

# 7 Steps to Getting Started with **FLEX**



## What is FLEX?

FLEX is a licensing model that allows you to empower teams to work and deliver in 2 different visual planning and work delivery modules. It allows you to give your teams access to Planview Projectplace™ and/or Planview LeanKit™ with the opportunity to switch module as needs arise. For the PMO leader, admin, or owner, this provides visibility into the status of all your projects, regardless of delivery type, so you can make informed decisions and drive better insights into the most granular level of work in your organization. It brings all the unstructured and agile work to the surface.



# 1. CHOOSE A PILOT TEAM

Choose a team to pilot these modules with. Pick a team that can give you ample feedback about their experiences with the capabilities. Anything that the team has found particularly useful? Any challenges? Learnings that can be applied across your organization? What are they currently using for their work delivery processes? How can you take that process and improve it?

Make sure to record as best you can any reporting or data around current speed of delivery and missed deadlines for the team. If you can't track this today, good news! Projectplace and LeanKit have built-in reporting capabilities.

Having trouble choosing a team for the pilot? Check out these common use-cases customers use each module for:

Planview Projectplace	Planview LeanKit
Marketing	DevOps/IT Ops
LOB Teams	Manufacturing
Construction	Human Resources
Procurement	Quality Assurance
Professional Services	Product Development
Case Study – Mentor Graphics	Case Study – Matisa



## 2. CHOOSING YOUR PATH

Is the pilot team going to try Projectplace (project delivery for teams) or LeanKit (enterprise Kanban for Lean-Agile work)? Here's some differences between how they approach work management and delivery.

Planview Projectplace	Planview LeanKit
General Purpose	Methodology
Accidental Project Managers	Lean and Agile Teams
Beginning and End	Human Resources
Procurement	Process and Flow
Discrete Workspaces	Value Streams
Objective Accomplishment	Process Excellence

Lean and Agile teams generally prefer LeanKit for process-centric and intake-driven work delivery, while project-centric teams have more success with Projectplace for milestone-driven, collaborative work. Planview® gives you access to both, so you and your organization can choose which experience has capabilities that best meet the team's requirements and work style needs. You can let the team decide which work delivery module to use, or – if you have clear insight into their ways of working – make that call yourself.



### 3. KICKOFF SESSION WITH PILOT TEAM

Set up a half-day working session with the pilot team to activate their user accounts and get access to the tool(s). Feel free to direct planning questions to your Customer Success Manager. Show a demo of both modules, or the one of your choice if you already know which is the best fit, so the team can begin to understand the available capabilities and their value.

#### **Introducing Projectplace** – 5-minute demo

#### **Introducing LeanKit** – 5-minute demo

Identify the person on the team that will own the pilot and ask him/her to set up the workspace(s) with a simple project workspace (Projectplace) or team-level Kanban board (LeanKit), so the team members can visually see how configurable the tools are and start to visualize work. If you're leaving the decision of which tool to use up to the team, walk through this in each module so that they can come to a decision of which they would be most successful with.



## 4. ENSURE PILOT TEAM SUCCESS

Once you have decided which module to trial and the team is set up with appropriate access, it's time for them to get to work. The best part of Projectplace and LeanKit is how intuitive and simple they are to use, so minimal training and oversight is needed on your part.

Agree on a project, feature, epic, or however work is defined – considering tasks and/or templates you may want to create, and have the team commit to using the tool to plan out and deliver that work. Decide on desired outcomes and define what success will look like. Create working agreements between the teams so that they all get a shared understanding of what is expected with their use (a great start is making sure that no work is hidden – leveraging the tool to show all work to help the teams prioritize).

Depending on if the delivery and project data is connected to be able to flow into your Planview PPM tool, this would be a great time as the PMO leader, to practice building out a project and pushing it down into either Projectplace or LeanKit for further breakdown from the team.

Otherwise, provide them with content on how to create and build their work with best practices to ensure smooth delivery. The section “Your Adoption Journey” on the FLEX use case and best practices pages for **Projectplace** and **LeanKit** within the Customer Success Center is a great place to start. Your Customer Success Manager would be happy to schedule a recurring call with the team to monitor progress.



## 5. RETROSPECTIVE ON PILOT

Now that the work has been delivered and the pilot test is complete, spend some time with the team to understand what went well, what didn't, what they learned through the process, and what best practices can be applied to future usage.

Leverage the built-in reporting in Projectplace or LeanKit to understand the speed and quality of the pilot team's work, compared to their previous process. Did they improve? Do you have more visibility into their work as the PMO leader? Any other stakeholders able to get the information they need to track delivery success? Are team members happier? These are the types of questions to ask and review. Invite your Customer Success Manager to the retrospective so they can answer questions, provide feedback, and track down answers for the team.



## 6. DECIDE ON PILOT AND EXPAND

Let the original pilot team start delivering using the tool. Consider additional teams to bring in and repeat the process with. Leverage the pilot team and your findings to accelerate their adoption and proficiency speeds.

Some customers choose to use only Projectplace, only LeanKit, or both especially in a larger enterprise with teams focused on different delivery approaches. As you have teams begin their own pilots you may end up having a mix of the two (or may decide to re-evaluate later on – the flexibility is always there). Establish learnings and best practices for each and rely on the Planview Customer Success Center for additional **usage and training information** if teams need help along the way.

## 7. CONNECTING TO YOUR PPM TOOL - OPTIONAL

Depending on your strategy, you may want to connect Projectplace and LeanKit with your PPM solution, whether it's Planview Enterprise One™ or Planview PPM Pro™. There are many benefits to doing so such as establishing a clear line of sight into strategy to delivery by creating a bi-directional flow of data and insights into portfolios and projects within your PPM solution. Work can be seamlessly assigned to the teams, so everyone gets to stay in their work experience of choice.

Talk with your Customer Success Manager or Managing Consultant to further discuss if it is something that you would like to learn more about. These two recorded webinars are also great resources:

- **Enterprise One and Connected Projectplace - the Best of Both Worlds**
- **Enterprise One & Connected LeanKit: Supporting Agile Project Delivery in a Hybrid World**

