

Strategy Training Guide



Strategy

splitvice

Splitvice offers you a new way of managing work on all levels of your company. Of course, an innovative solution to manage work requires a slightly different approach than what you are used to.

We call the **Strategists** those people that follow up the multi-project environment from a helicopter view, and that make strategic decisions. This guide is intended to quickly introduce new Strategists to the essential concepts of Splitvice and will learn them to better control work throughout the entire enterprise with the help of the work management staff.

Key concepts

- Projects versus operations
- Scenarios

Projects vs. Operations

Every company can basically split its daily activities in two categories:

- Projects, which are the activities you do to create a certain product (a building, a machine, a web application, ...). This can be related to one customer order, or could be a generic product. Any project has a start and an end date.
- Operations, which are activities you do on a regular interval and are not directly related to an on-going project. E.g. a weekly administrative task you have to do or a monthly personnel meeting. Operations are recurring, but the resources they consume can vary. For example, the first 3 months after a product is released, there might be a lot of service calls. Occasional service work on a finished project is also part of operations.



When you start with Splitvice you can start with only a few projects and operations for a limited set of people and gradually introduce the tool in your enterprise. But you get the most from Splitvice if for the group involved, all work is managed.

Projects vs. Operations

Projects

- Defined on a strategy level because you can decide to do or to not do them (e.g. ROI not sufficient, not enough resources, etc...)
- Work and expenses (budgets) are defined and must be closely monitored
- Priority between projects, timing and budget can change depending on the business

Operations

- Defined on a work management level because they primarily exist to make sure the time spent on them is taken into account
- Knowledge workers will create the work items for a specific operation whenever they do that kind of work. This way they can also log work for operations.

Project work

- Each project requires a certain amount of work and money which you can define in the project properties. This is the work and cost seen from a “high level”
- Typically, this is the “first estimate”. You get this when you sell a project from the offer that was made to the customer, or, you get this from an initial study regarding a new product you will be making
- Later on, in the work management mode, your Project Managers (PM’s) and team leads will further refine this work to do in different work packages
- These initial estimations are already useful to see the impact of this new project on your complete portfolio

Creating projects or operations

- Work managers can create projects and operations
- However, a created project has not yet an impact on the portfolio. Before it has, it must be made **active** first. Making a project active is done on the strategic level.

What is a scenario?

- Scenarios allow you to answer typical questions like:
 - Will we make the deadline if we hire three extra engineers?
 - If we postpone or even stop project X, will project Y be delivered on time?
- Scenarios allow you to make different combinations of projects that will or will not be executed, with extra people or budget, or with less people or budget, and see what the effect of these changes is on your planning
- Scenarios combine real/historical data (logged work) and combine this with future estimations to give you the most accurate view on your portfolio.



Scenarios are one of the most powerful concepts in Splitvice, and at the same time a unique function that you will not find in other tools!

Activating scenarios

- There is always one scenario active. This is the “current” combination of projects and their priorities you think is correct for your portfolio
- If you solve predicted conflicts making the necessary adjustments or, at a certain point in time another scenario would seem more favourable, the strategy can be changed by simply activating that scenario
- The active scenario can be altered but do this with care. “playing” with it to test a number of options, would always immediately impact your ongoing business and priorities. It’s better to copy the current scenario to a new one and simulate this alternative scenario.



Activating a scenario immediately affects all the work being done in your company and changes task and/or priorities.

Creating scenarios

The screenshot shows the SplitVice application interface. On the left, a dark green sidebar contains a menu with categories: WORKING ON PORTFOLIO, ADMINISTRATION, STRATEGY, and WORK. The 'STRATEGY' category is expanded, and the 'Scenarios' option is highlighted with a red box. The main content area is titled 'Rocket Science scenarios' and features a red circle around a '+' button next to the title. Below the title is a table of scenarios. A context menu is open over the 'Do only operations' scenario, showing 'Copy' and 'Delete' options, with the 'Copy' option highlighted by a red circle.

Name
Default
Do only operations
No Mars
Only Andromeda
Only launch platform
Only tech project
Only the moon
single project
STU
Try for transaction
variant on default

1. Go to the scenario overview in the strategy menu

2. Click the [+] button next to the title OR
Copy an existing scenario



You can define as many scenarios as you want, but you can also modify the scenarios when you are reviewing the results

Scenario - General

Add a new scenario

GENERAL PROJECT DECISIONS OPERATION DECISIONS NEW PEOPLE EXISTING PEOPLE USER ACCESS

Name


Description

SAVE CANCEL

Provide a name and optionally a description.
The description will be visible if you hover over the name
of the scenario in the scenario list.

Scenario – Project decisions

Add a new scenario


GENERAL	PROJECT DECISIONS	OPERATION DECISIONS	NEW PEOPLE	EXISTING PEOPLE	USER ACCESS
Project ↑	Will be executed	Weight	Set earliest start date		
2nd for weight	<input checked="" type="checkbox"/> execute	<input type="checkbox"/> set 100	<input checked="" type="checkbox"/> set date 	01/07/2020	▼
Antwerpen leefbaar	<input checked="" type="checkbox"/> execute	<input type="checkbox"/> set 100	<input type="checkbox"/> set date		
Black hole	<input checked="" type="checkbox"/> execute	<input checked="" type="checkbox"/> set 80	<input type="checkbox"/> set date		

Check whether the project will be executed or not in this new scenario

Set the weight of each of the projects in that scenario. The weight is a measure for the importance of this project compared to others. A good weight is e.g. the cost of delay

If you decide a project is executed, you can delay the execution. This can be for various reasons, to optimize your portfolio or because it depends on external data.

Scenario – Operations impact

Add a new scenario 

GENERAL PROJECT DECISIONS OPERATION DECISIONS NEW PEOPLE EXISTING PEOPLE USER ACCESS

Operation From

SAVE CANCEL

- Add a change in operation decisions
- Choose the operation to modify.
Choose a period, and the new load on the different roles.

Add operation decision

GENERAL ROLE LOAD COST

Operation
IP management

From
14/10/2017

To
15/10/2017


Scenario – People

- A typical question you want to answer and where scenarios will help, is:
 - What if you hire an extra engineer?
 - How many extra people do you need to make it in time?
 - What if we let two employees go
- Scenarios allow you to define this type of assumptions very easily. When comparing scenarios, you can then see what the impact is of those assumptions.
- The new people tab allows you to define extra resources
- The existing people tab allows you to reduce your resources, or to simulate extra skills



The users you add or remove are assumptions, thus they do not impact your portfolio user list

Scenario – New people

Add a new scenario 

GENERAL PROJECT DECISIONS OPERATION DECISIONS **NEW PEOPLE** EXISTING

Name ↑ Roles

SAVE CANCEL

Edit user details

DETAILS ROLES TRAINING

Name

Availability 100 %

Start date 06/12/2019

☐ Last date 06/12/2019

☐ Administration

☐ Astronaut

☐ CEO

☐ Deep admin

☐ Electronics

☐ Finance

☐ Mechanic

1. Click the [+] button next to the title

2. Give a meaningful name for these resources, like “new project manager 1”.

3. Set a start date for this resource and its availability

4. In the roles tab, select which roles this new resource will be able to execute, and their score for this role

5. In the trainings tab, select how much training will take in FTE's of other people, e.g. 0.5 FTE for 10 days.

Scenario – Existing people

The screenshot shows a web interface for adding a new scenario. At the top, there's a title 'Add a new scenario' with a red circle around a '+' button and a red arrow pointing down to a modal. The modal has tabs: GENERAL, PROJECT DECISIONS, ITERATION DECISIONS, NEW PEOPLE, EXISTING PEOPLE (selected), and USER ACCESS. Below the tabs, there's a 'Name ↑' header and a 'Roles' column. A 'SAVE' button is on the left. The modal title is 'Add user decision in this scenario'. Below it, a dropdown menu shows 'User to modify in this scenario' with 'Harry Streets' selected. At the bottom of the modal are 'ADD' and 'CANCEL' buttons. A red arrow points from the 'ADD' button to a second modal titled 'Decision for Harry Streets'. This second modal has tabs for 'DETAILS' (selected) and 'ROLES'. Under the 'DETAILS' tab, there are two fields: 'Availability' with a checkbox and the value '100', and 'End date' with a checkbox, a calendar icon, and the date '06/12/2019'.

Add a new scenario

GENERAL PROJECT DECISIONS ITERATION DECISIONS NEW PEOPLE EXISTING PEOPLE USER ACCESS

Name ↑ Roles

SAVE CANCEL

Add user decision in this scenario

User to modify in this scenario Harry Streets

ADD CANCEL

Decision for Harry Streets

DETAILS ROLES

☐ Availability 100

☐ End date 06/12/2019

1. Click the [+] button next to the title

2. Select the user you want to modify in this scenario

3. Enter the availability, an end date or a change in role

Scenario – User access

Add a new scenario

GENERAL

PROJECT DECISIONS

OPERATION DECISIONS

NEW PEOPLE

EXISTING PEOPLE

USER ACCESS

☐ Limit visibility to:

☐ Denis A.

☐ Igor.P

☐ Jeff Fitzgerald

☐ Jurgen Devlieghere

☐ Keynes

1. Select one or more users that are able to see this scenario

Important: you will only see the users that have the strategist or champion profile in this list

Very important: scenario user access must be carefully set since the choices evaluated include sensitive data like letting certain people go.

Managing scenarios

The screenshot shows the splitvice interface. On the left, a sidebar contains a menu with 'STRATEGY' expanded, and 'Scenarios' highlighted with a red box. The main area displays 'Rocket Science scenarios' with a table of scenarios. The first scenario, 'Do only operations', has a yellow box around its 'play' button. At the top of the table, there is a 'Configure columns' button (three vertical bars) also highlighted with a yellow box. The table lists various scenarios like 'Default', 'No Mars', 'Only Andromeda', etc.

Name
Default
Do only operations
No Mars
Only Andromeda
Only launch platform
Only tech project
Only the moon
single project
STU
Try for transaction
... on default

If you want to see what projects are active in what scenarios, click the “Configure columns” button

Click on
“Scenarios” to see
the list of
scenarios

Use the “play” button to activate a scenario. From
then on, this set of projects, priorities and delays is
the active scenario for your portfolio



Creating scenarios

Practice

- Enable the Strategy mode in the left upper corner
- Go to the scenarios overview screen
- Define a new scenario. Typically you define a first scenario where you will execute everything.
- Define an extra scenario where you only execute one project. This is needed for our next section in this training, where we will compare two scenarios

Portfolio simulations:

- scenario calculations
- scenario metrics

Scenario calculations

- In the scenario calculations, you can calculate a number of metrics for a specific scenario
- Really powerful is the possibility to compare these metrics for different scenarios
- While comparing the different scenario calculations, you can further tune the scenarios to optimize your project portfolio
 - Delay or cancel certain projects
 - Impact of people decisions
 - Adjust operational impact
 - ...

Comparing scenario calculations

splitVice < Rocket Science scenarios + [] [] Quick search

WORKING ON PORTFOLIO

Rocket Science

DASHBOARD

ADMINISTRATION

STRATEGY

Scenarios +

Default

Full load

Timings

Resources

Cost

Mandays

Project Delivery

Name ↑

Default Active

[Do only operations](#)

[No Mars](#)

[Only Andromeda](#)

[Only launch platform](#)

[Only tech project](#)

[Only the moon](#)

[Single project](#)

[STU](#)

[Try for training](#)

[variant on default](#)

Choose scenario to simulate

Scenario

☒ Default

☐ No Mars

☒ Only the moon

☐ Only Andromeda

Go to scenarios in the strategy section

Click the [+] button to add / choose a different scenario

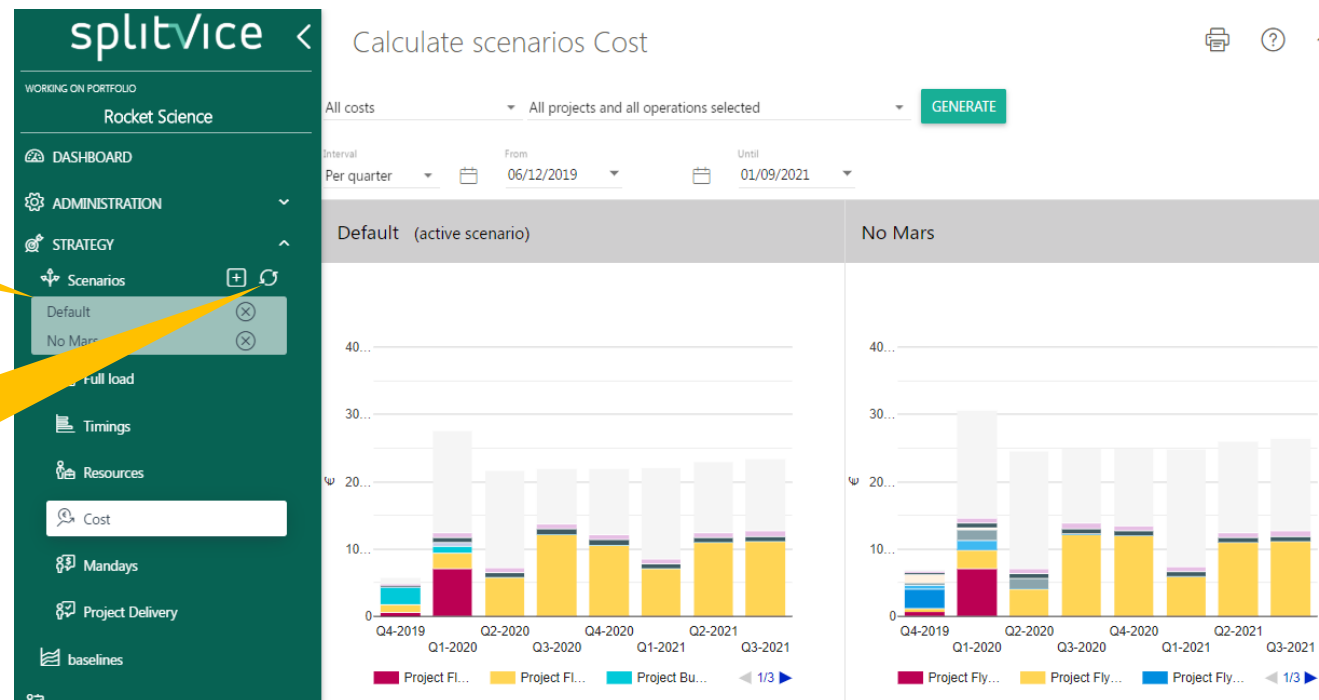
. You can select 1 or more scenarios. If you select only one, you can see the metrics Splitvice calculates on that scenario. This can be used to follow up certain parameters. If you select multiple, you can compare each of the metrics. This will be used to see how certain scenario decisions compare to other scenarios.

Comparing 2 scenarios

- When adding 2 scenarios, they are shown side by side
- The scale of the graphs will always be the same, so you can compare visually
- Projects are shown in their own color, so it's easy to compare

Here, 2 scenarios are compared

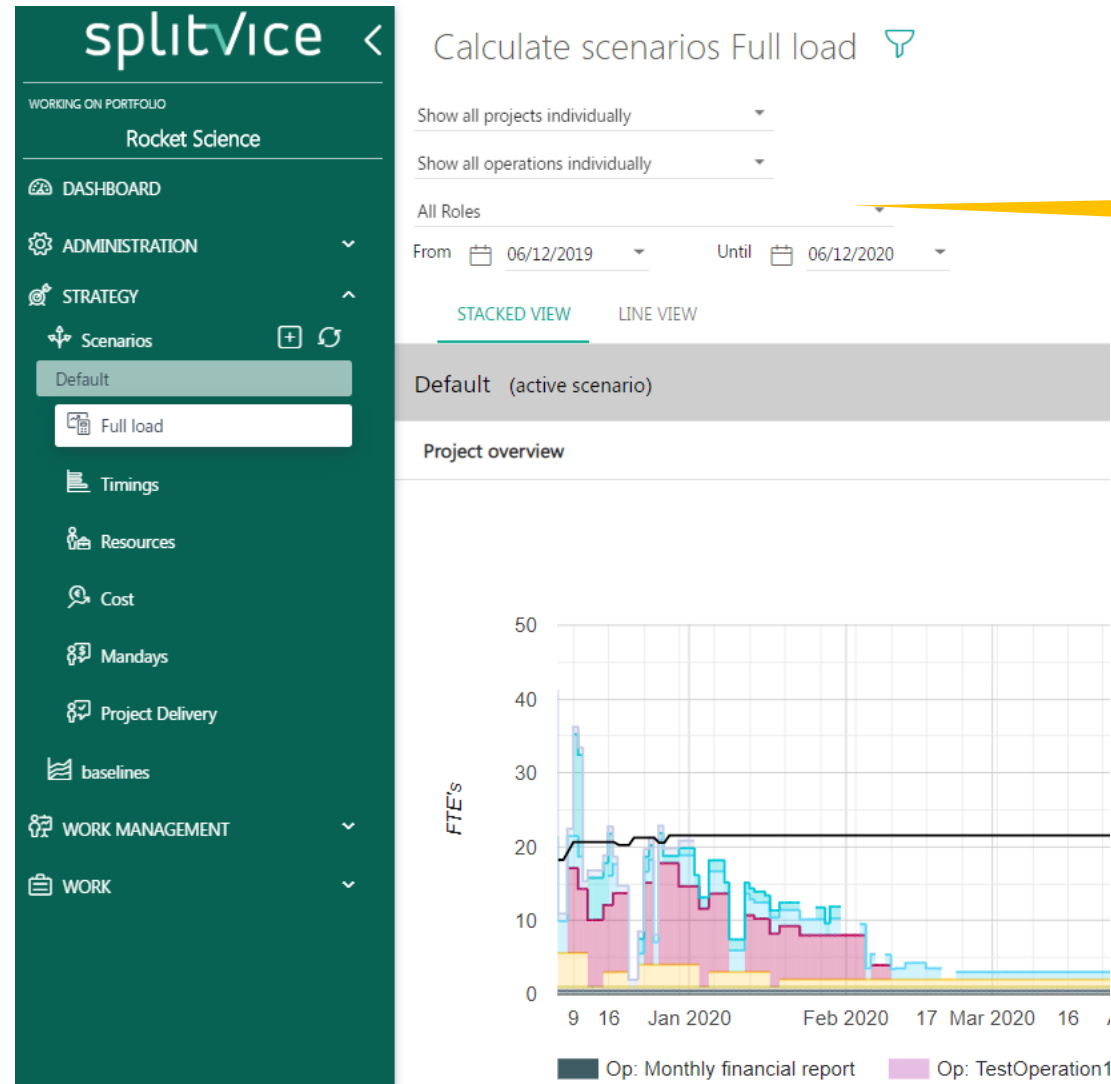
Use the refresh button to re-calculate. This can take some minutes.



Role load calculations (metric 1 of 6)

- Shows how many resources are required, in total, or per role, in function of time if all projects need to be delivered without any delay.
- Shows where resources are not all used
- Shows where you lack resources
- Assumes you want to execute everything as fast as possible. This means, as laid out by the work packages in the project, and taking into account optional start date for this project set in the scenario
- You can play with the start date of a project in the scenario, or, by adding/removing resources to make best use of all your resources

Role load calculations (metric 1 of 6)



You can see all roles together or zoom in on 1 role

Each project and operation shows in its own color the need (in FTE's). The black line shows how many FTE's are available.

This is the only view where the projects are shown as if

- they don't influence each other
- a lack of resources has no effect on the planning

Project time simulation (metric 2 of 6)

- Shows how long the completion of all your projects will take, based on the resources of the scenario (current users and their roles + any extra/less defined as part of the scenario)
- The scenario uses the weight of a project and the critical path to determine the priorities in the simulation of the future work whenever conflicts arise.
- Example: In a period where you have only one resource for a specific role, which must be shared over two work packages where this role is required, time to complete these work packages will be extended so they can be completed by that one resource.
- You can play with the start date of a project in the scenario, or, by adding/removing resources to move the end of certain packages forward or backward
- If you have a lot of shortages in your role load calculation, you'll notice timing goes a lot further to complete your portfolio (compared to each project viewed separately)

Project time simulation (metric 2 of 6)

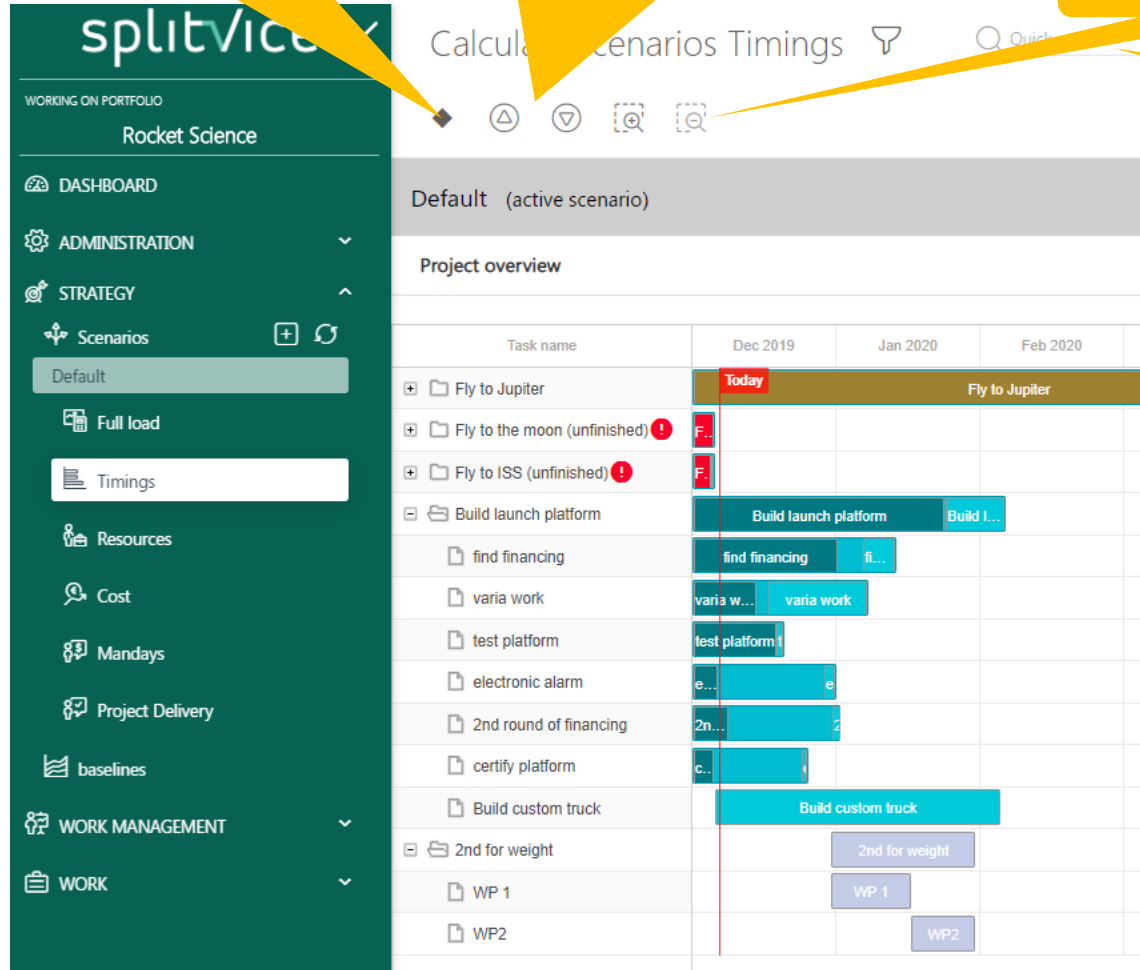
Show top milestones

Collapse / expand all projects

Zoom in or out

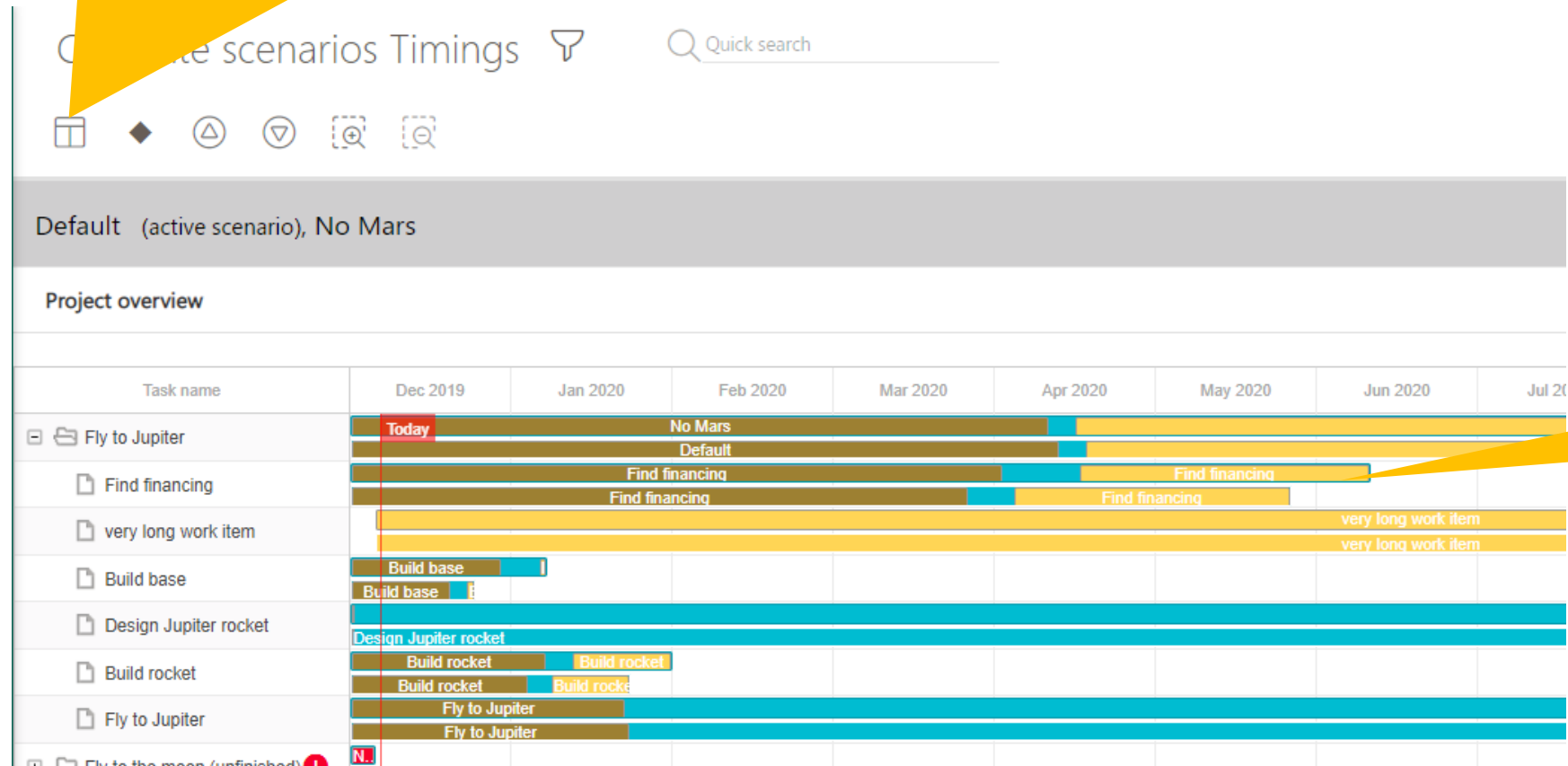
Quickly limit projects

The top level work packages are shown



Project timing simulations combined

Use this button to combine 2 Gantt chart of different scenarios into 1, rather than side-by-side

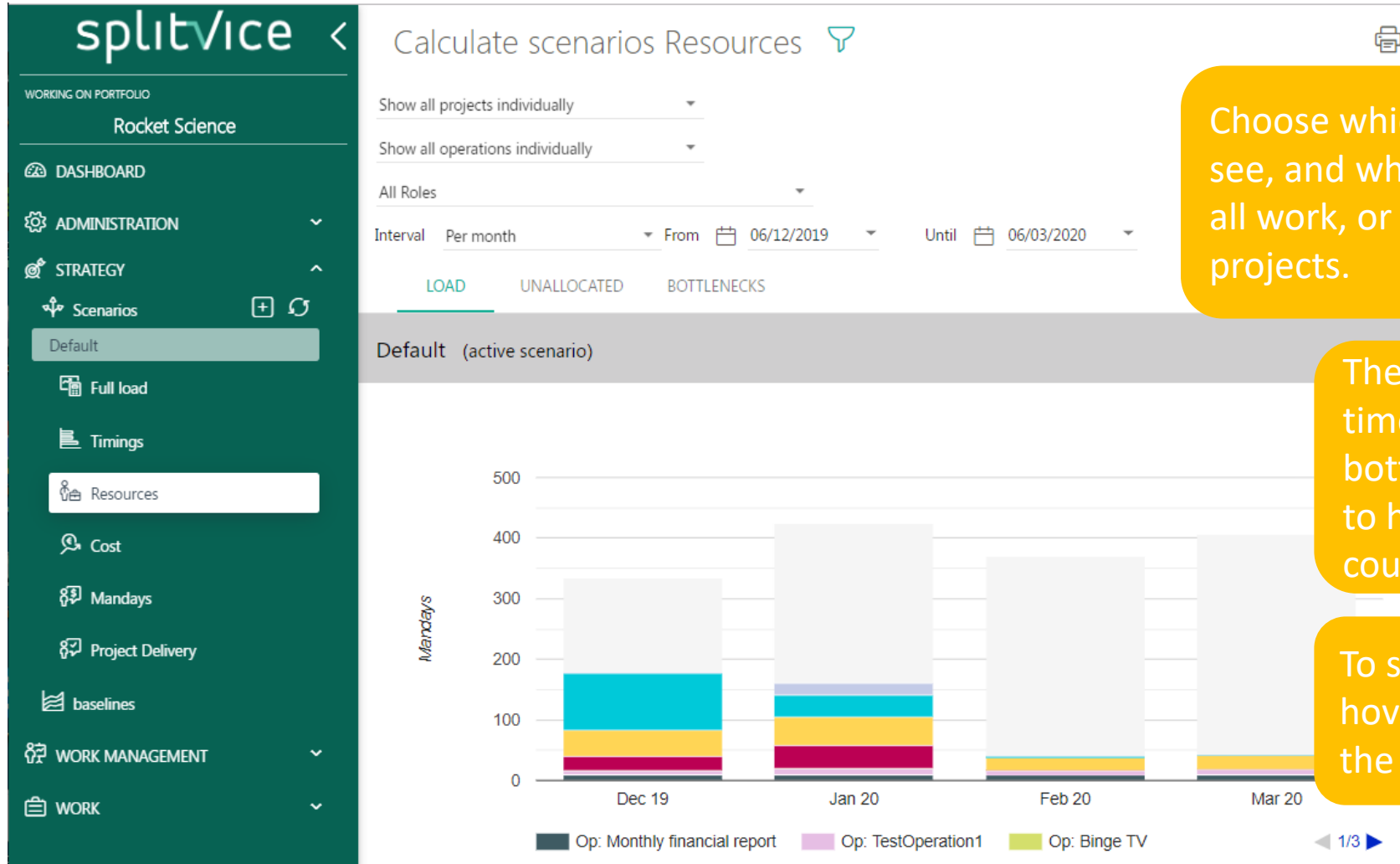


Timing differences become obvious

Resources simulation (metric 3 of 6)

- The resources simulation handles 3 views on the load on your organization
 1. the **load** of FTE's that goes to each project and operation.
 2. The **unallocated** FTE's of all roles combined in 1 graph
 3. The **bottleneck** roles and projects
- You can see this per month, per quarter or per year.

Resources / Load simulation (metric 3 of 6 - part 1)

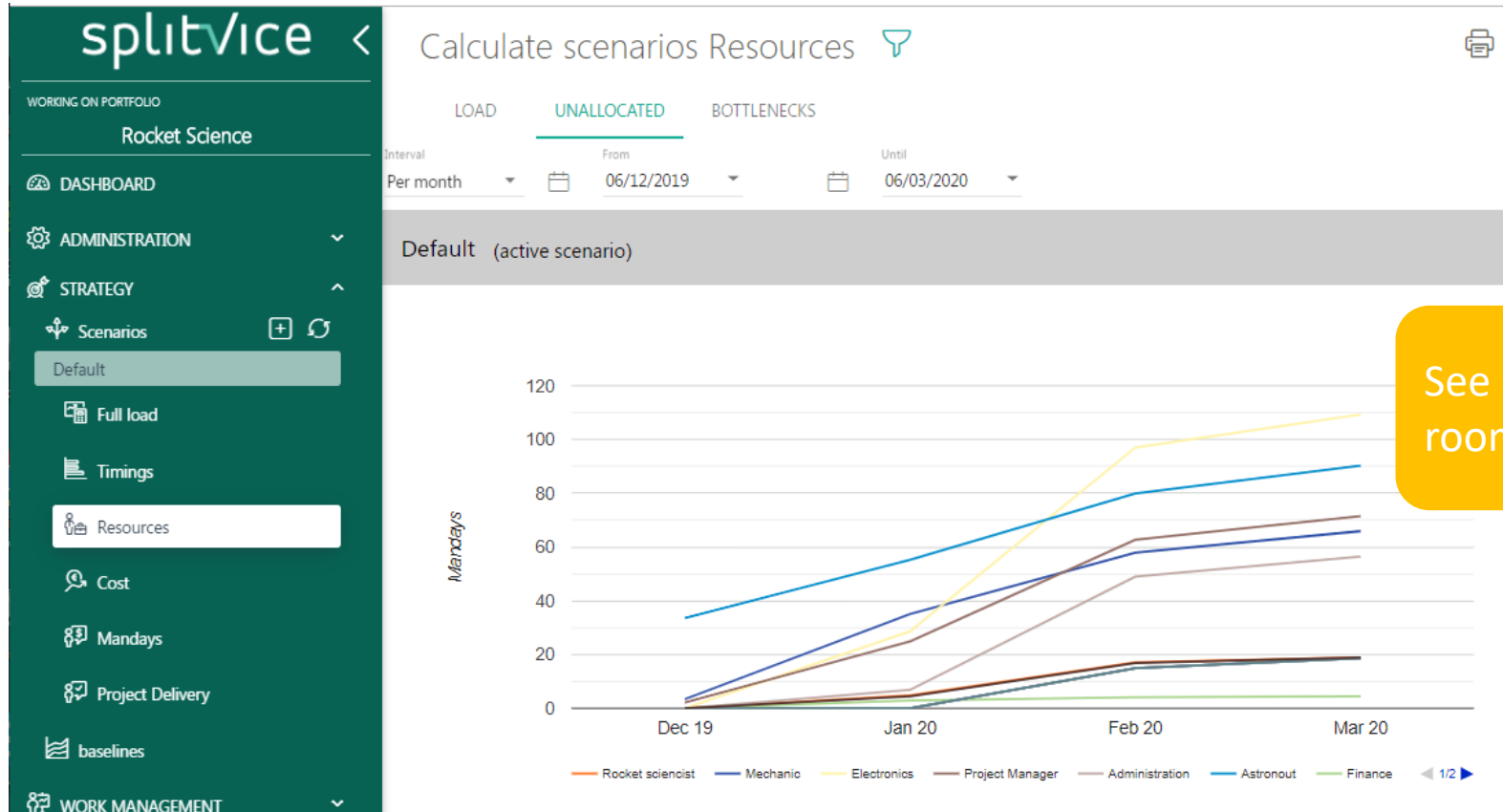


Choose which roles you want to see, and whether you want to see all work, or e.g. focus on the projects.

The grey area shows available time. Since each project has bottlenecks, it's perfectly normal to have some free time, but of course, you want to minimize this.

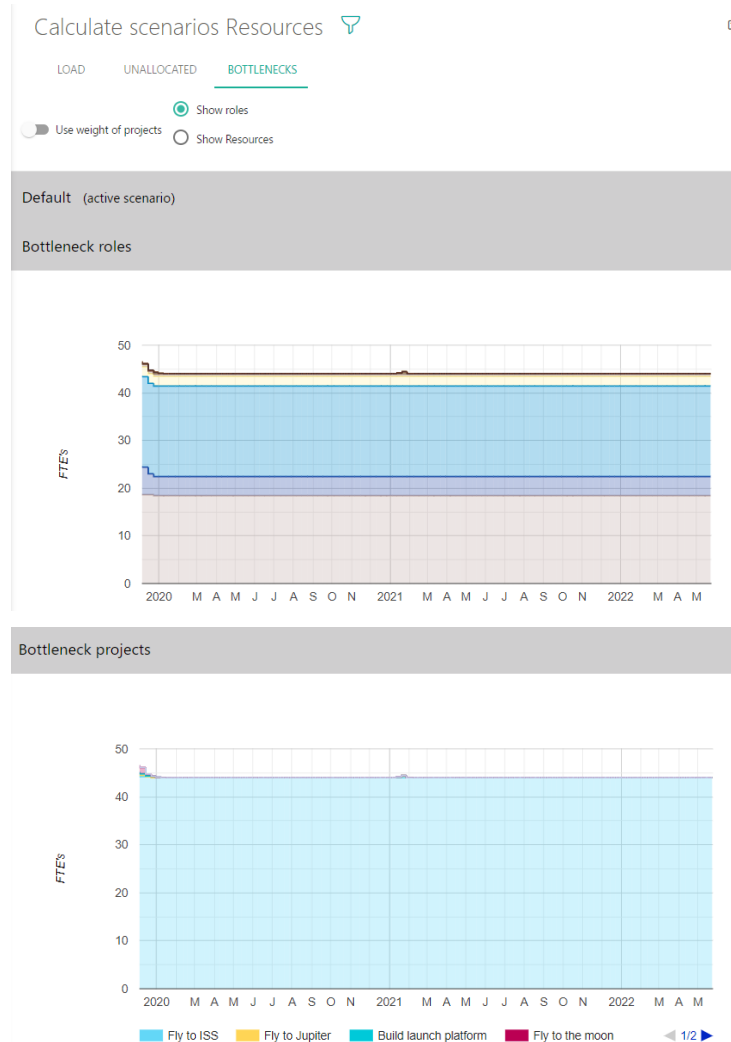
To see the amount of a graph, hover over the the section with the mouse

Resources / unallocated (metric 3 of 6 – part 2)



See in 1 graph where there is still room where work can be shifted to

Resources / bottlenecks (metric 3/6)



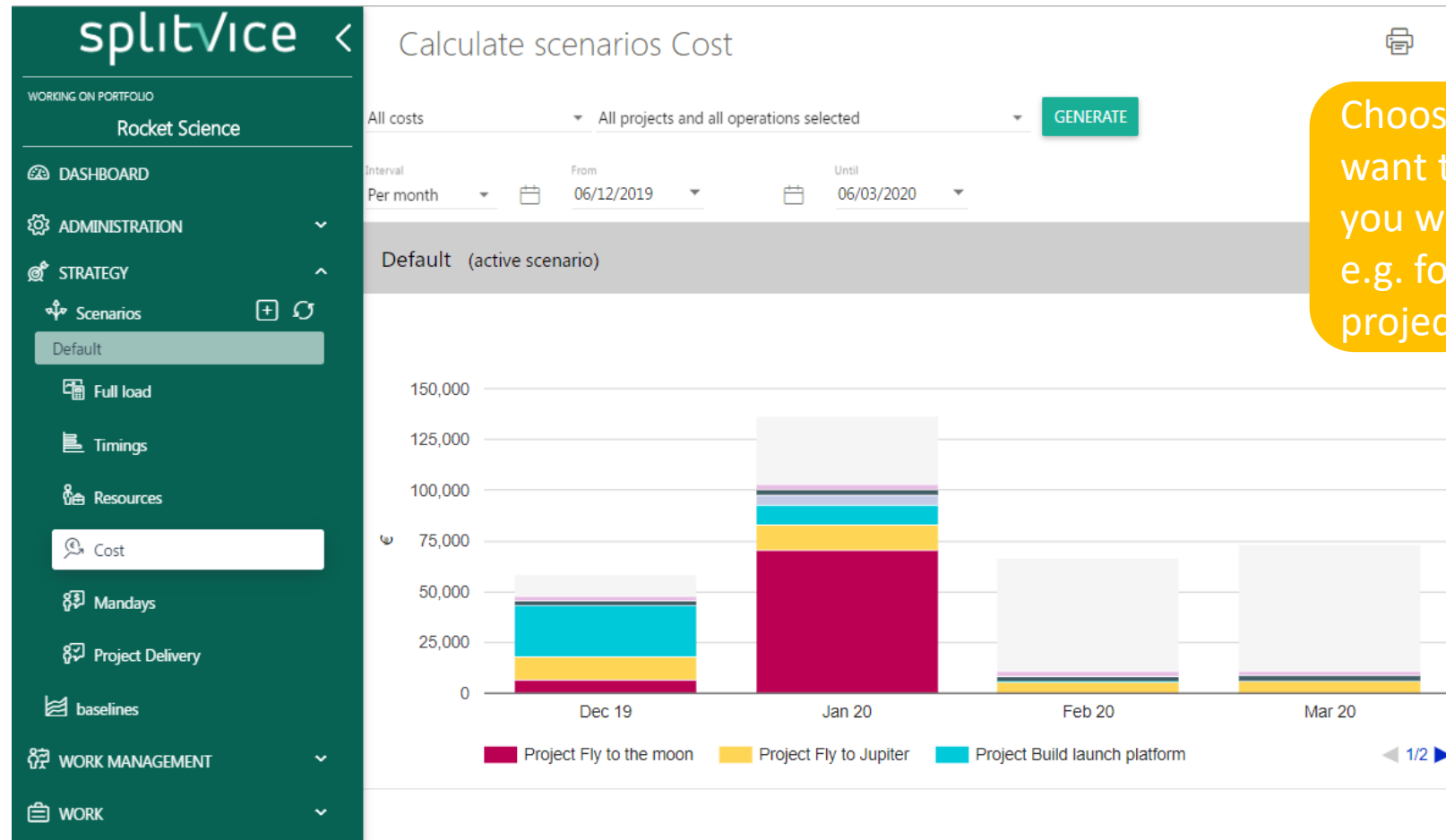
See what roles have resource issues over time

See what projects suffer from this lack of resources

Cost simulation (metric 4 of 6)

- Gives you an overview of all costs related to the selected scenarios
- You can filter on all costs or split up between people cost and expenses
- The people cost is based on the costs as defined in the administration. These can be general or role specific.
- You can filter on one or more projects
- You can display on a monthly, quarterly or yearly interval and filter on a certain start and end date
- Main goal of this metric is to show the impact of each of the scenarios from a financial cost point of view. Using these metrics, you get an idea on when the money will be spent

Cost simulation (metric 4 of 6)



Choose which costs you want to see, and whether you want to see all work, or e.g. focus on 1 or all of the projects.

To see the amount of a graph, hover over the the section with the mouse

Man-days simulation (metric 5 of 6)

splitvice <

WORKING ON PORTFOLIO

Rocket Science

DASHBOARD

WORK MANAGEMENT

Simulation

Full load

Timings

Resources

Cost

Mandays

Edit report

GENERAL

PARAMETERS

GROUPING

FILTER

From 1 year ago

Until today

Interval Per month

Value Work in mandays

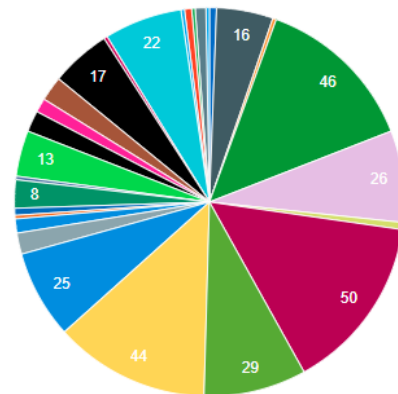
The most flexible report on work is the mandays report

It handles both past work and predicted work

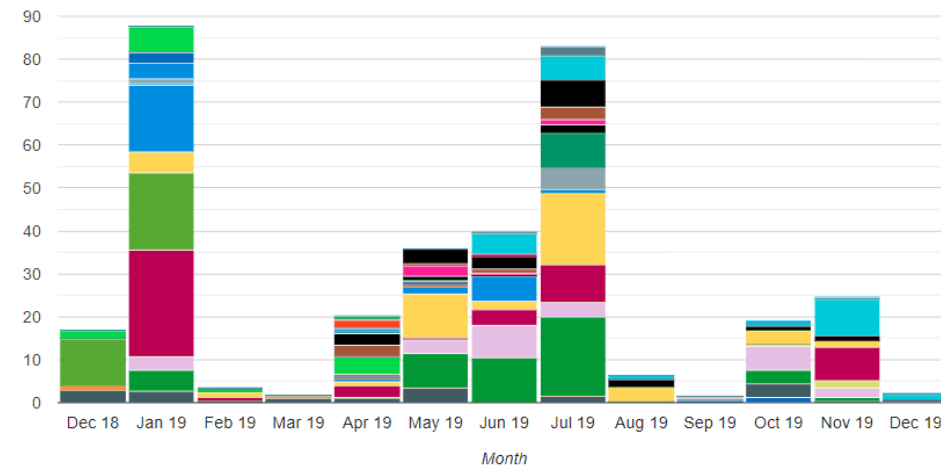
You can filter on projects / user groups / roles

The result is shown as total in a pie-chart and as time evolution in a bar chart

Work in mandays: total = 341



Work in mandays

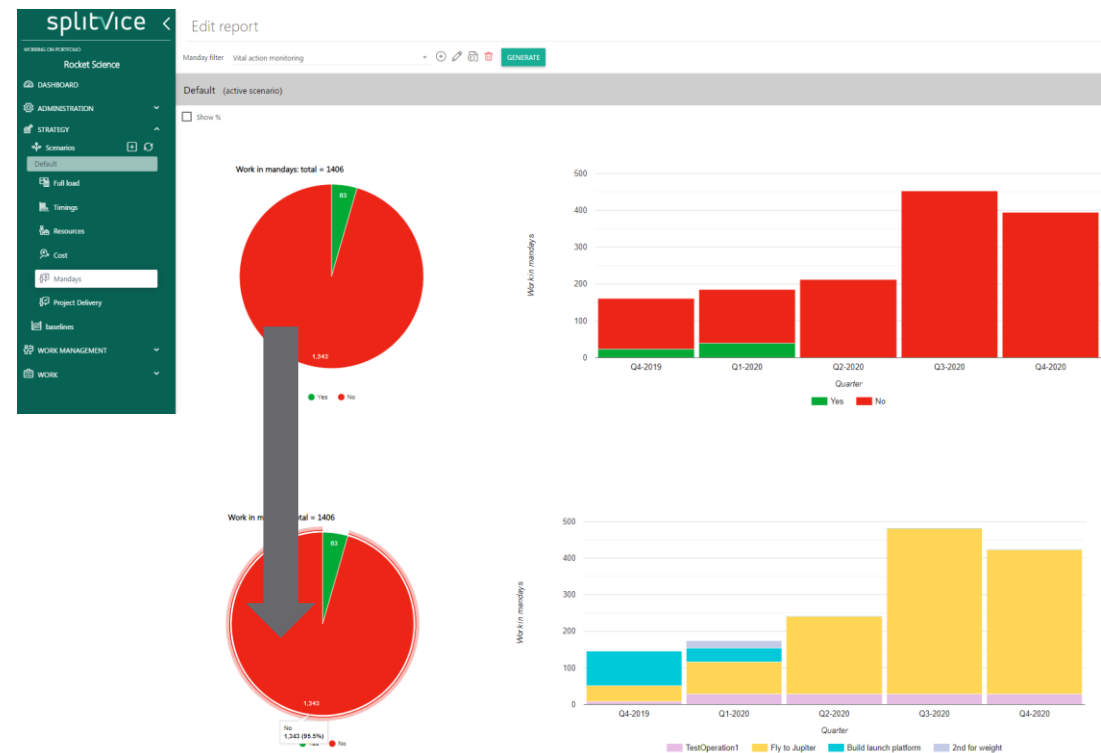


Man-days simulation – custom properties

- Define custom properties to your projects like e.g. the market they serve
- From then on, your portfolio simulation can break up the effort on this custom properties

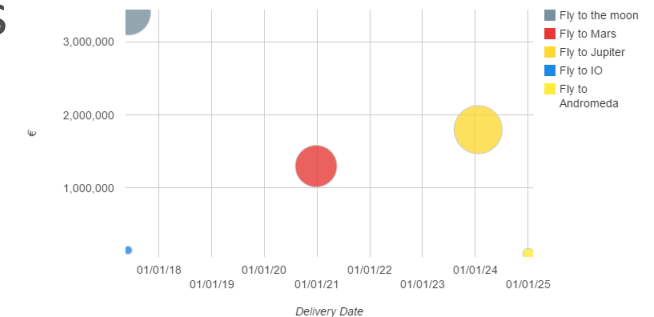
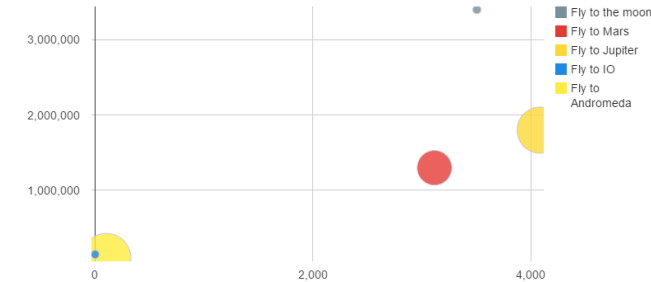
E.g. here, we defined a project property “monitored by top management” and filled this in for each project

Click on a part of the pie-chart and drill down to see what projects contribute to that metric value

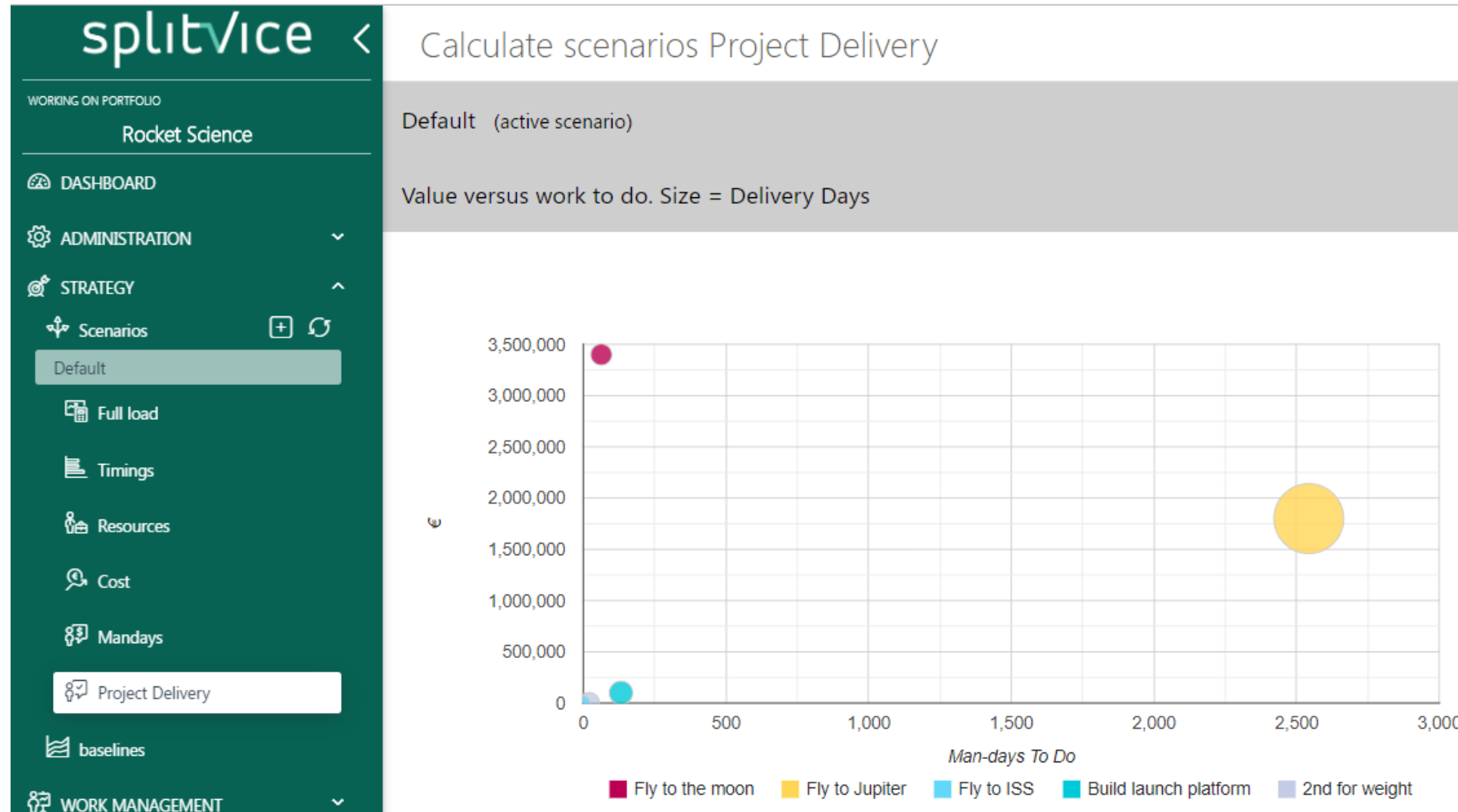


Project delivery (metric 6 of 6)

- Value vs. Work to do: Shows the number of days to deliver, for each of the projects in relation to the number of mandays to do.
The most interesting projects are high on the scale (high value) and on the left (not much work any more).
- Value time: Shows the man-days to do for each of the projects in relation to the delivery date.
The most interesting projects are high on the scale (high value) and on the left (delivered soon)
- Weight timeline: Shows the man-days to do for each of the projects in relation to the deliver day.
The most important projects are high on the scale. It's good if they are finished sooner (on the left) rather than later.



Project delivery (metric 6 of 6)



Dashboard

Your own dashboard

Edit the composition

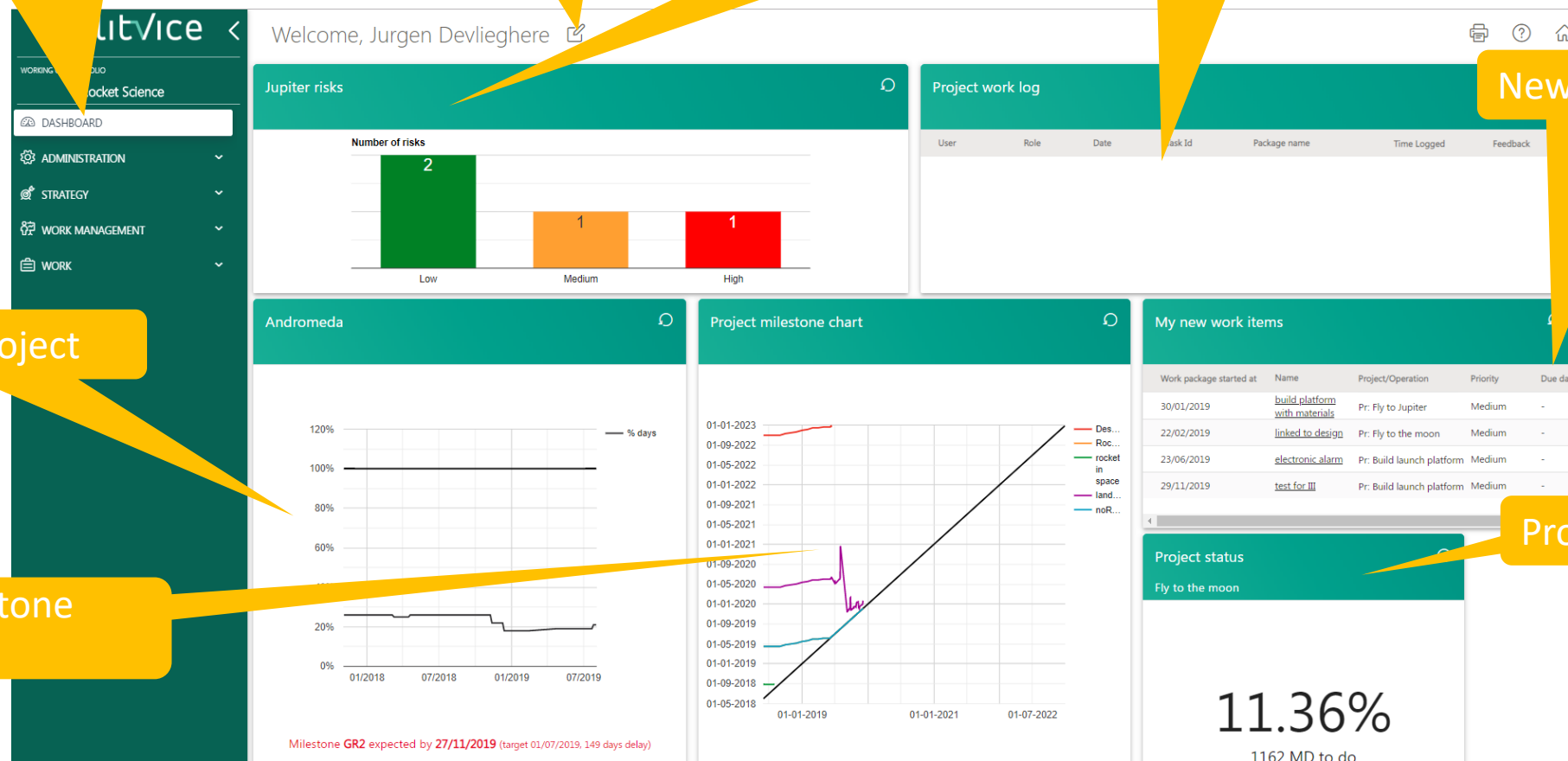
Project risks

Project work logs

New work for me

S-curve of a project

Project milestone chart



Project status KPI's

Set your strategy!

Once you have defined the different projects in your company, laid out the priorities and determined what the best scenario is for your portfolio, activate the best scenario and the actual work management can start.

Work managers can now start to define the work to be done by defining the different work packages for the project. They finetune the operations that are applicable to your business, and define the workflows that work must adhere to.





Find additional learnings in these movies

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