Norveld™

Project Management Institute. Rochester

The Project Roadmap

Reduce complexity and provide the Big Picture to your stakeholders and project team

PMI Rochester Professional Development Day 2022

Nov 16, 2022

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Principal, Norveld

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? *Has this* ever happened to you ?

Are we there yet? I mean, I feel like I don't know where this project is or where it's going!

That's too much information! I can't digest all that.

I just want to know where we are!

Executive Stakeholder

Sorry! Um, here's the project plan, and the latest status report. I'll email you links to the charter and to the team and committee minutes, and…

<gulp>

You (Project Manager)

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If so, you need a Project Roadmap

Objectives for Today

1. Learn how the Project Roadmap and *Start Right* align project members (and why that's needed).

2. Understand what a Project Roadmap is (and what it's not).

3. See what is involved in making a Project Roadmap (and who, and when), and some things to avoid.

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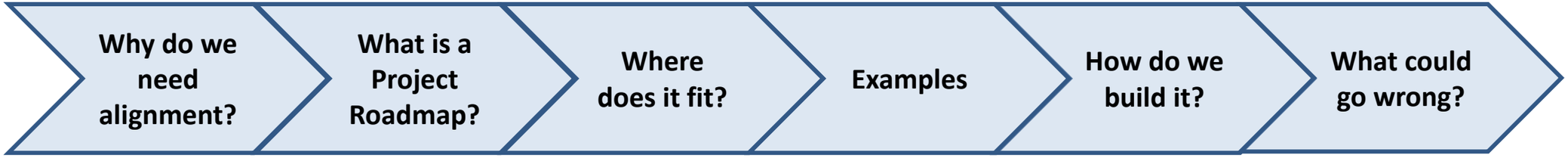
Today's presentation



- Why do we need alignment?
- What is a Project Roadmap? How does it help?
- Where does it fit into the project lifecycle?
- Some samples and examples
- How do we build one? Who is involved?
- What could go wrong? What are some common mistakes?

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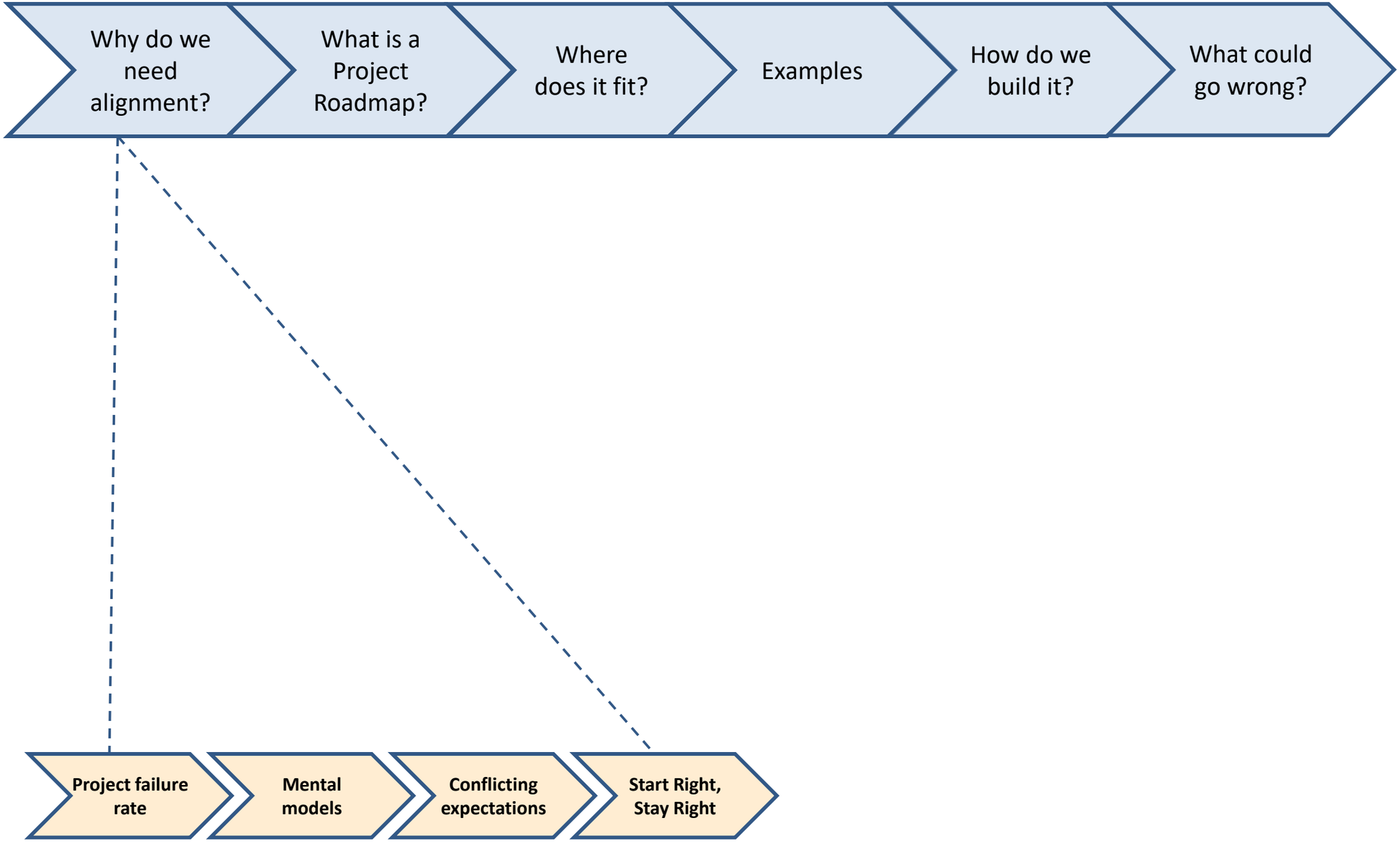
Why do we need alignment?



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Why do we need alignment?

For every project you have a vision of where you want to go and what the world will look like when you get there.

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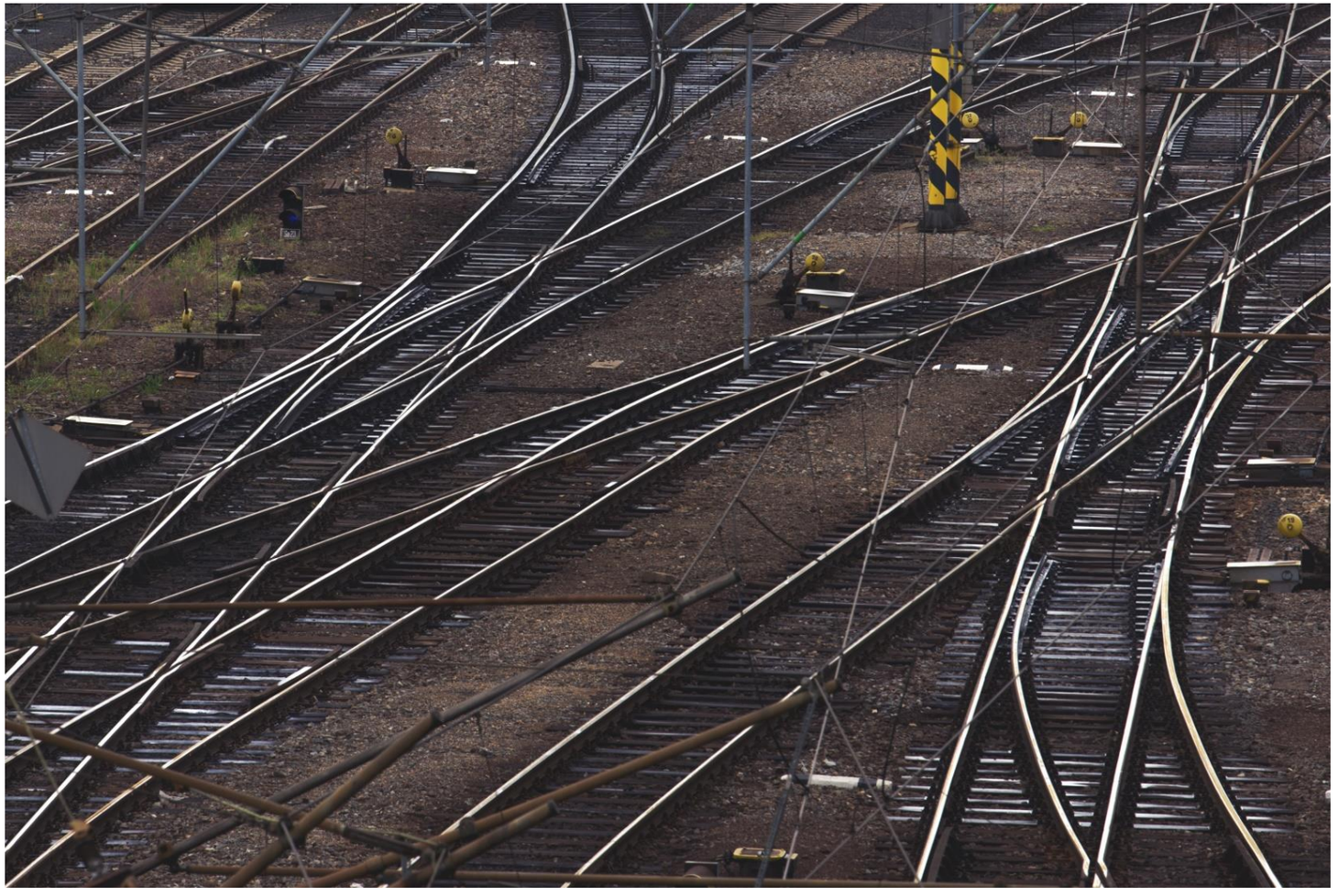
Why do we need alignment?

The reality is there is **NO** yellow brick road!



But there are many ways that can lead you to destinations you didn't plan on if you're not careful.

AND every stakeholder has a different path in mind!

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Why do we need alignment?

Project Failure Rate

Changing Requirements

Poor Communication

70%

of projects do not deliver the expected RESULTS

Poor Decision Making

Unrealistic Schedule or Budget

Why does this continue to happen?

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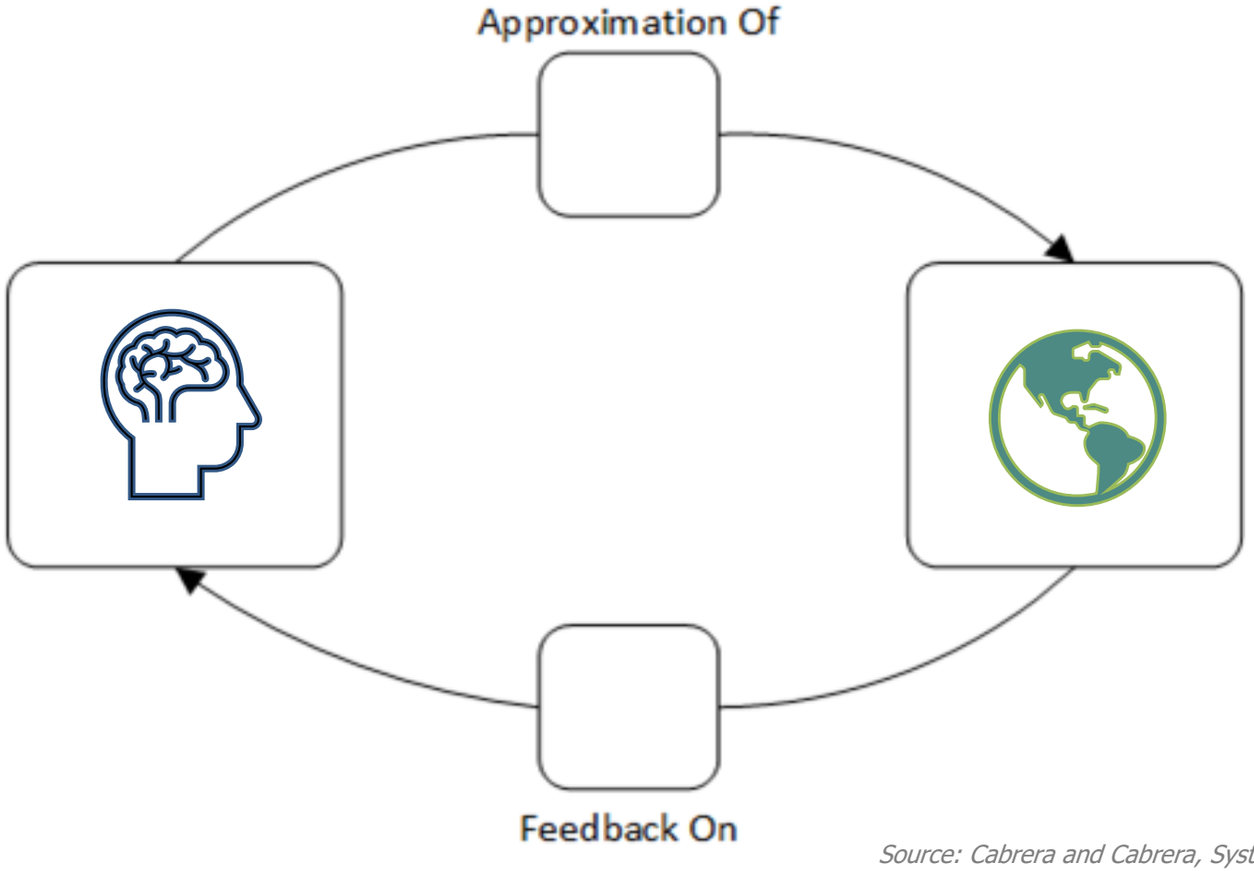
Sources: ESI, Standish Group, Forrester Research, PMI

Why do we need one?

Mental models

"…problems result from a mismatch between how real-world systems work and how we think they work."



Source: Cabrera and Cabrera, Systems Thinking Made Simple, 2015

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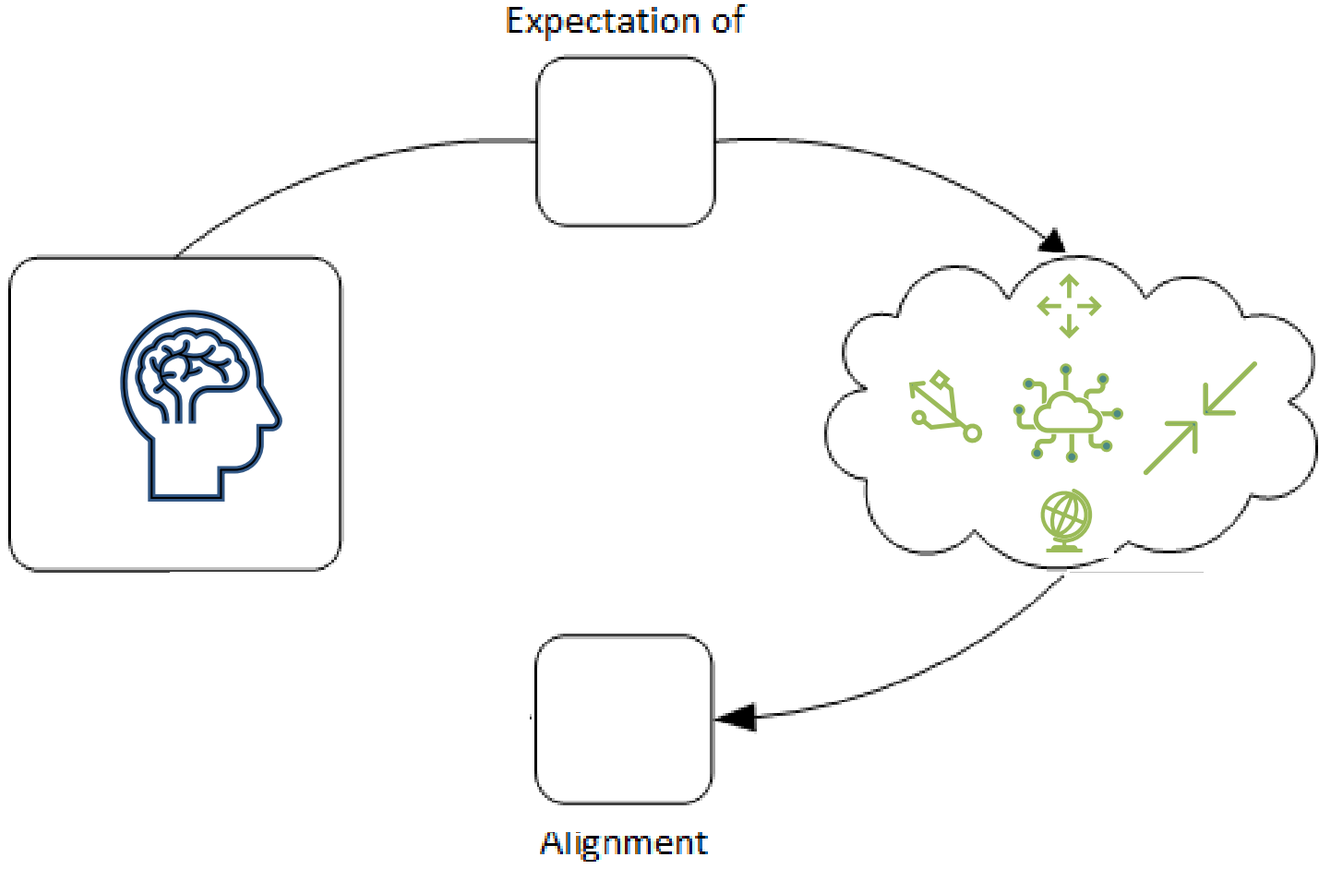
Why do we need one?

Mental models

"… project failures result from a misalignment between how a solution works and how we *expect* it to work."



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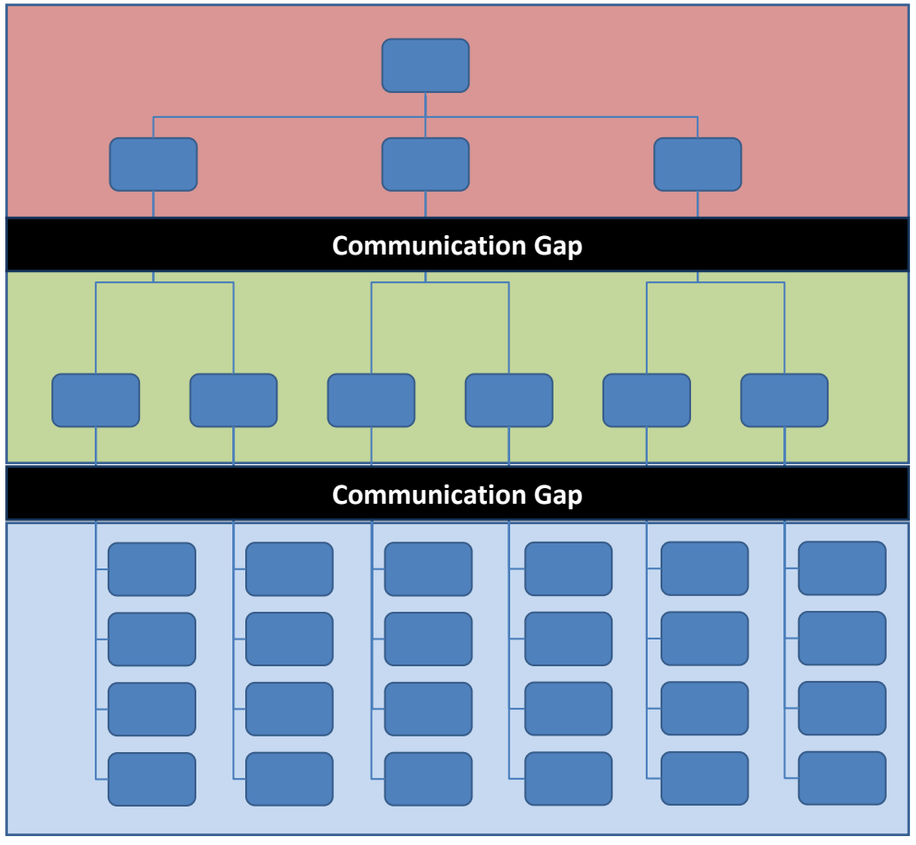
Why do we need one?

Conflicting expectations

Different levels of the organization have differing concerns, *even when all agree* on the desirability for the change the project brings. This translates to **conflicting expectations**.



Executive Level

*Innate concern is **SCHEDULE**. Want to know **HOW SOON** they can have it*

Operational Level

*Innate concern is **COST**. Want to know **HOW MUCH** it will impact their budgets*

Technical & User Level

*Innate concern is **PERFORMANCE**. Want to know **HOW WELL** it solves the problem*

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Why do we need one?

Start Right, Stay Right

- Align project team's and project stakeholders' definition of success.
- Create and harmonize important project start-up documents:
  - **PROJECT ROADMAP**
  - Communication Plan
  - Risk Management Plan
  - Change Control Plan
  - Adaptive Project Plan
- Create a common plan to **Stay Right** with the "Project Guidebook."
- Manage Expectations.

The PROJECT ROADMAP is the foundation for the other four elements of the Guidebook.

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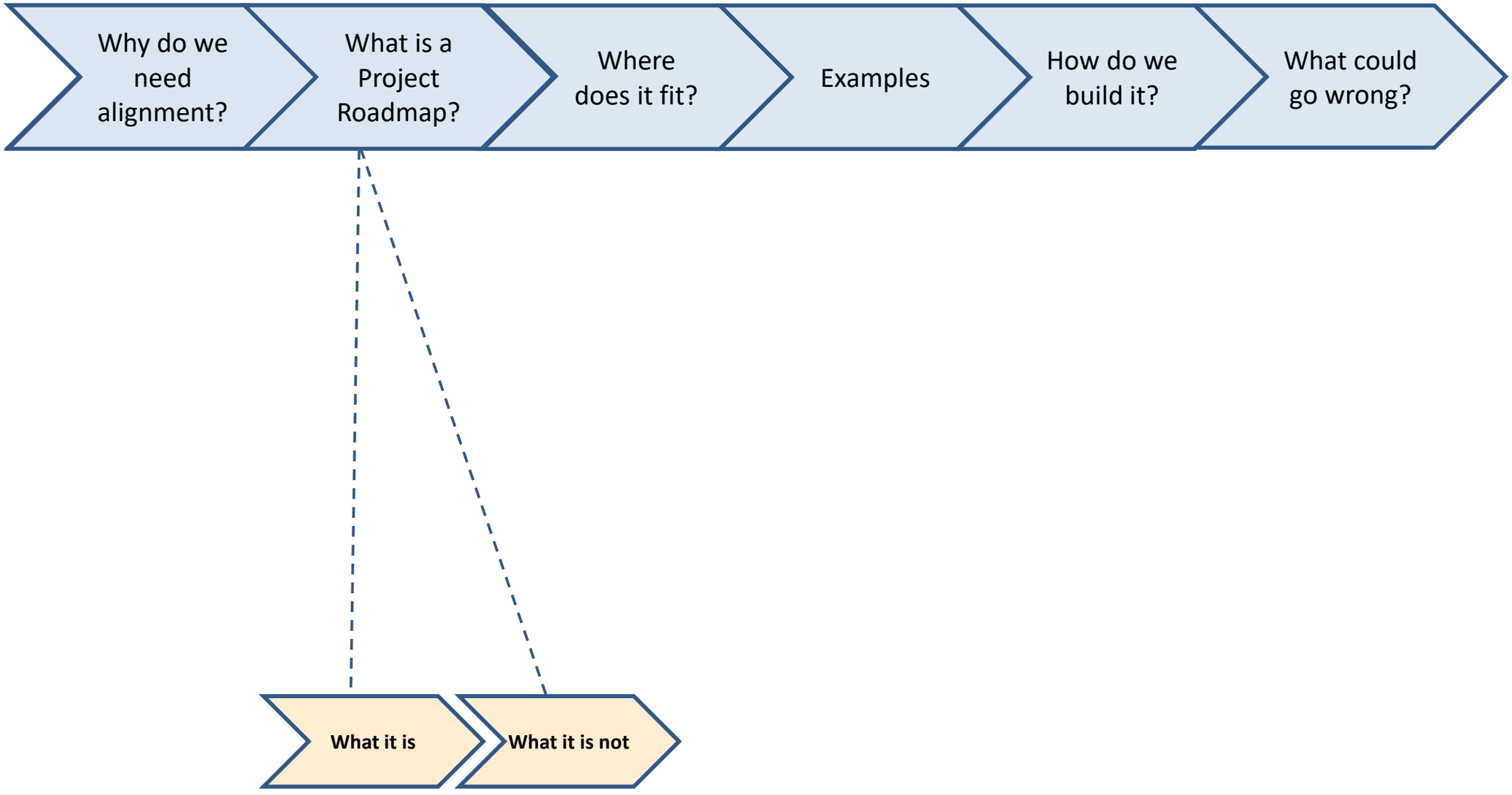
What is a project roadmap?



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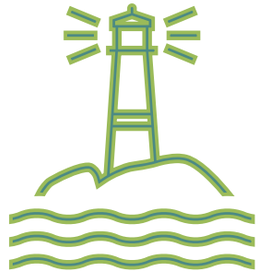
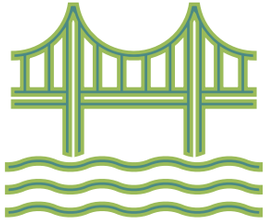
What is a project roadmap?

What it is



- High level, easy to understand view of a project—it shows where we're going

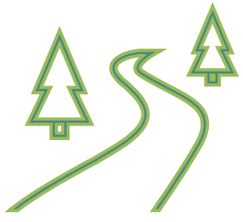


- Bridge between the vision for the project and its execution—it shows how we'll get there

- A communication vehicle useful in high-level meetings with clients and executives—it shows what we expect to see

- An overview of sub-projects, phases, or activities which may have own plans (steps)—it shows how to get back on track

It helps the project stay on the right track!



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What is a project roadmap?

What it is NOT

- **Not a Product Roadmap**
  - Shows features to be produced and released, and when
- **Not a Portfolio Roadmap**
  - Shows projects underway or planned, and schedule
- **Not a Customer Journey**
  - Shows customer interactions and in what sequence

Although these are related high-level views, they are not project specific.

- **Not a Work Breakdown Structure (WBS)**
  - Shows too much detail and specificity
- **Not an exact estimate of schedule or resources**
  - Sequence, timeframe, and level of effort only

Although these are derived from the roadmap, they are too low-level.

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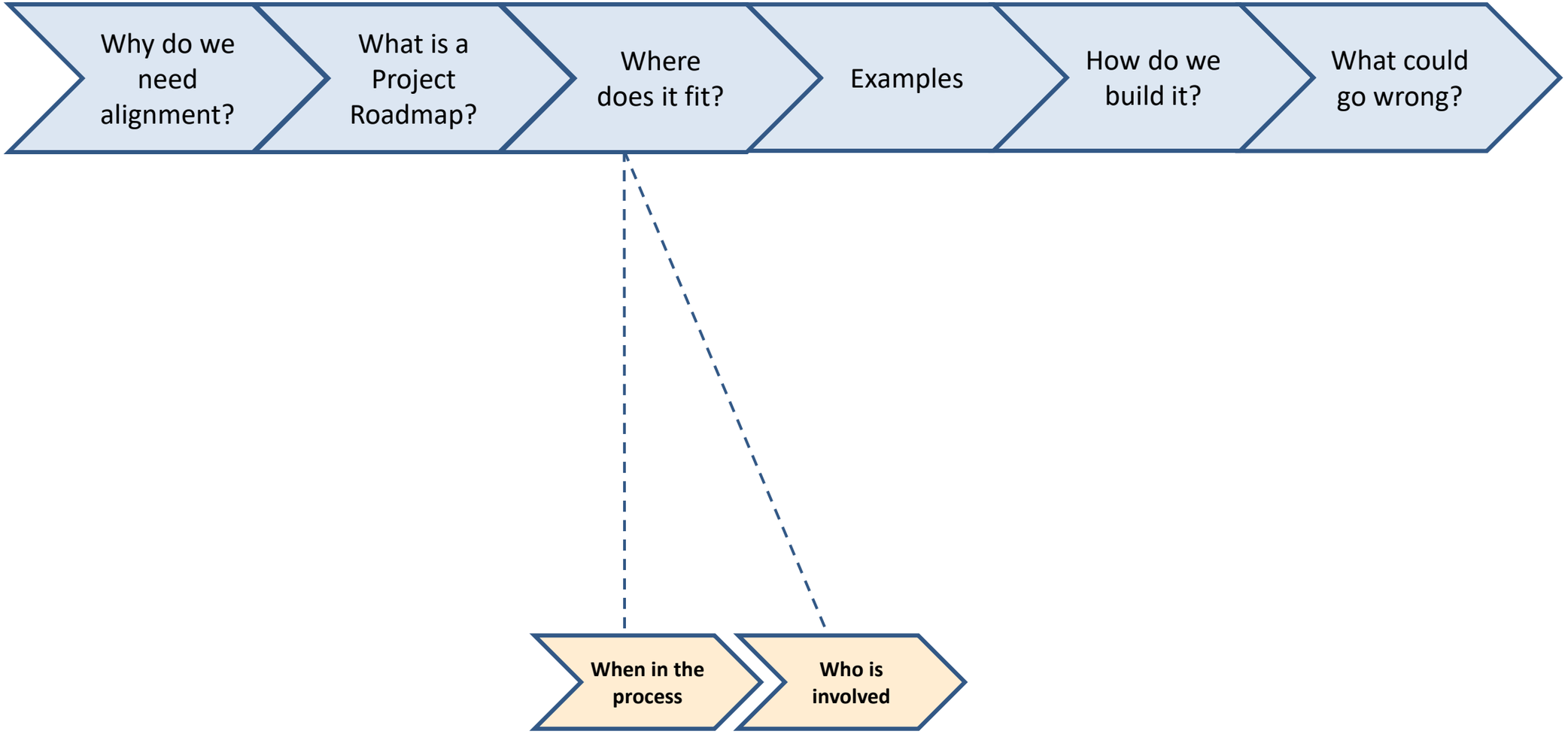
Where does it fit?



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Where does it fit?

When in the process

Overall Project Planning

Overall Project Objective and Vision

New abilities needed to achieve the goal

Business Scope

- Proposal
- Business Case
- Charter

Major “chunks” of project work

Path followed to achieve an activity

Project Scope

- **Roadmap**
- High level plan
- Useful for Discovery

Project work to be executed

Project Plan

- Adaptive WBS
- Risk Management Plan
- Communication Plan
- Change Control Plan

The Project Roadmap is one of the first pieces of work done in planning.

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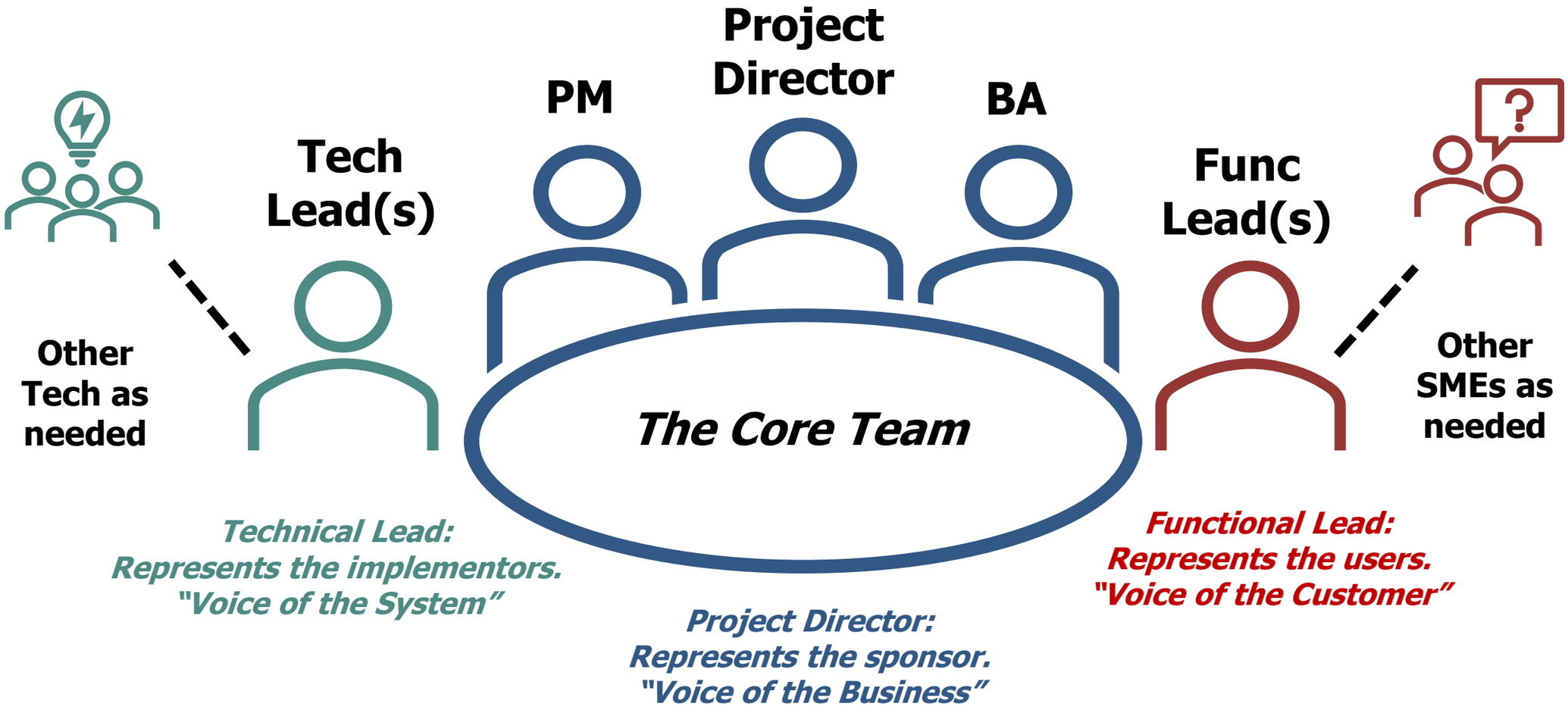
Where does it fit?

Who is involved?



The initial Project Roadmap should not take more than a few hours.

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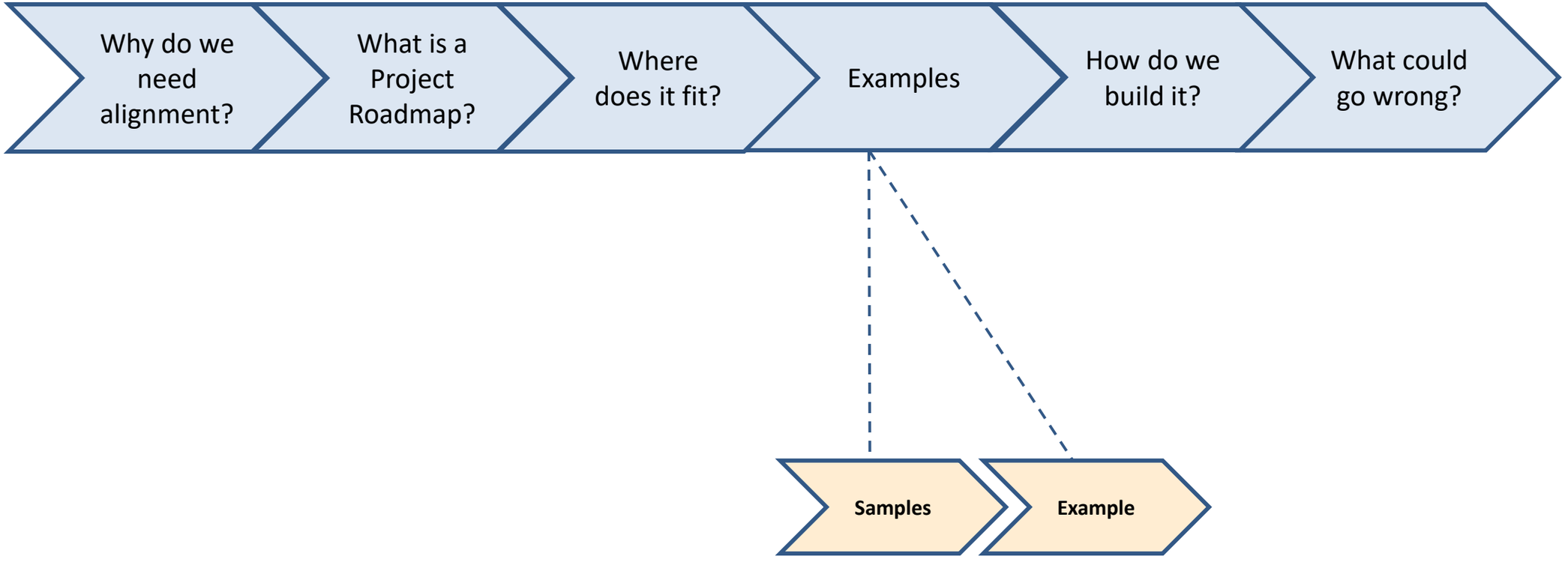
Examples and Case Study



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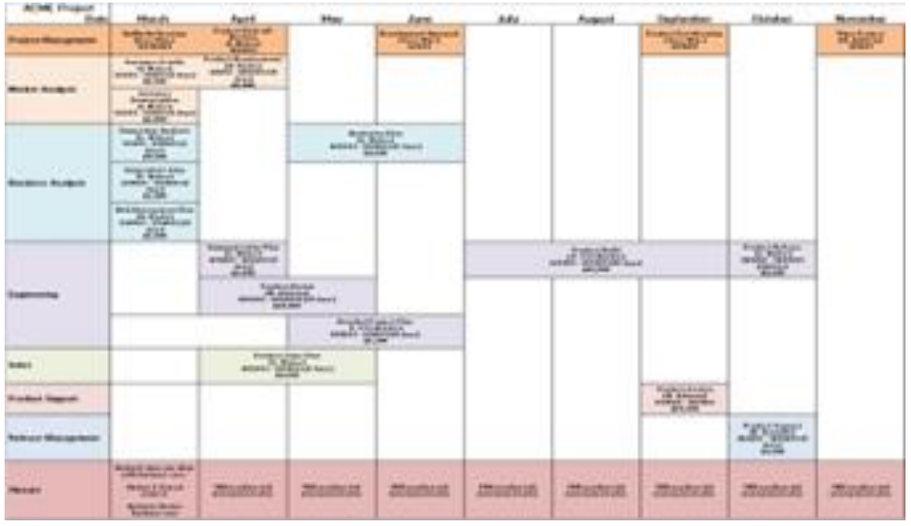
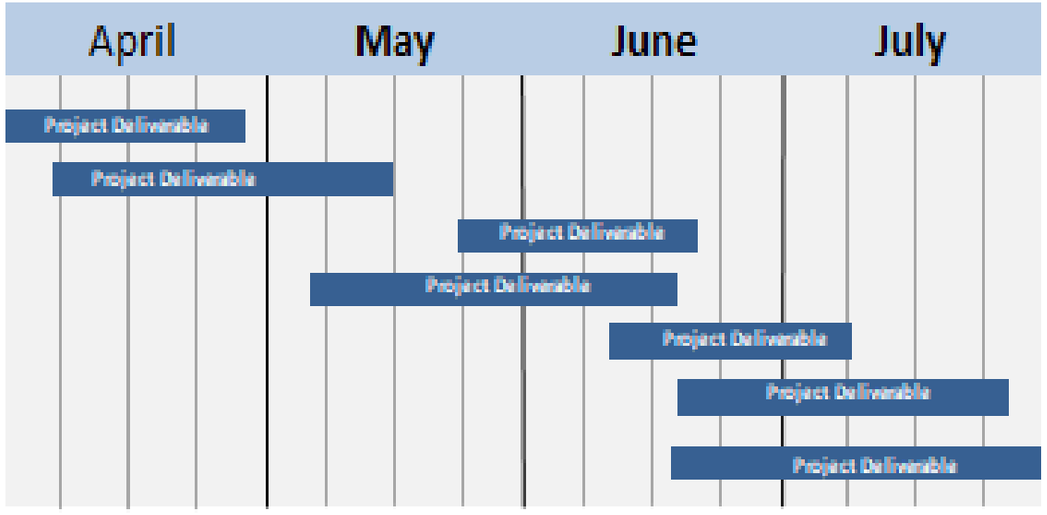
Examples

Sample roadmaps

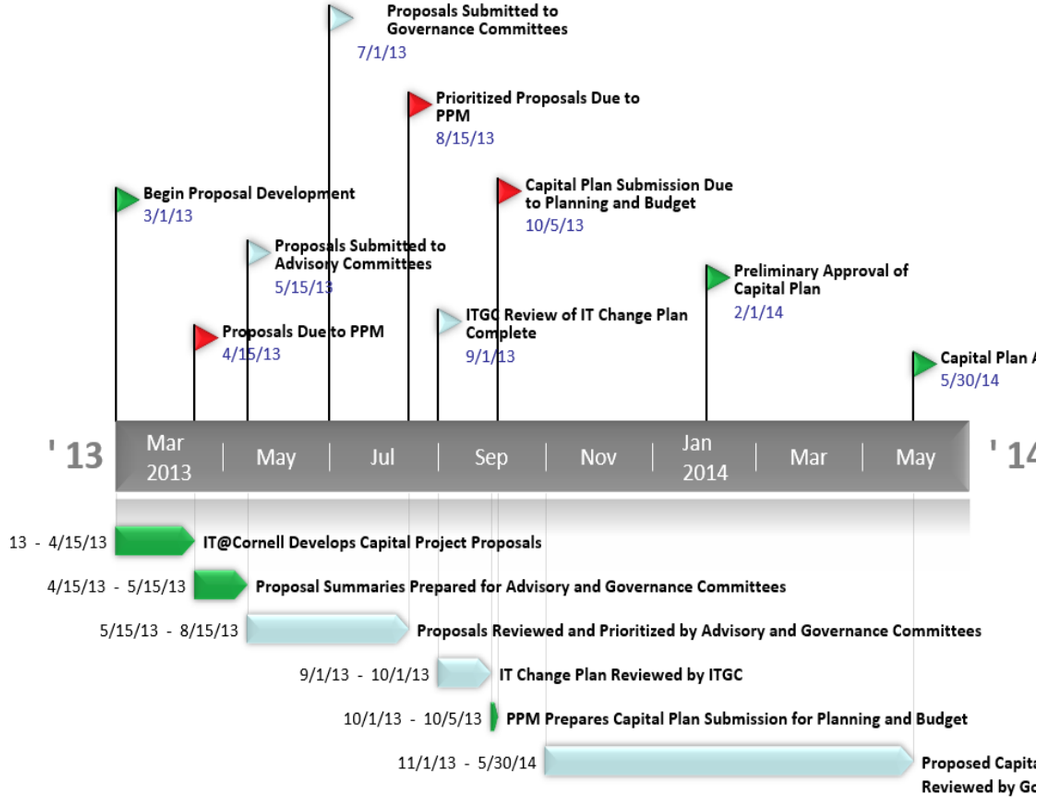
Built with Excel



Built with Visio



Built with PowerPoint



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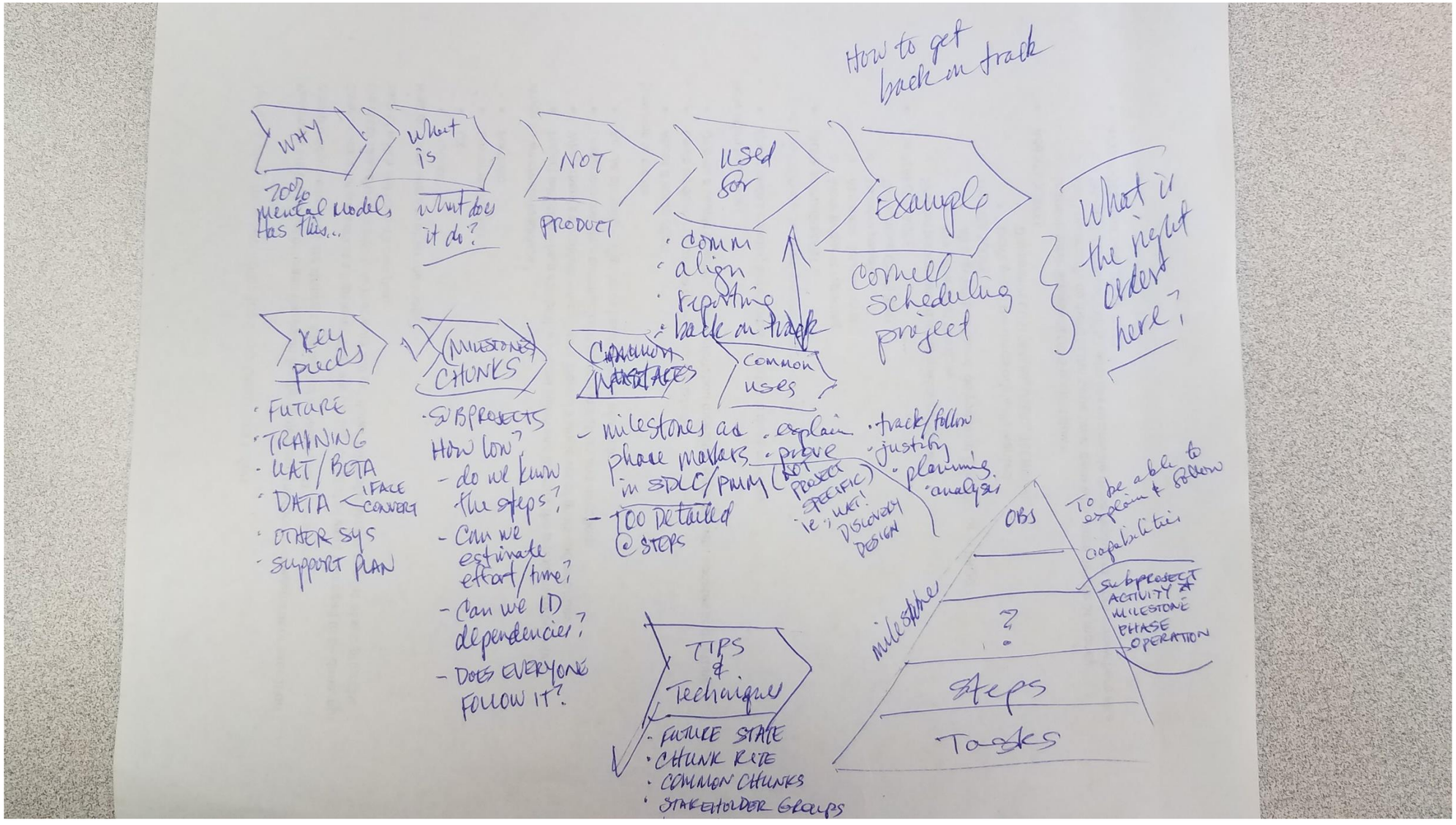
Examples

They don't start out fancy…



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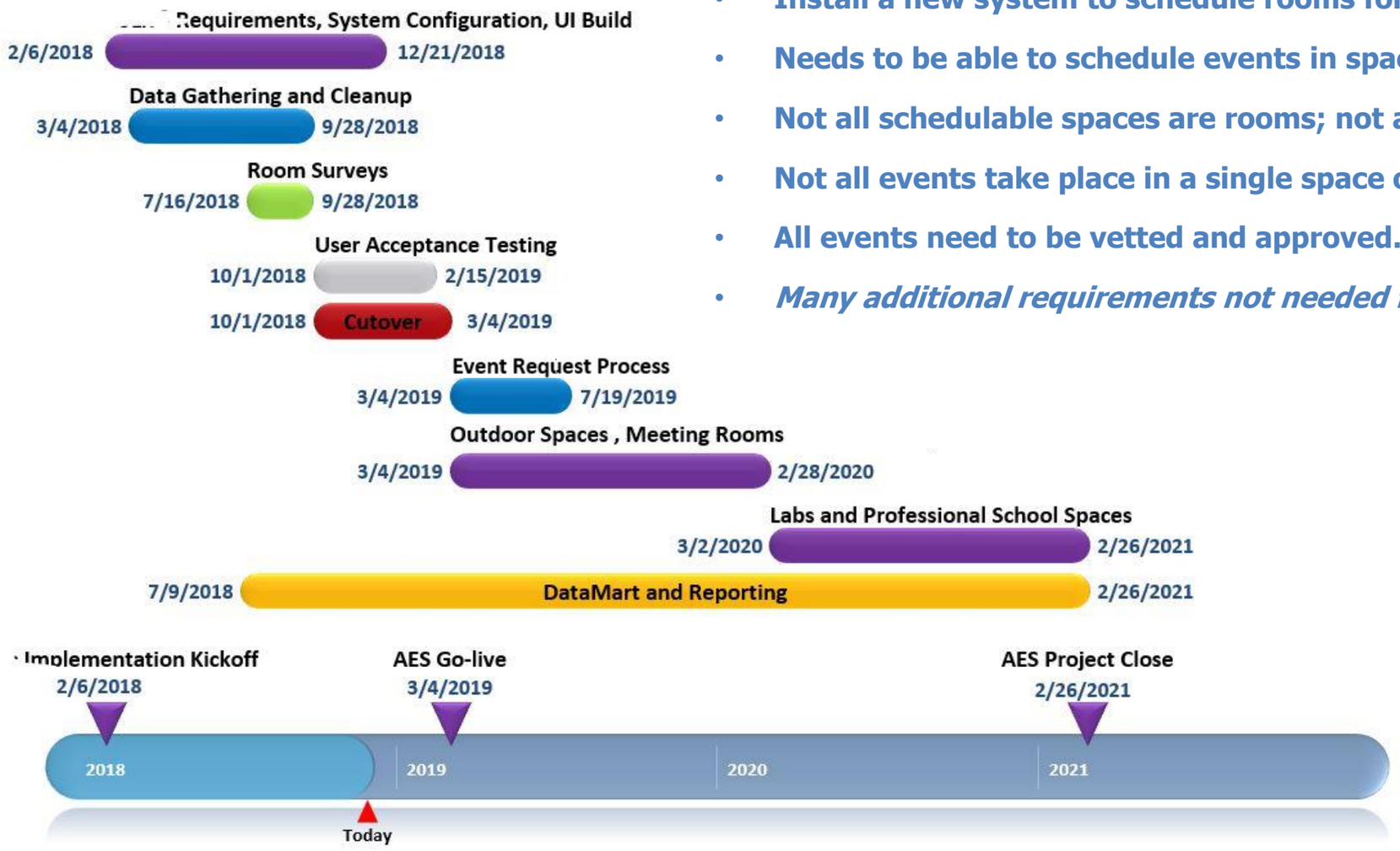
Examples

Example case study

Academic and Event Scheduling



- Install a new system to schedule rooms for classes and exams.
- Needs to be able to schedule events in spaces as well.
- Not all schedulable spaces are rooms; not all rooms are schedulable.
- Not all events take place in a single space or time.
- All events need to be vetted and approved. Some self-approve.
- *Many additional requirements not needed for this example…*

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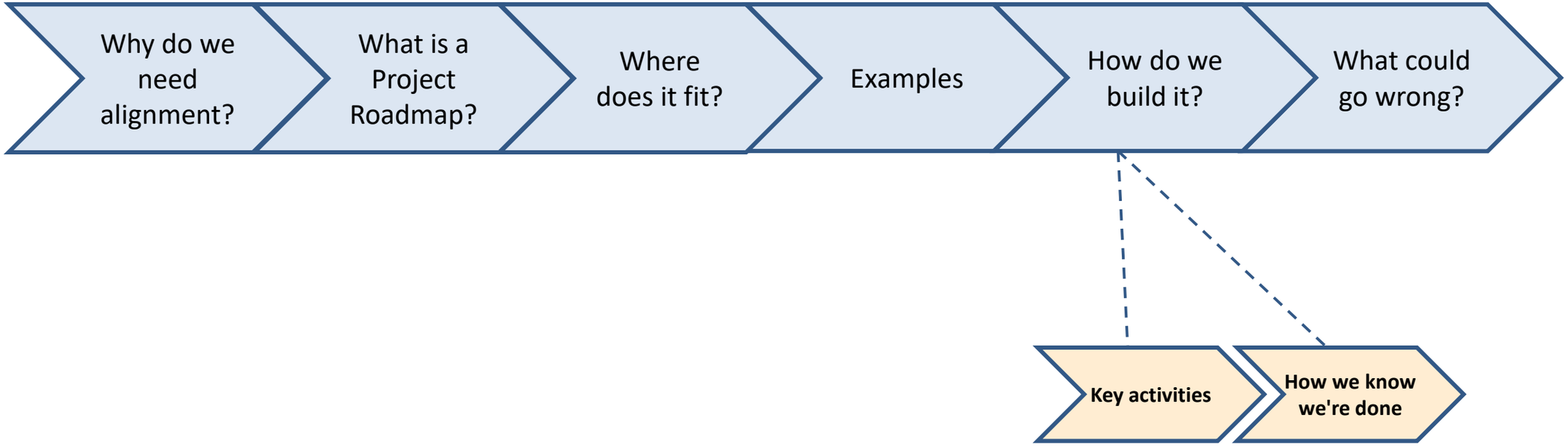
How do we build it?



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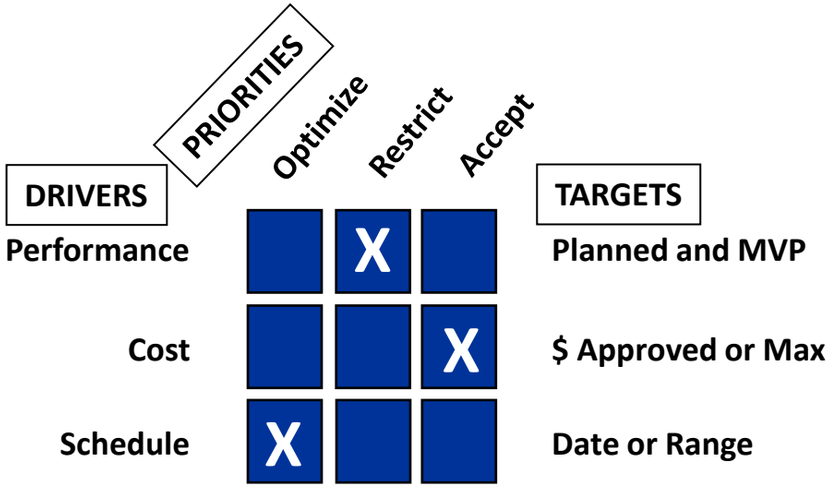
How do we build it?

Key Activities

Review Project Objective and proposal: the simple rubric

- What's your problem?
- What do you want me to do about it?
- When do you need it?
- Who's paying & how much?
- How do you think we'll do that?



Driver Matrix: The tough conversation

- MUST prioritize: only one driver per column.
- The main driver is put in OPTIMIZE (in this case, Schedule).
- Next most important is RESTRICTED (in this case Performance).
- Remaining driver is ACCEPTED (in this case Cost). When something needs to slide, this is first.
- They all have limits of some sort (Targets).

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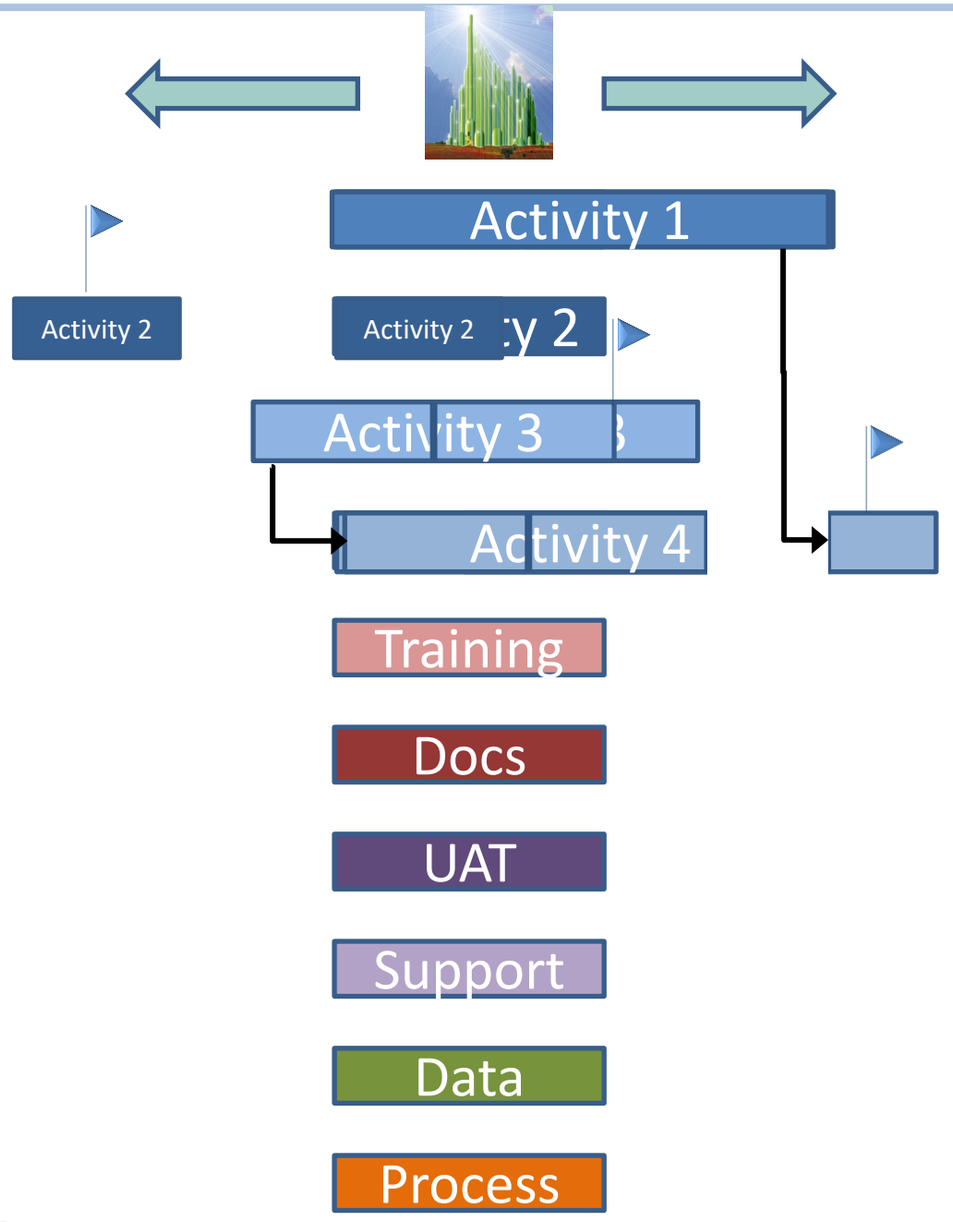
How do we build it?

Key Activities

- **Identify Activities**
  - Look FORWARD from the destination
  - Work BACKWARD from the destination
- **Don't Forget Standard Activities**
  - Training, Docs, UAT, Support, Data, Process
- **Identify Steps**
  - Path for each Activity or Sub-project
- **Add Level of Effort**
  - Your team's best educated guess
- **Sequence Activities and Steps**
  - Include dependencies
- **Add Milestones**
  - Determine whether stopovers, checkpoints or tollgates



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How do we build it?

Key follow-on activities

- **Determine the roadblocks.**
  - What could go wrong.
  - How you might fix it.

- **Identify new stakeholders.**
  - Determine their roles and influence.

- **Discuss what might change.**
  - Don't forget the standard ones:
    - Resource cut / loss
    - Schedule change / push
    - Performance / Scope increase

- **Eventually you will develop a full plan to address each area:**
  - Roadblocks -> Risk Management Plan
  - Stakeholder Identification -> Communication Plan
  - Changes -> Change Management Plan and WBS

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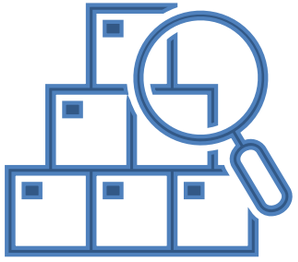
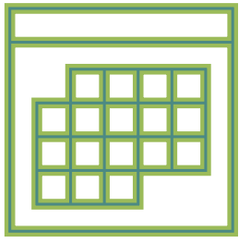
How do we build it?

How do we know we're done?



- When you can look at each step and say "we can see how to do that."



- When your developers / implementors say "we can estimate that."

- When you can look at the map overall and say "we can identify dependencies."

- When your stakeholders say "we can follow that."

When you can use the Roadmap to stay on track.

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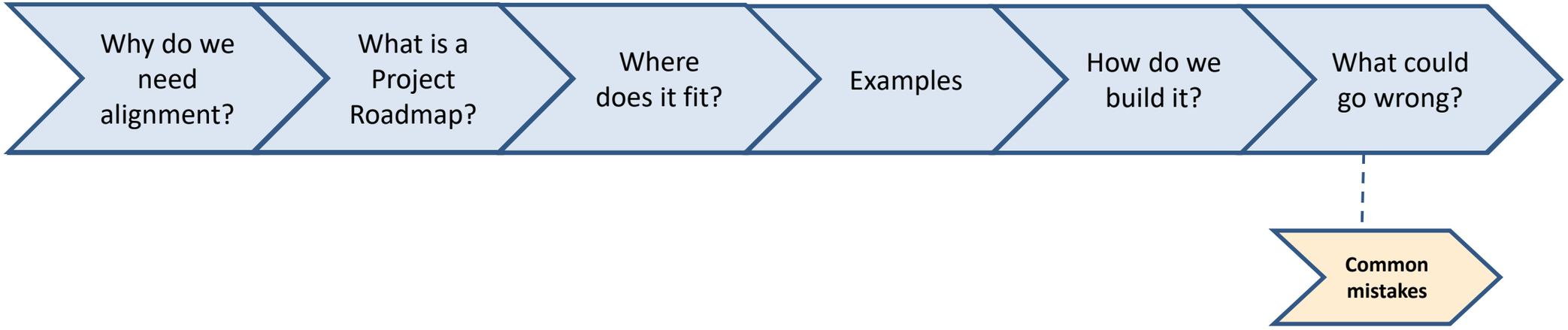
What could go wrong?



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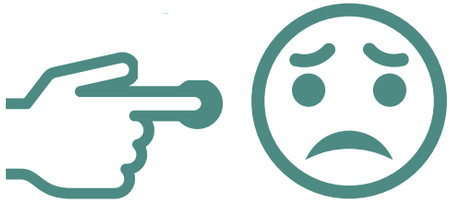
What could go wrong?

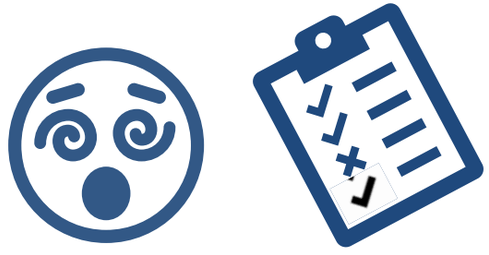
Considerations

- **People resist change.**
  - FEAR THEY WON'T BE ABLE TO SUCCEED



- **People don't like surprises.**
  - FEAR THEY COULD GET BLAMED

- **People can only hold a few things in their head.**
  - FEAR THEY WILL MISS SOMETHING



- **People tend to maintain status quo.**
  - FEAR THEY WILL BE ALONE

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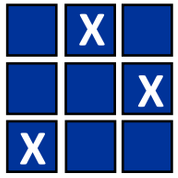
What Could Go Wrong?

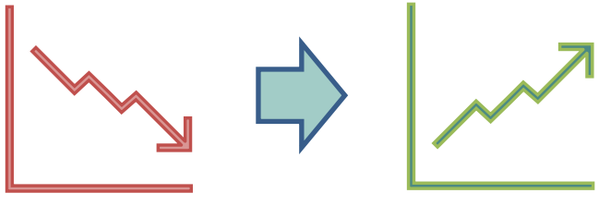
Common mistakes



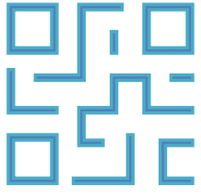
- Neglecting to use drivers to inform roadmap

- Not talking to stakeholders about how they will use the system in the future

- Forgetting to include “standard” activities such as training and UAT



- Failing to keep it updated as it changes



- Making Roadmap too complicated

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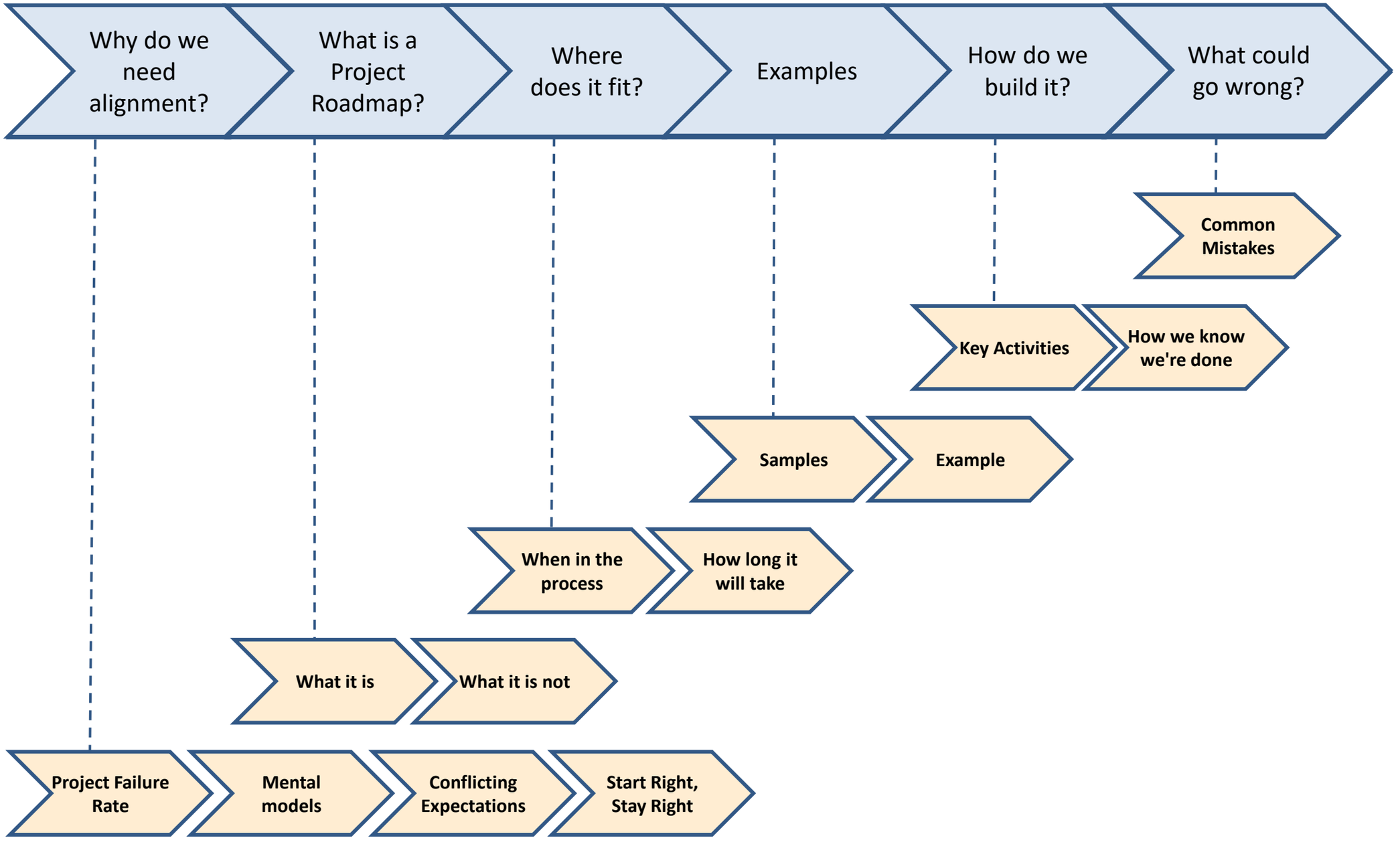
Today's Presentation



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Conclusion

1. The Project Roadmap is a high-level overview of the project that contains all the activities and milestones.

2. The tool or format isn't that important as long as you have one.

3. It forms the basis for other project planning artifacts:
   i. Communication Plan
   ii. Risk Management Plan
   iii. Change Management Plan
   iv. Project Plan / Work Breakdown Structure

4. It helps align expectations among all levels of stakeholders so that everyone is on the same page.

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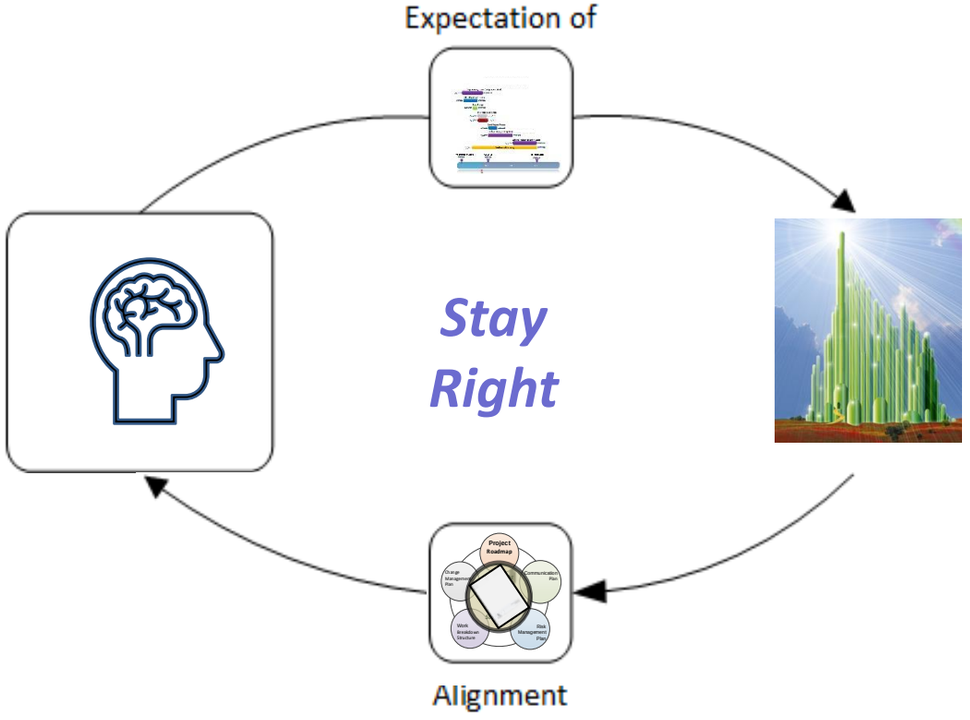
Closing the Loop

"… project success results from *ALIGNMENT* between how a solution works and how we *expect* it to work."



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Thank You

Comments and Questions

For any further questions, or help getting started, contact me at greg.busby@norveld.com.

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