Effective planning is the key to enterprise-wide visibility and strategic alignment—so roadmap it!

Get the best business outcomes for your organization
Introduction

Are you still tracking your strategic initiatives and roadmaps in PowerPoint? What if you make changes to your roadmap? Can your stakeholders across the organization get the latest updates to the plans? Can you easily communicate to teams how the work they’re doing tracks back to strategy?

You can’t afford to “set it and forget it”

Roughly 40% of executive leaders say their enterprise accountability and leadership are not aligned on strategy execution, according to Gartner.1 You can’t afford to be among them. In this competitive environment, you need to adapt quickly to business changes, and adjust your strategic initiatives accordingly. You cannot have a “set it and forget it” planning approach for the entire year. Your competitors are adjusting strategy based on the dynamic evolution of the market and if you want to stay ahead of them, you need to respond and adjust rapidly as well. Additionally, your teams at all levels need to get the latest information on strategic initiatives in a timely manner, to make sure what they are delivering is aligned with today’s business objectives.
Top-down, dynamic planning with the right tools

• **Effective roadmap planning is a game changer.** Organizations used to do planning from the bottom up, trying to match demands and project ideas with their strategies. But what’s more effective is top-down planning where an organization’s leaders first determine their top initiatives then business units and individuals propose projects that align with them. Perhaps that’s why 75% of leaders will leverage roadmap planning tools by 2023, according to Gartner.¹

• **The current manual tools you can leverage for planning are very rigid, they don’t allow you to adapt to rapid business changes.** They can’t facilitate ongoing planning or help you to communicate updates and progress to stakeholders, so it’s hard for everyone to remain aligned to the priorities. The intent of roadmap planning tools is to improve planning and communication among all business stakeholders. They can use these tools to create high-level plans on a timeline across the enterprise with complete visibility to all work and related data. And if there is a change in the strategy, the tools are agile enough to dynamically change the plans and ensure stakeholders at all levels of the organization are still aligned to new strategic directions.

In this eBook, we will dive deeper into what roadmap planning should be, its benefits, and how it works.
What is roadmap planning?

• **Roadmap planning helps organizations with the shift to making that planning adaptive and continuous.** Organizations can no longer afford to rely on rigid, annual planning processes. Roadmaps enable organizations to plan iteratively and collaboratively, driving enterprise agility. With roadmaps, organizations can align work to strategy, and keep that alignment. These modern roadmap tools connect those high-level strategic plans to product roadmaps and the actual work that’s delivered.

• **Roadmap planning covers everything.** A recent study shows that roadmap planning tools are used “to help coordinate activities across teams and individuals for ideation, problem solving and strategy development, and to help develop consensus, prioritize... and dynamically manage...decisions. The more advanced capabilities...provide visibility and transparency with near-real-time updates for business stakeholders, ensuring...focus while managing resources [and] milestones...”¹

• **Different parts of your organization might be using different types of work delivery method.** Some might be using traditional, some Agile. The ideal tool should facilitate those and hybrid project management, enabling you to plan and visualize demands, projects, and epics from a single roadmap regardless of the work delivery method. It should allow you to drive meaningful conversations from the top down, adjust work items and plans on the fly, and validate common understandings to ensure everyone in the organization is aligned to deliver shared outcomes. Through a single interface that’s both intuitive and interactive, you should also be able to display and group plans based on any criteria or attribute you want, create milestones and track progress.
Benefits of roadmap planning

The right roadmap planning tool empowers you to deliver a host of benefits for your organization.

• **Plan across business units:** Use the tool to plan your roadmap across all business units with a simplified user experience. You can start by building a high-level strategic initiative and then break it down into projects or epics while still having visibility across the portfolio for both traditional and Agile work.

• **Make informed decisions:** You can identify dependencies with roadmaps, consolidate them into an enterprise view or drill into them to see the plans for a department, product line or individual business asset. This top-down view with simple, at-a-glance insight can guide your organization’s leaders to make informed decisions and communicate their plans with all stakeholders.

• **Respond quickly to changes:** In ever-changing business environments, your planning tool cannot be rigid. Portfolio and product managers as well as service and application owners (and other stakeholders) can easily align roadmaps to the latest strategy that is coming from the top of the organization.

• **Deliver business outcomes:** Connect work to strategy by cascading plans from the top down—from the Enterprise Project Management Office (EPMO) or Strategy Realization Office (SRO) to project delivery teams. Plus, facilitate collaboration among stakeholders across the business. This allows you to trace back all the work that’s delivered to the original strategy and measure the outcome based on that.
Using roadmap planning to support hybrid project management

To give your organization the best possible chance of success, you must be able to deliver work as efficiently as possible while evolving to embrace emerging project management methods. That’s why organizations are embracing a hybrid approach to project management.

• **It’s the best of both worlds.** Hybrid project management is rapidly becoming the most effective way of delivering work, allowing you to combine traditional and Agile practices to create custom approaches that best accommodate the varied circumstances that teams are facing. Hybrid is the best of both worlds: structure, formality, and documentation for some circumstances; and flexibility, adaptability and speed for other circumstances. It allows you to deliver work that is optimal for every situation.

• **Leaders need complete visibility of all work.** According to one recent survey from Elizabeth Harrin’s well respected community, 60% managers are using hybrid project management, more than either Agile or traditional methods by themselves.² Those numbers are backed up by another survey which actually had hybrid usage slightly higher.³ With that in mind, leaders engaged in strategic planning need to have complete visibility to all work whether its Agile or traditional. And the EPMO or SRO must have views of all the roadmaps across the organizations, some of which might be established for Agile work while some might guide traditional work.
ServiceNow Roadmap Planning: align investments and teams to strategy

ServiceNow Roadmap Planning within the Alignment Planner Workspace facilitates management of your strategic priorities, your investment decisions and your allocations across your enterprise. You can establish your top initiatives and the strategy cascades down from top to bottom so that all roadmaps in the organization are connected to the original strategic initiatives. This tool allows you to easily create roadmaps for all your demands, epics, programs, projects and other task types regardless of the work delivery method (traditional, Agile or hybrid). Your enterprise portfolio managers can view all work that is aligning to the top strategic initiatives. You can filter roadmaps by desired criteria, and then share them with stakeholders across the organization, including executives, mid-level management and individual team members to drive meaningful conversations. This way, everyone will know what the plans are and that they are working on the right things. When that happens, you can ensure your investments and teams are aligned to strategies to ensure projects deliver business value.
Powerful capabilities of Roadmap Planning in Alignment Planner Workspace

• **Simple roadmap setup:** It’s easy to create a new roadmap view. Out of the box, you can select from existing items as a starting point from which you can base your roadmap. This includes Program, Project, Demand, Epic, SAFe Epic, and SAFe Feature. Once you select the items, simply title the roadmap and a planning period with a start and end date.

• **Customized roadmap visuals and configurable roadmap items:** Once you have your visual roadmap, it’s simple to modify the view and make adjustments with grouping as well as drag-and-drop functionality to support your high-level planning needs. In each roadmap view there are roadmap items that are configurable. For each item, you can assign each member of your team as an owner, manager or team member. Plus, you can select what numeric fields and currency you wish to display in the view.
Additional capabilities unique to ServiceNow

• **Agile and traditional planning to support hybrid project management:** You can plan traditional and Agile work in a single roadmap, which is critical if you’re going through Agile transformation and you’re using hybrid project management. This allows all enterprise portfolio managers to have one single view of work, regardless of the delivery method, to be tracked and connected to the high-level strategy.

• **Flexible planning hierarchies with connected roadmaps:** Before creating your roadmaps, you can set up your hierarchies upfront. Then you can cascade your roadmaps down to teams, making sure every roadmap in the organization is connected and aligned to the top strategy roadmap.

Plan and visualize demands, projects, and epics from a single roadmap for hybrid project management. Create milestones and track progress.
• Milestone creation and tracking: You can create a milestone of a specific type such as a launch date, then track what percentage of the work is done and its status. This enables you to focus on your deliverables and due dates and sequence your work effectively to support your key milestones. Since Alignment Planner Workspace supports both Agile and traditional roadmap, the tracking capability is designed to normalize the status updates for both traditional and Agile work and show percentage complete. Also, you can communicate regular status updates to stakeholders as well as review progress and track changes to roadmaps resulting from reprioritized business goals.

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Strategic alignment ensures business value

It’s no wonder more and more organizations are embracing roadmaps. But not all roadmap tools are created equal. You need a tool that will:

• Align your investments and teams to the strategy of your organization
• Facilitate continuous planning and update roadmaps as strategic initiatives change
• Provide total transparency into project status and progress across the enterprise for all types of work

What you don’t need is tool that’s nothing more than glorified PowerPoint and doesn’t integrate with any other applications or systems where strategic initiative and project data resides.

At ServiceNow, we recognize that, and it’s why we offer with Roadmap Planning.
Learn about better dynamic strategy management with roadmaps. Sign up for live demo today.

ServiceNow was founded on a very simple idea: that work should be easier. ServiceNow is making the world of work, work better for people. Our cloud platform and solutions deliver digital experiences that help people do their best work. For more information, visit: www.servicenow.com.

Sources
1. Market Guide for Product Management and Roadmapping Tools, Gartner
3. Trends in Modern Project Delivery, ProjectManagement.com

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