planview®

Anaplan Uses Planview Tasktop Viz to Drive Better Decisions and Employee Engagement

Anaplan

INDUSTRY:
Software/Technology

HEADQUARTERS:
San Francisco, CA, USA

EMPLOYEES:
2,200

PLANVIEW PRODUCT:

Planview®
Tasktop Viz

PLANVIEW SOLUTION:
Planview Value Stream Management

OVERVIEW

Anaplan is a cloud-native SaaS company that helps global enterprises orchestrate business performance. Their platform is powered by their proprietary Hyperblock® technology and connects teams, systems, and insights across organizations. Their global presence is reflected in their long list of clients which includes instantly recognizable names like: Adobe, Bayer, British Telecom, Del Monte, HP, and Groupon. Rapid growth necessitated a need for increased efficiency across their software delivery teams so they could accelerate their time to market and remove bottlenecks. Planview® Tasktop Viz allowed them to reduce the amount of manual and duplicate reporting by creating consistency and visibility of data across their entire software delivery lifecycle.

THE RESULTS

- Faster, data-driven decision making
- Improved employee engagement
- Grass-roots experimentation to improve business outcomes

"…when you can illustrate that developing a feature takes 25 days in an old system versus 2 days in a new system, leadership can quickly see the ROI."

– VINCE BUTERA, HEAD OF PORTFOLIO OPERATIONS

THE CHALLENGE

Head of Portfolio Operations, Vince Butera, and Program Manager, Jenny Peng wanted to transform the Engineering teams at Anaplan from a more traditional mindset that focused on completing projects and measuring activity to a product-driven, customer-centric outlook that measures success in terms of outcomes and business value. To this end, they led the implementation of Tasktop Viz across the 750-person engineering team and are using it to create a single view of their data that drives consistent ways of working across their value streams.

Before Tasktop, Anaplan primarily used Jira to track scope, effort, and dependencies, but encountered what Jenny described as a "monolith of metrics." Its patchwork implementation across different teams had resulted in an inconsistent view of data across their 70+ developer teams.

THE SOLUTION

Anaplan uses Tasktop Viz to connect Jira across its many development teams. They engaged the teams and invested significant time and effort to get internal alignment on definitions of workflows and development lifecycle stages so that the Flow Metrics – Flow Time, Flow Efficiency, Flow Velocity, Flow Distributions, and Flow Load – consistently and accurately reflect the way value gets delivered at Anaplan. These discussions are crucial to the underlying success of the implementation.

Jenny cites both the time savings and the ease of Viz's dashboards as benefits, commenting, "You can get team by team metrics from Jira, but it's not the same. It's a lot of work, and in Tasktop, it's already done with a clean UI and people respond to it very quickly." Engineering metrics like cycle time are also available out of the box with various tools, but are often too narrow to provide overall value, notes Vince, contrasting that with Tasktop Viz, which is "end to end, from the time it's an idea to the time it's in production, we can see where any given item is getting stuck in our value stream."

A DATA-DRIVEN APPROACH TO TALENT RETENTION

In response to the Great Resignation and in an effort to increase employee satisfaction and engagement, Anaplan wanted to pilot a four-day work week with their Application Experience team. They began a four-month experiment, operating under the premise that to continue the program past the pilot stage, productivity needed to stay the same regardless of the length of their work week.

Anaplan could observe the impact of the shortened workweek directly in Tasktop Viz, using Flow Velocity to instantly show them the impact on the amount of work delivered and Flow Efficiency to monitor whether process efficiency was maintained. After four months, the data revealed that the experiment was a success. The team's productivity remained unchanged whether they worked 4 x ten-hour workdays or 5 x eight-hour workdays.

The data from the experiment was so compelling that Anaplan's Chief Development Officer shared it at the Board level, just one example of how Tasktop Viz can demonstrate valuable metrics for this executive-level audience. After this successful pilot, other teams expressed interest, and Anaplan is happy to oblige with one caveat – the team must be using Tasktop Viz.

THE IMPORTANCE OF EXPERIMENTATION

Vince emphasized the importance of using Tasktop Viz to run experiments, emphasizing that these can be simple, even based on examples in Project to Product like the one that Vince describes here.

"Creating a feature in an old system takes a lot longer than creating a feature in a new system. Using the Flow Time data, you can easily make the case that you should deprecate an old system in favor of a new system. Teams can't always articulate this through a business lens, but when you can illustrate that developing a feature takes 25 days in an old system versus 2 days in a new system, leadership can quickly see the ROI.

ACCELERATING CHANGE WITH FLOW-BASED OKRS

Anaplan, like so many others, is in the midst of transitioning from traditional performance management to Objectives and Key Results (OKRs). They're experiencing the common challenge of connecting high-level strategic objectives to measurable work outputs that teams are doing every day. According to Jenny, "What's been missing is the same kind of metrics across teams."

When it comes to OKRs, Anaplan decided to use the Flow Framework® and Flow Metrics to help them measure key results, and Jenny credits the ability to visualize these in Tasktop Viz as making it easier to bring the organization together: "Now that we're all speaking the same language about our goals, it helps us share better ways of working together." For an objective to improve employee happiness, Anaplan sets key results around cognitive load (as measured by Flow Load) and throughput (the satisfaction of high Flow Velocity). For an objective on improving time-to-market, Anaplan sets key results around Flow Efficiency, and actively experiments around reducing wait times

ADVICE?

As with any initiative, Jenny and Vince learned a few things along the way. Their top tips for success?

Education and consensus-building. Take the time you need to create the baseline. At Anaplan, adopting the Flow Framework, meant collaborative discussions to agree on and map the four Flow Items - Features, Defects, Debt, and Risk - to their terminology and artifact nomenclature. It was important that be a group effort: "These were important conversations we had together, and we wouldn't have had them if we weren't using Tasktop."

Cultivate team-level empowerment. Much of the power in Tasktop Viz comes from the teams using the data they now have available. Anaplan saw significantly more success when they offered direction on problems to solve and then allowed teams to come up with their own solutions. Vince emphasizes, "It's hard to solve a problem you can't see with data" and credits the work of Tasktop's team of expert Flow Advisors and thought leaders who helped spark ideas and facilitate these conversations, "We would've had minimal success implementing the flow framework without the help of our team at Tasktop."

WHAT'S NEXT?

They see a future where they expand value stream management outside of engineering teams so they can understand across all functions how they are delivering their solutions to market.

As Vince says, "The first step in being metrics-driven is to have your diagnostic equipment set up. And that's what Tasktop is for us. It helps us connect pieces of data and compare different experiments and timeline events to help us understand what works and what doesn't. Without metrics, we operate under a lot of assumptions."