New Flexible Portfolio Management with BigPicture 8.0 powered by Boxes
FLEXIBILITY

“There’s no denying it: the only constant of the modern world is... change. Look at information technology back in 2013 — mobile applications just started developing along with personal cloud solutions. Move forward to 2017 — innovations popped up, such as virtual reality, the digital twin, and the like. Artificial Intelligence, Virtual Reality, 3D printing, blockchain, and serverless computing; new technologies have witnessed a breakthrough by breakthrough in recent years.

Project Management, Project Portfolio Management, and Product Management have been changing no less vigorously. They have seen a lot of shifts, and changes brought about by some brand new concepts, the rise of new methodologies, and the development of modern software.

The contemporary world of Project (or Product) Portfolio Management is a complex and intricate one. Companies attempt to effectively manage a tangled network of interdependent undertakings (projects, products or portfolios) by juggling or blending different methodologies from the Agile and Waterfall stacks. They strive to find the right path among the abundant possibilities: SAFe®, LeSS, Spotify, AgilePM, Prince2®, and many others.

So which is it? Lean or Classic? Agile or Waterfall? Or, maybe, a clever mixture of those? Well, the key to coping with challenges brought by the ever-changing circumstances of the modern world seems to be... flexibility.

And it is flexibility, which the core concept behind BigPicture 8 powered by Boxes. The present White Paper aims at showcasing the benefits of this brand new, unprecedentedly flexible generation of BigPicture.
CLEAR & PRECISE PORTFOLIO VIEW: THE CONCEPT OF BOX

With BigPicture 8, which adds much more functionality at the portfolio level, an even bigger picture becomes possible. What was available before, up to BigPicture 7, was just a flat list of Programs; it has now been extended to provide a complete, hierarchical portfolio structure — a detailed, drillable big picture of the whole organization.

The new Overview module allows the user to see a cross-enterprise view of projects, products, programs, and portfolios. Furthermore, each portfolio can be made up of any given number of different elements — it may consist of traditional projects, agile products, programs, ARTs, Program Increments (PIs), iterations, phases, or other undertakings.

Flexibility is there to ensure better adjustment to the PM/PPM methodology or methodologies used at an organization.
PORTFOLIO LEVEL REPORTING & DATA AGGREGATION

The new generation of BigPicture offers to facilitate portfolio management and answer the reporting needs much better than ever before. It is now not only viable for the PMO to integrate agile, waterfall, and hybrid projects into a single portfolio, or several portfolios, but also to monitor the progress of undertakings at every level of scale.

The Overview module allows the executive manager, the CEO, or the Portfolio Manager to track the way work progresses and assess the health status of different projects, products, portfolios, and the overall company strategy.

With the following columns displayed, Overview allows the user to see the aggregated portfolio data that has been calculated automatically for smooth and easy reporting:

- Statuses of all undertakings “to do”, “in progress”, “done”, also with the view of progress percentage value,
- Time tracking progress bar (based on “Time Spent” and “Remaining Estimate” values),
- Original Estimate,
- Remaining Estimate,
- Time Spent.

As already explained, it is flexibility that is the founding concept in BigPicture 8. With the possibility of adding any field to the Overview module, the Executive, Business Owner, or Portfolio Manager have been enabled to flexibly design their own dashboard that will conveniently serve as their main “data management center.”

All work progressing at the organization, all delays, hold-ups, and impediments are now accessible to be viewed in a single place.
Unprecedented Tool Customization. Adjusting BigPicture 8.0 to Fit Any Framework

Agile, Waterfall, or Hybrid? Whatever methodology, BigPicture 8 is designed to comply with the organization's chosen framework or any array of frameworks. Be it a SAFe® program, a LeSS product, a Prince2® project, be it an ART, a Program Increment (PI), an iteration, a phase, you name it — each of these schemes now possesses a default template available in BigPicture, already preconfigured to be consistent with it.

We've dubbed these templates "Box Types". When the preconfigured setting of a given Box Type fails to match an unusual or a more complex business scenario, it can be customized freely or even created from scratch.

Using Box Types, you can create any number of specific Boxes (flexible high-level containers that come already preconfigured, partially customized or fully personalized) that will make up your organization's Portfolio. This in fact means unprecedented flexibility in the way you can shape a portfolio hierarchy to best suit your business circumstances.

Even if various departments at an organization use different approaches and choose to run their projects and programs in divergent ways (which we very often find is the true reality of modern businesses, i.e. engineers use agile products, ARTs, Program increments, iterations, while HR, business development, and legal departments stick to waterfall projects and phases), there now exists a tool that brings clear visibility into all of them in one convenient space!
Customization flexibility brought by BigPicture 8 goes even further than that. It is now the end-user who decides specifically which modules available in the App will be activated in a given Box Type. Previously, there was a default setting in BP7. The new, improved tool safeguards against redundancies and allows for enabling only those modules that are best adjusted to your chosen framework or frameworks, i.e.:

- Board and Scope for Agile undertakings,
- Gantt and Resources for waterfall projects,
- or, less typically, Gantt for Agile programs, when, for example, a time-based roadmap of epics is needed; in this case the name “Gantt” can be conveniently changed to “Roadmap”, “Agile Plan” or other.

Once the right modules are selected, their default Views per module, available Quick Filters and plenty of other configuration can be flexibly customized for each Box Type defined.
MULTI-PLATFORM SUPPORT

“All Tools United. Beautifully.”

These 4 words have come to define the vision behind the development of BigPicture.

This idea has been the driving force for our teams for several months now — the mission is to develop a Project/Product Portfolio Management tool that not only will unify all methodologies and frameworks but will also bring together all Apps that are used at the different levels and different departments of an organization.

Consequently, over 1,600,000 lines of code have been written so far to build a perfectly flexible solution with a capability to upload issues from outside of Jira, and thus offer continuing support to multiple other platforms or tools.

What does this mean in practice? Unprecedented autonomy for teams and departments in choosing the tools of their preference. Be it a local Jira instance or Trello (and, soon, the likes of TFS [Azure DevOps Server], Rally Software, Google Calendar, etc.), you will be able to have them linked to BigPicture. Residing on top of other task-managing tools, BigPicture will deliver a manageable portfolio, a bird’s eye view with visual roadmaps, boards, Gantt charts, real-time reports, and more, based on information recorded by teams in tools they choose to use on a daily basis.

Thanks to the real-time, two-way synchronization between Jira, Trello, and BigPicture, the interconnected tools can exchange information seamlessly. Whenever a task is being tackled in BigPicture, the relevant Trello or Jira instance will immediately know about it. And the other way round — when a change is introduced to an item Jira or Trello, it will instantly become evident in BigPicture. What better way to allow teams to keep their freedom to determine their favorite tools, and upkeep team practices which work best, and the management to have portfolio-level overview of all company undertakings and the progress thereof?

No need for cross-company implementation processes, bearing transformation costs, conducting exhausting training for multiple teams. No risk of causing aversion and weakening of morale. Simply connect the tried and tested tools to your BigPicture instance and have all of your cross-enterprise data flow from the bottom echelons, through middle management levels, up to the very top.

A genuinely flexible software solution for flexible organizations!
ACME Corporation. Introduction

To provide a clear view of the advantages offered by the new and improved BigPicture, let's take a hypothetical company, set its business situation, and see how, at every layer of the scale, benefits can be reaped from the unprecedented flexibility of the tool.

ACME Corporation is a construction company that runs multiple long-term projects (investments). The scope of these projects is usually precisely defined, and project requirements are relatively stable throughout the execution. ACME's organizational structure includes an IT department that carries out a series of IT products to develop usable software for ACME's internal use. Apart from internal undertakings, from time to time, the team also builds custom-made IT systems for a variety of external clients. Unlike classical projects, all IT activities are characterized a fair amount of changeability and dynamicity.

Organizational Structure, Project Management Frameworks, and Key Figures

ACME Corporation uses a classical waterfall approach (i.e. Prince2®) for the execution of most of its projects, which is necessitated by the fact that they fall under rigorous public procurement regulations. As may be expected, the company's IT department prefers to go 'the agile way'. Its teams use Scaled Agile Framework (SAFe®) and deliver incremental value iteratively in the course of consecutive sprints. SAFe® is also used to develop tailored IT solutions for clients outside of ACME.

ACME is headed by a CEO, while a COO oversees the entirety of investment projects. The IT department is run by the company's CIO. The CEO has recently also nominated a PMO (Portfolio Management Officer), entrusting him to look after the quality of project management and uniformize reporting standards. The PMO shall answer directly to the CEO.

Further down the organizational ladder, each project is assigned to a competent Project Manager. There is partial overlapping of responsibility in cases where a given IT undertaking constitutes a part of a larger investment project from ACME's portfolio, in which case there are actually two PMs involved. In such instances, the overall responsibility rests with the Investment Project Manager.

ACME also procures the services of an external contractor — an Interactive Agency responsible for the graphic design as well as the management of websites and landing pages that have been set up to inform the public of the projects under development.
ACME's Project Management Software

- MS Project and MS Excel are used to manage investment projects,
- ACME's IT Team uses Jira and as well as a basic Kanban board,
- The Interactive Agency communicates with ACME's IT Department with Trello.

ACME - the Challenge

What ACME Corporation needs is for the CEO to have quick visibility into the progress of all projects and programs that are carried out at the company. At the moment, all reporting to the CEO is performed by the Directors on the basis of information submitted by the respective PMs.

There are several disadvantages to this approach: it's time-consuming, it generates a lot of distortions and inaccuracies as well as instances where "grass is being painted green". To rectify the situation, the CEO has entrusted the PMO Director with a task of finding advanced PPM software that would allow ACME to:

- Display all projects/products being executed at the company in the form of a Global Project Register,
- Define two separate portfolios: a portfolio of all Investment Department undertakings and a portfolio of all IT Department undertakings,
- Identify those IT products that constitute a part of an investment project,
- Present the following data per each portfolio: important dates and milestones, aggregated values, and estimates of workload and risks,
- Identify all projects and products in which external contractors are being used.

One additional requirement is that the new App smoothly can integrate well with other apps used at the company without, however, replacing any of them. This way, the top management hopes to ensure the implementation of the tool will proceed efficiently, taking the form of an effortless evolution rather than a risky revolution.
1. With the use of new, flexible BigPicture 8.0, the PMO will:

- Design ACME's Global Portfolio with a register of all its undertakings,
- Set up an Investment Project Portfolio containing all relevant investment projects,
- Create IT Product Portfolio containing all IT products, executed for internal and external contractors,
- Grant proper authorizations (permissions to the COO and CIO),
- Determine an adequate report layout by configuring BigPicture Overview to display all vital data per project as well as all relevant aggregated values (also providing for a situation where the IT project data affects the aggregates for investment projects).

2. With the use of the new, flexible BigPicture 8.0, the Investment Project Manager will:

- Create projects by selecting appropriate Box Types and populate each project with data (either manually or importing data from other tools),
- Import all data from MS Project and Excel into the new tool,
- Match all IT products to relevant project stages, where they constitute a sub-project of a larger undertaking,
- Allocate all Investment Projects in the Investment Project Portfolio.
3. With the use of new, flexible BigPicture 8.0, the IT Product Manager will:

- Customize a Box Type to create a Box for each and every IT product in his Portfolio,
- Use a preconfigured Box Type to set up an ART (to last throughout product execution),
- Select a ready-made PI Box Type to establish a PI for the duration of the product,
- Use a Board module to create a PI backlog (by selecting appropriate Jira issues),
- Match the selected Trello cards to relevant iterations with some task taken from Trello “TO DO” list (as it has been agreed on together with the contractor, the marketing agency, that this list contains [tasks to be completed within the duration of the present iteration]),
- Structuring the IT Project Portfolio to include all IT products.

4. With the use of new, flexible BigPicture 8.0, the Teams and the Marketing Agency will:

- Work smoothly and effectively while continuing to use their preferred task managing tools and upkeeping the well-established and well-operating work practices.
SoftwarePlant was founded in 2015. Now, only a few years later, our suite of Product and Project Portfolio Management products have been tried and tested, and found favor with over three million users around the globe.

With close to 17,000 teams, from start-ups to Fortune 500 companies, using our solutions every day, we are convinced that our success has been possible due to an unbeatable combination of four factors: modern thinking, a love for technology, meticulous attention to quality, and a drive for constant improvement.