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Product and Project Management

Your Guides:
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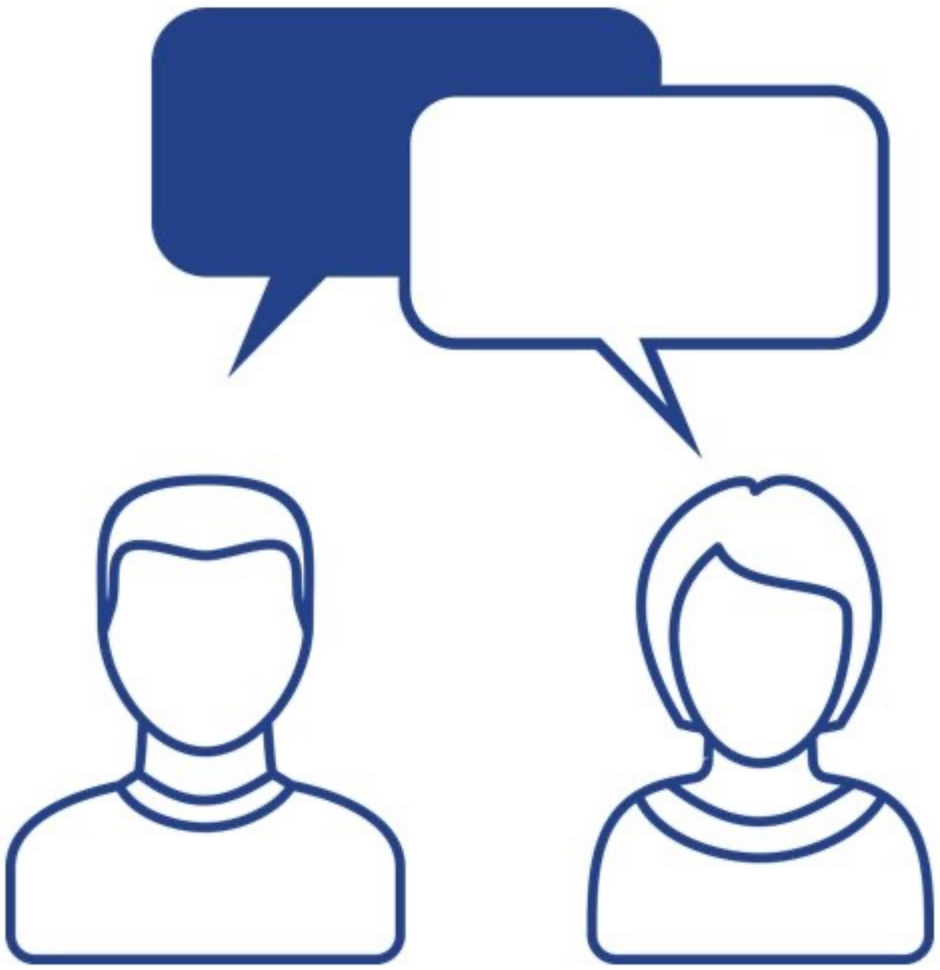
Introduction

Introductions

- Take 5 Minutes
- Turn to a Person Near You
- Introduce Yourself



Your Journey?

- How many of you are All Waterfall, All Agile, or a Mix?
- Are you considering a Product Model over the Projects?

Rethinking How We Define, Fund, and Deliver Work

In recent years, technology organizations have increasingly shifted from managing work through projects to **delivering value through products**. This evolution offers significant advantages — but only if we fundamentally change how we define, fund, and execute development.

- First, we must move from prescribing specific solutions to **articulating the outcomes** we seek to achieve. This shift empowers teams to solve for impact, not just output.
- Second, we must rethink funding. Rather than allocating budgets to a fixed scope of work, we should **invest in the ongoing capacity to evolve and improve products over time.**

This session will explore how these changes can be embedded within Clarity to align strategy, funding, and delivery — enabling your organization to unlock the full potential of a product-led approach.

What Is a Product

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Product Defined and Product Lifecycle

- What is a **Product**?
  A **product** is **anything that delivers value to a defined customer segment and can be offered to a market to satisfy a need or want.**

- What is a **Product-Led** Organization?
  A **product-led organization** places **the product experience at the center of its growth, customer acquisition, and retention strategy.**

From Projects to Products

PROJECT MANAGER FOCUSES ON:	PRODUCT MANAGER FOCUSES ON:
DEVELOPMENT	**STRATEGY**
Project requirements Investment delivers scope	Evolving customer needs Investment delivers benefits/KPIs
PLAN	**VISION**
Predictive Planning (up-front)	Adaptive planning (iterative)
TEAM-ORIENTED	**BUSINESS-ORIENTED**
Short-lived Project Team	Long-lived Feature Team
TECH KNOWLEDGE	**INDUSTRY KNOWLEDGE**
Beginning and end date One-off delivery	Permanent (until decommissioned) Continual Improvements
BUDGET	**TCO**
Isolated costs	Product-level P&L
COMPLETION	**GROWTH**
Focus on delivery	Focus on outcomes

Key Advantages of Product-led Organizations

- **Customer-Centric**
- **Increased Agility**
- **Cross-Functional Collaboration**
- **Faster Time-to-Market**
- **Sustainable Growth**
- **Data-Driven Decision Making**
- **Total Cost of Ownership**

The shift to a product-driven culture is a strategic decision that involves changes in processes, mindset, and sometimes organizational structure.

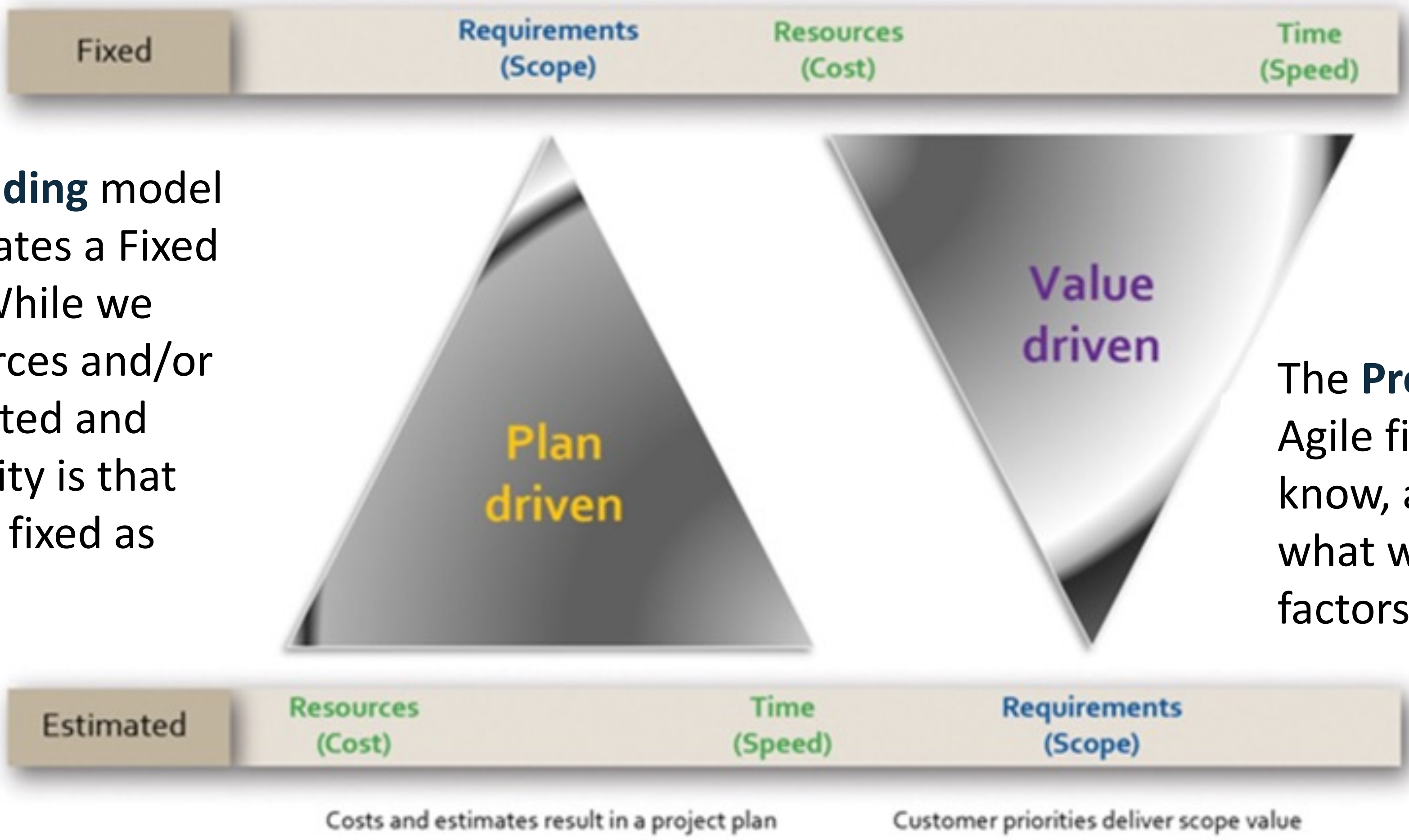
It's not just about developing products but about **building a culture that values customer satisfaction, collaboration, and continuous learning.**

Product Funding

Why Shift from Project to Product?

Paradigm Shift

The **Project Funding** model in Waterfall creates a Fixed Requirement. While we think the resources and/or time are estimated and flexible the reality is that one or both are fixed as well.



The **Product Funding** Model in Agile fixes what we reasonably know, and then we estimate what we can fit into those two factors.

Project Funding vs Product Funding

Project Funding Model	Product Funding Model
• Projects are time-boxed. There is an assumed start and stop date. This results in creating many Projects in many different processes and tools. • Teams and resources are staffed on Projects, often resulting in resources being “peanut-buttered” across multiple Projects at the same time. • Annual planning activities take months and force teams to estimate time-to-market and costs based only on very high-level requirements. • Principles align to typical Waterfall processes.	• Products are NOT timeboxed. Products exist if they are profitable and provide customer value. • A physical, software, or service Product can only exist if it meets customer needs and provides value. • Teams and resources are static and support a single Product or Product Group. Work is brought to these static teams, simplifying budgeting and planning. • Annual planning is reduced to weeks, since static teams establish budgets and costs. • Product backlogs are prioritized and ranked. • Teams move to high-margin Products. • Principles align to typical Agile methodologies and frameworks.

How To Build Product-led Organizations

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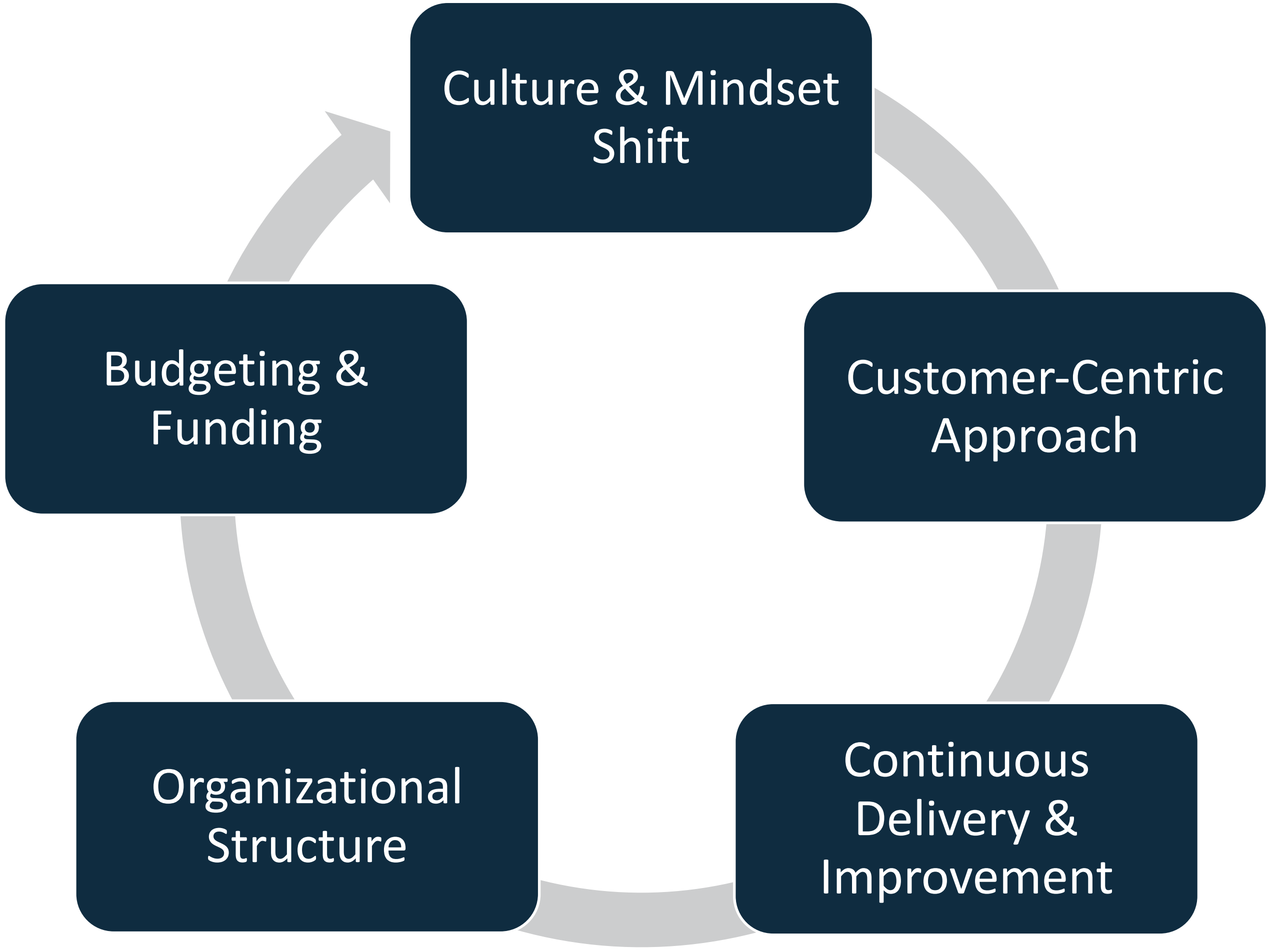
Moving from Project to Product – A Mindset Shift



Strategy Over a Plan

Strategic—Do our Products align with our overall business objectives, vision, and strategy?

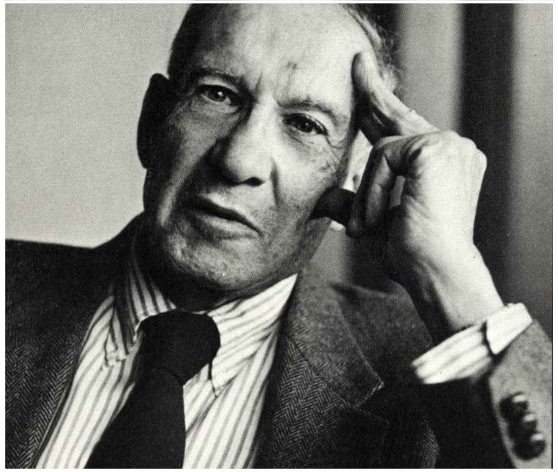
Treating a plan as a strategy is an anti-pattern

Mistaking strategy for a plan is a common mistake

Strategies are meant to drive outcomes

This Is How We Have Always Done It!

Cultural: Does our culture prioritize long-term customer value and continuous improvement?



“Culture eats Strategy for Breakfast”
– Drucker

Culture change comes last
– Kotter

➢ Instill, cultivate, and nurture **continuous improvement**

Fit-for-Purpose Supporting Toolset

Technical / Tooling—Does our technical infrastructure and tooling support Product, DevOps, continuous integration / continuous deployment, and both Waterfall and Agile project management?

Tool changes should support the process, not dictate the process

Adopting DevOps and/or DevSecOps is a deliberate choice in supporting product-led organization

Tackling debt should have an allocation every iteration

Governance Adds Value

Governance: Are our governance structures setup to support rapid decision-making, reduced administration, and increased autonomy at the team level?

01

Governance provides a clear direction and alignment across the organization.

02

Governance structures facilitate effective decision-making.

03

Governance helps in managing risks associated with the product.

04

Governance ensures that resources are used efficiently and effectively.

05

Governance promotes accountability and transparency.

In a product-led organization, governance is not about bureaucracy or slowing things down, but rather about providing a framework that enables **speed, innovation, and customer value.**

Fund the Products and Value Streams

Financial—Does our financial planning and budgeting processes accommodate the dynamic nature of product delivery?

- Who determines where the budgets are allocated?
- What will it take to move to continuous planning around funding allocations?
- Is the organization open to bringing work to the teams, and not teams to the work?
- Funding based on finish date creates anti-patterns.
- Funding scope impacts teams' ability to deliver complex products.

Challenges

Shifting to product-led is not always straight forward

Anti-Patterns of Product Implementations

Due to **misconceptions** about Product-Focused Development, organizations often treat Products and Projects interchangeably and **undermine** their efforts to realize the value of Product-Focused Funding and Development.

Common anti-patterns of Product

- Rename the "Projects" to "Products"
- Internal components are Products
- Capabilities labeled as Products
- Services that are provided within the business

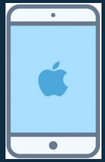
What Is a Product? Examples!

Insurance Underwriting

No, this is a component of selling insurance

Etsy

Yes



iPhone

Yes, Hardware, Software, App Store

Large Language Model

Could be **either**

Point of Sale Software

Could be **either**

ChatGTP

Yes

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Essential Traits of Successful Products

Product Traits:

- Should have the potential to be revenue-generating
- It must be a service, functionality, or capability that the customers can identify
- It should follow a defined product lifecycle
- Products can be tangible goods, intangible offerings, or combinations

Tangible	Intangible	Combination
Physical items like devices, clothing, consumer goods, or machinery	Services, digital experiences, or intellectual property	Integrated solutions blending software, hardware, and service

Characteristics of Products

- Relevant
- User-Friendly
- Cost Effective
- Unique
- High-Quality Design
- Scalable
- Adaptable
- Problem-Solver
- Comprehensive Documentation
- Brand Awareness

Product Lifecycle Examples

Product Lifecycle

Ideation → New Product Development → Active → Maintenance → End of Life → Done

Ideation
Lean business cases.
Product/market research.
Initial funding sources ID.

New Product Development
Develop prototypes.
Determine MVP.
Define monetization.

Active
Maintain existing functionality.
Additional new functionality.
Incremental improvements.
Grow revenue.

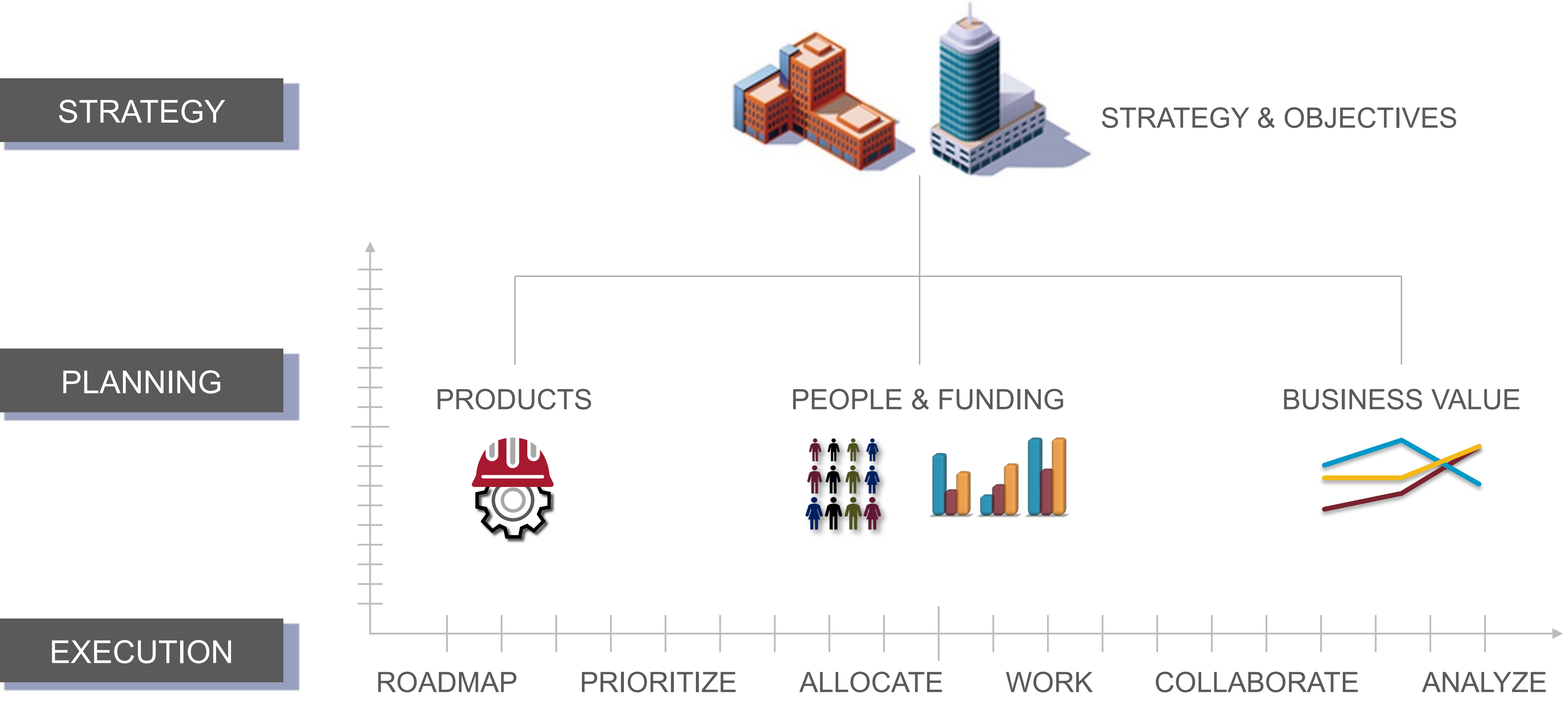
Maintenance
Maintain existing functionality.
Small enhancements.
Maintain revenue.

End of Life
Gracefully end Product.
Transition to new Product.
Cleanup infrastructure and/or contracts.

Done
Close Product.

Products in Clarity

Get **clarity**.



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Starting with CITs

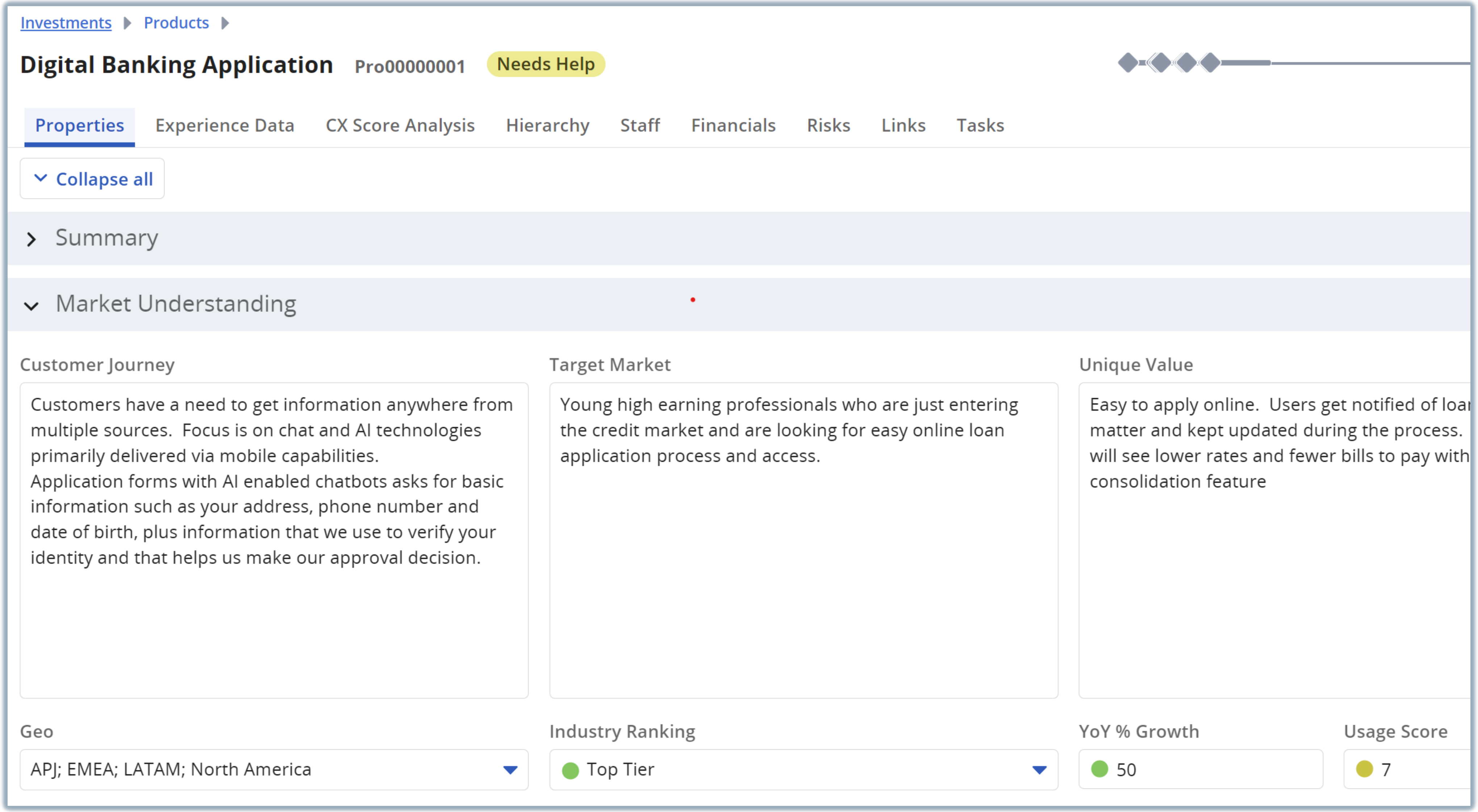
Investments

Value Streams | Portfolio Epics | Features

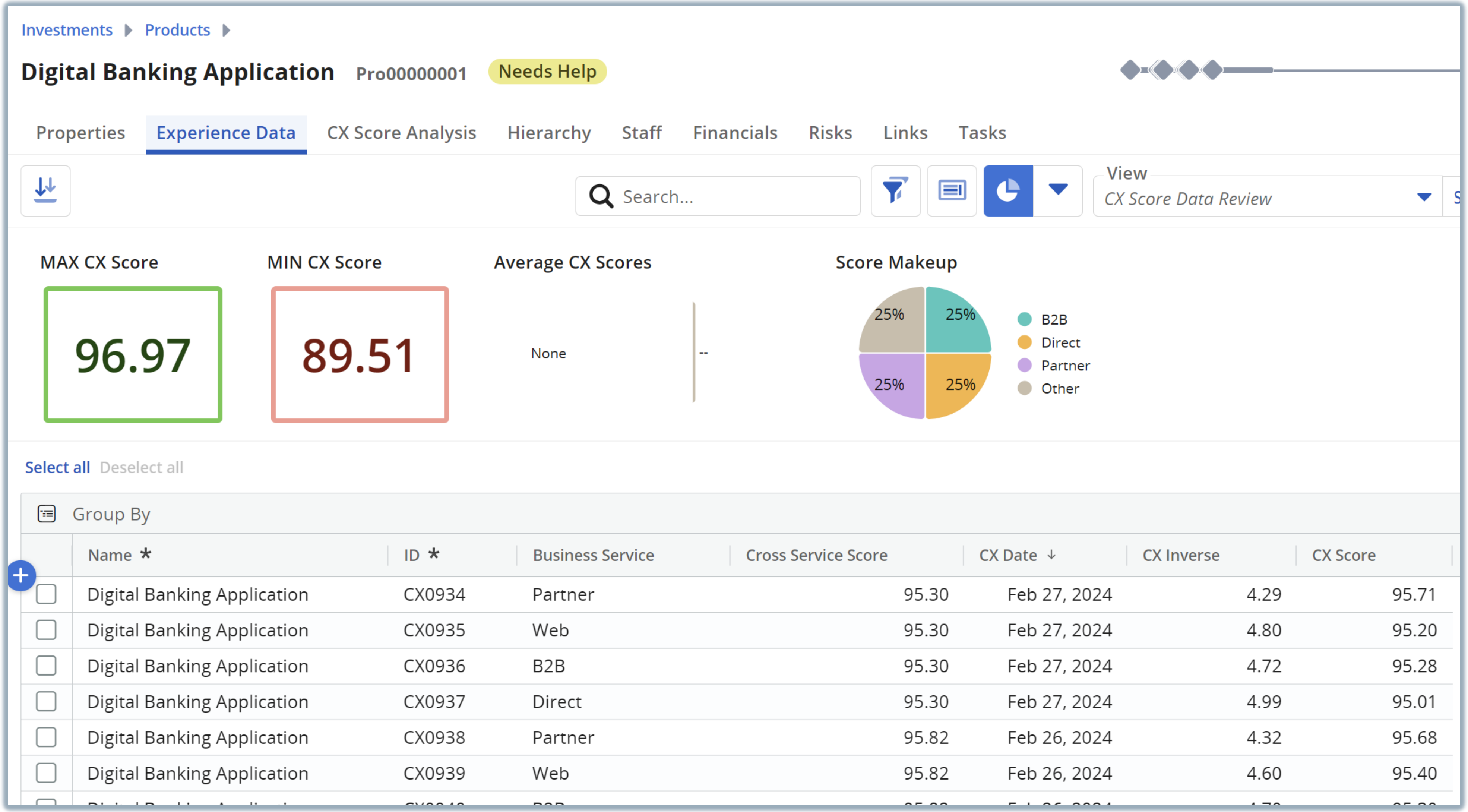
Technology Portfolio Management

Products | Product and Service Lines | Business Capability | Applications

Starting with CITs

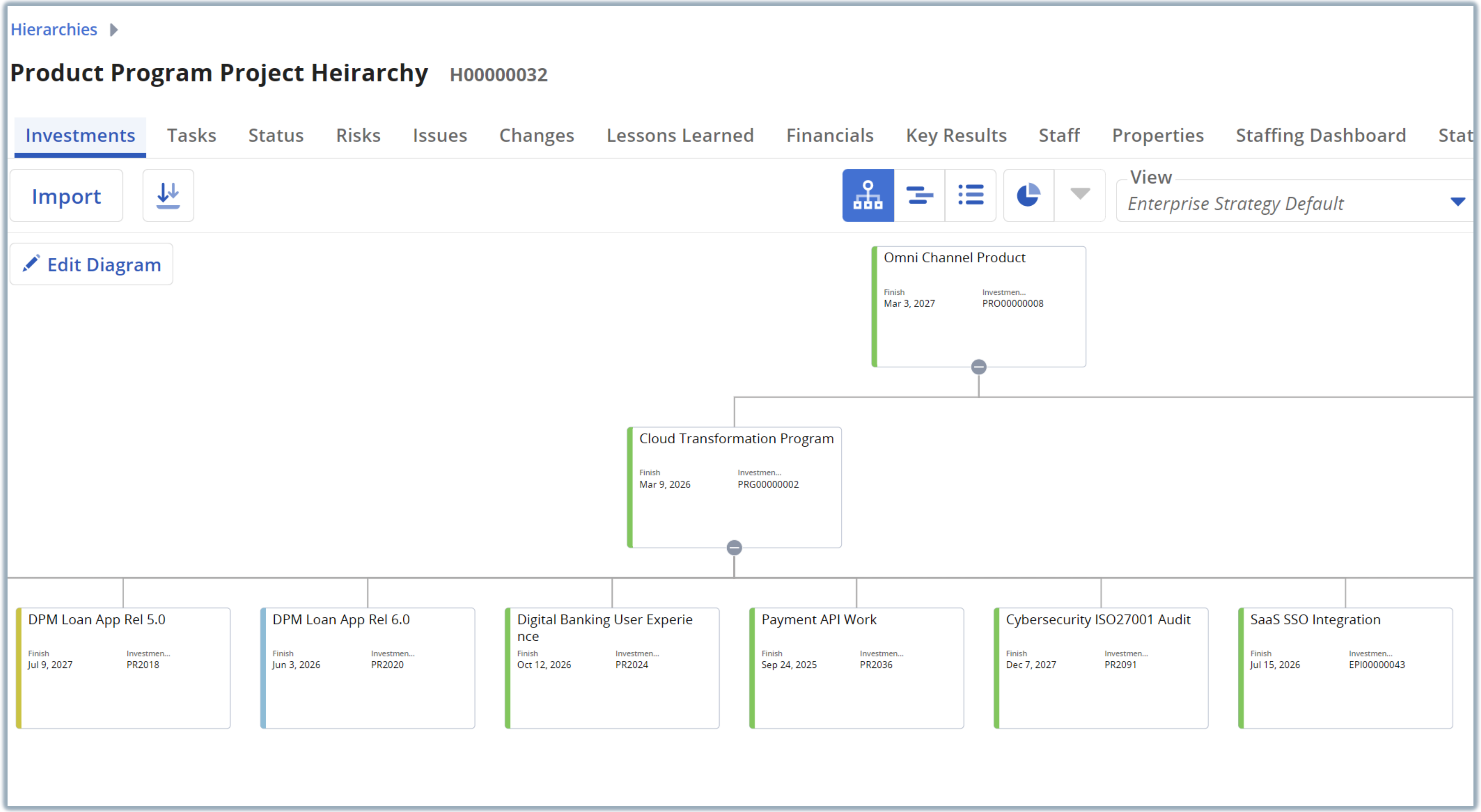


Starting with CITs

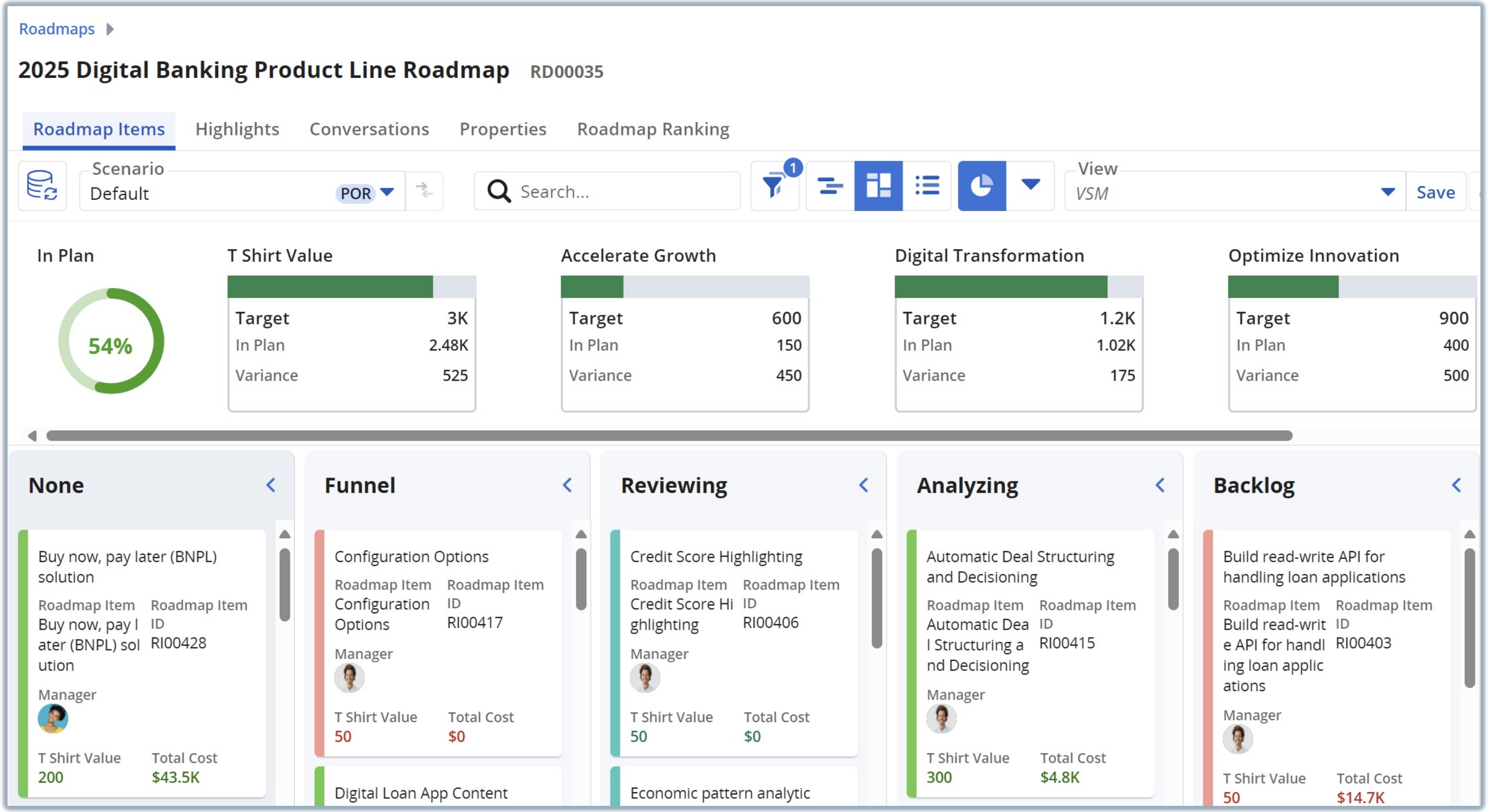


Name *	ID *	Business Service	Cross Service Score	CX Date ↓	CX Inverse	CX Score
Digital Banking Application	CX0934	Partner	95.30	Feb 27, 2024	4.29	95.71
Digital Banking Application	CX0935	Web	95.30	Feb 27, 2024	4.80	95.20
Digital Banking Application	CX0936	B2B	95.30	Feb 27, 2024	4.72	95.28
Digital Banking Application	CX0937	Direct	95.30	Feb 27, 2024	4.99	95.01
Digital Banking Application	CX0938	Partner	95.82	Feb 26, 2024	4.32	95.68
Digital Banking Application	CX0939	Web	95.82	Feb 26, 2024	4.60	95.40

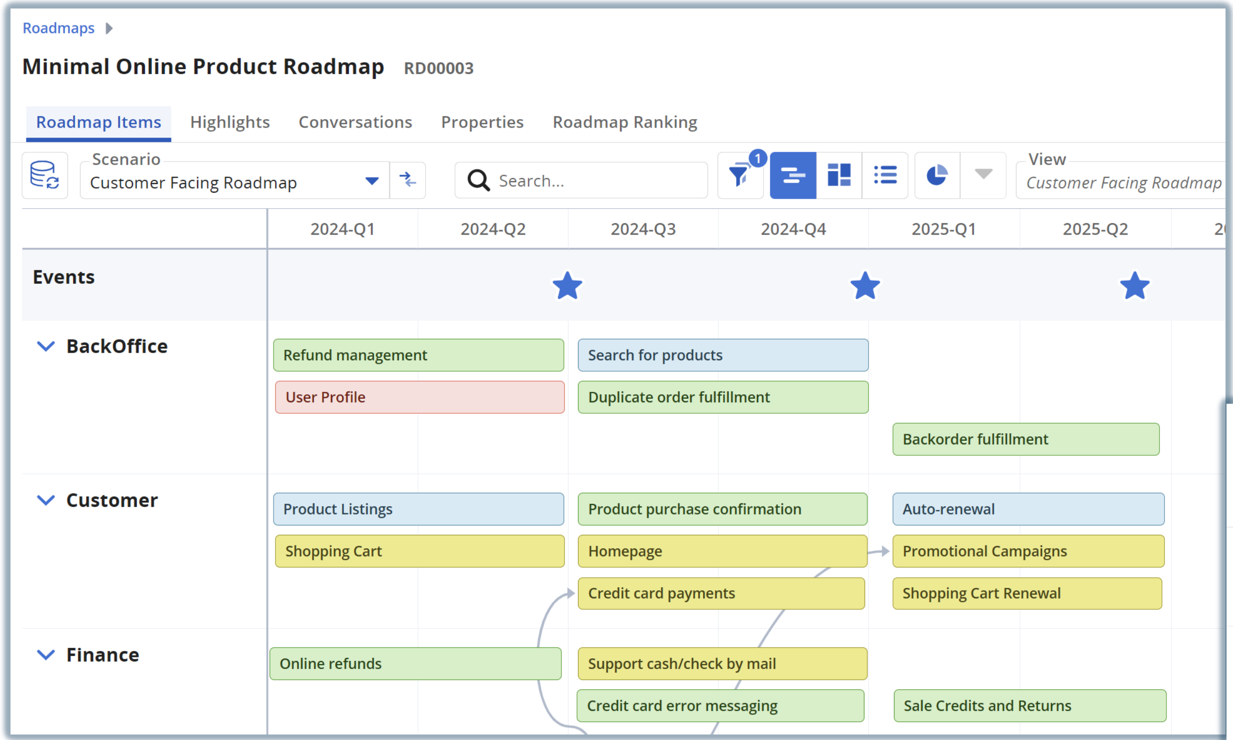
Leveraging Hierarchies

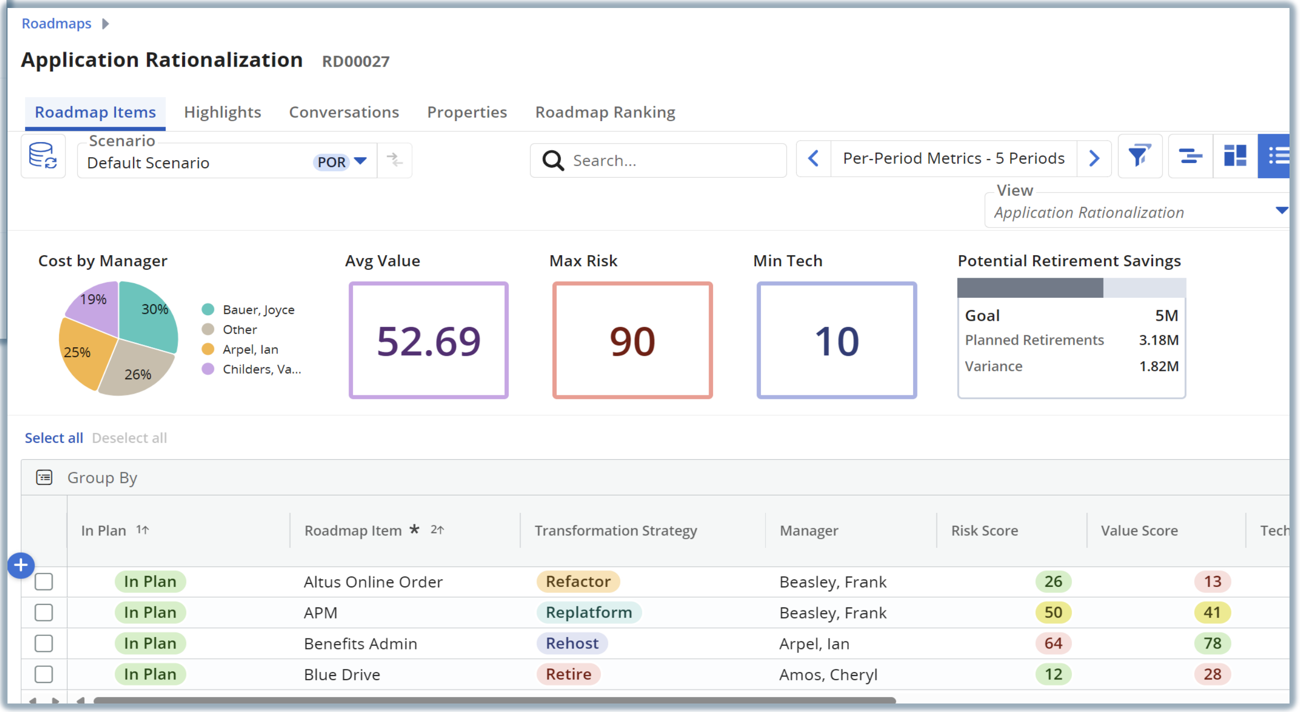


Product Roadmaps – Link to Strategy



Product Roadmaps





Let's Take a Look!

DEMO

Product Investment

Product Line

Product Roadmap

Value Stream

Conclusion

Final Thoughts on Product-Led Success

Avoid the
Agile Veneer

"We've always
done it this way..."

Doing the same thing, but
expecting different results

"Our tools define
the process..."

- A shift in terminology does not change the way we work.
- We must change how we define work, along with the process that manages the work.
- Promote continuous exploration and learning.
- Avoid sunken costs, be open to "pivots."
- Fund capacity to support Product strategy, Operations, and Maintenance.

Key Takeaways

- **From Projects → Products:** Align work around enduring value streams, not temporary initiatives.
- **Benefits at Scale:** Improved customer retention, market penetration, and brand loyalty.
- **Outcome-Driven:** Define the "why" and "what impact," not just the "how" or "what feature."
- **Funding for Capacity:** Invest in sustained product teams, not fixed scopes.
- **Build Product CITs in Clarity:** Product and Project Investment can both be Managed in Clarity. Leverage Hierarchies and Roadmaps to aggregate and visualize Product investments.

Questions?

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- Click on **Report PDU's**
- Click on **Course or Training**
- Class Provider = **Rego Consulting**
- Class Name = **Rego University**
- Course **Description**
- Date Started = **Today's Date**
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