



# Roadmapping: Switching from Project to Digital Product Management

Clarity PPM

# Businesses can no longer afford to rely on rigid, annual planning processes.

Customers are growing more discerning and competitors more disruptive. From a planning perspective, this accelerates the pace and puts pressure on organizations to make everything a “top priority.” The result? Organizations are overcommitted and investment plans are driven by operational backlogs rather than a shared strategic vision.

**To succeed, business leaders need to transition from traditional project management to digital product management.**

They need 360-degree visibility into all the components, including hardware, software, services and processes, underpinning digital products like check-in systems at airports or employee portals at work.

**“We’re undergoing a digital transformation focused on delivering new, innovative products our customers want. What we like about Clarity PPM is its flexibility to support any of our initiatives and suggest new approaches that we hadn’t even considered yet.”**

**— Gale Persil, Program Portfolio Director, Pitney Bowes.**



Introducing new  
*Roadmapping capabilities*  
designed to support the  
way modern enterprises  
actually plan: iteratively  
and collaboratively.



An aerial, top-down view of a multi-lane highway. Several cars are visible, including a white van in the upper left, a white sedan in the middle left, a dark car in the lower left, and a white sedan in the lower center. The road has white dashed lane markings and a solid white shoulder line. The background is a light, hazy sky.

# Why Clarity PPM?

**It's not enough for  
your PPM solution  
to simply stack rank  
demands from different  
product groups.**

Today's agile enterprises need lightweight, adaptable planning tools that facilitate stakeholder engagement and top-down investment strategy across the portfolio.

Every business leader knows their investment strategy needs to be supported by comprehensive and reliable data, but that doesn't mean there's a magic formula that can spit out a perfect plan. Today's market leaders know that growth means managing for innovation, not managing a backlog. They need the ability to create—and maintain—a shorthand view of what every business unit is planning and doing and how it supports a global strategy.

# PPM tools need to become *strategic planning tools*

**Strategy is a constant conversation, not a one-time calculation.**

It's time to move beyond pseudo-project portfolio management solutions that were really only designed for tactical IT demand management. While these tools may be capable of aligning resources to work, they can easily become a barrier to meaningful innovation by encouraging cumbersome, bottom-up planning.

**This is the promise of lightweight, visual roadmapping tools, but enterprise-grade solutions go a step further:**

Clarity PPM gives stakeholders a visual and interactive view of what's happening across all their business units at a high-level, but they connect those high level strategic plans to the actual product roadmaps and the actual work being executed. It's about having the right data at the right time, in an intuitive format, so they can make better decisions faster.

# Three reasons agile roadmaps are essential to PPM

A roadmap is a high-level visual summary of the vision and trajectory of a portfolio over time. It is a visualization of your strategy and the “why” behind what you’re building.

For modern businesses, a roadmap is an essential bridge between the people steering the strategy and the people doing the work. It’s what enables 10, 20, 100 different teams to function as one.



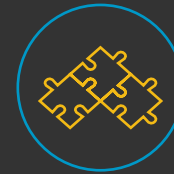
## **Planning should be quick and easy**

Traditional investment planning requires users to articulate projects at a far too granular level just to get started, leading to organizational fatigue or even an absence of meaningful planning.



## **Integrated product portfolio management drives innovation**

Connecting current work with the long-term vision places the emphasis on growth and broadens the realm of possibility across products and services.



## **Users need a single integrated vision of objectives**

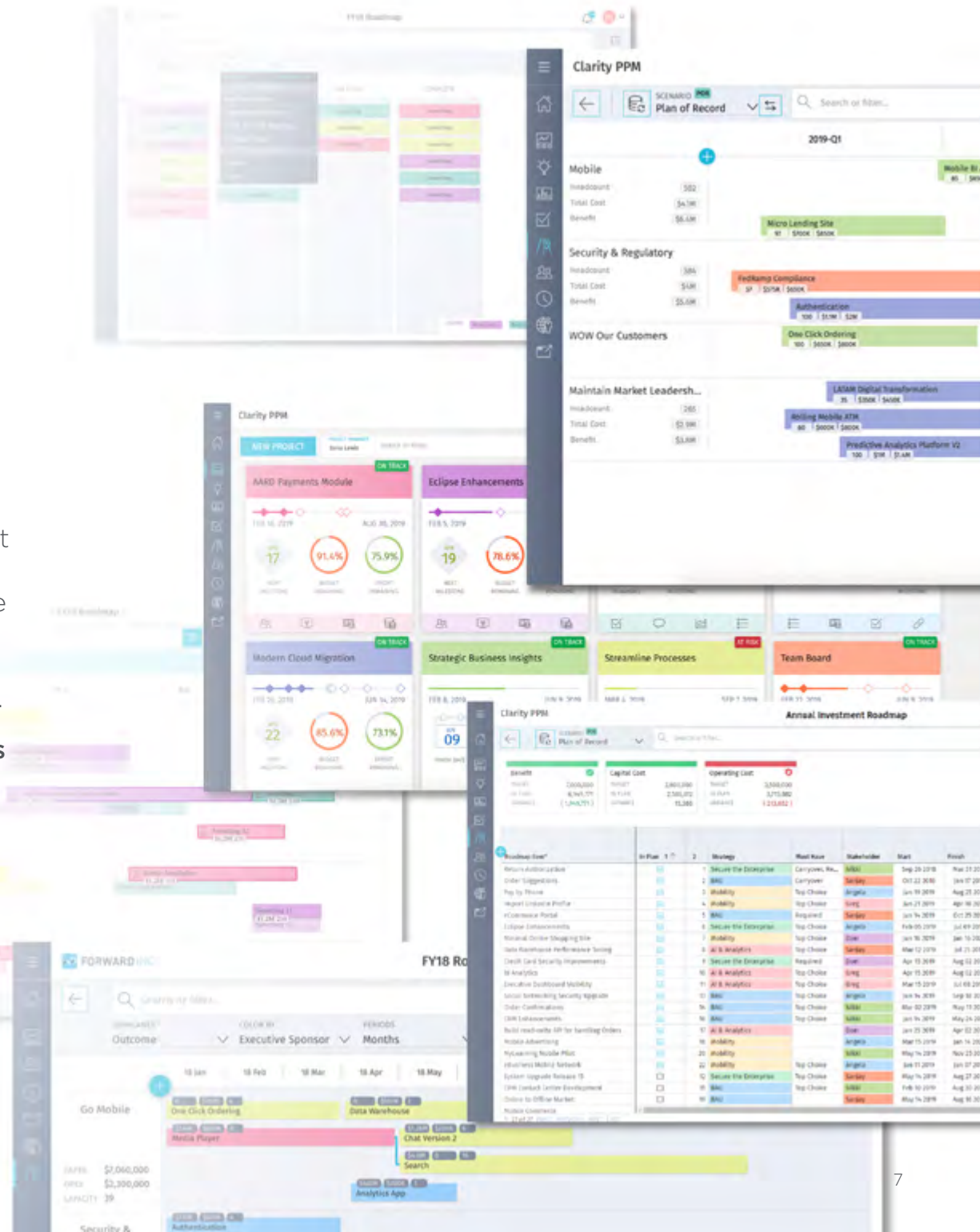
Stakeholders need a method to visualize, communicate and gain consensus around a proposed set of objectives. That means they need the ability to analyze new initiatives alongside work that is already planned or underway.

# The Clarity PPM roadmap

Clarity PPM's powerful roadmapping capabilities are designed to meet the needs of many stakeholders involved in strategic management and planning. There's no limit to the number or types of roadmaps that can be created in the Clarity PPM system. For example, they might include product, architectural or feature roadmaps, or any other roadmaps required by an organization.

Each agile roadmap includes multiple different views including a **timeline view**, a **board view** and a **grid view**. The user can toggle from one view to the next to access the information they need and easily save personalized views ("picklists") that they can return to as needed.

Let's take a look at how these different views address the unique needs of team members across an organization.







# Meet Susan Johnson

Executive Leader

It's her job to prioritize and fund initiatives, ensuring the organization is strategically aligned and able to respond to change. She needs clear visibility into all initiatives, without having to get deep in the weeds or hunt down data from different sources.

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## *Challenge*

**"It's my job to drive innovation, but I spend too much time doing demand management. I need to know—at any given moment—how different initiatives are aligning to our goals, and how changes will impact our overall strategy."**

## *Solution*

**Roadmap timeline view »**



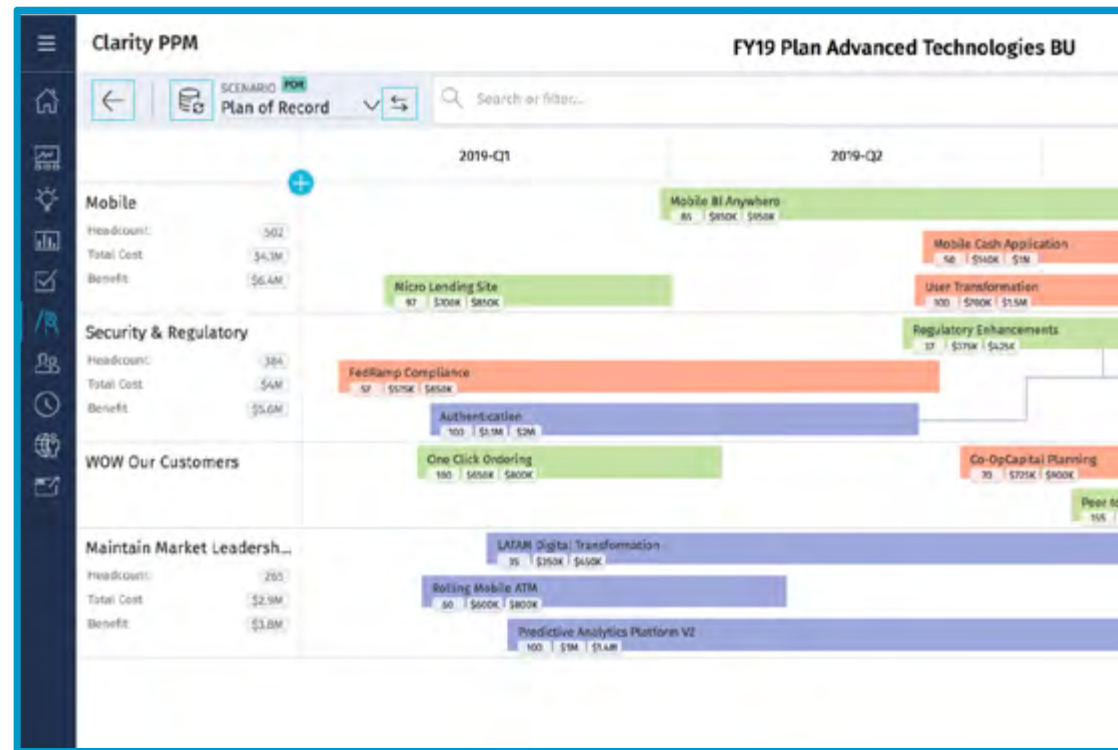
# Roadmap timeline view

## Easily visualize and communicate investment options

- Customize time horizons and easily pivot the timeline to different swim lanes—e.g., executive sponsor, outcomes, status
- Configure investment types to match the way your business operates.
- Show dependencies and expose relevant metrics—e.g., capex, opex, capacity

## *Benefit:*

Stakeholders are able to visualize and communicate a proposed set of objectives and see a complete, interactive picture of investments across multiple time horizons.





# Meet Jennifer Logan

## Product Manager

As a modern product manager, Jennifer is plugged into customer needs, product features and how much the product is expected to cost. It's her job to maximize return on investment and customer value. She is also increasingly involved in roadmapping—not only at the product level, but across the entire organization or business unit.

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## *Challenge*

**“For me, it’s about connecting the dots. I need tools that can support my product roadmapping needs and show me how current work supports the broader portfolio strategy, because both plans and status can change quickly.”**

## *Solution*

**Roadmap grid view »**

# Roadmap grid view

## Easily perform constraint-based planning

- When it's time for more detailed planning, easily drill into the "spreadsheet view"
- Sort and arrange items by any number of constraints
- Easily communicate the impact of different changes or strategic pivots back up the chain

## *Benefit:*

The grid view, with its constraint based planning, guides users via an iterative planning process. It helps product and project managers build a plan that can account for multiple constraints simultaneously, and provides simple, visual transparency to how their product plugs into the overall strategic roadmap.

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# Meet Rita Lee

## Financial Manager

Rita is an expert at financial projections—knowing how much the project is expected to cost and how to minimize financial risk. It's her job to act as an independent set of eyes, evaluating projects and products through the lens of financial performance. She needs to call out when things are off pace and raise a flag before isolated issues become cascading failures.

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## *Challenge*

**“It’s not enough to view projects or initiatives in isolation. I need to see the dependencies and interconnections between different work streams so I can understand the true impact of changes and issues and advise stakeholders accordingly.”**

## *Solution*

**Roadmap board view »**

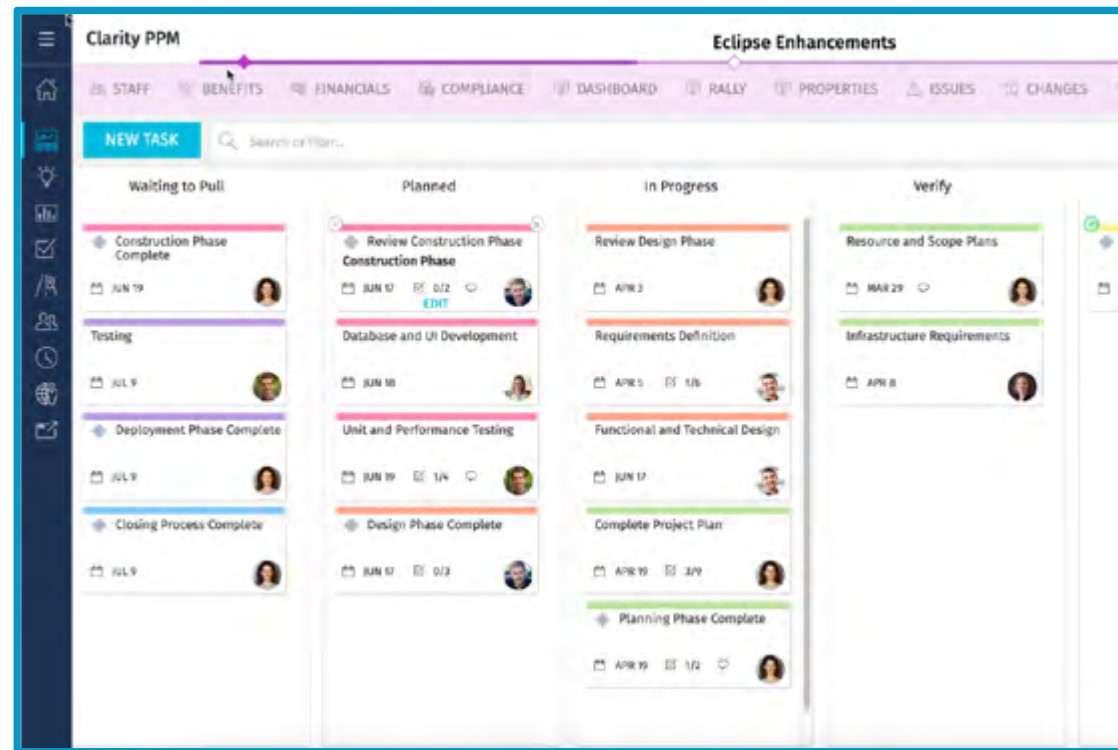
# Roadmap board view

## Clear, easy-to-use operational investment view of the work

- Visualize investments based on funding, approval gates, status or any other custom dimension.
- Change item status through simple, drag-and-drop interface
- Fully configurable, with the ability to customize columns, colors and fiscal periods
- Easily save or share custom views

### *Benefit:*

Stakeholders get a status view of all in-progress and planned work, connecting financial investment to actual tasks and project status. Even if the roadmap was set at the beginning of the year, they can jump in quarterly—or anytime—to approve investments, alter plans or analyze different investment scenarios.





# Meet Sid Patel

## Portfolio Manager

Sid needs to understand the big picture. He's responsible for funding and headcount alignment across the portfolio. He provides insights for strategic pivots, to ensure the company is delivering superior outcomes based on solid business decisions.

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## *Challenge*

**"A lot of different teams roll up to me. I need to know what questions to ask, so I can provide stakeholders the insights they need to make strategic decisions about how to invest across the portfolio."**

## *Solution*

**Scenario comparison view »**



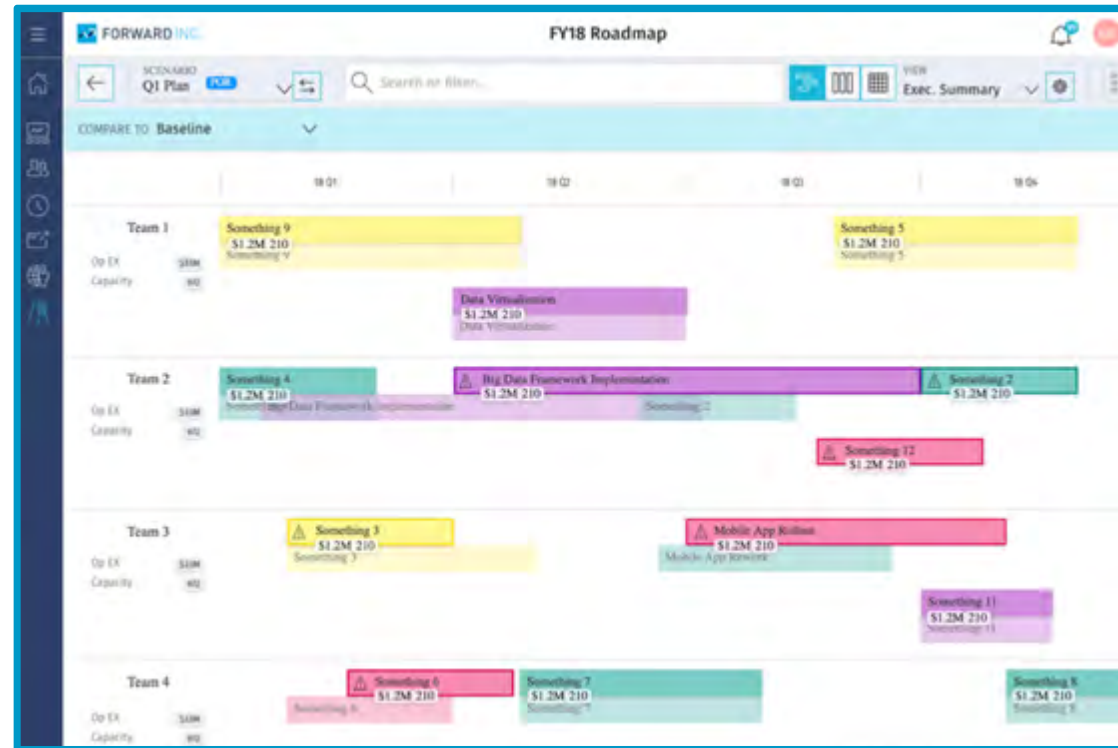
# Scenario comparison view

## Compare baseline plans against work in progress

- Easily save and compare different roadmap plans
- Compare scenarios and measure outcomes against a baseline or the original plan
- Identify and manage changes and identify opportunities at a glance

## *Benefit:*

Product and portfolio managers are able to prioritize investments based on value before entering into detailed planning. They can forecast the impact of changes and visualize dependencies, which helps them build consensus and put more emphasis on innovation.



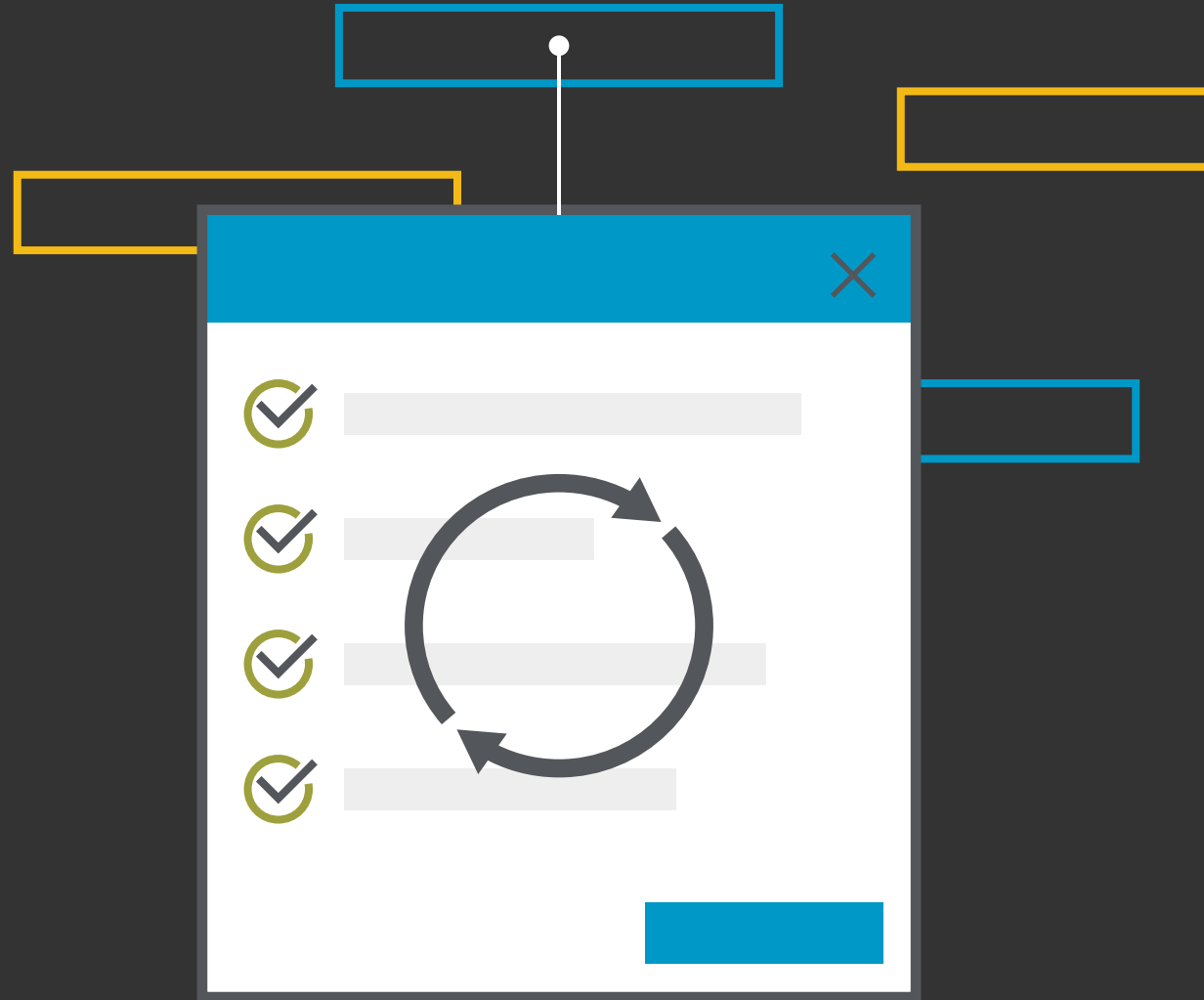
# Roadmap linking and syncing

## Connect roadmaps to projects—when and how you want

- Link roadmap items to projects
- Drill into project data via timeline, board and grid views
- Import projects to create new roadmaps faster
- Control WHAT roadmap items and attributes you sync and WHEN you sync them

### *Benefit:*

This is where strategy meets execution in an intuitive and powerful way. It's great to keep roadmapping lightweight and high-level, until it's time to put it into action. Then you need the ability to connect the “plan” to the “plan of action.” With Clarity PPM, the transition is seamless, and users get full control over what is synced, so you're free to explore lots of scenarios and never forced into detailed planning before you're ready.



# Bottom line:

## Clarity PPM is built for the way people and organizations plan and work today.

The market is full of bare-bones roadmapping tools and low-cost project management solutions, but they may not deliver the forecasting capabilities modern business leaders need to make data-driven business decisions.

## Consider:

- Whether you need a PPM solution that is only capable of providing low-level functionality for the project manager, or if your organization could benefit from PPM technology that provides 360-degree optics across your organization.
- Whether a simple, visual roadmapping tool will meet your needs, or if you need a tool that can actually connect to the work being planned and executed across your organization.

### Does your solution support:



An intuitive visual interface for planning and communicating investment strategy?



Rapid and adaptable investment planning across your whole portfolio?



Flexible, personalized views to support the needs of different stakeholders across the business?



The ability to connect your roadmap to compare baseline or actual project data once in progress?



# About Clarity PPM

**A modern PPM platform designed for the way today's businesses plan and work**

With the latest release, we've focused specifically on the addition of powerful roadmapping capabilities. These tools are designed to promote strategic management and innovation and decrease fatigue, helping enterprise companies navigate fast-moving, disruption-prone markets.

**Learn more about how Clarity PPM can help your business bridge the gap between insight and action:**

**[www.phasecp.com/clarity-ppm](http://www.phasecp.com/clarity-ppm)**  
**[Info@phasecp.com](mailto:Info@phasecp.com)**