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# Sopheon Accolade<sup>®</sup>

Innovation Planning and Roadmapping –  
Introduction to Planning Training Guide

Version: 17.0



## About Sopheon Accolade®

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# About the Accolade Education Program

This module is part of the Sopheon Accolade Education Program (AEP). The AEP modules are designed to help Accolade users perform the tasks in their company's business process using the Accolade application. The content in the modules is meant to be used side-by-side with the application, and is part of the overall documentation suite provided for Accolade.

The benefits of using Accolade as part of your company's innovation development process include the following:

- Reduced cycle time by displaying clear structure and visibility.
- Reduced rework through timely, properly sequenced completion of all key tasks and milestones.
- Assured positive user experience through properly developed product requirements.
- Improved communication by automating collaboration between multifunctional team members.
- Provided decision-making information. Poor projects are stopped or placed on hold so resources can be redirected to more promising and higher value projects and products.
- Provided clear project requirements. Expectations of a project team and project manager at each stage are clearly spelled out.
- Managed business risk. Break resource commitments into increments or stages.
- Established key baseline information and metrics.

The Accolade documentation suite contains the following additional components:

Document	Contents
<i>Sopheon Accolade What's New in This Release</i>	For each release, review this document for an overview of the new features and changes within the release.
Accolade Online Help	Accessible directly through Accolade, the online Help provides comprehensive how-to and reference information about all aspects of using Accolade.
<i>Sopheon Accolade Administrator's Guide</i>	Provides information for administrative professionals regarding Accolade setup. This information is also provided in the online Help.
<i>Sopheon Accolade Installation Guide</i>	Provides information about the installation of the application and its required databases.
<i>Dashboards for Accolade Installation Guide</i>	Provides installation information for installing the Dashboards for Accolade component.
Quick Reference Cards	A PDF that can be printed double-sided that provides quick tips and navigation information for using Accolade.

Document	Contents
Online Help for Accolade Add-ins	Accolade add-ins, including Accolade Office Extensions, Accolade SmartDocuments for Google, Accolade SmartDocuments for Office, Accolade Portfolio Optimizer, and Accolade's integration with Microsoft Project, each include their own Sopheon created Help file accessible directly from the application after the add-in is installed. Each Help file describes how to use the features of that particular add-in.

## Prerequisites for Using this Module

The contents of this training module assumes you have a basic understanding of the terms and concepts listed below and how they are used in your installation. In addition, the content in the related training modules listed below may be helpful before reviewing the contents of this module.

### Accolade User Roles

- None

### Terms and Concepts

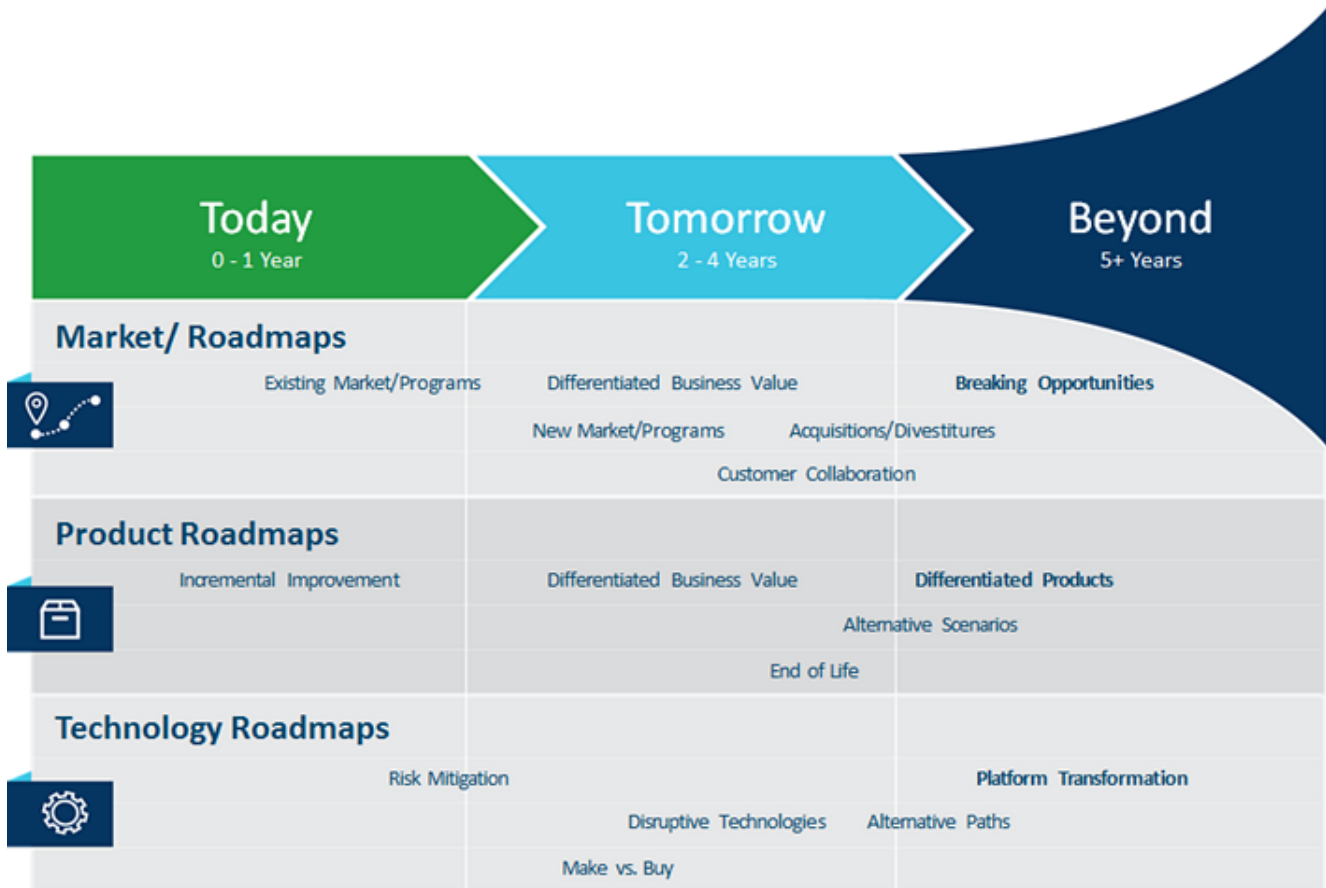
- Your business landscape

### Related Training Modules

- Getting Started with Accolade
- Planning in Accolade
- Working with Planning Views

# Planning and Roadmapping Introduction

An innovation strategy looks at the areas of your business planning for today, tomorrow, and beyond. These segments can vary in length from being short to long, depending on your industry. Your "today" may be 6 months or a year, where "today" for another industry may be a 1 to 3 year plan.



A roadmap is essentially a tool to communicate a view into your business at any point in time. You may have roadmaps that illustrate the following:

- Market needs, trends, and events.
- Product delivery time lines, end of life cycles, and strategic gain.
- Technology usage and requirements.

These roadmaps interact to provide a broader understanding of how the technologies your company develops apply to the products within the product roadmap, and on to how the products your company is planning to deliver fit into the marketplace that you serve. With these roadmaps, your company can answer questions such as:

- Do you know if the products and initiatives being created in your company are going to fulfill your growth goals?
- Are the technologies you are developing aligned with products that you can launch in a timely fashion to meet a market need?
- Could you quickly react to a market change and know how that changes your business?

A successful roadmap is a communication tool and is essential to providing answers to all of these questions and more. Using Accolade Innovation Planning provides organizations with the insight they need into current activities and their strategic goals, including:

- A repeatable decision making process across the organization that is based on one set of data.
- The data to identify gaps in your pathway to success.
- A visual way to determine the impact of short-term decisions on longer term strategic objectives.

## Management Benefits

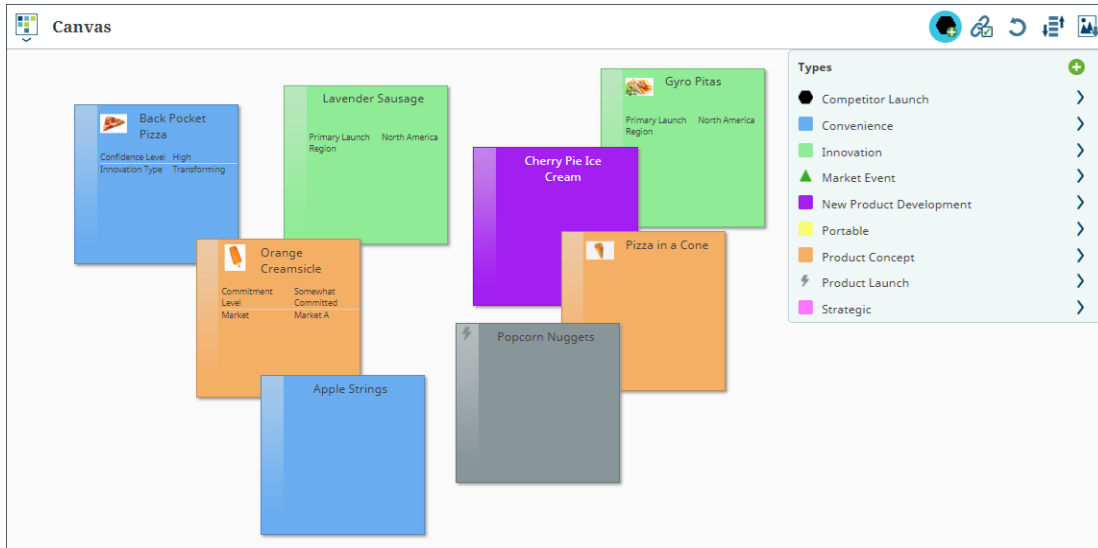
Management roles within your company benefit from a clear strategy and roadmap in the following ways:

- **Executives** can articulate a strategy to other executives and portfolio managers to strengthen decision-making and portfolio performance.
- **Planners and Business Analysts** can create narratives outlining the current and future states of their organization using verifiable company and market data.
- **Portfolio Managers** can show the alignment of markets, products, and investment opportunities within their portfolios to an overarching corporate strategy.
- **Marketing Managers** can use roadmaps to see events and trends that the organization should react to in the market place.
- **Product Managers** can ensure that what they are creating targets market needs and schedules.
- **Technology Managers** can ensure that the technologies and underlying developments help build products targeted on the product roadmap.
- **Project Managers** can link day-to-day activities and efforts within their teams with the company's overall strategic initiatives, providing line of sight for team members to how their daily work contributes to the company's strategy.

# Roadmapping Components

The components of a successful roadmap include the following:

- **Elements** - The foundation of an innovation plan and strategy are the products, technologies, and market drivers that are part of your business. Each planning initiative, product, technology, or event in your planning strategy is represented as a planning element within Accolade.



- **Data Attributes** - Planning elements can contain pieces of data. This data can be used to categorize and analyze the makeup of your roadmap, and to make decisions regarding the elements within it. Each data attribute is represented as a metric within Accolade.

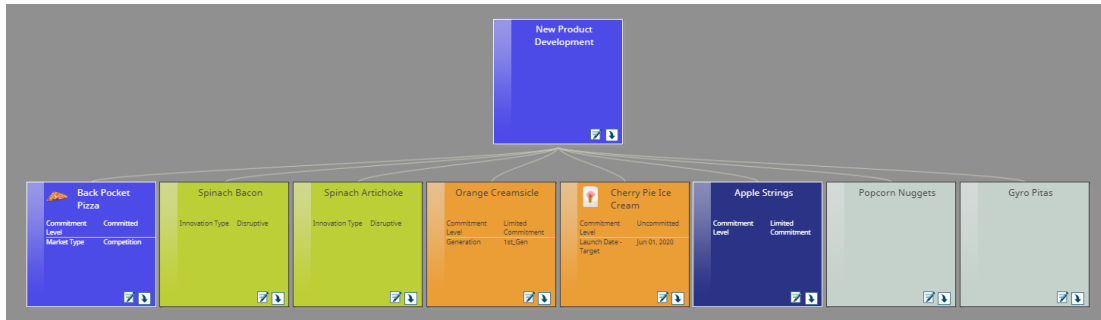
The screenshot shows the 'Back Pocket Pizza Details' dialog box. It has four tabs: 'Details', 'Metrics', 'Relationships', and 'Security'. The 'Metrics' tab is active, displaying a list of metrics with their values:

Metric	Value
Approval Deadline	
Commitment Level	Committed
Confidence Level	High
Flavor Profile	[None]
Innovation Type	Transforming

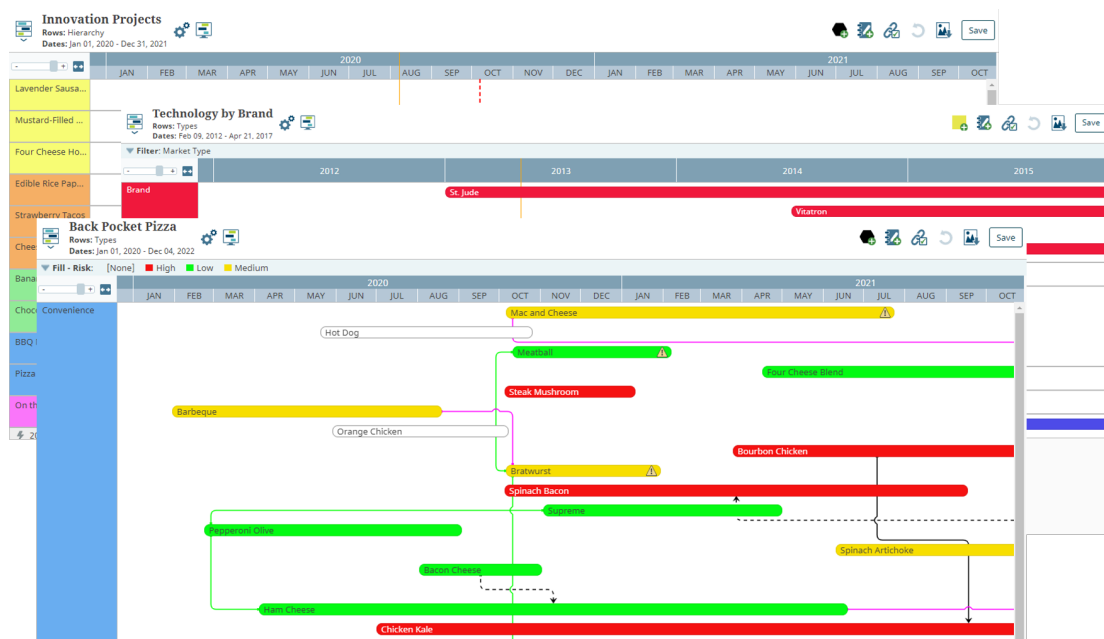
At the bottom of the dialog, there are three buttons: 'Delete', 'Done', and 'Cancel'.



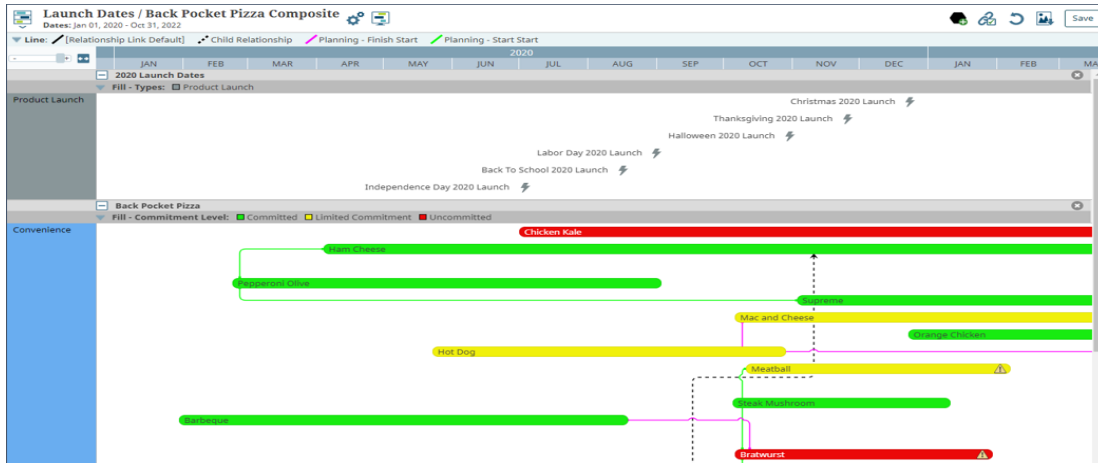
- Organized Business Landscapes** - How all the elements that you create are categorized to describe your organization. For example, having 500 planning elements is a great start to capturing all the initiatives and milestones that are important. However, if you create groupings of elements, you can establish focus into a single area. The organized business landscape is represented in Accolade as a hierarchy and is how you represent parent/child relationships between elements.



- Roadmap Views and Ownership** - The views that see into the planning initiatives and events and how they relate. Each view can be defined across a span of time from months to years or decades, or can be a comparison of two data attributes in a grid format. Visualizations are created as Grid and Gantt views within Accolade Innovation Planning. Management roles in your company may own different aspects of your overall roadmap and strategy, and may have different views to visualize the data that is important to their decision making.

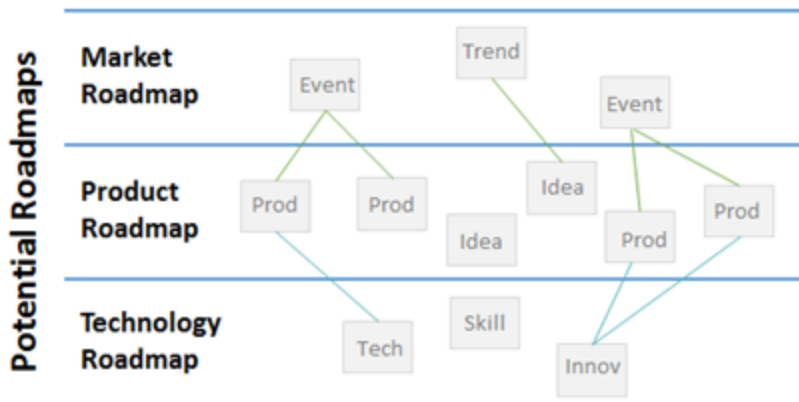


Combine multiple Gantt views into composite views so a single manager can see how the initiatives on their roadmap interact with those on another roadmap.

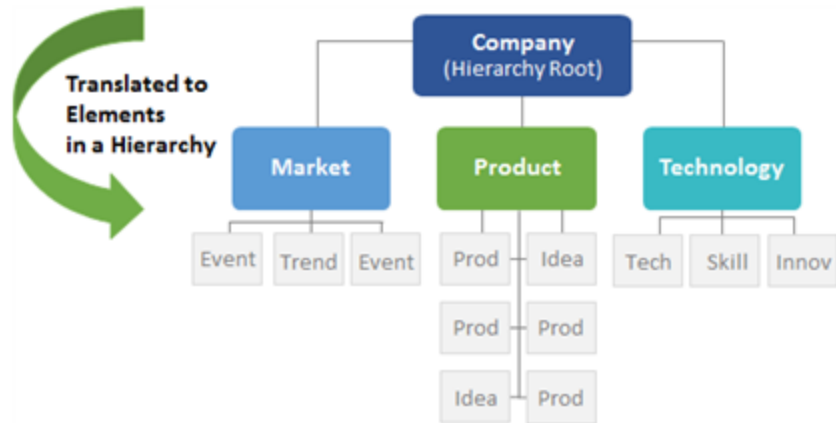


## Defining and Organizing Your Business Landscape

As you start your roadmapping journey, you first need to determine what is going on in your organization and map all those components in an organized structure that represents your business. If you have separate roadmapping needs for market initiatives, product development efforts, and technologies, you likely have personnel who manage those roadmaps who need insight into their specific area.

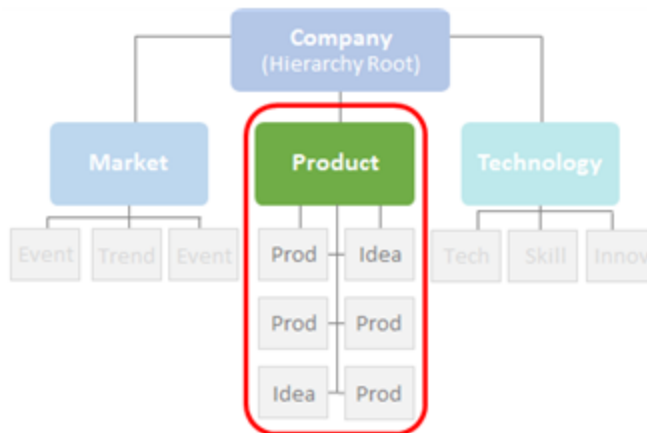


How you define your organization's structure, or hierarchy, can be as unique as your company and the marketplace you serve. However, thinking about the hierarchy and how items fit into that hierarchy helps to categorize them, and to ensure users within your organization have access to the components that are most important to them.



Each item in this structure (except for the hierarchy root) has an element type associated with it that contain common characteristics that you want to use within your roadmaps. This is a simple example containing three hierarchy silos (Market, Product, and Technology) so that these roadmaps can be managed individually. The hierarchy for your business may require additional levels to appropriately group all the elements.

As you are designing and building the hierarchy, think about how managers within your organization will access the components that are important to them. For example, you may have a manager or managers that only need insight into products and not the market events or needs. For these managers, you can create views into the elements that fall within the Product portion of the hierarchy.



After you have established a hierarchy, Accolade provides automation tools, such as automatic link rules, that you can use to ensure that additional elements created are automatically linked into the appropriate place in the defined hierarchy, and thus included in defined roadmap views.

## Brainstorming and Grouping What You Have

Within each level of the hierarchy silos you outlined above, brainstorm the initiatives and efforts that are going on in each. Think about items in categories such as:

- Marketing components
  - External events such as trade shows or pending legislation
  - Market trends
  - Market needs
- Product components
  - Products and services in development or maintenance that contribute to your overall revenue
  - Concepts and ideas that you currently do not develop, but have plans to develop to meet a gap in your offering to serve a specific market need
- Technology components
  - Technologies
  - Skill sets
  - Other items that enable you to create and maintain the products and services you offer



During this brainstorm, it can be helpful to use Post-it® notes in various colors to represent elements and their types. For example, place all products on notes of one color and all external market events on another color. You can also use a large white board with multiple color markers.

Each item you write down translates to a single planning element within Accolade, while each color translates to a planning element type that represents a group of items with common characteristics.

## Determine What You Want to Know

Now that you have a picture of all the efforts going on in your company and the market trends, needs, and events that are drivers behind your efforts, you need to determine the data points that will provide the comprehensive views into how all the efforts are aligned. Each data point translates to a metric in Accolade. Metrics are used to measure, compare, evaluate, and further define an effort and how it fits into a roadmap. Each metric should provide data that a roadmap user can use to make decisions when reading their roadmap.

Metrics, like your organization, are unique to the problems you are trying to gain insight to, and the products and technologies your organization develops. Think about what data you need to provide insight into cross sections of the overall strategy. Metrics might be different based on the categories of initiatives you defined earlier. For example, you may need different metrics for market events than you do for products and technologies. Common metrics include, but are not limited to:

- Financial metrics, such as Net Present Value (NPV), Expected Revenue per Year, and Project Cost.
- Strategic metrics, such as Risk Level, Market Newness, and Competitive Strength.
- Organizational metrics, such as Brand, Business Unit, and Strategic Initiative.

The problems you are solving with your innovation strategy, and the questions you want answered drive the metrics you create. Be selective and start small, you can always add metrics later.

The screenshot shows a web form titled "Back Pocket Pizza Details" with a close button (X) in the top right corner. Below the title are four tabs: "Details", "Metrics", "Relationships", and "Security". The "Metrics" tab is currently selected. The form contains five metric entries, each with a star icon and a label:

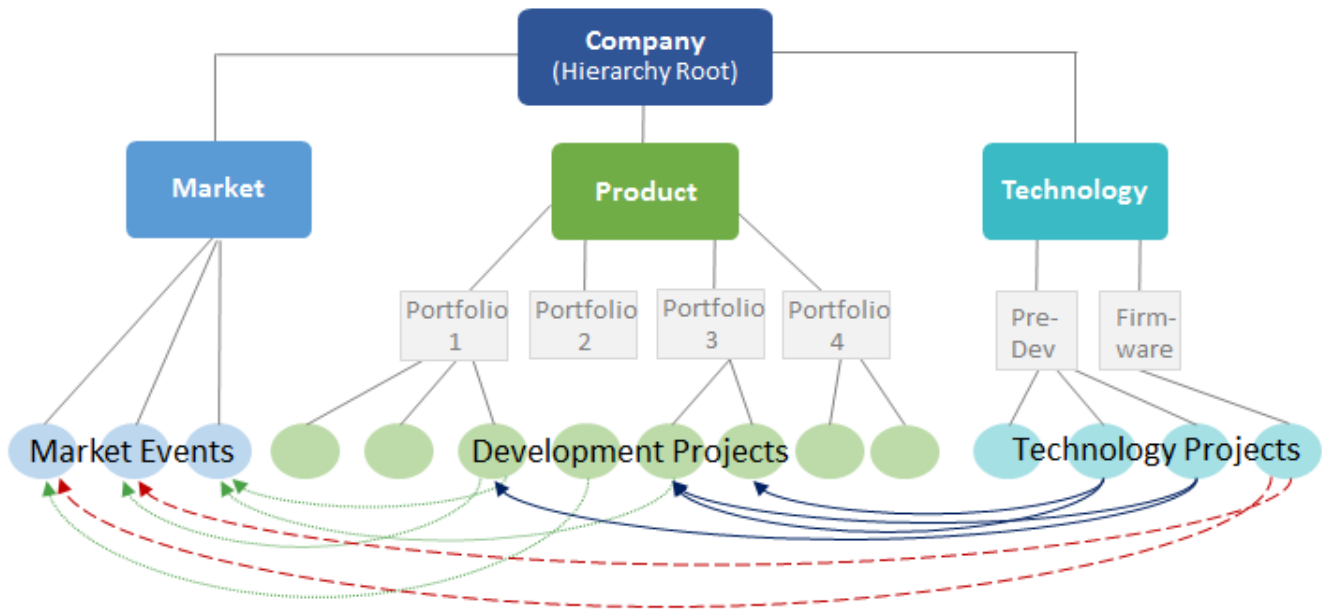
- Approval Deadline:** A text input field.
- Commitment Level:** A dropdown menu with "Committed" selected.
- Confidence Level:** A dropdown menu with "High" selected.
- Flavor Profile:** A dropdown menu with "[None]" selected.
- Innovation Type:** A dropdown menu with "Transforming" selected.

At the bottom of the form, there are three buttons: "Delete" on the left, "Done" in the center, and "Cancel" on the right.

After you have a list of metrics, map these to the groups of elements that were part of your brainstorm activity. Some metrics can be used for organizational purposes in addition to the metrics you added to classify elements into an organization structure. For example, an element can have a metric value for Brand, which is used to align it in the correct brand in the organizational hierarchy, and it can also have a metric for the strategic initiative that it supports.

# Determine How Things Relate to Each Other

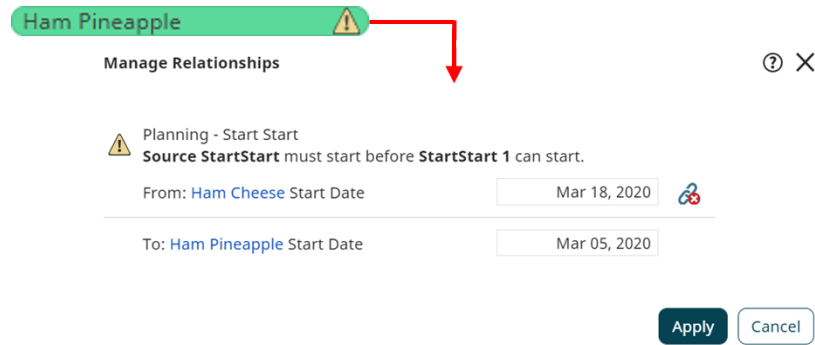
As you outline all the initiatives that make up your business, you may find that a single initiative relates to multiple strategies, belongs to more than one business unit, or that it impacts multiple projects or market-related trends or needs.



In this example, you can see that multiple initiatives have relationships that span the hierarchy, each created using a link type. This example contains the following link types:

- Market Event-to-Product (dotted green lines)
- Product-to-Technology (solid dark blue lines)
- Market Event-to-Technology (dashed red lines)

Understanding how the initiatives in your organization relate to one another can alert planners to conflicts within the roadmap. For example, if part of a project is falling behind and you change the project's delivery date to accommodate a slip in schedule, using a relationship that indicates a dependency between the project and its target market launch can provide a visual notification that the market launch is in jeopardy.



You can also use relationships to link projects that roll up to a larger strategic revenue goal. The strategic revenue goal is used to track the progress toward 10% growth from the prior year. Linking the projects that contribute to that strategic revenue goal provides insight into whether you are on track to meet the goal, and what happens if an included project does not meet its planned launch date.

Determine the types of links you need, such as:

- Technology relationships. Does a project or initiative rely on having an underlying technology or component complete first?
- Product dependencies. Does one product need to finish before or after another?
- Launch dependencies. Are there marketing components that need to take place before a finished product can be released to the market?

Link types are defined as a configurable component within Accolade. How to establish the links between elements once they are in Accolade is described in *Working with Planning Views*.

## Planning Next Steps

You have all the components you need to start transferring your innovation plan and strategy in Accolade and to create the roadmap views. Use the following training modules to continue:

- Planning in Accolade
- Working with Planning Views

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