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Q&A WITH DR. ROBERT COOPER ON ACCELERATING INNOVATION: *LESSONS LEARNED FROM THE PANDEMIC*

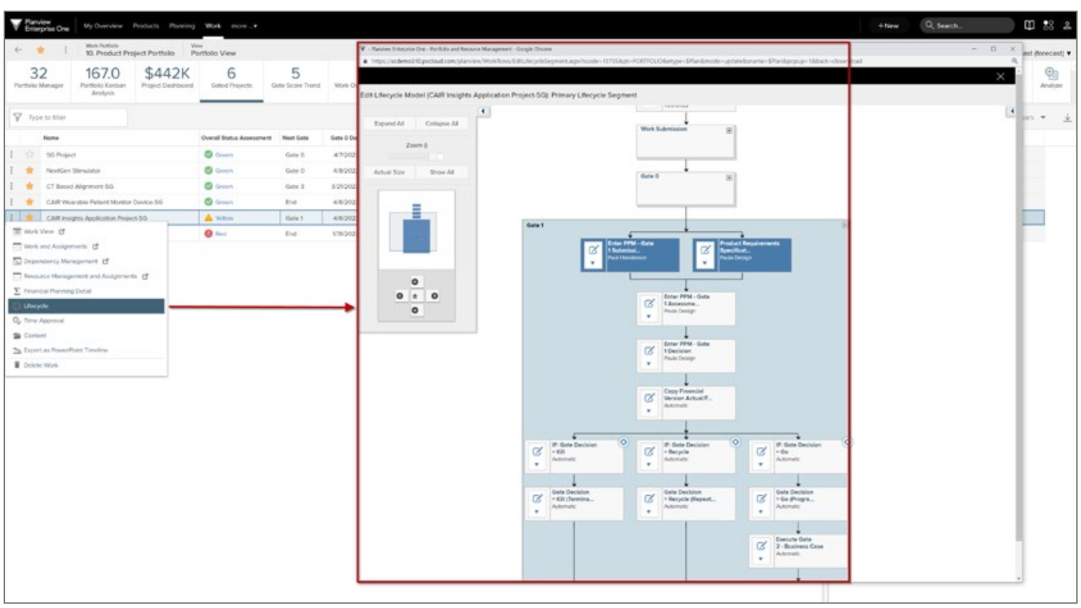
Agile-Stage-Gate PPM Implementation, Collaboration, and Virtual Challenges

Implementing the type of change discussed in this webinar – approaching things from multiple perspectives and combining different production methodologies – and getting people onboard with those changes can be challenging. The questions covered here talk about getting started with Agile-Stage-Gate and how to get a team to buy-in.

Q: In reference to the pandemic, is there a way to do the value stream meeting (VSM) virtually? Our teams are global and getting them in the same room is not easy or possible.

Carrie Nauyalis, Planview® Executive in Residence:

Yes! We showed a screenshot of how visualizing the product development lifecycle is probably one of the best ways to accomplish a virtual VSM. Having built that out as part of the process and being able to see that is especially useful in a test environment.



Are you able to share a visual representation of your product development cycle with remote teams?

Under each stage in the VSM you can expand your view and see the different deliverables, and the different configured screens with different milestones that need to be hitting the gatekeepers approving everything.

Having that visualization inside of a tool allows people to drill down to see the timeline data we need to capture – how long is it taking, how long does a stage take, or how long an activity takes as far as the life cycle is activated. You can do VSM, you can do that measurement visually, collaboratively, and virtually because it's all within the software.

Q: How long does it take to implement portfolio prioritization?

Dr. Robert Cooper:

It depends on what kind of tools you have at your disposal.

If you are already using good data management software for new product projects such as Planview, it shouldn't take you too long – about as long as it takes to make the decision, to discuss.

Perhaps with help from Carrie or others, you can figure out how to build the most effective dashboards or what charts might be most effective. Although some of that is available in articles and literature.

Then schedule your first portfolio review with charts ready to roll. You also must make sure that the senior people are there, so there is a bit of a time element of scheduling. Resource owners should definitely be at the meeting and usually the leadership team of the business.

MORE THAN 80% OF SURVEY RESPONDENTS
have difficulty gathering and analyzing data – Planview State of Strategy Execution Benchmark Study (see pg. 11)

That's probably one of the constraints. Making sure that folks are available. Setting it up and going fast. But you have to have the data in some format.

Carrie Nauyalis, Planview® Executive in Residence:

We can go as fast as our new customers can. But it is more about making decisions on how much change can the organization handle at once. We tend to phase out our implementations. So often we start with that – a single list of projects with rules on them. Start there and get that rolled out and just let people adapt to that type of change.

Next, introduce named resources and a full work breakdown structure with more life cycles. Because it isn't about entering into the data.

I have taught people who've been administrative assistants and executive VPs on how to configure the tool. It's all done within the UI there's no coding required.

Having that capability and being able to grow your process will help you expand as you go. Otherwise, if you implement too much change there's a big learning curve that you have to manage as well.

We have to be super thoughtful about what outcomes the client is looking for. What problems are they trying to solve? We work backward from there as part of the implementation, but we can definitely go super-fast.

Dr. Robert Cooper:

We were in constant discussions with a company I was chatting with where I had a provided a chart for force ranking because they did not have the benefits of software like Planview. They had to do everything in excel.

Their portfolio manager had data on projects, but he didn't have all the data. He had to spend some time collecting data which is painful. He had the company's strategic buckets in place and management had already made some pretty good indications of what they thought the optimal resource mix should be – but for him to go through force ranking, he needed to collect some data.

He did not have that capability at his fingertips. It was all done manually and was a bit more painful.

Q: How can you apply agile concepts to traditional heavy equipment manufacturing companies for new product development?

Dr. Robert Cooper:

We've worked with Volvo construction equipment in Sweden. We're working with another large US company that makes farm equipment. Heavy tractors and combines. So absolutely, yes.

Carrie Nauyalis, Planview® Executive in Residence:

Planview has seen it as well in our own customers. Our automotive customers who are engineering heavy equipment or industrial-type stuff.

SEE HOW VOLVO USED PLANVIEW TO CREATE A CONSOLIDATED VIEW OF ALL ONGOING AND PLANNED WORK IN THEIR PRODUCT PORTFOLIO

Dr. Robert Cooper:

Volvo was implemented by a good friend of mine in Gothenburg, Sweden. He owns a consulting firm that I often work with and he reports great metrics like ***approximately 30% reduction in time to market by using agile methods***.

Q: If my organization uses spreadsheets to capture time weekly, but not time on tasks because in automotive we have 400 plus tasks, how do I convince engineers to get rid of spreadsheets and adopt new, more flexible technology?

Dr. Robert Cooper:

Once engineers see the benefits they may switch, but in terms of time, I know that in the automotive field you spend a lot of effort to try to capture where people spend their time, and sometimes the data is actually truthful. But I've heard rumors that it's a bit of a liar's club like asking the boss, "Where do you want me to say, I spent my time?" And hopefully it's fairly accurate.

I can't help you with how to change your system to record time on tasks, but if you can't capture it real-time, at minimum try to capture time in the post-launch review.

In other words, when people do a retrospective analysis of their project, have them go back and map out what they did. It's not a huge effort to say, "Oh, by the way, here's what you did. Now how much time did you spend on each of these tasks? How much calendar and person-days' time?

Q: Twenty percent of our resources on projects are not dedicated. This is usually OPs, how do we get them engaged and be sure they'll be available when needed?

Dr. Robert Cooper:

That's always a very difficult question, unfortunately, the answer somewhat depends on what industry you are in because there are different answers for every industry.

For instance, if you're making machinery, for all intents and purposes, it is hard to get those folks to spend time with you.

One way we have found effective is if you are having gate meetings for major projects. Hopefully, the gatekeepers comprise the leadership team of the business. This is especially critical at important gates, like the money gates where there's a major commitment of resources, for example: go to develop, go to trials, and validation, and finally, go to launch.

Make sure the senior people of the business are there – the leadership team – including the head of operations and or his or her direct support subordinate. That person would be a representative, with full voting authority.

The purpose of a gate meeting is not just to approve the project it's to approve the resources. So – and a lot of people make that mistake – if I'm a project leader and I want my project approved, I don't need to go to a gate meeting.

I can take it to a local Catholic Church and get the priest to bless it. There my son your project is blessed, it's approved carry on.

THE PURPOSE OF A GATE MEETING IS NOT JUST TO APPROVE THE PROJECT. IT'S TO APPROVE THE RESOURCES.

That and five dollars buys me coffee at Starbucks. It's worthless and that's what a lot of geek meetings are all about.

The project leader comes in, presents their project and the gatekeepers say, "Yeah, this is a good project. Carry on." And the project leader leaves being set up for failure because they forgot to do the most important thing – discuss resource capacity.

When I don't know what the commitment is for resources at the gate meeting it's a hollow go decision that sets the project leader up to failure. So basically, the gate meetings need to be changed to resource commitment meetings, where in the event of a goal decision, the gatekeepers commit the resources that the project leader needs to move to the next stage of the project.

If the next stage happens to be production trials, then the senior production person or operations people in the room are committing their resources because they own them.

That's how you get the operations people involved. You get senior leadership to commit resources, right at the gate meeting.

Of course, it's up to me, the project leader to be very clear as to what resources I need. If I come in with a grossly underestimated list of resource requirements, then obviously I'm going to be in trouble. But if come in with a clear plan of action for the next phase, and a list of the resources, I need to accomplish that plan, then it is up to the gatekeepers to review.

The same thing is true of sales the sales resources. This is a very, very critical notion to get through.

Gate meetings are not just project approval meetings. They are resource commitment meetings for the next phase of the project.

There are a couple of other tricks too.

Get somebody from operations on the project team from the beginning. Even if they don't show up to every meeting at least they're part of the team. And by being part of the team, they are also accountable for results.

They're not just an observer, they're not just a person that comes to the meeting. Right there, on the core team, they are accountable for results at the beginning. They will be at the post standing up with the team leader and the rest of the folks on the team saying, "Here's what we said we have achieved. Here's what we actually achieved. If there is a gap, here's why."

Get somebody on the project team, not just as an observer, but as a real person on the team accountable for results.

ABOUT OUR EXPERTS

Dr. Robert G. Cooper

Creator of the Stage-Gate® Process

BOB COOPER, One of the most influential innovation thought-leaders in the business world today. He pioneered many ground-breaking discoveries in product innovation, including the Stage-Gate® Idea-to-Launch Process, now implemented by almost 80% of North American companies. Having spent 40+ years studying the practices and pitfalls of 3000+ new product projects in thousands of companies, he has assembled the world's most comprehensive research in the field of product innovation management.

A prolific author, Dr. Cooper has published 130+ academic articles and thirteen books, including the best-selling Winning at New Products, now in its 5th edition. He is the recipient of numerous prestigious awards including the Crawford Fellow from the Product Development and Management Association (PDMA) and the Maurice Holland Award from the Industrial Research Institute (IRI). He is also Professor Emeritus of Marketing and Technology Management at the DeGroote School of Business at McMaster University, and a Distinguished Fellow at the Institute for the Study. (From: https://www.stage-gate.com/our-founders/)

Carrie Nauyalis

Innovation and NPD (New Product Development) Executive in Residence at Planview

Carrie is passionate about being an overall evangelist and thought leader in the product development and portfolio management industry. She is an active speaker, MBA guest lecturer, blogger, and vlogger on all things PPM (Project Portfolio Management), with warm places in her heart for Stage-Gate, IoT (Internet of Things), blockchain, and agile.

In Carrie's 20-plus years with Planview, she's held various positions including global consulting and product management. In her current position, she works to establish partnerships, ensuring customers get the greatest ROI out of their Planview investment, develop go-to-market strategies, and deliver enhancement ideas into Planview Product Management based on market trends.

Prior to Planview, Carrie held multiple systems engineering positions with Emerson Process. She earned her bachelor's degree in Communication from Truman State. Occasionally, she escapes her home and favorite city of Austin, Texas traveling to exotic destinations like Egypt, Zimbabwe, Malaysia, and Dubai.

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