



Sustainable Enterprise Roadmapping: Key Success Factors

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Roadmapping has the potential to provide an organization with the necessary tools and methods to significantly improve their ability to create, optimize, and “control” their own future. When used successfully, roadmapping can bridge the gap between strategic thinking and day-to-day decision making, including portfolio management. When cross-functional team members participate in the roadmapping process and are accountable for maintaining their content and relationships with other functions on a continuous basis, communication and priority synchronization is maximized.¹

However, achieving success in this area is not trivial! Organizations often struggle with significant culture change and new functional responsibilities. The idea that an organization’s strategic plan can be reduced to roadmap elements which are then combined to produce integrated, synchronized, forward-looking views may seem like an impossible challenge; the scope of such an effort could be overwhelming. However, if the key implementation barriers are broken down one by one and managed in a manner where expectations and progress are measured realistically, any organization can be put on the path toward successful enterprise roadmapping.

Fortunately, roadmapping has a cumulative value effect; the entire enterprise does not need to be roadmapped before value is returned. Roadmapping even small elements of the enterprise will immediately improve communication and priority synchronization for that section of the company. Below are a few suggestions for organizations seeking to overcome barriers to successful enterprise roadmapping.

Progress measurement

New process implementations, particularly those involving significant culture changes like enterprise roadmapping, require both a clear vision of what success will look like, as well as a realistic time frame in which that vision can be achieved. These ultimate goals and timeframes can then be broken down into measurable, intermediate goals and timeframes, and converted into a visible maturity path for the overall implementation. A fully integrated enterprise roadmapping may be the ultimate goal, but an organization may also consider intermediate goals such as roadmapping at the functional, program, departmental, and finally divisional level.

In each case, the scope of the implementation would be clearly defined (i.e. which specific programs or functional areas would participate first and so on, as well as the specific required actions to take the effort to only the next stage). In this way, progress will continue to be manageable and measurable while the overall program is driven by the intermediate successes at each stage.

Scope

The most daunting challenge of enterprise roadmapping is the sheer scope of the system. The most successful roadmapping implementations have started with small areas of concentration, which are used to create test cases that can then be extended to the entire enterprise. Once established, the roadmapping implementation can be grown “organically” at a pace that makes sense and does not over tax available resources. In this instance, the focus of the initial implementation may be a few key growth programs or key innovation areas following the maturity path approach described above.

Cross-functional sessions can be held to help create the initial roadmap architecture and the associated guidelines for using these roadmaps.

Participants in these sessions can then continue to develop adjacent roadmap elements, representing other strategic elements under their functional control. For example, a technology leader may only represent those elements which pertain to the growth area under consideration in the original cross-functional meeting but after the meeting would be able to create additional roadmap elements for those strategic elements under his/her control that were not discussed relative to this growth area.

As these participants are pulled into additional roadmapping sessions, they would continue to refine and modify their elements until their entire area or scope of responsibility is covered. Over time, the breadth and depth of the enterprise roadmapping system will grow to become an integral part of the planning process and critical to decision-making.

Leadership

Leadership support is an obvious requirement for successful implementation of any major change process. Roadmapping process implementations can be stifled or lose momentum when leadership changes occur or when their focus shifts to other activities. Leadership support must include both a willingness to fund roadmapping initiatives, as well as making a visible show of support for using roadmaps for critical, forward-looking decision making.

This is particularly important in enterprise roadmapping where new responsibilities may be added to functions that did not exist before. This might include a marketing director that must make the creation and maintenance of a segment roadmap a key objective for all segment marketing managers reporting to him/her. Leaders need to request that roadmap reviews be included in strategic planning meetings, program reviews, portfolio management sessions, etc.

When people are visibly rewarded by leadership for correctly maintaining and managing their roadmap elements (or conversely, penalized for not upholding their responsibility), everyone will perceive that roadmaps are indeed an important part of the decision making culture and will participate. Eventually, it will become second nature to use roadmaps as a tool for defining and defending decisions.

Process Integration

Roadmapping implementations often suffer when new roles and responsibilities are introduced, particularly in the early stages, due to the time and effort required to get started. While some initial training events are required, it is very important that roadmapping be treated as a planning process improvement – not just an ad-hoc event or one-off initiative. Roadmapping needs to be fully integrated in the ongoing planning and execution processes for the organization.

Relying on information from roadmaps and associated databases needs to become the way the organization does business. Processes for new product development (i.e., Stage-Gate®, PACE®, DFSS), strategic planning, competitive assessment, next generation product identification, and innovation planning and technology platform planning can derive significant value from roadmapping, due to its ability to provide priority conflict resolution on a real-time basis. For example, a product roadmap review is an appropriate gate deliverable for a new product development process to ensure the product under development is still strategically aligned with the organization's growth and financial priorities at that point in its development.

User-friendly Tools

Enterprise roadmapping implementations are impossible without user-friendly tools and easy to understand guidelines. If the process gets bogged down with data entry and data management issues, then NO value will be derived. Participants will quickly get frustrated with the added burden the new process imposes on them, and will decide not to participate fully or at all. If the required information to support a decision cannot be formatted and accessed quickly and easily, the system will not get used, leading to obsolete data and unreliable information.

International PLM software provider, Sopheon®, has an excellent example of such a tool. Sopheon's product roadmapping solution, Vision Strategist™, was built and continues to develop from the perspective of supporting roadmapping requirements. In addition, having someone at each major

location with the part-time responsibility of being a local roadmapping champion to support implementation, ongoing training (tool and process), and continuous improvement is a tried and true method for implementation success.

For more on this topic, visit the Whalen Management Group Web site, www.whalenmg.com.

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