

Whitepaper

Charting Your Journey to Success in Today's Technology Revolution

How Work and Resource Management Will Equip You to Survive AND Thrive

As you may have noticed, while the business world has been changing for some time now, the current pace is unprecedented. Some are calling it the biggest technological revolution ever, and it's only just beginning. From cloud computing to smart devices to online support, every industry is immersed in digital transformation in order to leverage new advances and meet customer expectations.

Products and technology are converging in new ways as well, from mobile computing to home entertainment, automotive, healthcare, and more. And with artificial intelligence making advances by the day, who knows what awaits in the next few years?

All this technology disruption is speeding the pace of innovation as companies try to stay ahead of the competition. This means more work, often being done by fewer people who are also trying to get other work accomplished.

As if all this rapid change and increased innovation isn't enough, the very nature of the workforce is changing with the advent of blended teams, increased diversity, and post-boomer expectations.

Indeed, it's a perfect storm of change, exacerbated by the fact that most organizations struggle to integrate strategy and execution to begin with. The need to stay integrated

and aligned amid unprecedented technology shifts, full-speed innovation, and changing workforce requirements raises new challenges that require a new management mindset and a broader set of tools.

This is the very problem that work and resource management is meant to address as the next evolution in planning.

Work and resource management brings together domains that have traditionally been implemented and managed independently and in disjointed fashion; areas as disparate as:

- Project Portfolio Management;
- Product Innovation;
- Strategic Planning;
- Enterprise Architecture; and
- Work Collaboration

Approaching these areas synergistically opens up new insights and enables the vision and alignment needed to succeed and stay ahead in today's dynamic business climate. After all, a technology revolution warrants a planning and management revolution, and that's what work and resource management brings.

Welcome to the Revolution

Before we get further into work and resource management, let's take a closer look at the characteristics of this technology revolution and the impact it has on current management thinking:

- **Digital Transformation:** Technical advances such as cloud computing, big data analytics, mobile computing, artificial intelligence, and the internet of things (nearly everything is connected to the internet these days) can revolutionize the customer experience, create new revenue channels, and lead to new innovations. But it requires better internal integration between strategy, execution, technology, and outcomes (e.g., products, services, facilities, and more).
- **Product and Technology Convergence:** From smartphones and smart TVs to internet-connected

and fully automated cars, telemedicine, mobile medical devices and more, products and technology are converging at an alarming rate, being bundled and embedded to create new offerings. For some organizations, it means the need to innovate and keep up. For others, it means their current offerings are outdated and new products and services are needed. In either case, companies need to better integrate their strategy, technology, and product offerings, and align and prioritize work accordingly.

- **Increased Pace of Innovation:** If necessity is the mother of invention, then there has never been a greater need to innovate. But this means even more change amidst a growing pipeline of already planned projects and other work, all being executed by increasingly constrained resources. Having an integrated view of how well all the resources in your organization (not just people resources) are being applied will be essential, as will the ability to conduct continuous planning, not just quarterly or annually.
- **Fundamental Workforce Changes:** Managers are under increasing pressure to do more with less, which means they not only have to take on more work themselves, but they often rarely have time to effectively coach and support the people who do report to them. This is compounded by the need to accommodate an increasingly diverse workforce, especially millennials, who have specific expectations and demands (one of which is a reasonable work-life balance).

The blended workforce is on the rise as well, creating yet another kind of diversity, with full-time permanent employees working side-by-side with freelancers. Multiple studies predict that at least 40% of the workforce will be freelancers in the next few years. Whether accommodating millennials or planning the right blended strategy of employees and freelancers, effective resource planning will be crucial in the new world of business.

Given the new complexities of the business world, clearly, it's no longer just enough to "manage project portfolios" or "plan strategy" or "assess the product roadmap" or "improve work collaboration," as if all of these activities can be done in isolated silos. These activities, and more, need to be looked at in an integrated fashion; approached with a new mindset; and undertaken in concert with an enterprise architecture blueprint. Collectively, this is what work and resource management is all about.



What Exactly is Work and Resource Management and Why is it so Important?

In short, work and resource management is a business approach that enables greater agility and cross-organizational alignment by better integrating planning, enterprise architecture, work collaboration, and more, with a keen focus on business capabilities and outcomes. It looks at people, technology, and other assets in the context of the products and services that they are meant to support. Its central principle is that organizations can no longer afford to operate in silos.

Strategy is at the core of work and resource management. It is the spine that connects work and resources, and ensures the entire organizational ecosystem is operating from the same guiding principles. Once the strategy is defined, resources can be deployed and optimized to perform the work – via roadmaps, methodologies, processes, portfolios, projects, and collaboration – and the outcome of that work becomes delivering on the strategy.

If you are wondering how this compares with project portfolio management (PPM), PPM is a valuable organizational process and toolset to ensure that projects are aligned with strategy and are being executed efficiently. It is the primary software and approach that a typical PMO (project management office) relies on to ensure the right projects are being done right.

Think of PPM as one component of work and resource management; the latter sitting at a higher level. If PPM connects projects and people to strategy, work and resource management looks at the broader picture, including products, services, enterprise architecture, work collaboration methods, and how they all fit together. In essence, work and resource management keeps all the parts connected and in sync in the face of constant and rapid change.

As you think about sailing your own ship into uncharted waters toward the perfect storm of technological change, innovation, and workforce change, it should begin to make sense why a holistic approach like work and resource management is necessary. But to understand more, we'll need to go on a little test cruise. We'll begin by exploring the considerations, perspectives, and priorities needed to be successful. Then we'll get into some specifics on how to run the ship effectively in this new world. Let's set sail!

Plotting the Course: Next-Generation Planning

Think about it. One of the safest places to be in a storm is on a cruise ship. Why is that?

For one, the crew is constantly monitoring the weather, both before the trip and en route. In bad storms, they use state of the art technology to navigate around the rough seas. They're in constant contact with multiple weather advisory services and ports of call, and can make changes instantly. When they do face rough seas, which is sometimes unavoidable, they keep the ship moving forward with its front end pointing into the waves, so it can plow through in any weather. The stabilizers do the rest. From a leadership perspective, they understand the strategies and the capabilities they need to achieve them, both from a technological standpoint and a human standpoint.

By the same token, it's important to stay ahead of the game in business by looking at the weather patterns (i.e., the market and technology trends), preparing for potential storms, and building adaptability and change into your routine. No matter where you are in your organization, whether you're a C-level executive, senior manager, PMO leader, enterprise architect, or some other role, if you're responsible for planning strategies, people, technology, and work in your company, you need to embrace what's really going on and know where to focus your energy. Specifically, the following mental shifts are necessary:

- **Product and service-driven outcomes; not just projects** – Your company is much more than a list of projects. The services or products you deliver should drive every decision you make. It's surprising how little connection there often is between the projects being executed in an organization and the ultimate products and services they are undertaken to deliver or improve. Projects should always be prioritized, scheduled, managed, and assessed in the context of their respective outcomes, whether products, services, or facilities. This can help with resource tradeoffs as well. It's no coincidence that, by 2020, 40% of organizations will embrace the product portfolio paradigm to manage technology investments.¹
- **Strategic capabilities; not just strategic planning** – On the flip side, organizations love to plan goals and strategies, yet they take an overly tactical view of the capabilities in their organization, creating a

gap between strategy and execution. Capabilities, in terms of people, processes, and technology, must be strategic. In a world of rapid transformation, strategy is not enough. Building and efficiently utilizing capabilities to achieve that strategy is critical. Do you know what your company's core capabilities are? Do you know where to invest to improve them?

- **Integrating work and resources of all types –** The concept of resource planning is broadening. Organizations have to track more and more types of resources and how they relate to one another, including people, technology, applications, assets, and more. If you develop a product, are you able to easily determine the underlying projects, people and technology that go into it, and the costs therein? Do you have a good understanding of the work and resources needed to maintain your applications, infrastructure, or services, and how they all connect to the outcomes they support? If you add a product, keep an outdated application, or eliminate a service, is the work and resource impact clear? Is the value and cost clear? Fifty-two percent of organizations can't adequately perform scenario planning to optimize work and resources.² This makes it difficult to adapt to change, and risks time and money spent on lower value activities.
- **Embracing unstructured work –** The largest body of work in any organization is the day-to-day, unstructured work that employees do both individually and in teams. This can be in the form of firefighting, small requests, or even informal projects. After all, 2 out of 3 project leads are "accidental project managers" with no formal training.³ They've been asked to undertake an effort, which may or may not be formally identified or tracked as a project. Not all this unstructured work is strategic in nature; in fact, maybe about 10-15% is. While it should only be necessary for a PMO to have oversight into that strategic subset, all work execution should be as efficient as possible and have some tie to value. This is where work collaboration methods and tools make a huge difference. The fact is, unstructured work is here to stay, so it's important to embrace it, optimize it, and maximize it.

By taking a product-centric (or service-centric) view, paying attention to strategic capabilities, integrating work and resources of all types, and embracing and maximizing unstructured work, you'll be much more prepared for the storm ahead, while traditional businesses find themselves washed ashore or crashed into the rocks of progress. This is the new way of planning, and much more appropriate when facing stormy seas in uncharted waters.

Now that the course is set and you have the right tools and mindset to be successful, it's time to make sure the ship is running as effectively as possible.

Running the Ship: 21st Century Efficiency

Earlier, we saw how cruise ships navigate the high seas with skill, efficiency, communication, and a good bit of advanced technology. Now, imagine if they only planned their journey once, just before departure. Imagine if they weren't up to date on the latest technology, didn't have access to naval and weather systems, and only communicated with the ports of call at arrival. Imagine if they didn't have access to remote experts who may be needed at a moment's notice, whether for equipment issues, marine advice, or more. Imagine if the crew wasn't able to be in constant contact with one another for up-to-date information or addressing passenger emergencies.

This wouldn't be a very tight ship, yet it's how many organizations run their companies. This "dark ages" management approach won't cut it in today's times. Instead, significant value and agility can be gained by doing the following:

- **Shifting to continuous planning**
– In the face of constant change, you still need a plan, but one that is continuously adapted to keep resources aligned and mapped to goals. Already, 85% of IT organizations deviate from the annual plan several times per year.⁴ The trend is evolving even further from quarterly to monthly, and ongoing as an organic part of the intake of new work and governance of existing work. When change happens at such a rapid pace, continuous planning is vital to keep people aligned with goals, and to keep goals aligned with the realities of the market.
- **Maximizing virtual and global teams** – By and large, today's teams don't sit together. The "average" team can be global, multicultural, multigenerational, virtual, remote, or co-located. In fact, 79% of knowledge workers reported working always or frequently in dispersed teams.⁵ Yet, many organizations still insist on co-location, often at the expense of productivity, expertise,



and morale. They're missing the proverbial boat. To improve productivity and work collaboration, you need to recognize that the workforce is not only shifting, including more diversity, more millennials, and more freelancers, it's getting more geographically dispersed. Indeed, opening your doors to virtual and remote work gains you access to a broader array of experts and more efficient operations. Besides, it's now the norm. Embrace it, because your competitors certainly will.

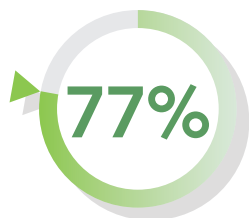
- **Leveraging technology effectively** – It should be

obvious by now that technology is everywhere. The key is, are you leveraging it effectively? Specifically, are you connected to your customers? Do your products take advantage of new technology opportunities? A staggering 50 billion devices will be connected by 2020.⁶ Will yours be among them? This is where enterprise architecture (EA) can help. The goal of enterprise architecture is to create a standardized IT environment across the organization with visible connections to the business and its strategies. Through its maps of IT assets, business processes, and strategic capabilities, EA can help determine how business strategy can be best realized through technology. This includes, among other things, buy vs. build decisions and product technology advances. In today's market, this is a core competency and should be integrated with other processes.



- **Supporting diverse work methods and mobility** – In

addition to the workforce changing, work methods are changing as well; there is not just one way to work. Organizations use projects, lean, agile, phase-gate, and many more methods and apps in pursuit of business goals. Work collaboration software is all the rage, even for major strategic projects, often integrated with some larger system. The days of a "one size fits all" project management methodology are gone. Instead, embrace multiple work methods and integrate the various tools as needed, so people can work in the most effective way for the job. Perhaps the biggest shift in work methods is mobile capability. An overwhelming 77% of millennial workers want greater mobile connectivity.⁷ Incidentally, customers are no different, with most products and services offering some type of mobile support. In today's world, flexible and mobile are not just nice-to-haves, they're necessities.



Readying Your Own Ship

You've seen the next generation of planning. And you've explored new ways of managing work execution that will better prepare you for digital transformation and meeting today's workforce and customer expectations. Now it's time to ready your own ship.

Just as a cruise ship serves as a modern vessel of technological wonder, so can your organization. It's just a matter of the right people taking new approaches in their roles to drive the work and resource management elements forward. Specifically:

- **EA Directors** – You're in a key position for driving strategic capabilities and technology in the organization. Reach across the IT organization and into the PMO to drive strategic outcomes. Be sure to articulate the IT/business connection in meeting strategic digital transformation and workforce enablement goals. Make work and resource management and its technology needs a central part of the business EA blueprint.



- **PMO Directors** – Shift from a project-centric view to being a strategic partner in raising the bar on the links between strategy, planning, and execution. Drive effective resource planning methods, foster continuous portfolio planning, and embrace diverse ways of working. Also, drive the conversation from projects to products and other outcomes. Don't be the methodology police; be the business connector.



- **Product Development Directors** – Insist on an integrated view into the work and resources that drive product development. Champion a product-centric view of activities throughout the organization. Connect with EA directors and other technology leaders about how digital transformation is impacting your product lines and what to watch out for.



- **Executives** – Embrace continuous planning to keep people, goals, and market changes aligned. Acknowledge the vast amount of unstructured work inherent in any company and the benefits of effective and efficient



collaboration. Support requests for technology that improves work collaboration, helps drive strategic capabilities to meet digital demands, and enables better resource planning and more product-centric perspectives.

- **C-level** – Lead your organization fearlessly into the technology revolution by encouraging a work and resource management approach, elevating the PMO to a business connector, and relying on Enterprise Architecture to better integrate IT and the business. Broaden the conversation from strategies and programs to include business outcomes, resource optimization, and strategic capabilities.



Whatever your role, to get started on the right foot with work and resource management, begin with one simple step at a time to reach your ultimate destination:

- Talk to stakeholders about work and resource management and ask questions from their perspective. Get a sense of how each of the elements impact their area.
- Find champions in your organization who would be willing to socialize the ideas and pull the right people together to launch an initiative.
- Analyze technology trends in your market, both from the employee and customer perspective, and assess the current gaps and opportunities for improvement.
- Examine how your organization approaches strategic and resource capacity planning. Talk to management about adopting a more continuous approach and incorporating a broader definition of resources.

Perhaps most importantly, don't just say, "We're implementing PPM," or "We're installing a work collaboration tool," or "We're conducting our annual strategic planning." Instead, say, "We're better aligning our company to meet the challenge of the greatest technological revolution the world has ever seen by instituting the new mindset, methods, and tools of work and resource management."

Remember, taking on the whole journey at once can be daunting, so chart your course, hoist your sails, and keep your sights set on the horizon. Then watch as your competitors marvel from the shoreline as you smoothly navigate right by.

About Planview

As the global leader in work and resource management, Planview makes it easier for all organizations to achieve their business goals. We provide the industry's most comprehensive solutions designed for strategic planning, portfolio and resource management, product innovation, enterprise architecture, and collaborative work management. Our solutions span every class of work, resource, and organization to address the varying needs of diverse and distributed teams, departments, and enterprises. For more information, visit Planview.com.

About the Author



Jerry Manas is an internationally best-selling author, speaker, and consultant. He is frequently cited by leading voices in the world of business, including legendary management guru Tom Peters ("In Search of Excellence"), who often references Manas's bestselling book *Napoleon on Project Management* for its insights on simplicity and character, and Pat Williams, Senior VP of the Orlando Magic, who called Manas's book *Managing the Gray Areas* "a new path for leaders."

Jerry's latest book is *The Resource Management and Capacity Planning Handbook* (McGraw-Hill), which Judith E. Glaser, noted author of *Conversational Intelligence*, touted as "the first book dedicated to what is essentially the drivetrain of organizations—the effective use of its people toward its most important activities." He also co-authored the bestseller, *42 Rules for Creating WE* with Glaser, which Angela Ahrendts, CEO of Burberry, called "today's greatest guide for team success."

A sought-after consultant, Jerry helps clients maximize their organizational people resources, leading to a greater capacity to innovate, a more value-focused and productive workforce, and an increased ability to adapt to change. He is a popular speaker at events around the world, speaking on resource planning, organizational change, lessons from history, and other topics.

In addition to his writing, consulting, and keynotes, Jerry is a founding member of The Creating We Institute, an international thought leadership community dedicated to fostering WE-centric thinking in organizations through research in neuroscience and positive psychology. He

was also part of the leadership team for several Project Management Institute standards.

Jerry's work has been highlighted in a variety of publications, including the Houston Chronicle, Chicago Sun Times, National Post, Globe and Mail, Huffington Post, and others. He has appeared on radio and TV internationally, including Iceland, where he appeared on a National TV program talking about their economic recovery. Follow him on Twitter [@jerrymanas](#).

Learn more at Planview.info/WRM

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