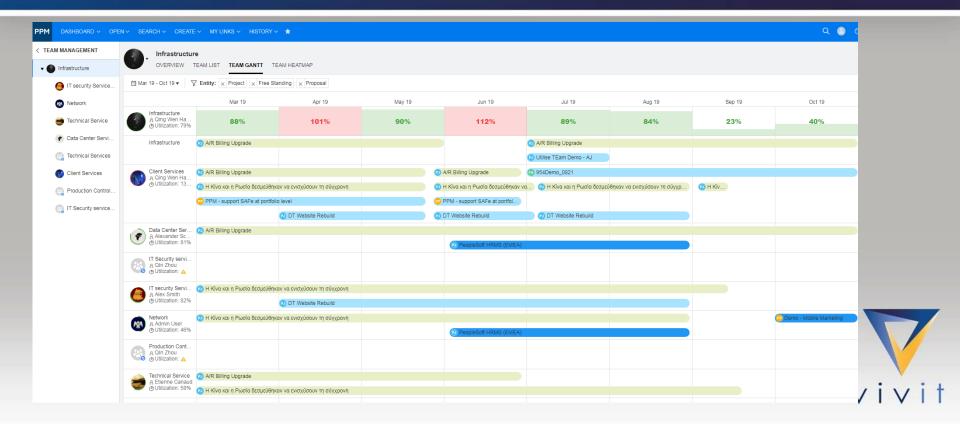
  For details, see staffing profile Costs view

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Team Overview Charts – Total Running Cost vs. Total Billable Cost

Total Running Cost vs. Total Billable Cost

- Does the team make a profit?

- What is the team performance over time?

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Team Monitor – Project Allocations

Team Monitor –Team Heatmap

Team Manager

PPM · DASHBOARD ⌄ · OPEN ⌄ · SEARCH ⌄ · CREATE ⌄ · MY LINKS ⌄ · HISTORY ⌄ · ★

< TEAM MANAGEMENT

- ▼ Information Technology
  - Fix mWeb
  - ▸ Infrastructure
  - Seat Maps
  - Ticket Delivery

Information Technology

OVERVIEW · TEAM LIST · TEAM GANTT · **TEAM HEATMAP**

📅 Apr 19 - Mar 20 ⌄ · 🔽 Team/Resource: · ✕ Utilization · ✕ Remaining Capacity · ✕ Unmet Demand · ⏱ 👤 FTE

TEAM/RESOURCE		APR 19	MAY 19	JUN 19	JUL 19	AUG 19	SEP 19	OCT 19	NOV 19	DEC 19	JAN 20	FEB 20	MAR 20
▼ Information Technolo	Utilization	69%	64%	73%	110%	121%	77%	52%	49%	22%	7%	7%	7%
	Remaining Capacity	17.80	20.90	15.11	-5.73	-12.24	12.65	27.00	28.00	43.14	51.00	51.00	51.00
	Unmet Demand	10.93	18.64	25.95	32.05	34.45	28.09	25.70	7.00	9.14	15.00	13.00	7.00
Infrastructure	Utilization	91%	99%	117%	91%	87%	23%	44%	40%	11%	11%	11%	11%
	Remaining Capacity	3.80	0.03	-5.89	3.27	4.76	27.65	20.00	21.00	31.00	31.00	31.00	31.00
	Unmet Demand	10.93	18.64	25.95	26.05	27.45	22.09	19.70	7.00	5.00	6.00	4.00	4.00
Fix mWeb	Utilization	0%	0%	0%	483%	633%	417%	50%	50%	50%	0%	0%	0%
	Remaining Capacity	7.00	7.00	7.00	-23.00	-32.00	-19.00	3.00	3.00	3.00	6.00	6.00	6.00
	Unmet Demand	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Seat Maps	Utilization	⚠	0%	0%	0%	0%	67%	67%	67%	0%	0%	0%	0%
	Remaining Capacity	0.00	6.00	6.00	6.00	6.00	2.00	2.00	2.00	6.00	6.00	6.00	6.00
	Unmet Demand	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Ticket Delivery	Utilization	0%	0%	0%	0%	0%	75%	75%	75%	61%	0%	0%	0%
	Remaining Capacity	7.00	7.86	8.00	8.00	8.00	2.00	2.00	2.00	3.14	8.00	8.00	8.00
	Unmet Demand	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Technical Writer	Utilization	-	-	-	-	-	-	-	-	-	-	-	-
	Remaining Capacity	-	-	-	-	-	-	-	-	-	-	-	-
	Unmet Demand	-	-	-	-	-	-	-	-	-	-	-	-
Technical Writer	Utilization	-	-	-	-	-	-	-	-	-	-	-	-
	Remaining Capacity	-	-	-	-	-	-	-	-	-	-	-	-
	Unmet Demand	-	-	-	-	-	-	-	-	-	-	-	-

Team Monitor –Team Heatmap

Team Manager

PPM | DASHBOARD ⌄ | OPEN ⌄ | SEARCH ⌄ | CREATE ⌄ | MY LINKS ⌄ | HISTORY ⌄ | ★

< TEAM MANAGEMENT

Information Technology

- Information Technology
  - Fix mWeb
  - ▸ Infrastructure
  - Seat Maps
  - Ticket Delivery

Information Technology
OVERVIEW | TEAM LIST | TEAM GANTT | **TEAM HEATMAP**

📅 Apr 19 - Mar 20 ▾ | ⧩ Project: | ✕ Percentage Fulfilled | ✕ Unmet Demand | ✕ Unmet Demand Team | ✕ Allocation | ✕ Percentage Fulfilled Team | ⊘ 👤FTE

PROPOSALS/PROJECTS/ASSETS		APR 19	MAY 19	JUN 19	JUL 19	AUG 19	SEP 19	OCT 19	NOV 19	DEC 19	JAN 20	FEB 20	MAR 20
PJ A/R Billing Upgrade	Allocation	16.00	14.00	10.53	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	Percentage Fulfilled	81%	96%	100%	⚠	⚠	⚠	⚠	⚠	⚠	⚠	⚠	⚠
	🏢 Infrastructure	81%	96%	100%	⚠	⚠	⚠	⚠	⚠	⚠	⚠	⚠	⚠
	Unmet Demand	3.81	0.60	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	🏢 Infrastructure	3.81	0.60	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
PJ PeopleSoft HRMS (E	Allocation	0.00	0.00	8.00	8.00	8.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	Percentage Fulfilled	⚠	⚠	100%	100%	100%	⚠	⚠	⚠	⚠	⚠	⚠	⚠
	🏢 Infrastructure	⚠	⚠	100%	100%	100%	⚠	⚠	⚠	⚠	⚠	⚠	⚠
	Unmet Demand	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	🏢 Infrastructure	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
PJ DT Website Rebuild	Allocation	5.14	5.30	5.16	4.87	5.14	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	Percentage Fulfilled	100%	35%	34%	91%	100%	⚠	⚠	⚠	⚠	⚠	⚠	⚠
	🏢 Infrastructure	100%	35%	34%	91%	100%	⚠	⚠	⚠	⚠	⚠	⚠	⚠
	Unmet Demand	0.00	10.00	10.00	0.45	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	🏢 Infrastructure	0.00	10.00	10.00	0.45	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
PJ Η Κίνα και η Ρωσία σ	Allocation	14.92	14.05	14.10	14.06	14.10	4.35	0.00	0.00	0.00	0.00	0.00	0.00
	Percentage Fulfilled	149%	139%	140%	141%	140%	63%	⚠	⚠	⚠	⚠	⚠	⚠
	🏢 Infrastructure	149%	139%	140%	141%	140%	63%	⚠	⚠	⚠	⚠	⚠	⚠
	Unmet Demand	-4.87	-3.96	-4.05	-4.10	-4.05	2.59	0.00	0.00	0.00	0.00	0.00	0.00
	🏢 Infrastructure	-4.87	-3.96	-4.05	-4.10	-4.05	2.59	0.00	0.00	0.00	0.00	0.00	0.00
PP PPM - support SAFe	Allocation	3.14	3.30	3.16	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	Percentage Fulfilled	100%	100%	100%	⚠	⚠	⚠	⚠	⚠	⚠	⚠	⚠	⚠
	🏢 Infrastructure	100%	100%	100%	⚠	⚠	⚠	⚠	⚠	⚠	⚠	⚠	⚠
	Unmet Demand	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

What can you do today?

- **Expose your resource pools as Teams**
- **Leverage the Gantt Chart and Heatmap View for unprecedented visibility**
- **Start using the Teams overview customizable dashboard**
- **Address the Matrix Organization challenges:**
  - Consider using the Org Unit as reference (functional) hierarchy for your resources
  - Use Teams to represent work allocation
- **Become a Design Partner and make sure R&D addresses your use case**

Next Steps - Roadmap

- **Team allocation**
- **Customizable Dashboard & Self-service portlets**
- **Synchronize Teams with Agile Tools**
- **Team timesheets**
- **Teams in What-if Scenarios**

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Questions & Answers

Please type your questions in the questions pane.

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Upcoming Events

Friday, September 25, 2020 – German Event
Virtual Meeting: DevOps mit ALM Octane
Time: 10 - 11:30 Uhr CEST (Frankfurt)
https://www.vivit-worldwide.org/events/EventDetails.aspx?id=1416125&group=

Tuesday, October 6, 2020
Virtual Meeting: Vivit Dallas/Ft. Worth User Group: Accelerate Automated Testing
Time: 12:00 - 1:00 PM CDT (Dallas)
https://www.vivit-worldwide.org/events/EventDetails.aspx?id=1423918&group=

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Agile, DevOps and Testing Virtual Event

Calling all Agile, DevOps and Testing speakers

If you have an enlightening story to tell, want to showcase your process or instruct others with your insights on how you do what you do with Agile, DevOps or Testing, along with other Industry Experts at the 4-Day Vivit/Unicom event this December 1-4 then Contact Vivit today!

The deadline to submit your Agile, DevOps and Testing topic is October 2, 2020

v i v i t

Thank you

- Complete the short survey so your Vivit leaders can better serve you in the future
- For more information, go to:
  - Vivit-Worldwide at https://www.vivit-worldwide.org/
  - Micro Focus Community Site at https://community.microfocus.com/t5/Project-and-Portfolio-Management/ct-p/sws-PPM

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Thank You

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