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Gartner at a Glance



Leveraging Road Maps as a Tool for Communicating Change

Cathleen Blanton

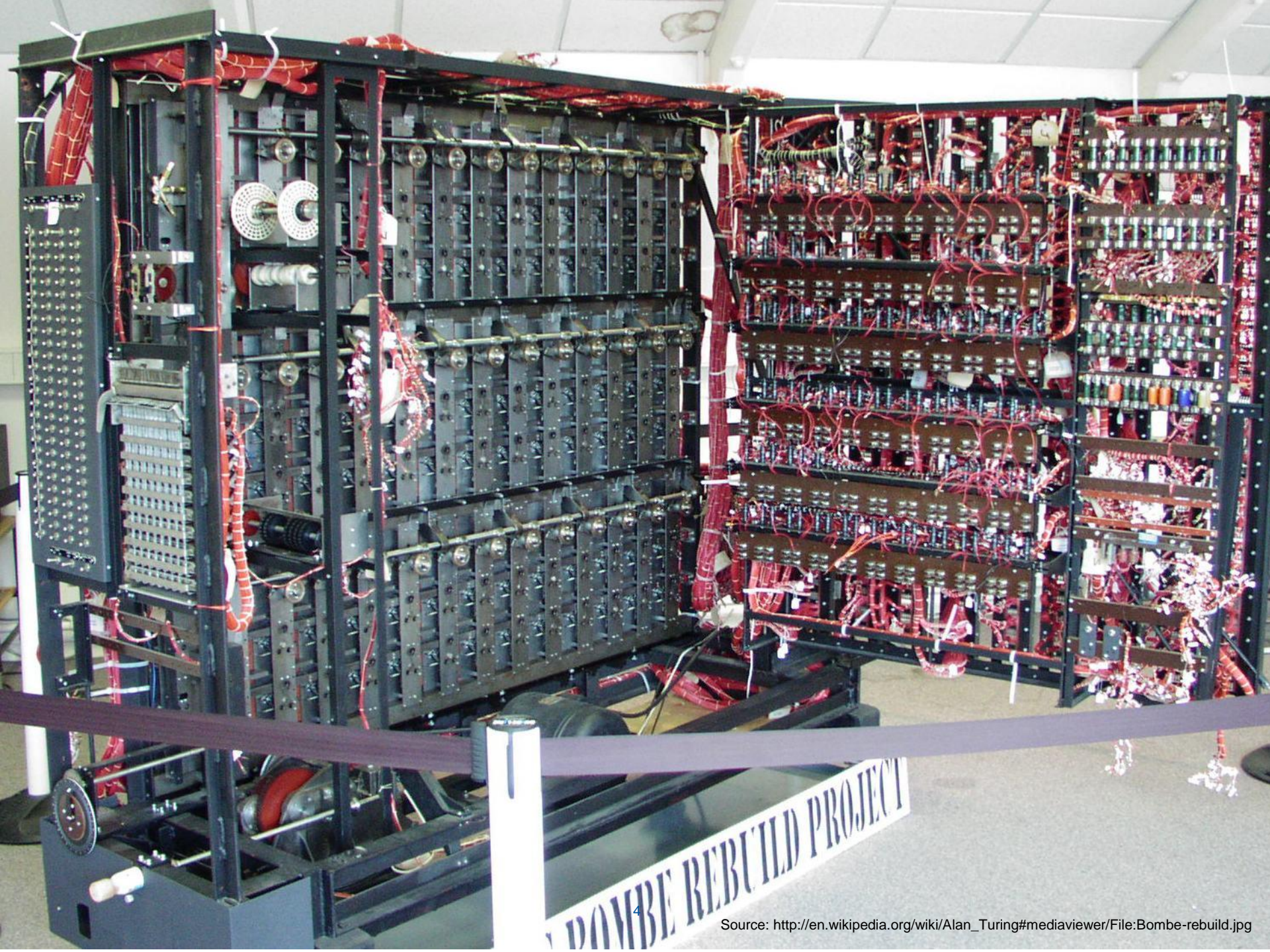
Mark McGregor
Twitter: @markmcgregor

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Key Issues

1. A road map classification system – understand the types and how they are typically used
2. Journey maps – know what they are and when they should complement or replace a roadmap
3. Technology choices for creating roadmaps

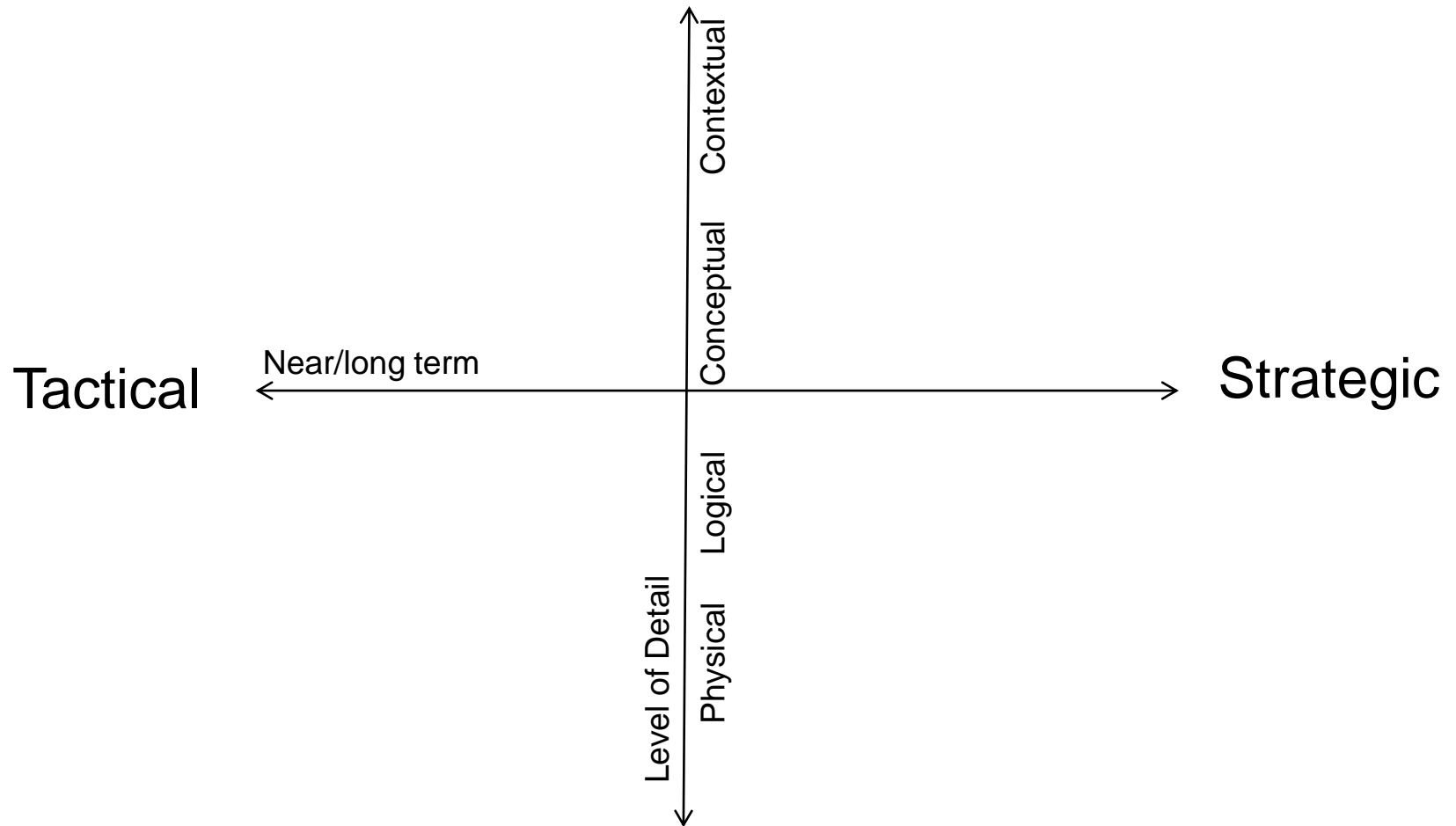
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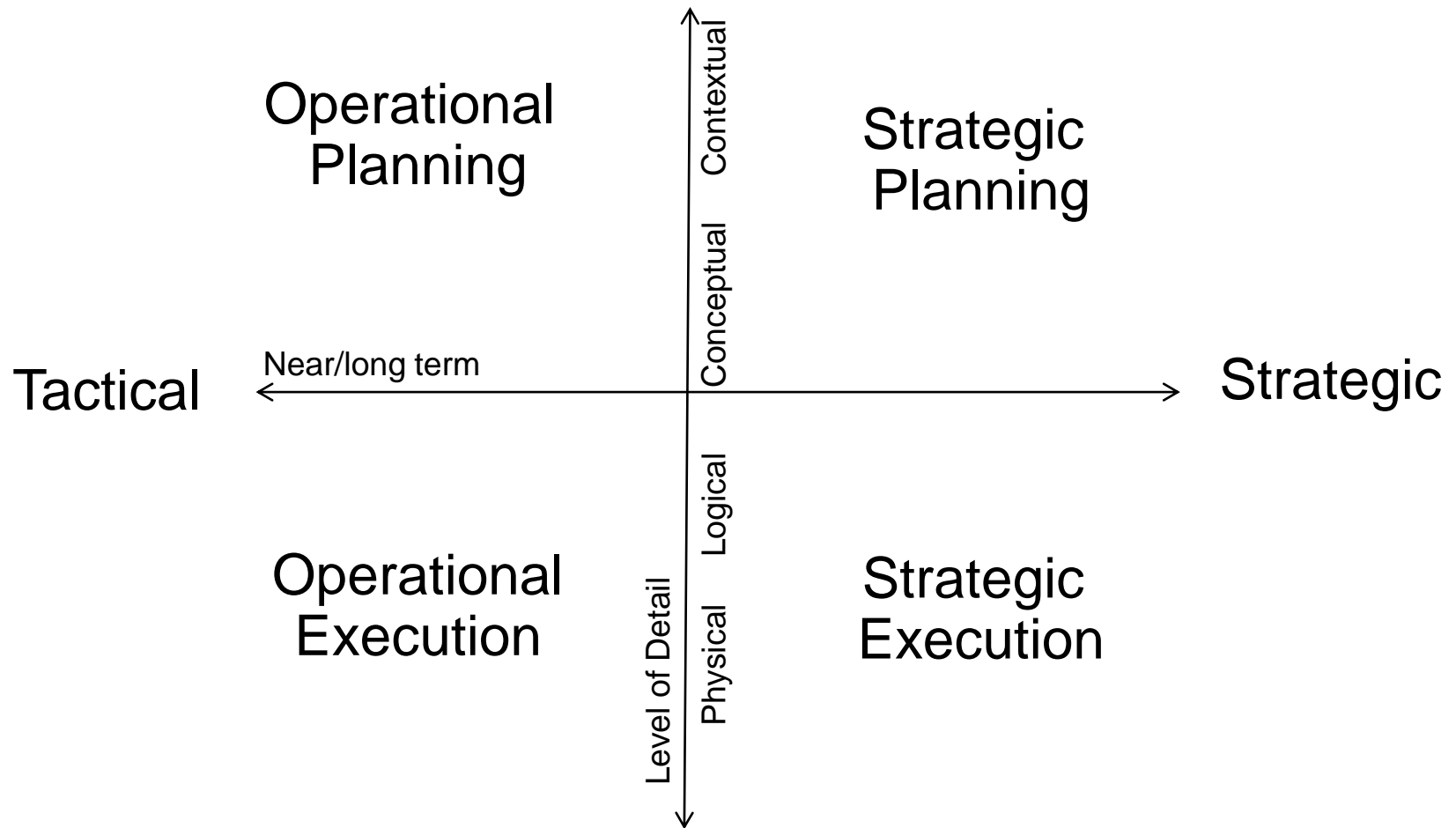
Definition of a Roadmap

- A roadmap is a **graphical** representation that is used to illustrate the **milestones** and **deliverables** required to **transition** to a future state from a current state over a specific period of **time**.
- What makes a roadmap distinct and differentiated is that it:
 1. Uses time as the primary dimension.
 2. Shows milestones and the deliverables that are needed to occur over time to achieve the future state
 3. Delivers a level of abstraction appropriate to the audience and intended purpose
 4. May also show additional influencing factors

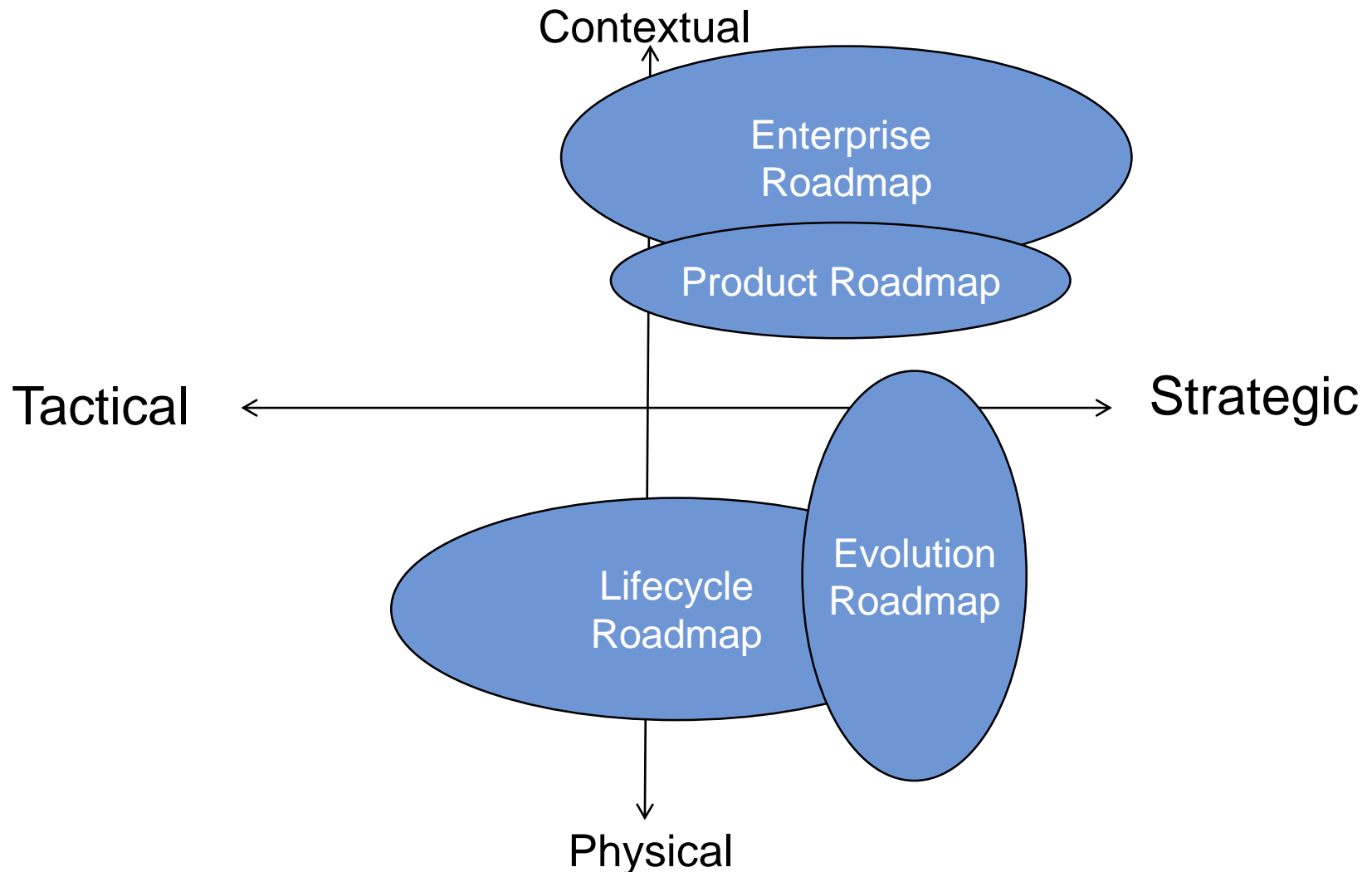
Roadmap Topology of Roadmap Types



Roadmap Topology of Roadmap Types



Roadmap Topology of Roadmap Types



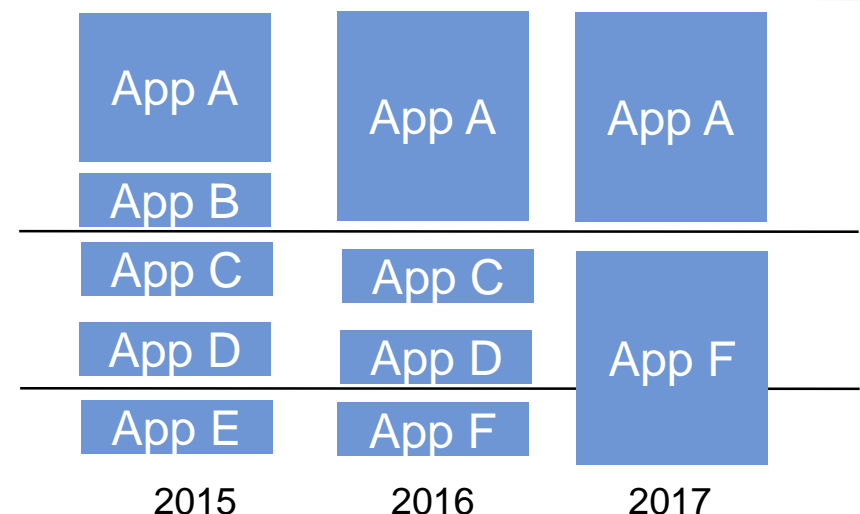
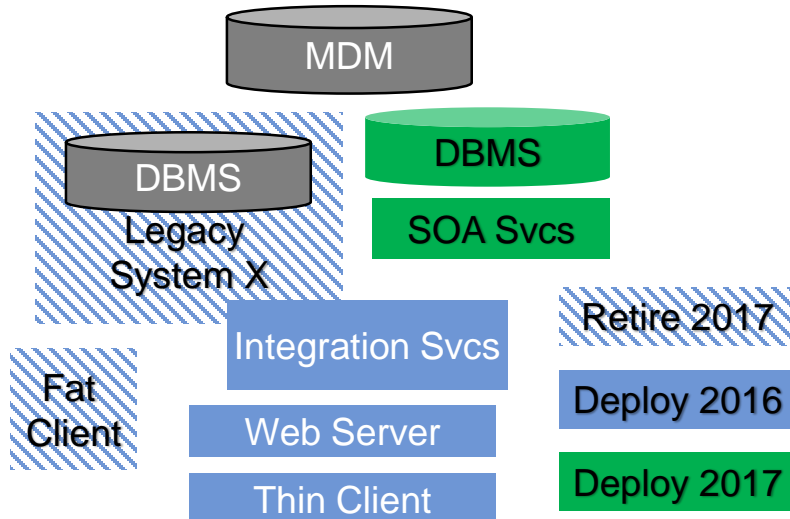
Definition of an Enterprise Roadmap

- An enterprise roadmap is a type of roadmap that illustrates ***current and planned strategic change*** (business ***outcomes***, business ***capabilities***) at a ***contextual*** level and over a specified time.
- What makes an enterprise roadmap distinct and differentiated is that it:
 1. Is an abstraction that depicts a conceptual view to provide context for the changes to high level business capabilities over time.
 2. Tracks highest level business outcomes that are directly linked to business KPIs
 3. Indicates change across the enterprise (business and technology), not just one program, business unit and/or technology
 4. May also highlight top level risks and disruptors

Please see prior webinar for more info on Enterprise Roadmap

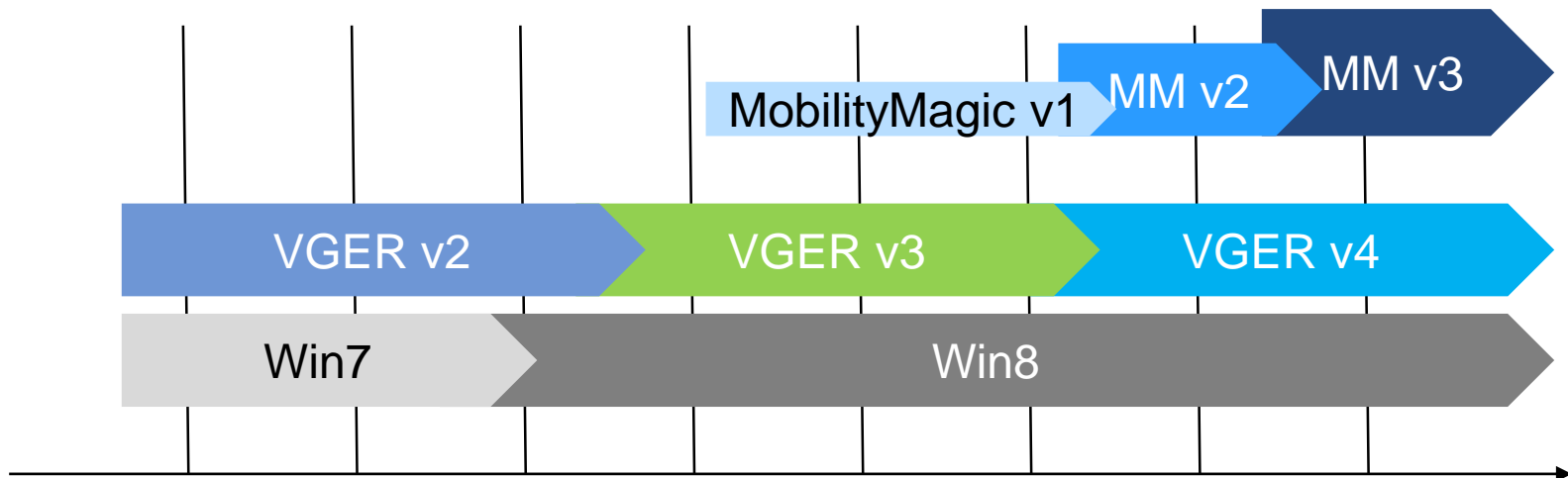
Definition of an Evolution Roadmap

- Evolution roadmaps depicts a **strategic target state** needed to deliver **specific business outcome** and how components are **deployed** and **retired** to support the solution
 - Evolution roadmaps are used to validate and communicate transition plans and provide point-in-time overall interim solutions views
 - Evolution roadmaps are typically at logical level of abstraction or lower.
 - Evolution roadmaps show the time dimension through colors, shadings or versions, but not necessarily on a timeline
 - “Heat maps” can be a special case of evolution roadmaps



Definition of an Lifecycle Roadmap

- An lifecycle roadmap depicts the full **lifecycle** of a capability, system or technology over time – from **introduction/deployment** through to **retirement**. Lifecycle roadmaps:
 - Show timing of major **enhancements, migrations** and **retirements**
 - Help organizations coordinate change



Polling Question

How do you use lifecycle or evolution roadmaps to communicate proposed change and develop buy-in?

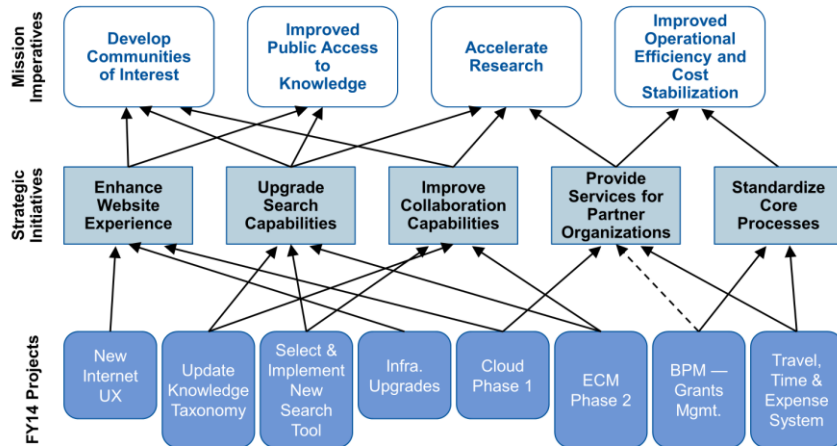
- 1) Never seen nor heard of them.
- 2) We use, or plan to use, lifecycle roadmaps to show when migrations occur.
- 3) We use, or plan to use, evolution roadmaps to help people visualize how the target state will emerge.
- 4) We are using, or planning to use, both of them.

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Strategy Maps and Enterprise Roadmaps

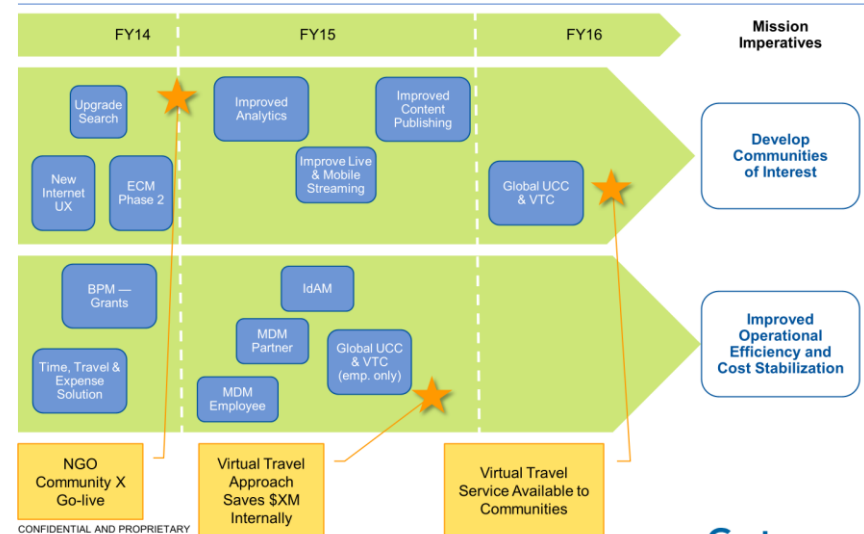
Scenario 2: Strategy Map



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Scenario 2: Road Map



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Please see prior webinar for more info on Strategy Maps and Enterprise Roadmaps

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What Are Journey Maps?

	What They Do	What They Show
Journey Maps	Show an individual's tasks, activities or actions that occur during a journey taken to a outcome	<ul style="list-style-type: none">• The path taken to achieve a desired outcome.• How a journey crosses applications, silos and organizational boundaries.• New opportunities, risks and potential disruption.• Current or desired target state for the experience
Road Maps	Show initiatives, capabilities and outcomes on a time dimension	<ul style="list-style-type: none">• How to achieve business outcomes• How different initiatives relate to each other

Customer Journey Map

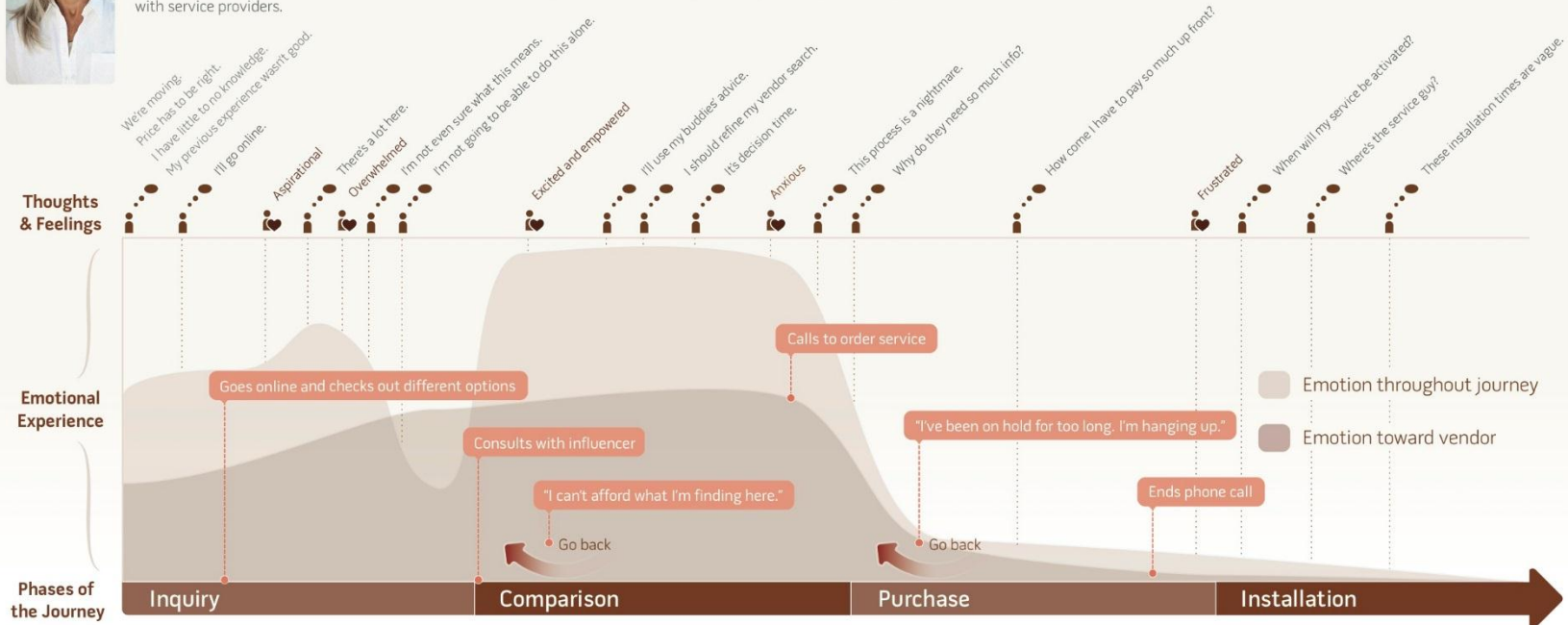
(See G00264094 “Use Journey Maps in User Experience Design and Digital Workplaces”)



Sarah's Broadband Provider Journey

Sarah is moving her family of three. She knows she's going to need phone and Internet service. The effective and contextual factors that will affect Sarah's choice in broadband vendors are price, and her existing knowledge of and previous experience with service providers.

effective[®]



Description

The Inquiry phase features the reasons people are shopping around for new service. These are usually related to moving and relocation, an upgrade to existing service or hunting down new deals. Moving is the biggest reason.

Recommendations

Design homepages with separate, targeted call-out areas lying above the fold, tailored for residential and tech-savvy customers. Internal product areas should include basic plain-English product descriptions and large price points with a clear call to action. Bullet points should include keywords that summarize options and features typically found in product datasheets.

Description

The potential customer comes into the Comparison phase usually armed with the right info and tech jargon and is looking for the lowest cost. Customers tend to be brand agnostic. If they can't find the right price or the right services, they may leave and go back to Inquiry.

Recommendations

Use IP location services to geo-locate customers – removing the current service address roadblock. This allows users to configure services before adding them to the cart and reflects bundled price discounts in a clear and obvious manner.

Description

The Purchase phase involves the provider requiring quite a bit of personal info. The order flow tends to be complex, and the process can be all over the map. There is a sense of delayed gratification – waiting on service installation and activation.

Recommendations

Reduce the amount of information required by streamlining and improving any areas that contain form fields, using industry best practices. Work on setting expectations for the Installation phase with phone customer service reps to improve the overall experience with your brand.

Description

The Installation phase is the handoff from customer service to the installer. There are usually scheduling conflicts among all parties involved. This phase can be somewhat painful for the customer in dealing with the installer.

Recommendations

Many factors converge to make this phase of the customer journey unpleasant. Providing accurate arrival times, courteous technicians and clear instruction materials during installation can help alleviate the negative experience in this phase. Also, consider having leave-behind customer comment cards so customers feel empowered to give feedback into the process.

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Source: EffectiveUI

User/Customer Journey Map

(See G00264746 “Three Practices Enterprise Architects in Banks Should Avoid in Order to Respond to Key Banking Trends”)



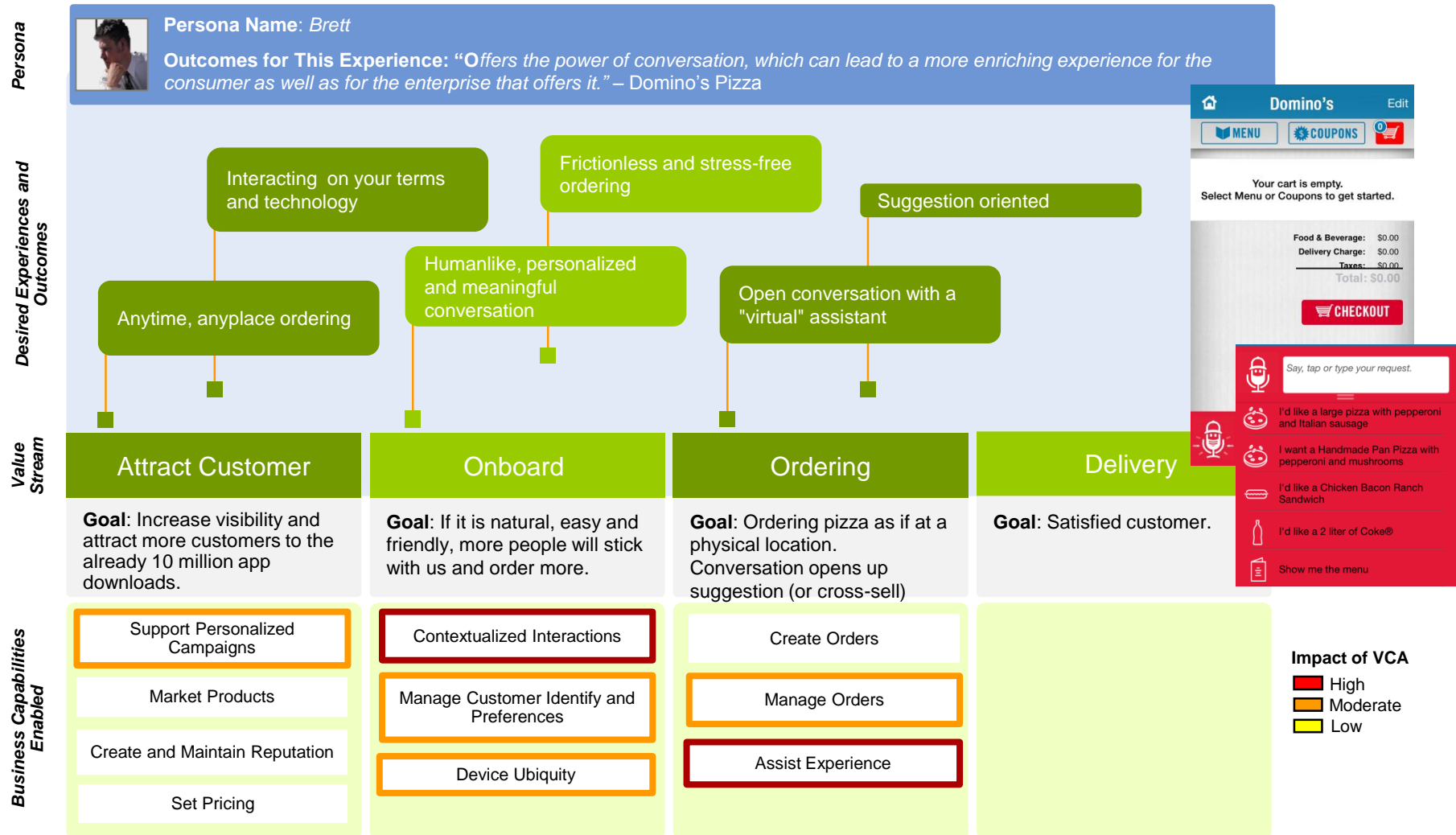
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Source: Lono Creative

Business Outcome Journey Map

(See G00272240 "Toolkit: How EA Enables Digital Humanism via Business Outcomes Journey Maps to Exploit Digital Disruptions")



See: <http://whatsnext.nuance.com/dominos-virtual-assistant-order-pizza/>

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Ecosystem/Customer Journey Map

HOW CAN A SOLICITOR HELP ME TO BUY MY HOME?

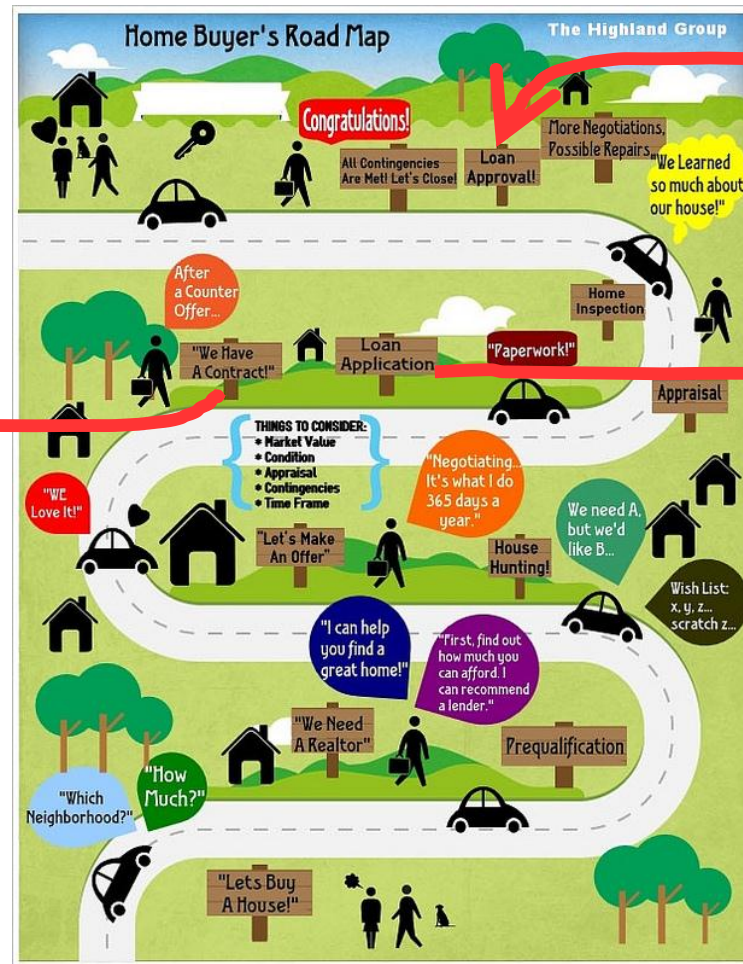
EXPLAINING THE PROCESS
Your solicitor will explain how the whole house-buying process works. They will help identify what you need to do and provide expert advice at every stage.

SEARCHES
Your solicitor will carry out various investigations and searches for you and your mortgage lender to make sure you know as much as possible about the property before you buy. If anything out of the ordinary is found, they will advise you as to what actions to take.

ENTERING INTO THE CONTRACT
Your solicitor will make all the necessary investigations and help to resolve any property-related legal problems before 'exchanging contracts'. This involves arranging for you to enter into a binding agreement (contract) for the purchase between you and the seller. They will arrange a date that you agree for the purchase to be completed.

COMPLETION
Your solicitor will take all steps to complete your purchase including transferring the funds. This is when you get the keys to your new home. They will help you prepare the tax returns and make arrangements to pay the Stamp Duty Land Tax to HMRC. They will also register your name as the owner and your mortgage provider as the lender at Land Registry.

To find your nearest compensating expert, visit finda.solicitor.org.uk



Source: Lono Creative

Quick Tips on Journey Maps

1. Journey maps complement roadmaps they do not replace them.
2. Journey maps focus on an instance of tasks, actions or activities, whereas roadmaps focus on evolution over time.
3. Journey maps are a great way for enterprise architects to help their organizations discover opportunities and risks.

Polling Question

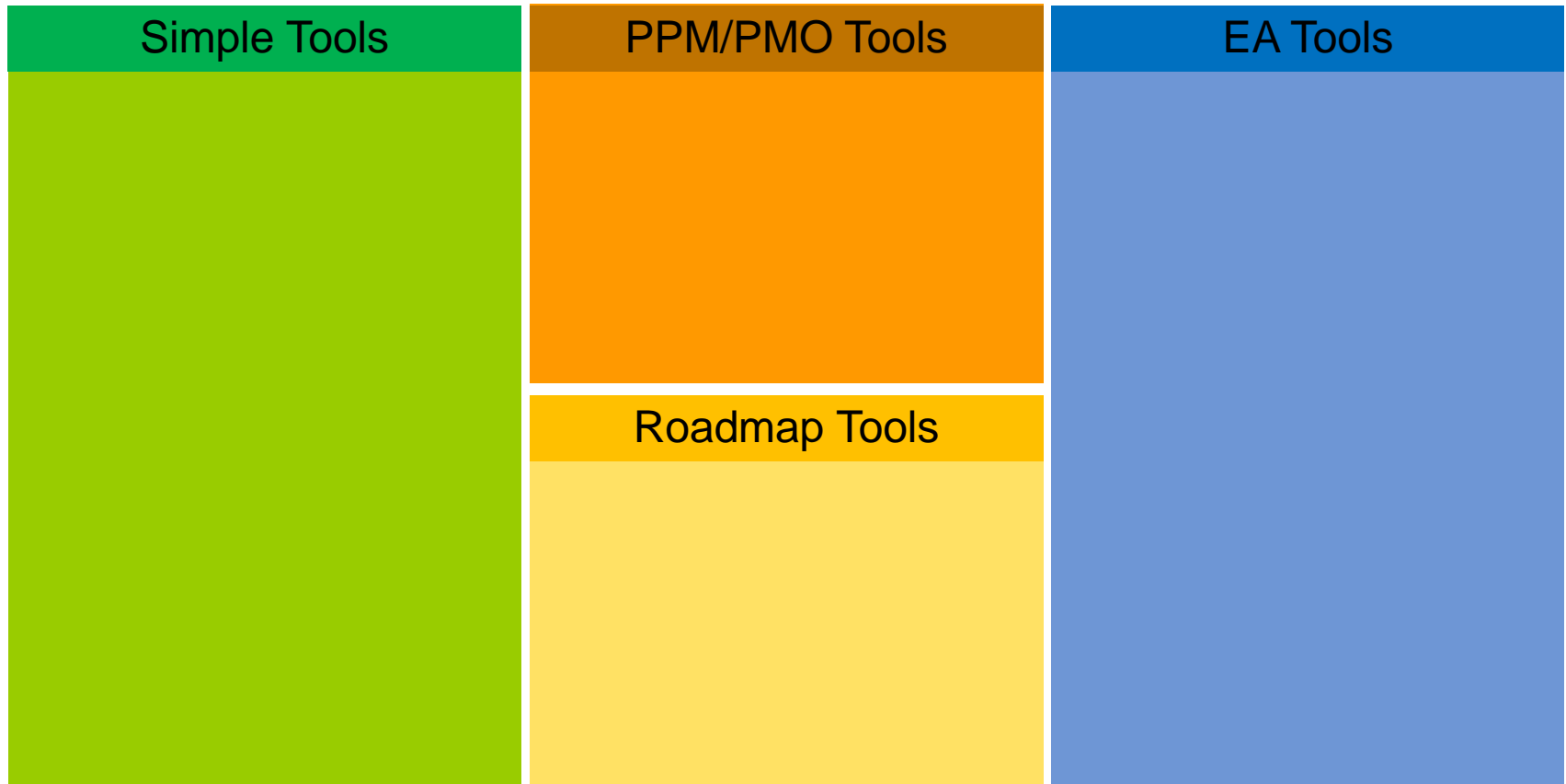
Are you using journey maps?

- 1) No plans to use them.
- 2) Journey maps are used by development teams or marketing, but not within EA or for strategic planning.
- 3) We are using them as ecosystem or business outcome journeys as part of strategic planning.

Key Issues

1. A road map classification system – understand the types and how they are typically used
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Technologies for Roadmapping

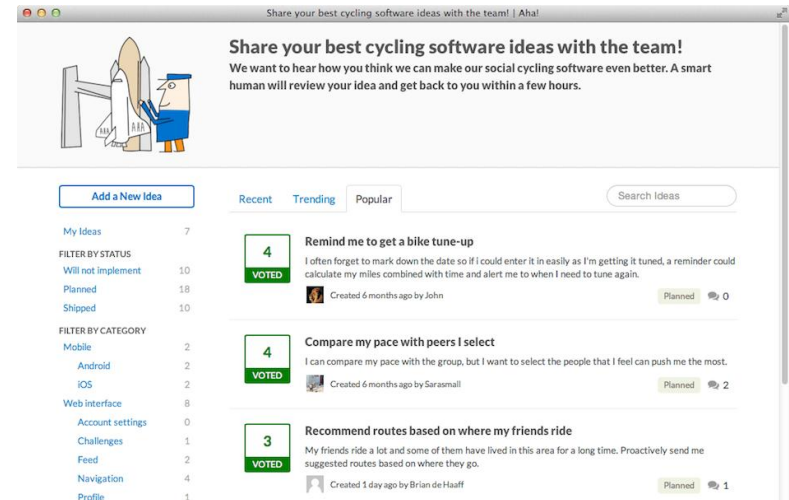
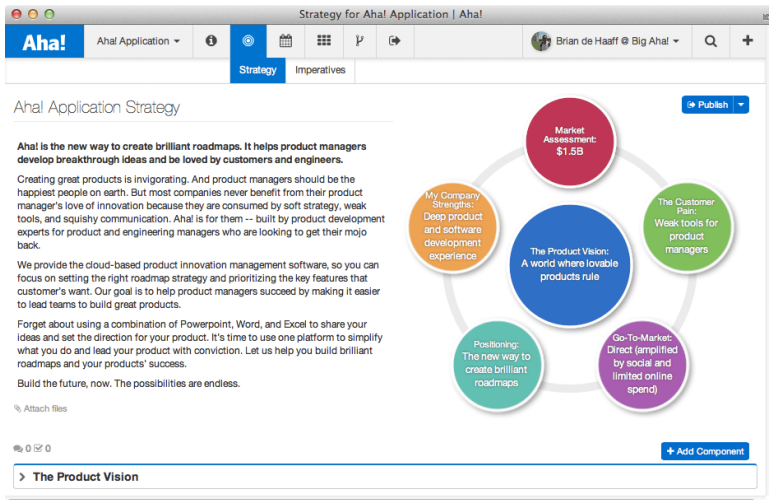
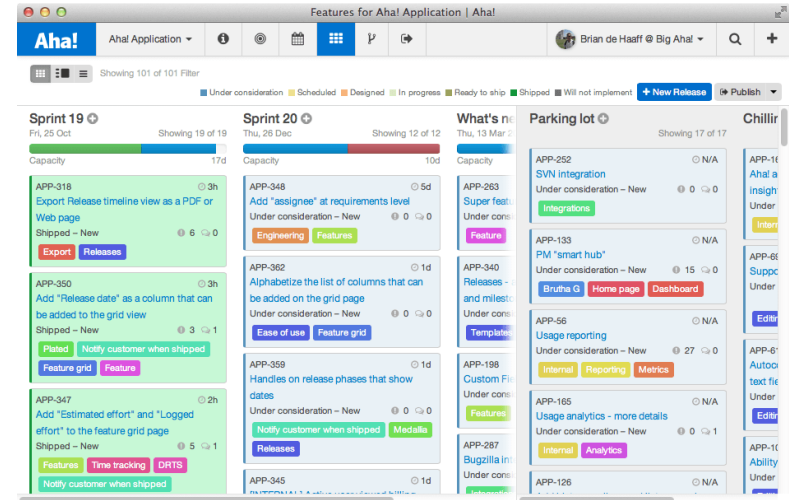
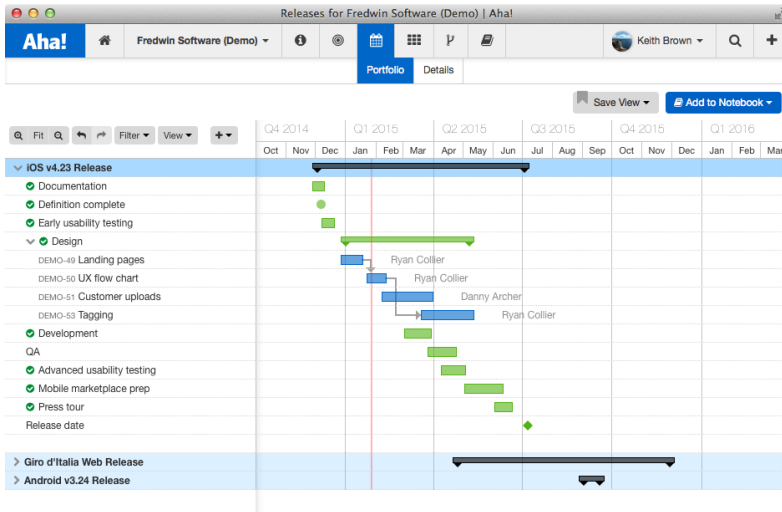


Technologies for Roadmapping

Simple Tools	PPM/PMO Tools	EA Tools
<ul style="list-style-type: none">• Post-it Notes• PowerPoint• Visio• (iGrafX)	<ul style="list-style-type: none">• Clarizen• Daptiv• Innotas• Oracle• Sciforma• VersionOne	<ul style="list-style-type: none">• Avolution• BizzDesign• Casewise• IBM• MEGA• Qualiware• SAP• Software AQ• Troux
	Roadmap Tools	
	<ul style="list-style-type: none">• Aha!• ProductPlan• Sopheon	

Vendors shown are a reduced list for illustrative purposes only and no inference should be assumed as to the relative merits of one over another. In each category there are many other vendors that are as capable and be as well or better suited to your needs.

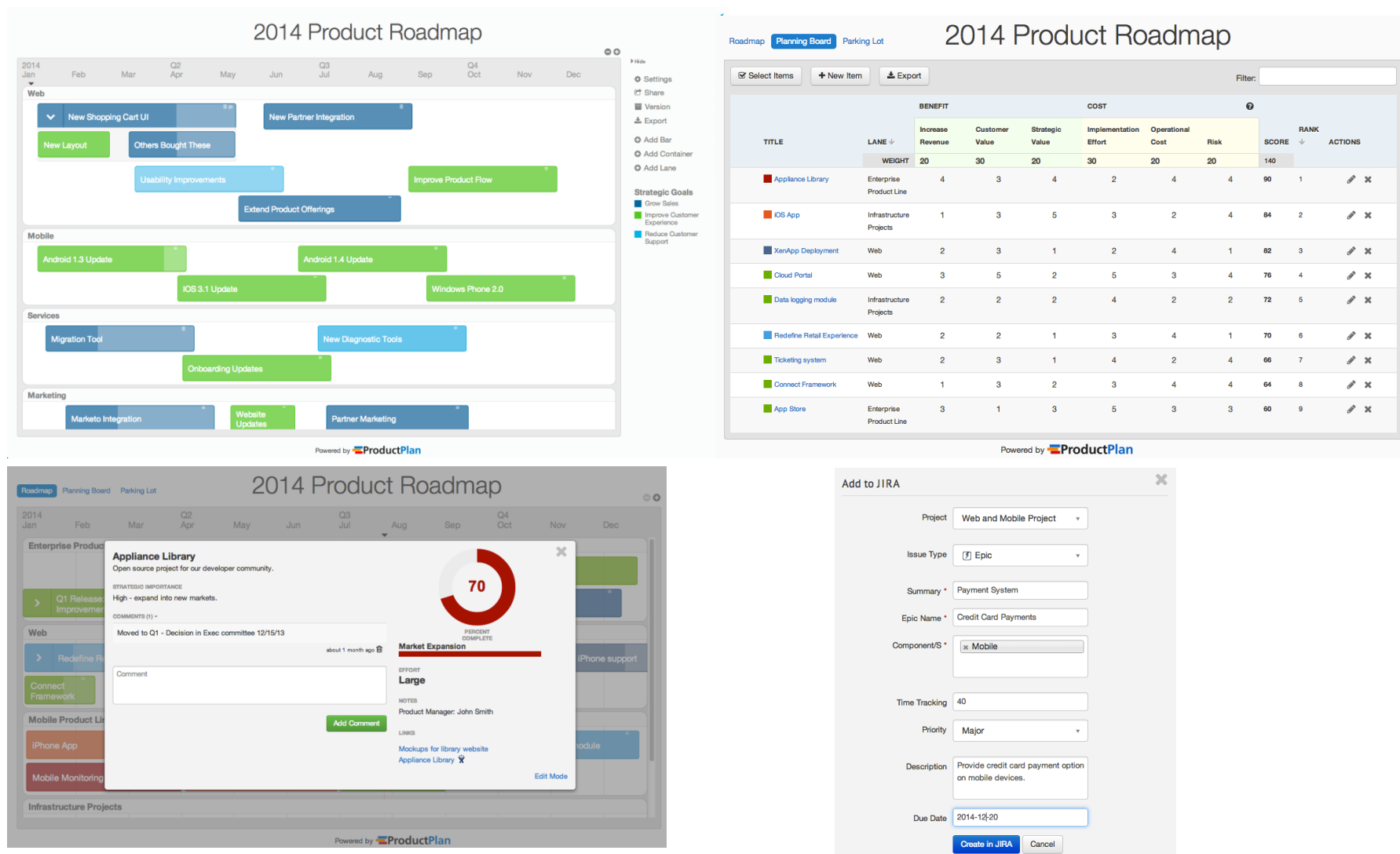
Aha!



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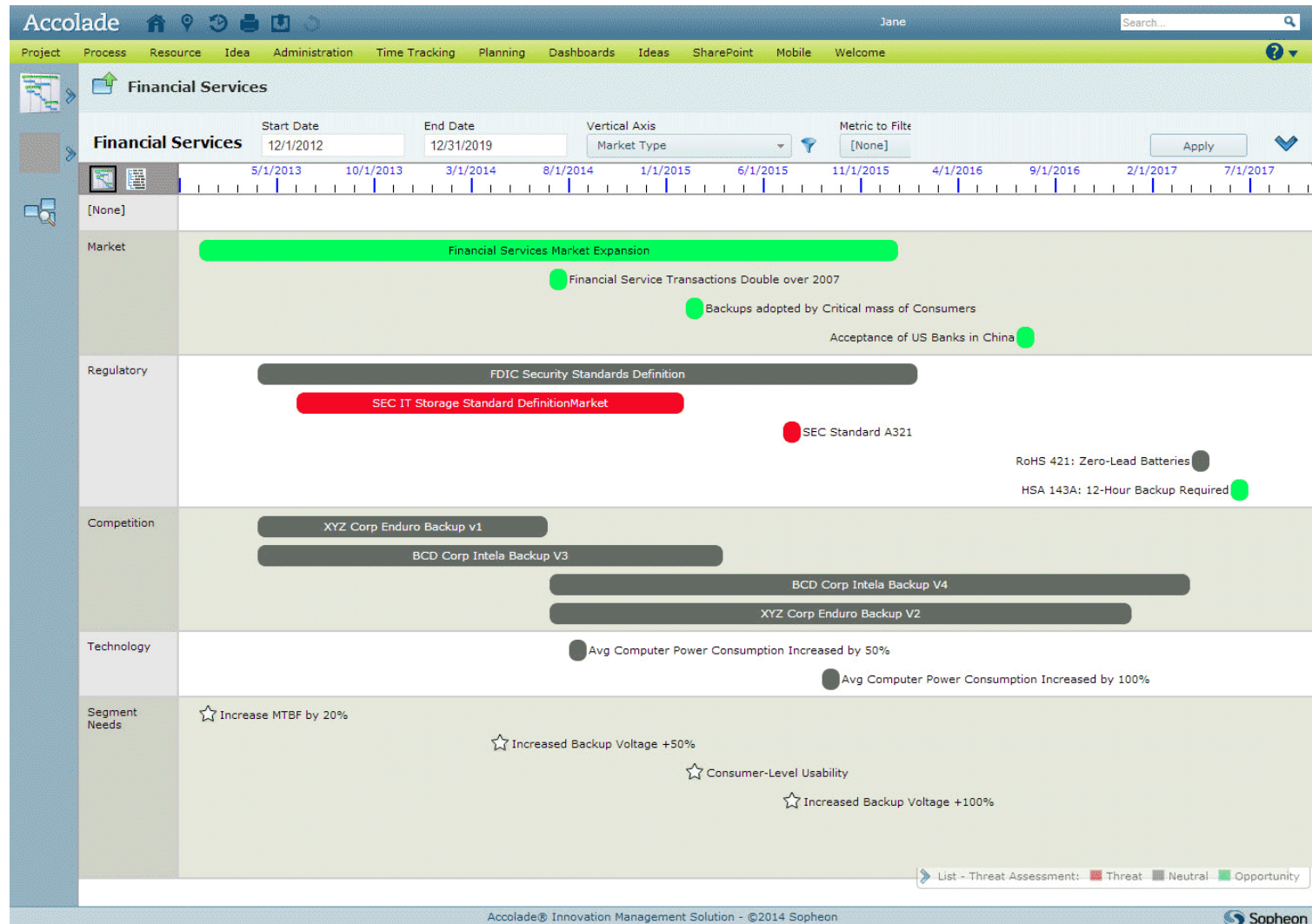
ProductPlan



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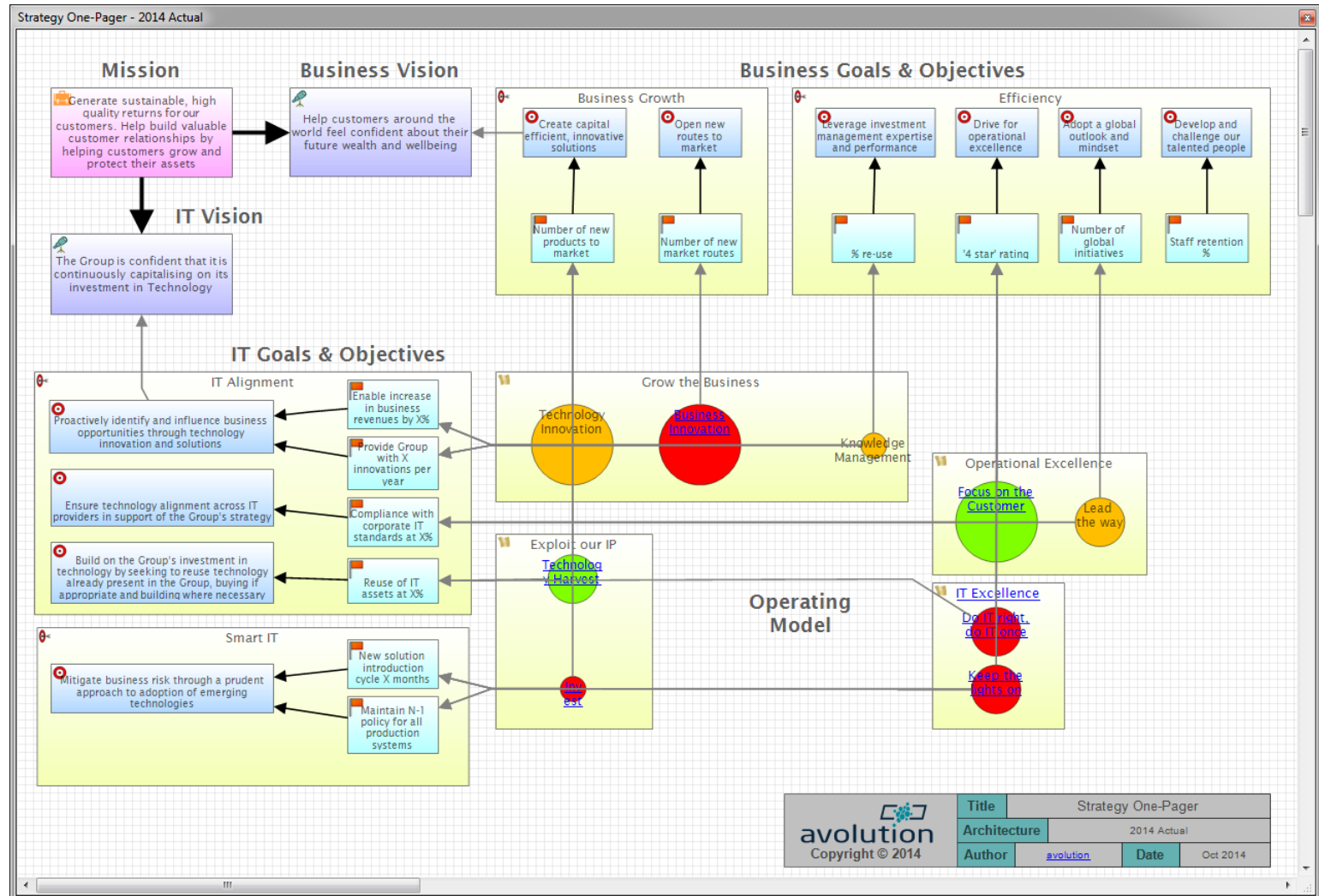
Sopheon



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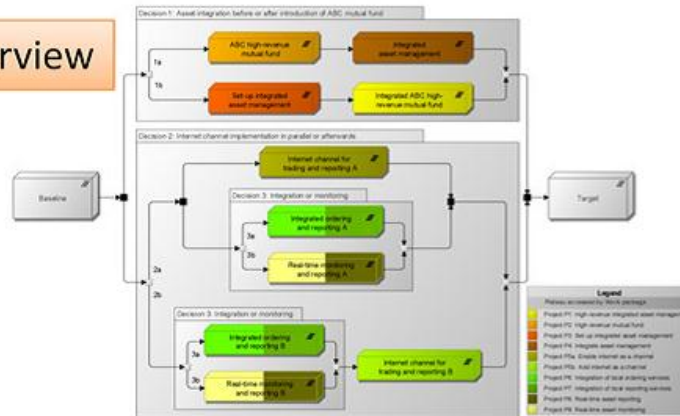
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Avolution

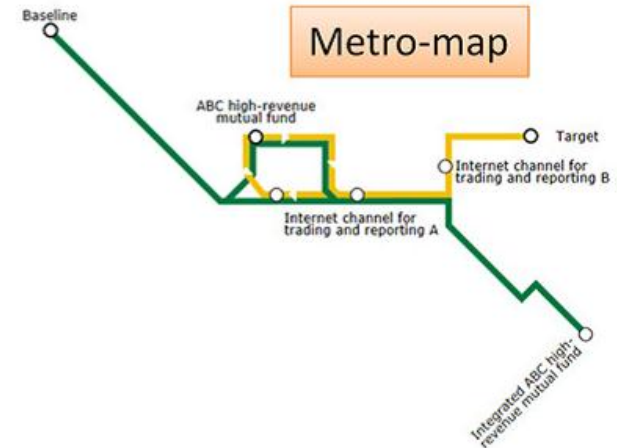


BizzDesign

Overview



Metro-map



Animated roadmap

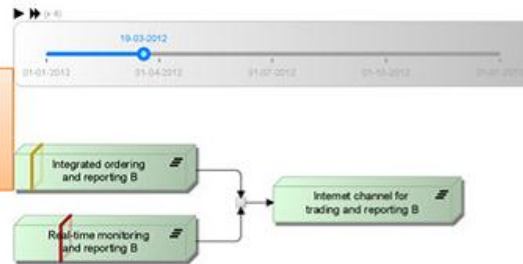


Table roadmap

Applicatieservice x wordt gebruikt door bedrijfsproces x Bedrijfsproces

	Archisurance	Accepteer	Claim afhandeling	Creëer overeenkomst	Informeer klant	Premie innen	Registreer	Sluit overeenkomst	Uitbetalen	Waarderen
Archisurance										
CIS				2015			2016			2014
Claim informatie service	2016	2015		2015			2015	2016		2014
Polisservice			2014		2014	2014		2014		

Verwerken... Vink... Geen vink... Attribut bewerken/tonen... Labels...
Afdrukken... Kopieëren... Kopieëren... Waarom tonen in cellen... Landschapskleuren...

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Quick Tips on Technology

1. Don't assume more sophisticated is always best.
2. Check with other teams whether they already have tools you could use.
3. Focus on the overall process and outcome, not the immediate need, in order to select the most appropriate tool or technology.
4. Create and leverage “Use Cases” to understand the needs for and uses of roadmapping technology.

Recap

1. What types of roadmaps should I use? And when?
2. Are there other types of maps that supplement road map efforts?
3. What is the best way to create road maps?

Recommendations

- ✓ Consider use, purpose and lifespan of roadmap before choosing technology?
- ✓ Use journey maps to model your ecosystem and identify new business opportunities and risks?
- ✓ Stay focused on business outcomes, or customer outcomes when creating roadmaps or journey maps?

Recommended Gartner Research

- ➔ **Five Best Practices for Building EA Road Maps that Enable Outcomes**
Cathleen Blanton (G00252402)
- ➔ **Create Enterprise Roadmaps to Communicate and Execute Strategy Effectively**
Mark McGregor & Cathleen E. Blanton (G00271512)
- ➔ **Classify Roadmap Styles to Guide Roadmap Development**
Cathleen E. Blanton & Mark McGregor (G00272041)
- ➔ **Toolkit: How EA Enables Digital Humanism via Business Outcomes Journey Maps to Exploit Digital Disruptions**
Mike J. Walker, Betsy Burton & Marcus Bloesch (G00272240)
- ➔ **Magic Quadrant for Enterprise Architecture Tools**
Saul Brand (G00263193)
- ➔ <http://www.gartner.com/webinar/2859518>

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