



AN EXPERIENCE REPORT:

# Transitioning From Project To Product

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# Transitioning from Project to Product



Nicole Bryan @nicolebryan

*Vice President, Product Development @ Tasktop Technologies*

Nicole is the leader of our Product Development organization and has extensive experience in software and product development, focused primarily on bringing data visualization and human considerations to the forefront of DevOps and Agile.

**Oh My.**

# Oh My.

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Does moving to Product Value  
Streams really involve all of that?



## DISCLAIMER

Tasktop is **not** 30,000 people!

Source: CIO.com, Making the shift to product-based IT, January 2019

## GARTNER CIO SURVEY 2019

**55%** of IT organizations  
are moving from project to product

# FLUMMOXED



Budgeting



Timeframes



Success



Teams



Prioritization



Visibility



Risk

- 01  
Us vs Them
- 02  
Problems have to go too high up to get resolved
- 03  
Lack of knowledge about and empathy for our customers



- 04  
Felt more inward focused than outward focused
- 05  
Were we \*really\* product focused truly all the way through the entire organization?
- 06  
Investment decisions are “twice baked”



Budgeting



Timeframes



Success



Teams



Prioritization



Visibility



Risk



**MINDSET IS  
EVERYTHING**

**PRODUCT THINKING**

**Customer First**



Budgeting



Timeframes



Success



Teams

Prioritization



Visibility



Risk



Budgeting



Teams



Timeframes



Success



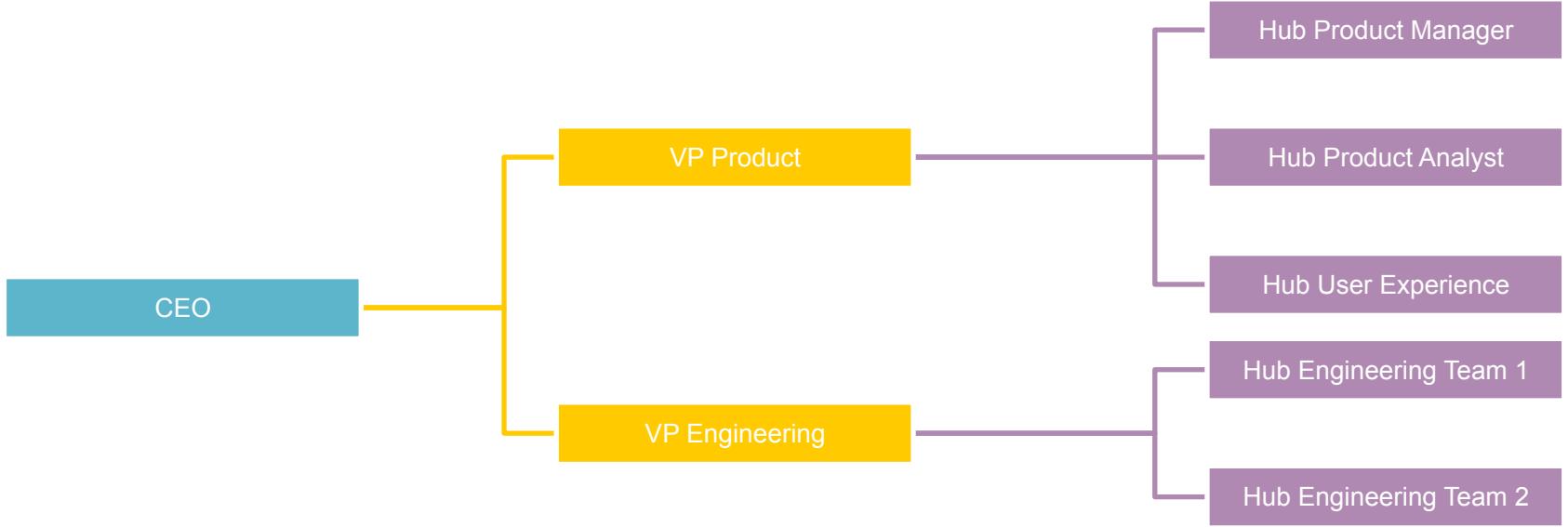
Visibility

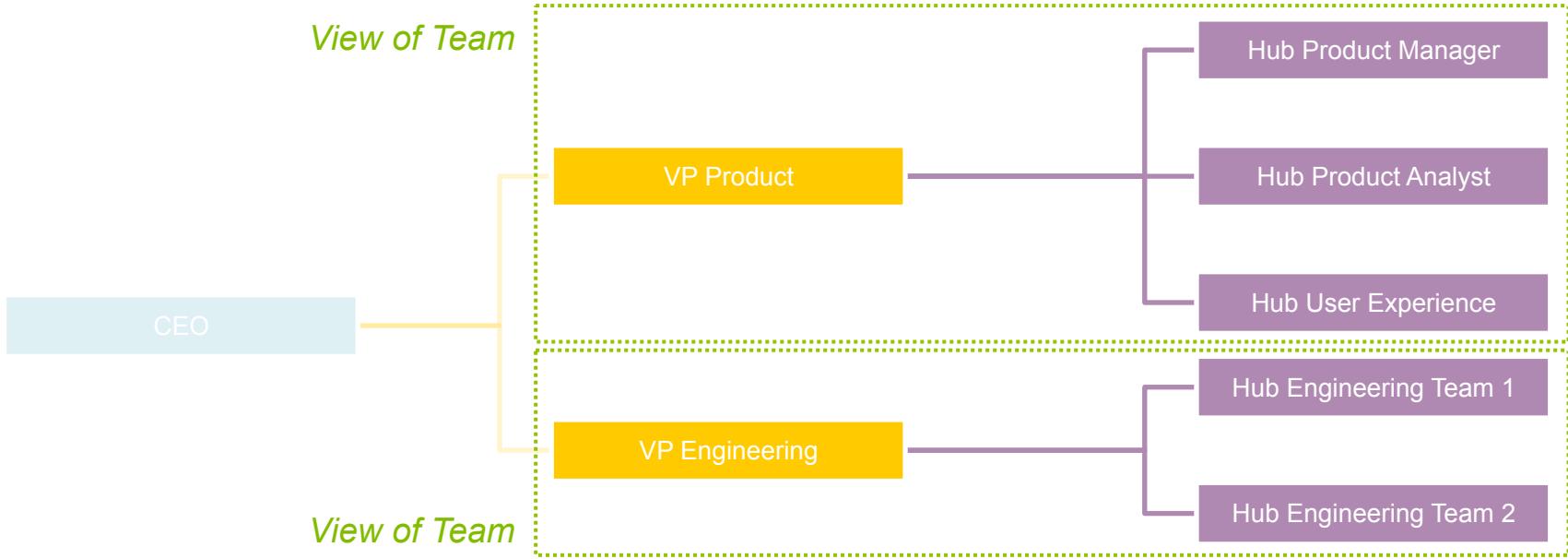


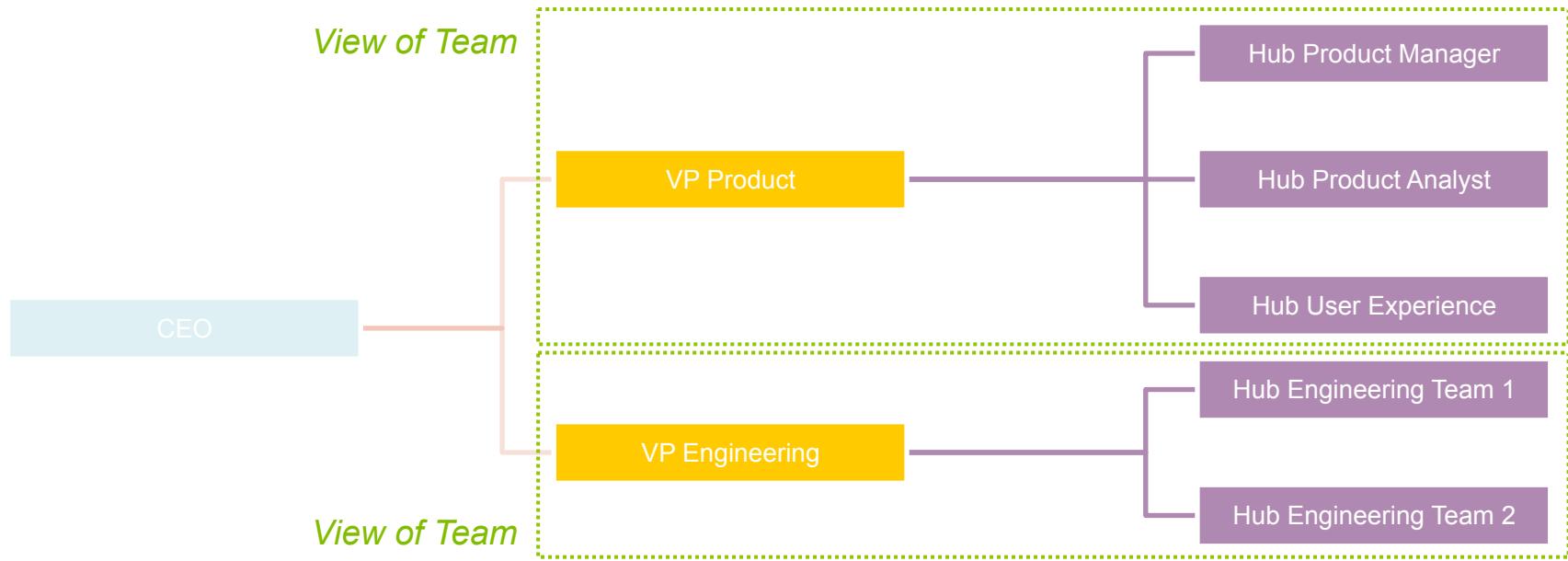
Prioritization



Risk

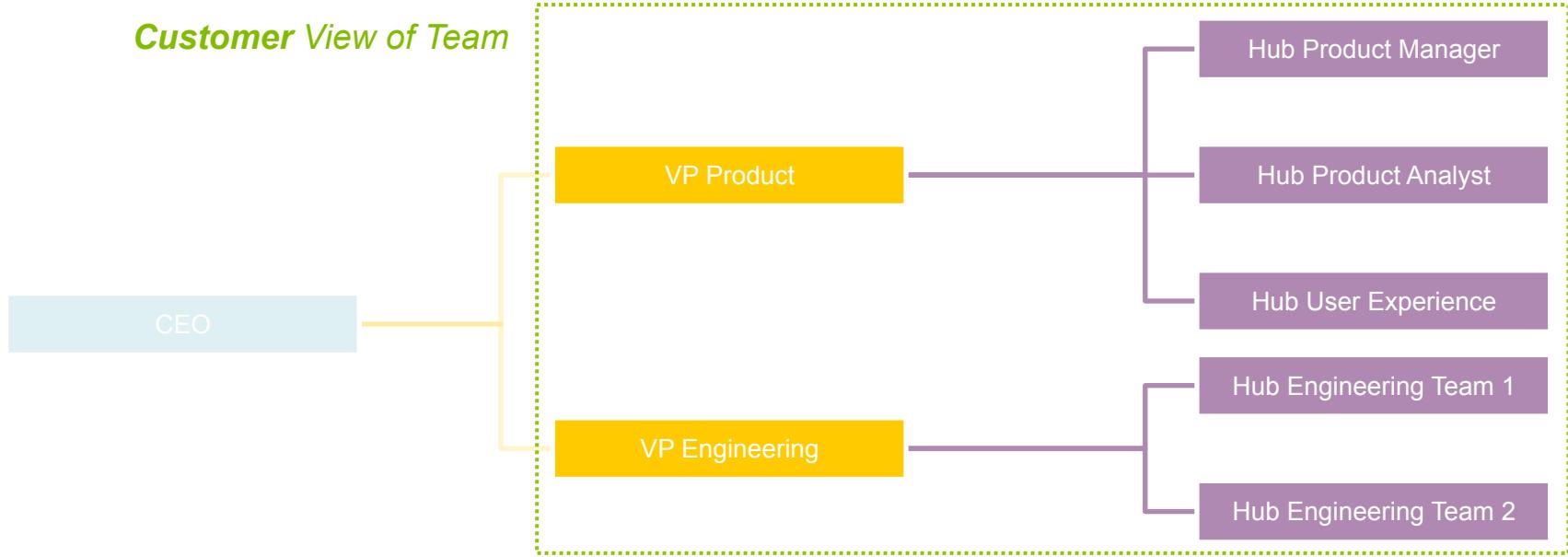




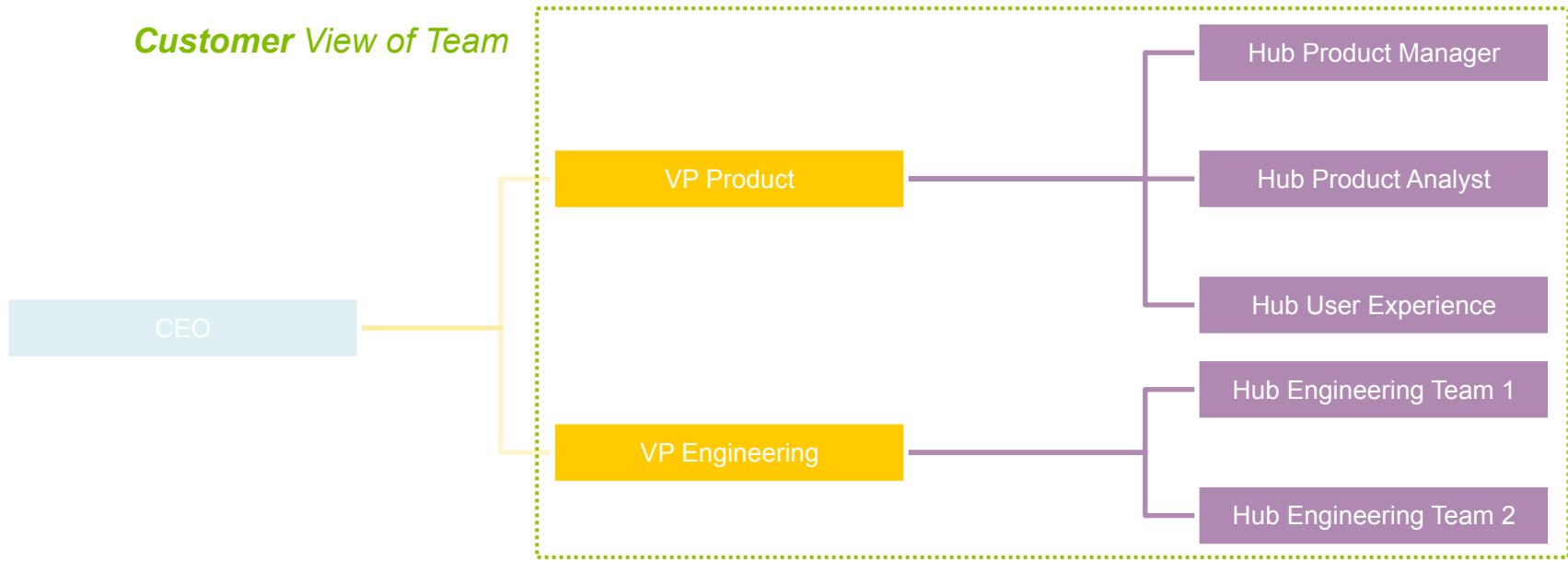


- Creates a Product vs. Engineering attitude
- All difficult decisions have to go all the way to the CEO
- \*Internal\* View of Team – not the customer view of team

## *Customer View of Team*

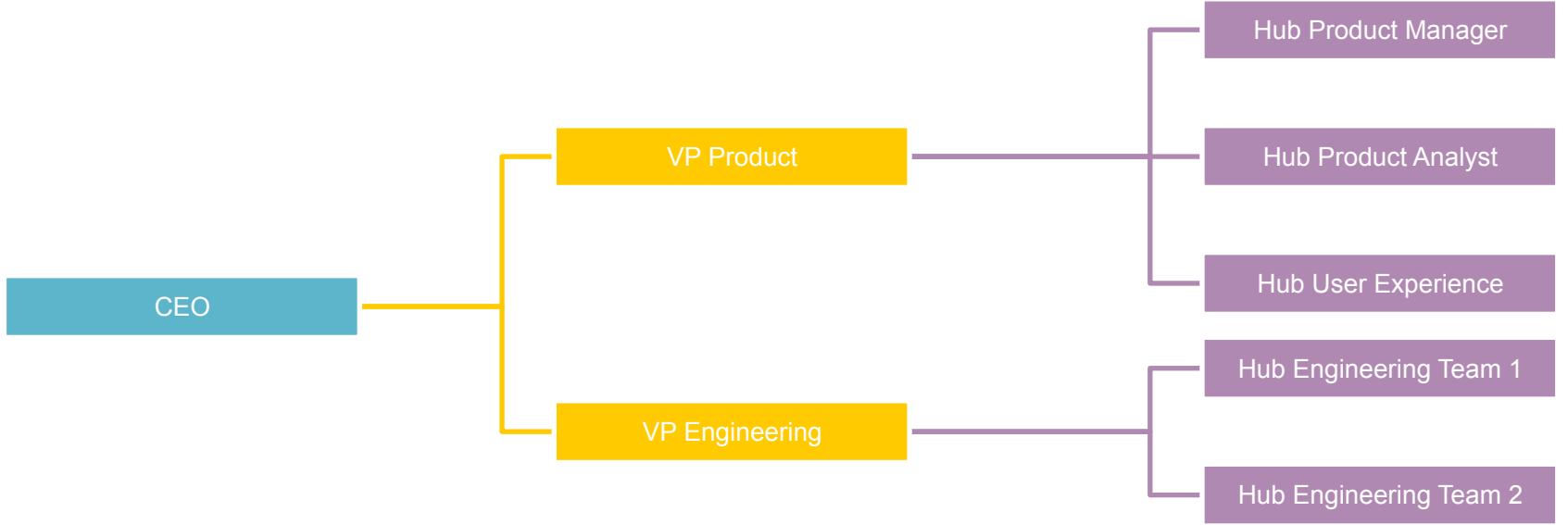


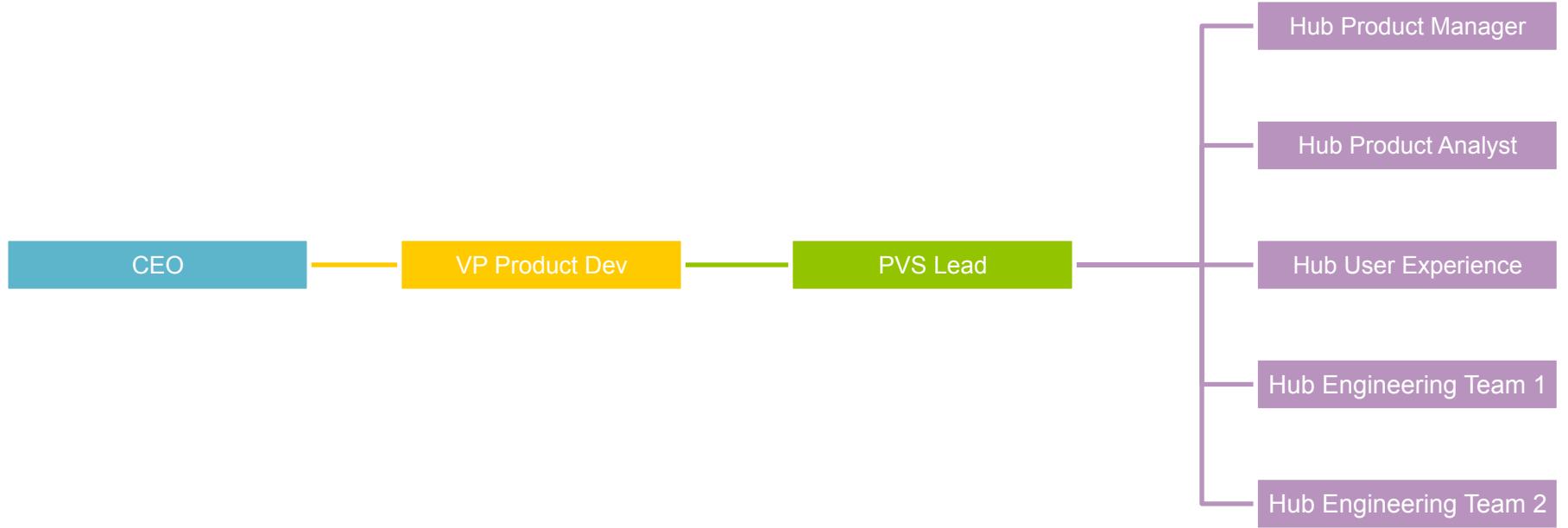
## *Customer View of Team*

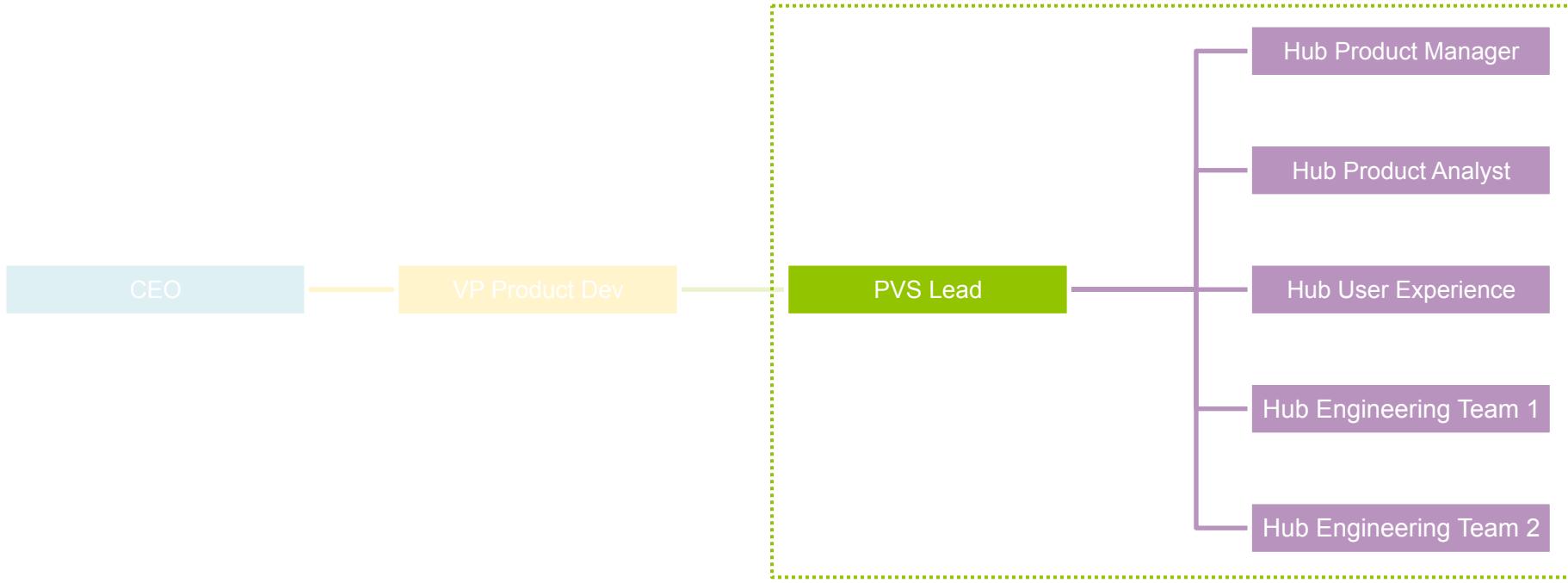


The values of "product thinking" embodies:

**CUSTOMER FIRST**







- It is “we” that matches how our customers see us
- Decisions are pushed down – almost all made directly within a PVS or between PVSs
- (Dependencies still matter)

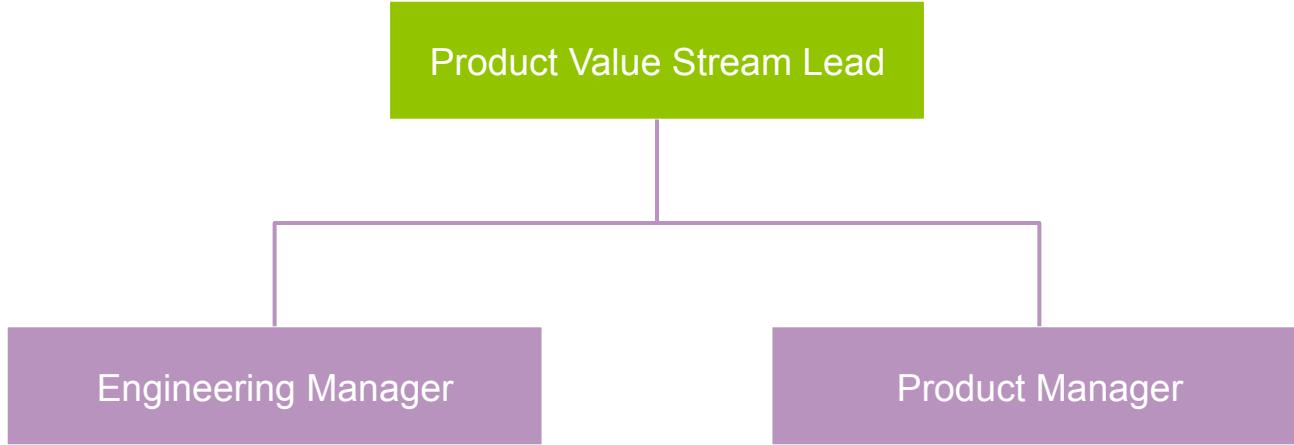
# What Happened

**What Happened** because of **What Happened**

# What Happened

- ✓ New role: **Product Value Stream Lead**
- ✓ Moved from a Product Team and an Engineering Team to a single Product Development Team with 4 Product Value Streams
  - 2 *internal* facing Product Value Streams
  - 2 *external* facing Product Value Streams

# Top Level Default Structure





Product Value Stream Lead





Product Value Stream Lead



Sorry, no results found ...

# **Product Value Stream Lead vs. Product Manager**

# Product Value Stream Lead vs. Product Manager

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You need **BOTH**  
**NEITHER** are Project Managers

Title	Core Mandate	Expectations
Product Value Stream Lead  (Director or above)	Responsible for all aspects of their PVS: both business (vision, design, customer happiness, costs, pricing, market changes), operational and technical (agile teams, estimation, architecture)	<ul style="list-style-type: none"> <li>• People <ul style="list-style-type: none"> <li>• Work across all product value streams to ensure happiness and effectiveness across all PVSs</li> <li>• Happiness of the team, hiring, determining necessary staffing levels</li> <li>• Resource coordination &amp; staffing within and between PVSs</li> <li>• Cultivate a culture of innovation and technical integrity</li> <li>• Manage direct reports (typically managers)</li> <li>• Budget responsibility</li> </ul> </li> <li>• Product &amp; Technology <ul style="list-style-type: none"> <li>• Understanding of your product(s) in the context of Tasktop as a business by spending significant time with field and customers</li> <li>• Determine Flow Item Distribution because of the larger context that is seen</li> <li>• Emphasis on understanding customer, customer journey, whole product experience, sales motion, market, market first, etc.</li> </ul> </li> <li>• Process <ul style="list-style-type: none"> <li>• Communication coordination throughout the larger value stream inclusive of support, GTM, IT, security, etc</li> <li>• Eliminate macro (not micro) roadblocks and 'noise' for productivity. Get out of the way of day to day work and decision making</li> <li>• Dependency management between PVSs when unable to be addressed by individual teams</li> <li>• High level customer problem and escalation solutions - understanding and identifying relative importance of customer issues and broader business issues that could affect their PVS</li> <li>• Set objectives, results, and measure success of your PVS</li> </ul> </li> </ul>

Title

Product Value Stream Lead  
(Director of Product)

**Responsible for all aspects of their PVS: both business (vision, design, customer happiness, costs, pricing, market changes), operational and technical (agile teams, estimation, architecture)**

Cross all product value streams to ensure happiness and effectiveness across all PVSs  
Lead of the team, hiring, determining necessary staffing levels  
Coordinate & staffing within and between PVSs  
Foster a culture of innovation and technical integrity  
Have direct reports (typically managers)

- Budget responsibility
- Product & Technology
- Understanding of your product(s) in the context of Tasktop as a business by spending significant time with field and customers

**• Determine Flow Item Distribution because of the larger context that is seen**

- market, market first, etc.
- Process
  - Communication coordination throughout the larger value stream inclusive of support, GTM, IT, security, etc
  - Eliminate macro (not micro) roadblocks and 'noise' for productivity. Get out of the way of day to day work and decision making
  - Dependency management between PVSs when unable to be addressed by individual teams
  - High level customer problem and escalation solutions - understanding and identifying relative

**• Set objectives, results, and measure success of your PVS**

their PVS

Product Manager	<p>Responsibility for prioritization of all flow items by deeply understanding all stakeholder needs (customer, field, analysts, etc) and technical tradeoffs ensuring efficient delivery of prioritized flow items.</p>	<ul style="list-style-type: none"> <li>• Ownership of a small/medium commercial offering OR ownership of a large internal product including prioritization of backlogs</li> <li>• Feature design responsibility of an entire product</li> <li>• Effectively listens to customers to understand their needs and KPIs, and can discuss how a product might improve the customer business</li> <li>• Can handle communication and appropriate escalations of complex customer problems</li> <li>• Evaluates and provides direction on feature analysis and design to more junior members of the team</li> <li>• May assume agile "Product Owner" role on one or more teams</li> <li>• Typical relevant work experience: 6-10 years</li> </ul>
Senior Product Manager	<p>Responsibility for prioritization of all flow items <b>for a complex or multi-component product</b> by deeply understanding all stakeholder needs (customer, field, analysts, etc) and technical tradeoffs ensuring efficient delivery of prioritized flow items.</p>	<ul style="list-style-type: none"> <li>• Ownership of a collection of internal products OR ownership of a large commercial offering</li> <li>• Creates vision for entire product or product line</li> <li>• Feature design responsibility of an entire product or collection of internal products</li> <li>• Provides significant direction on the design of advanced complex features</li> <li>• Evaluates and provides direction on feature analysis and design to more junior members of the product development team.</li> <li>• Effectively listens to customers to understand their needs and KPIs, and can discuss how a product might improve the customer business</li> <li>• Can effectively communicate with senior customer representation of escalated customer problems</li> <li>• Identify opportunities for new commercial offerings</li> <li>• Typical relevant work experience: 8-12 years</li> </ul>

Product

	<p><b>Responsibility for prioritization of all flow items by deeply understanding all stakeholder needs (customer, field, analysts, etc) and technical tradeoffs ensuring efficient delivery of prioritized flow items.</b></p>	<p>Ownership of a small/medium commercial offering OR ownership of a large internal product including prioritization of backlog.</p> <p>Feature • <b>Feature design responsibility of an entire product</b></p> <p>Effectively listens to customers to understand their needs and KPIs, and can discuss how a product might improve the customer business</p> <ul style="list-style-type: none"><li>Can handle communication and appropriate escalations of complex customer problems</li><li>Evaluates and provides direction on feature analysis and design to more junior members of the team</li></ul> <p>• <b>May assume agile "Product Owner" role on one or more teams</b></p> <p>• Typical relevant work experience: 6-10 years</p>
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# PVS Lead

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Whole picture: Business, Operational,  
Technical

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Significant people management duties

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Generally no feature design

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Primary Flow Metrics: *Flow  
Distribution & Flow Efficiency*

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# Product Manager

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Prioritization, prioritization,  
prioritization

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Generally no people management  
duties

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Feature Design

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Primary Flow Metrics: *Flow Time, Flow  
Load & Flow Velocity*

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## PVS LEAD (Former Engineering Manager)

“The PVSL role creates team agency combining PM, design, and technical execution along with a whole business lens through all lifecycle phases. It has very little to do with being a PM. PM execution is a responsibility within this role.”



## PVS LEAD (Former Product Manager)

“First, it requires me to speak in terms of business results – almost exclusively about what we want to accomplish not how we want to accomplish it. As people in tech jobs go, I’m relatively un-enamored with technology so I don’t get wrapped up in technology for technology’s sake. Second, it forces me to delegate the role of technical lead to someone on the team. And this should serve to empower the team to do what they think is best.”



Don't be blind!  
Specific Individuals Matter

Context & Background  
Matters

Do you need other  
adjacent or cross  
cutting roles?

Flexibility within PVSSs

## Considerations

# Intentional vs. Perfect

# Simon says ....

# Carmen

~~-Simon~~ says ....





**I**nternal or  
**S**hared Services,  
**F**rameworks,  
**C**omponents

**Dependencies will exist.**

**Relish them rather than shirk them.**

**What Happened** because of **What Happened**

*“People don’t resist change, they resist loss”*

## Engineers

Concern of lost culture

Being managed by  
non-engineers

Would they no longer  
be insulated?

## Product

Being swallowed up – far  
more engineers

All the sudden being  
responsible for technical  
details?

Clarity (Perception)

# Loss Map

?

Career path confusion? To be a PVS Lead?

# Career Ladders

Title	Core Mandate	Expectations
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## Engineering Technical Track

Title	Core Mandate	Expectations
Junior Software Engineer (co-ops and interns)	Learning development skills and experiencing a professional software development organization.	<ul style="list-style-type: none"> <li>• Contributes to tasks, defects, debts, features with guidance.</li> <li>• Learning professional development skills and techniques.</li> <li>• Accepts and grows with guidance from mentors, and peers.</li> <li>• Typical relevant work experience: 0 years</li> </ul>
Software Engineer 1	Delivering stories, defects, and technical debts with guidance. Acquiring and learning skills, tools, and techniques in order to become an effective creator of business value.	<ul style="list-style-type: none"> <li>• Contributes to features.</li> <li>• Can define and deliver well defined, usually small, simple features with help from other team members.</li> <li>• Becoming a productive developer and effective creator of business value by acquiring and learning skills, tools, and techniques.</li> <li>• Accepts and grows with guidance from manager, mentors, and peers.</li> <li>• Typical relevant work experience: 0-3 years</li> </ul>
Software Engineer 2	Delivering high quality and complete feature implementations and fixes.	<ul style="list-style-type: none"> <li>• Contributes to design of, and leads implementation of features of small to medium complexity.</li> <li>• Reliably, consistently, and generally independently completes features and project work.</li> <li>• Communicates effectively and professionally with fellow contributors and business stakeholders with some oversight.</li> <li>• Technology or domain expertise in a few areas always striving for continued learning</li> <li>• Typical relevant work experience: 2-7 years</li> </ul>
Senior Software Engineer	Leading and delivering features of all sizes, and providing leadership and mentorship to the team.	<ul style="list-style-type: none"> <li>• Designs and leads implementation of complex features that cross team boundaries. Solves challenging technical issues.</li> <li>• Known as a rock-solid, highly productive developer who can be relied on to deliver projects and features.</li> </ul>

# Who Leads?

- ✓ Product background or Engineering background?
- ✓ Resulting Optics & Tone
  - Engineering Lead
  - Product Lead
- ✓ Over compensate
- ✓ Ensure career tracks
- ✓ Communication with Executives

**Does the story end here?**

# Does the story end here?

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Oh My.



FINANCE

“You want me to give you budget and revenue numbers based on what?”



SALES

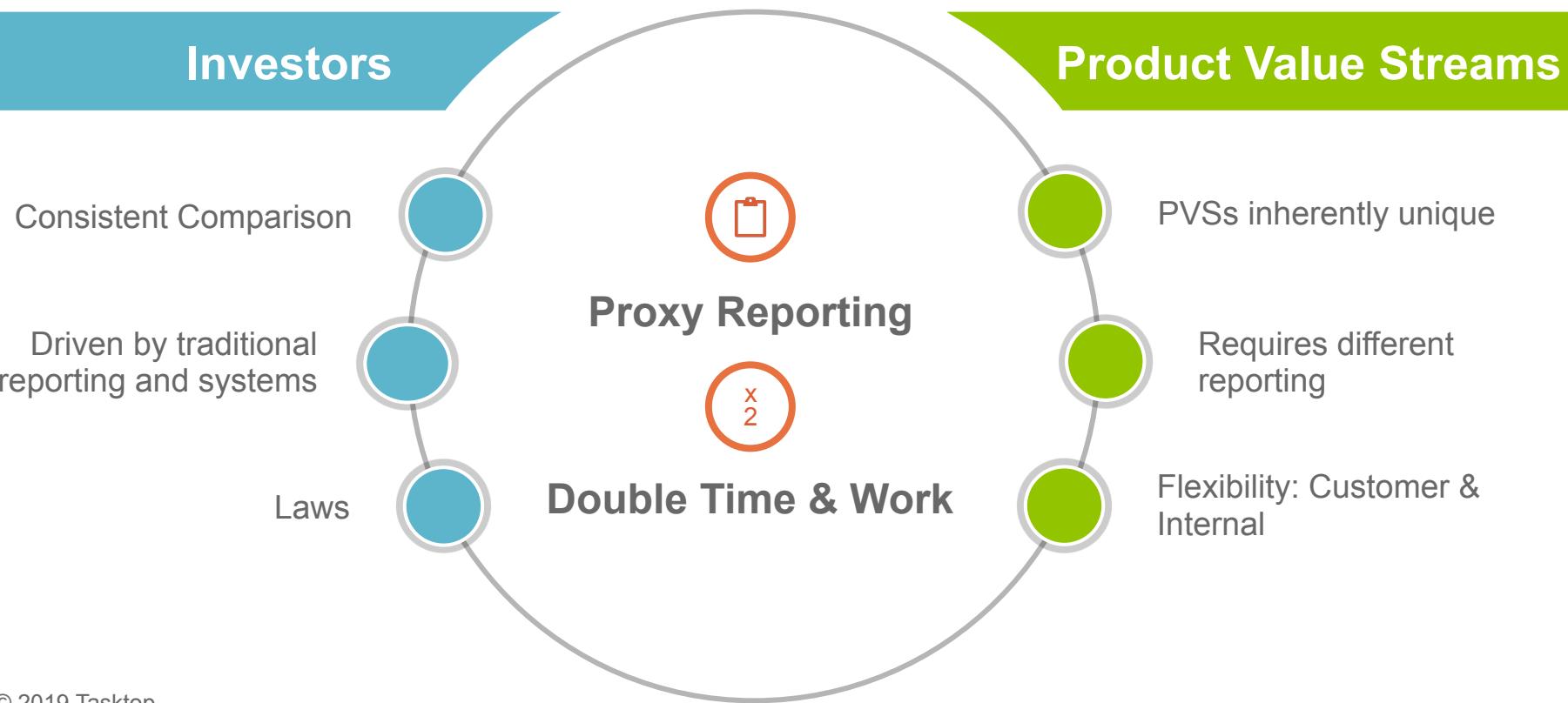
“Why are you talking to me about these ‘technical debt’ things?”



EXECS

“Am I going to get consistent reporting & visibility across all products?”

# The World of Finance



# Conversation Changers

 FEATURE  	<p>DESCRIPTION</p> <p>BENEFITS for CUSTOMERS  </p> <p>BENEFITS for TASKTOP  </p> <p>© Tasktop 2019</p>	 DEBT  	<p>DESCRIPTION</p> <p>BENEFITS for CUSTOMERS  </p> <p>BENEFITS for TASKTOP  </p> <p>© Tasktop 2019</p>
 DEFECT  	<p>DESCRIPTION</p> <p>BENEFITS for CUSTOMERS  </p> <p>BENEFITS for TASKTOP  </p> <p>© Tasktop 2019</p>	 RISK  	<p>DESCRIPTION</p> <p>BENEFITS for CUSTOMERS  </p> <p>BENEFITS for TASKTOP  </p> <p>© Tasktop 2019</p>

# FLOW DISTRIBUTION: Product X

The ratio of the four Flow Items planned for the release



-- Features

- ❖ Feature 1
- ❖ Feature 2



-- Defects

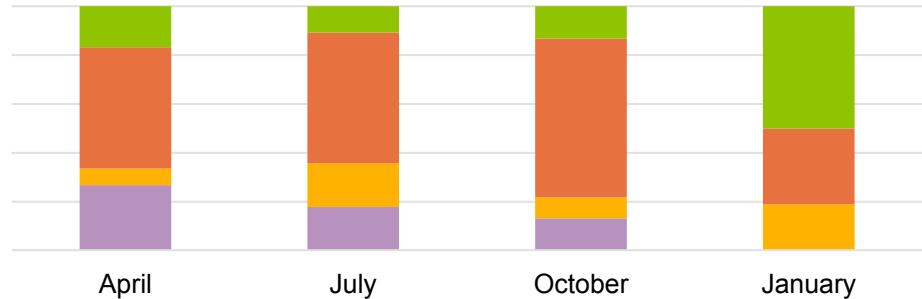


-- Risks



-- Tech Debts

- ❖ Debt 1
- ❖ Debt 2



[+ Add Product](#)[Dashboard](#)[All Products](#)[Viz](#)[Hub](#)[Platform](#)[Cloud](#)[Test](#)[Tool Connections](#)[Organization](#)

Nicole Bryan

## Hub

[2 Tools](#)   [2 Projects](#)   [13 Types](#)   [9,006 Artifacts](#)[Flow Metrics](#)[Categorize Artifacts](#)[Configure Product](#)[All](#)[Feature](#)[Defect](#)[Risk](#)[Debt](#)

2018-12-01 ~ 2019-05-31

Group by Week

## Product Live Stream

New Artifacts Today

0

Total Artifacts

9,006

Artifact Updates Today

0

Total Artifact Updates

7,120

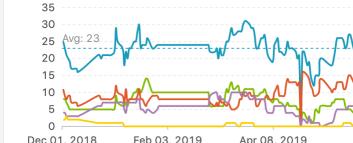
## Flow Load

23

flow items in progress, on average

Dec 01, 2018 - May 31, 2019

Group by Day

[Help](#)[Estimate Workload](#) →

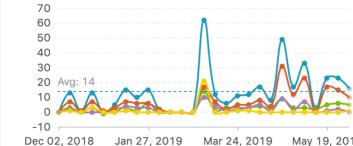
## Flow Velocity

366

flow items completed

Dec 01, 2018 - May 31, 2019

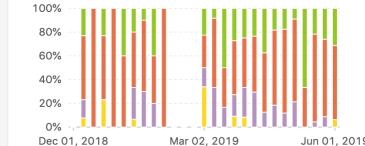
Group by Week

[Help](#)[Explore Throughput](#) →

## Flow Distribution

Dec 01, 2018 - May 31, 2019

Group by Week

[Help](#)[Review Allocation](#) →

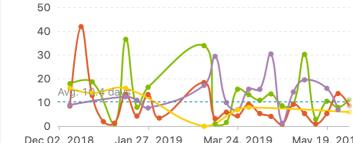
## Cycle Time

10.4

days to close a flow item, on average

Dec 01, 2018 - May 31, 2019

Group by Week

[Help](#)[Analyze Speed](#) →

## Cycle Efficiency

58.1%

of cycle time spent in active states

Dec 01, 2018 - May 31, 2019

Group by Week

[Help](#)[Find Bottleneck](#) →

# Pitfalls

- Change Management always the hardest part
- Tricky balance - “imposed upon” vs. “driven by”
- Recognize the entire organization won’t operate this way instantly
- PVSs is a terrible acronym

# Victories

- ✓ Overall more of a customer focus
- ✓ Much less of an “us” vs. “them” – more of a “we are in this together”
- ✓ Investment decisions are easier to implement
- ✓ Consistency of Reporting



# Any Questions

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