How Project & Portfolio Management systems succumbed to the triple constraint & What to do about it...
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How Project & PPM (PPPM) Management systems succumbed to the triple constraint & What to do about it...

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Abstract

Objective

This brief paper will explain how planning systems have evolved or succumbed, if you like, to the triple constraint, which is such a core principle of planning itself. Because so many organizations have implemented Atlassian (Jira), we see supporting systems becoming oriented to the perceived needs of their own stakeholders. We will make the case however that the best portfolio management solutions are built from the ground up where the work is actually going on.

About Blended Perspectives

Blended Perspectives is an Atlassian Platinum Enterprise certified Solutions partner. We are a Canadian specialist consulting firm, operating out of Toronto, Canada, with offices also located in St. Louis, USA. Blended Perspectives specializes in consulting around enterprise processes such as SDLC, ITSM, PPM and Project Management that drive collaboration, innovation, and productivity. Our solutions encompass strategy, processes, application configuration and technical implementations. Our mission is to enable organizations to unleash the power of their teams and to leverage the true potential of their business via enhanced tools and processes.
A Short History of Planning Systems and IT

1. The Early Days – Wild West Planning

In the early days of IT, it was like the wild west where there were low expectations and quite often poor results. Much research was done on why projects failed. Project Management was immature, and the technology dominated, because it was so new. With reports like the Standish report on project chaos, a new awareness of how bad many projects were run shepherded in a new era of more disciplined project management. To give you a perspective the first version of MS Project for Windows was launched in 1990! That is only 28 years ago.

2. Professional (traditional) Project Management

The entry of the Project Management Institute and the PMP certification has had a strong and profound effect on the quality of planning and project management in general. For anyone who has had to pass the test, it’s a trial of the first order. I remember it well. Certainly, it has become the de facto standard for professionals in the planning space. Yet whilst it solved tactical issues, a lot of problems in delivery still existed and failures still occurred. During this stage of evolution (which is very much still with us), tools such as MS Project and Excel for control logs tackling issue and risk management, became prevalent and mostly still in use today. Projects were and are mainly managed in isolation. In addition, there are stages in the project lifecycle where certain types of tasks need to be completed. Let’s review though the key tenets of the PMI core methodology.

In this world Project Management is a set of processes:

1. **Initiating**: Processes performed to define a new project or a new phase of an existing project by obtaining authorization to start the project or phase.
2. **Planning**: Those processes required to establish the scope of the project, refine the objectives, and define the course of action required to attain the objectives that the project was undertaken to achieve.
3. **Executing**: Those processes performed to complete the work defined in the project management plan to satisfy the project specifications.
4. **Monitoring and Controlling**: Those processes required to track, review, and regulate the progress and performance of the project; identify any areas in which changes to the plan are required; and initiate the corresponding changes.
5. **Closing**: Those processes performed to finalize all activities across all Process Groups to formally close the project or phase.

In the application of these processes to IT there are a few issues in terms of how these processes functionally operate, and for instance, how lean construction/Agile is supported. And although they are not strictly sequential there is a separation between planning and executing that implies a form of Waterfall implementation. That is certainly how the majority of large projects have been run historically.

If one thing is sure – PM’s love their MS project plans. I have witnessed teams running their sprints, burndown charts – in fact all their reporting in Jira but with a shadow PM who has replicated the Agile journey as a stage in their MS project plan! In some respects, total control over a stand-alone plan provides the ability to ensure every change is captured against a baseline – but it requires constant attention and updating by often just the PM to maintain its relevance. Tools such as Jira and Confluence are antithetical to this as they strive to engage and encourage team participation in project execution.

The cone of uncertainty also dominates thinking in this realm – initial estimates would be based on assumptions and scientifically whittled down to more precise estimates, then ultimately delivered. Of course, when everything changes, that’s where the trouble starts. No one ever remembers the variance expectations, also when the end result is five times more expensed than hoped for. In my view, this kind of planning places an emphasis on scope management.

3. **Portfolio**

Enter the third stage of maturity; Portfolio Management. In this world, the key strategy is to capture all the project work and costs. Systems such as Planview or Clarity have prevailed. A typical process is that every project’s budget is loaded into the system and all of the staff are assigned. It’s then actually similar to an accounting system. Does the approved spend on IT cover the assigned staff? PMs effectively identify who they need on their projects and then staff managers intercede and approve. Status is often reported in the system as well. These systems can be considered the equivalent of an ERP for IT. The marketplace for “PPM” tools is summarized fairly comprehensively but narrowly by a relatively recent report by Insight Research entitled;

**Project Portfolio Management (PPM) Market report categories the global market by Platform Type, Deployment Type, End Users and Geography.** In this report the following vendors are the focus of their research:
• Ca Technologies
• Hewlett-Packard Development Company L.P.
• Planisware
• Changepoint Corporation
• Innotas
• Oracle Corporation
• SAP SE
• Celoxis Technologies
• Planview
• Workfront, Inc.
• Microsoft Corporation

But no Atlassian. No Jira.

The below definition from Apps Run The World however, makes it clear that in fact a lot of what happens in Jira is exactly the same as a PPM; (note this doesn’t make the distinction as to what type of project it is).

“Project and portfolio management (PPM) applications include those that automate and optimize the initiating, planning/scheduling, allocation, monitoring, and measuring of activities and resources required to complete projects. PPM applications also cover certain aspects of IT service management especially those that involve project portfolio management within the IT domain.”


If you are to believe them the market looks like this;
The good news is that Atlassian rates a mention. The bad news is that the market size as defined by them is really small – some $2.5B – whereas others will tell you it’s closer to $8B. Later we will look at how Gartner views this space – which is different once again. I think the confusion here is that no one is looking at the PPM market appropriately, in its entirety.

Implementation – if you have ever implemented an IT PPM though, at an enterprise level, you would have likely seen the pain to make them work. Furthermore, for most, the question is whether, in the end, they represent real truth; since very little actual collaboration or work is done in them. Project Managers will tell you that they manage plans in MS Project, track time in a separate system, create PowerPoint status reports, enter resource management info and status again via the IT PPM and so on. In fact, the endless bureaucracy of status reporting and PowerPoint decks can quite literally drive PMs crazy.

4. Agility

There is a great line in Top Gun; “I feel the need, the need for speed!” In the last five years, there has been a great amount of pressure to move to a more agile approach to development – away from what has been labeled “the waterfall mindset”. We love Jira and there is no doubt that it’s the most widely used Agile planning tool in the market today. The following chart illustrates the huge dominance Atlassian (Jira) has in the Agile SDLC market space.

Source http://www.blendedperspectives.com/dominators-pretenders-legacy-agile-tools/
What this is telling us is that the majority of large organizations today are using Jira and associated tools to develop software (especially as it related to Agile initiatives). It contrasts markedly with the previous views in that Microsoft doesn’t even get a mention.

A challenge with Agile is enterprise scalability because Agile is really a technique that emphasizes certain processes and behaviors leading to better, faster development or delivery. It’s great but the question is whether it scales or whether there is some overall superstructure such as SAFe that provides a universal answer. However, the further you move away from the nucleus of an Agile team, the less the principles seem to apply, especially at the portfolio level. There is no question that Agile estimation principles – such as transparency and DevOps have greatly contributed to improving IT. But Agile teams moving at different speeds, present some interesting challenges for Portfolio Managers. Agility emphasizes above all else speed – real code over designs for instance. This, of course, is antithetical to the Portfolio Managers who emphasize cost and control.

So where does that leave us?

Let’s go back to that old triple constraint model. Basically, each stage of evolution and the tools that support them tend to lean towards certain aspects of the triple constraint model. In addition, certain stakeholders adopt tools for various purposes and can perhaps unwittingly bias the view of what is happening in their universe. I think we can see easily that even how you define the market distorts the true picture of planning approaches in enterprises. Another idea we propose here is to replace quality – which of course is important; with the truth. It’s the truth we want most when we plan or implement a plan – not the filtered perspective of how much something costs, how long it takes or what it delivers.

The realization that we have tools fragmentation driven in part due to stakeholder interests opens up the possibility to consider a bolder more perfect model. Imagine a new era of planning and management that emphasizes a focus on supporting the executional elements of project management and the scaled truth of what that means, rather than fragmented systems representing different versions of the overall truth. Sometimes it’s just best to call a spade a spade – building a PPM system that is
separate from the work being done is like painting a picture of someone, whom you have never seen – rather described to you in varying degrees of accuracy.

It thus becomes a poor shadow of the truth that is so very important in terms of performance management.

It’s easiest understood by contemplating how such a truth is best achieved. Some use cases best explain this –

- Track time against the *actual work* being done
- Aggregate results from *where they are derived*
- Planners and developers and business teams working off the *same milestones*
- Planning methods suitable for the type of plans *needed*
- Compare reported status to *actual real-time metrics*
- End to end *integration and traceability* to operations such as DevOps systems like code repositories
- Incorporation of knowledge management and documentation

**Starting to sound familiar?**

To achieve these features, we really need everyone working in one system. To do that you need a very flexible application. That’s where Jira comes into play. Firstly, in numerous companies today, many if not most developers are there already. Yet if we are to achieve this goal we really need to provide the necessary tools for all teams rather than take an overly strict definition of what can and can’t be done using it. The good news is that with all of the add-ons available in the Atlassian world, there is something for everyone. This also calls for Atlassian stack owners in their organizations to embrace add-ons (safely). If you need Gantt charts, issue logs, risk management, budgets or time management it can all be in one place; Jira and by context linked to its sister application, Confluence from a knowledge management and collaboration perspective. This then enables ubiquity – or ubiquitous planning and management. Proof of this is the evolving use of Portfolio Add-ons in Jira as well as the large numbers of organizations who all record their time in the application.
Call to action – tread carefully

Many enterprise systems such as Planview or similar have taken a lot of effort to set up (no matter how unpopular) and so the best way to create a ubiquitous planning & management model is to start from the ground up as the diagram below portrays. In this model, Jira becomes the book of record that will send out data to other portfolio and planning “dependent” systems and then ultimately replaces them. The following stages are good milestones to work towards – every organization is different and will take various amounts of time to get to the desired state of real-time, ubiquitous PPM.

And remember!!

If you want to find out more about how Blended Perspectives can help you with best project management practices, contact us today!