

2013 Portfolio Planning - Products

DRAFT Discussion Document
v3.0

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Executive Summary

- **Objectives of the Portfolio Planning Exercise:**

- Determine the major strategic investments for 2013
- Resolve key functional gaps within Products (and IIG?)
- Develop resource reallocation plan to successfully deliver on them
- Deliver a committed 2013 roadmap

- **Design goals / guiding principles (in priority order)**

- Drive revenue growth
- Optimize for the needs of the portfolio
- Reduce the long term cost structure through better leverage of existing assets

- **In Scope**

- Portfolio strategy
- Product family/ line strategy
- Resource allocation within the Products team

- **Out of Scope For This Effort**

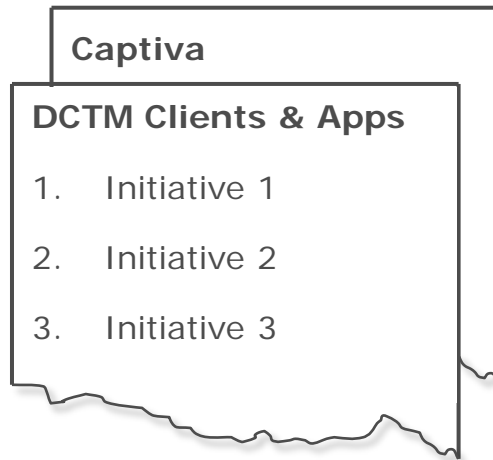
- Resource (re)allocation across other functions within IIG (e.g. Sales, Marketing, OnDemand, Healthcare, etc.)
- How we will build the Liquid BU
- M&A strategy

Process Overview – Portfolio Strategy & Resource (Re) Allocation

	What	Who
1. Develop 2013 Product Family Strategies	<ul style="list-style-type: none"> Develop revenue-maximizing strategies for 2013 for each product family <u>independently</u> Includes: Documentum, Captiva, DocSci and Kazeon 	<ul style="list-style-type: none"> PM Leads
2. Identify & Prioritize New Initiatives	<ul style="list-style-type: none"> Stack rank list of initiatives for 2013 in each product area Stack rank list of unfunded initiatives for 2013, both within product lines, and across the portfolio Merge, evaluate & prioritize unfunded initiatives 	<ul style="list-style-type: none"> PM Leads Aaron Rohit Jeroen
3. Resource Estimation	<ul style="list-style-type: none"> PM provides enough additional detail to Arch, ENG to size estimates Arch, ENG provides t-shirt sizing for all initiatives, as well as skills required to deliver on the same 	<ul style="list-style-type: none"> ENG Leads PM Leads
4. Resource Allocation Planning	<ul style="list-style-type: none"> Existing product family initiatives get [50%?] of currently allocated resources [35%] of ENG resources are redeployed to fund the new initiatives [15%] of resources reallocated to address functional gaps 	<ul style="list-style-type: none"> ENG Leads PM Leads R/A/J
5. 2013 Plan Finalization	<ul style="list-style-type: none"> Revise 2013 roadmap and based on new resource plan Deliver locked 2013 roadmap Deliver PM reorg plan 	<ul style="list-style-type: none"> ENG Leads PM Leads

Process Detail – Key Steps Explained

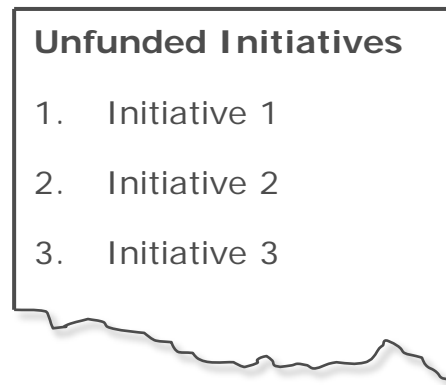
Steps 1 & 2



Step 1:

- Each product family lead stack ranks initiatives for **their product areas** for 2013
- Knowing the amount of Engineering effort is NOT required

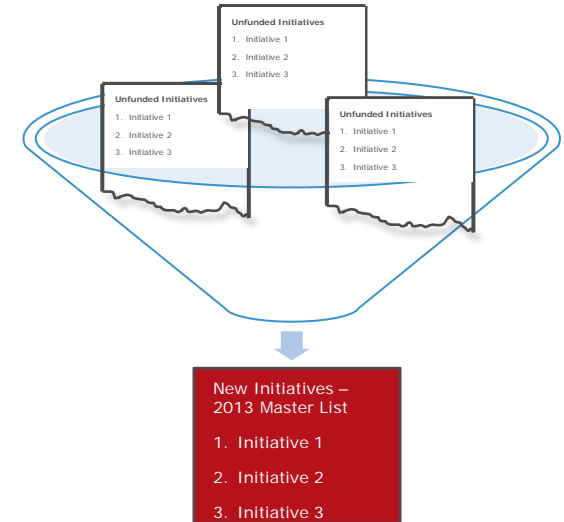
Before the offsite



Step 2A:

- Each product family lead stack ranks their list of **new/ unfunded initiatives** for 2013
- This includes ideas from their area, as well as cross-portfolio
- No ENG costs required

Before the offsite



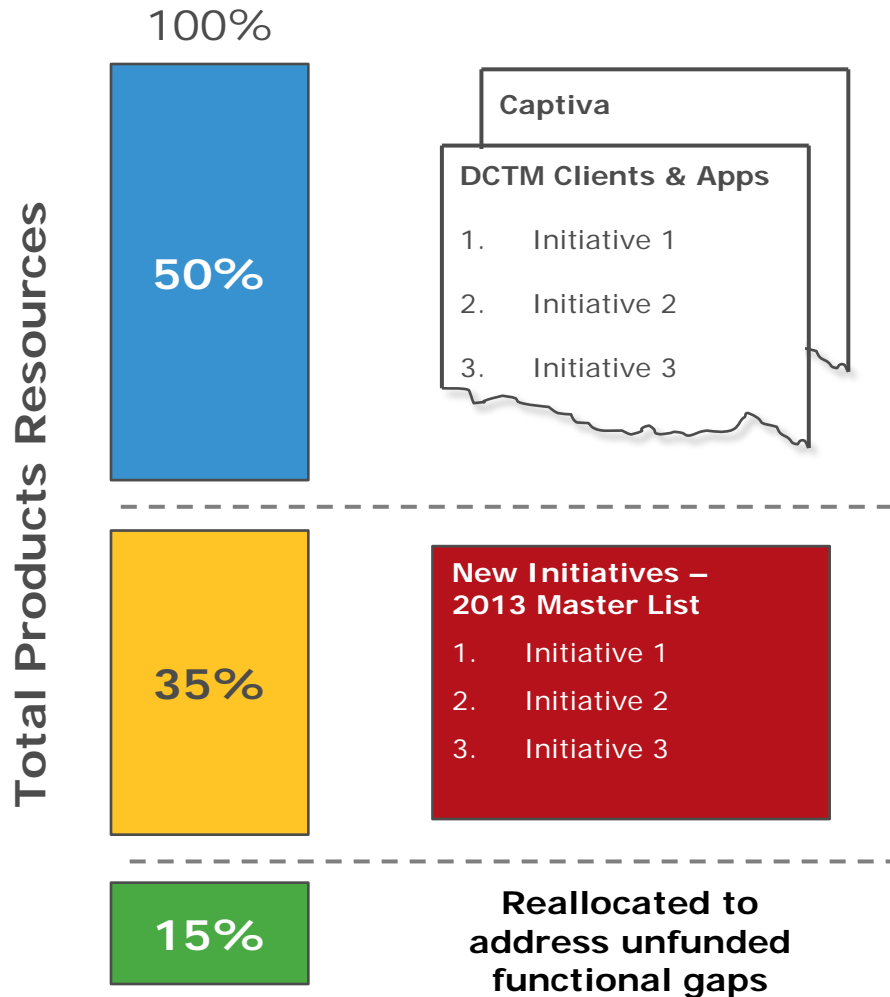
Step 2B:

- New/ unfunded initiatives lists are merged and re-ranked according to multiple, pre-defined criteria (e.g., revenue, strategic value, etc.) across the portfolio

At the offsite

Process Detail – Key Steps Explained

Step 4



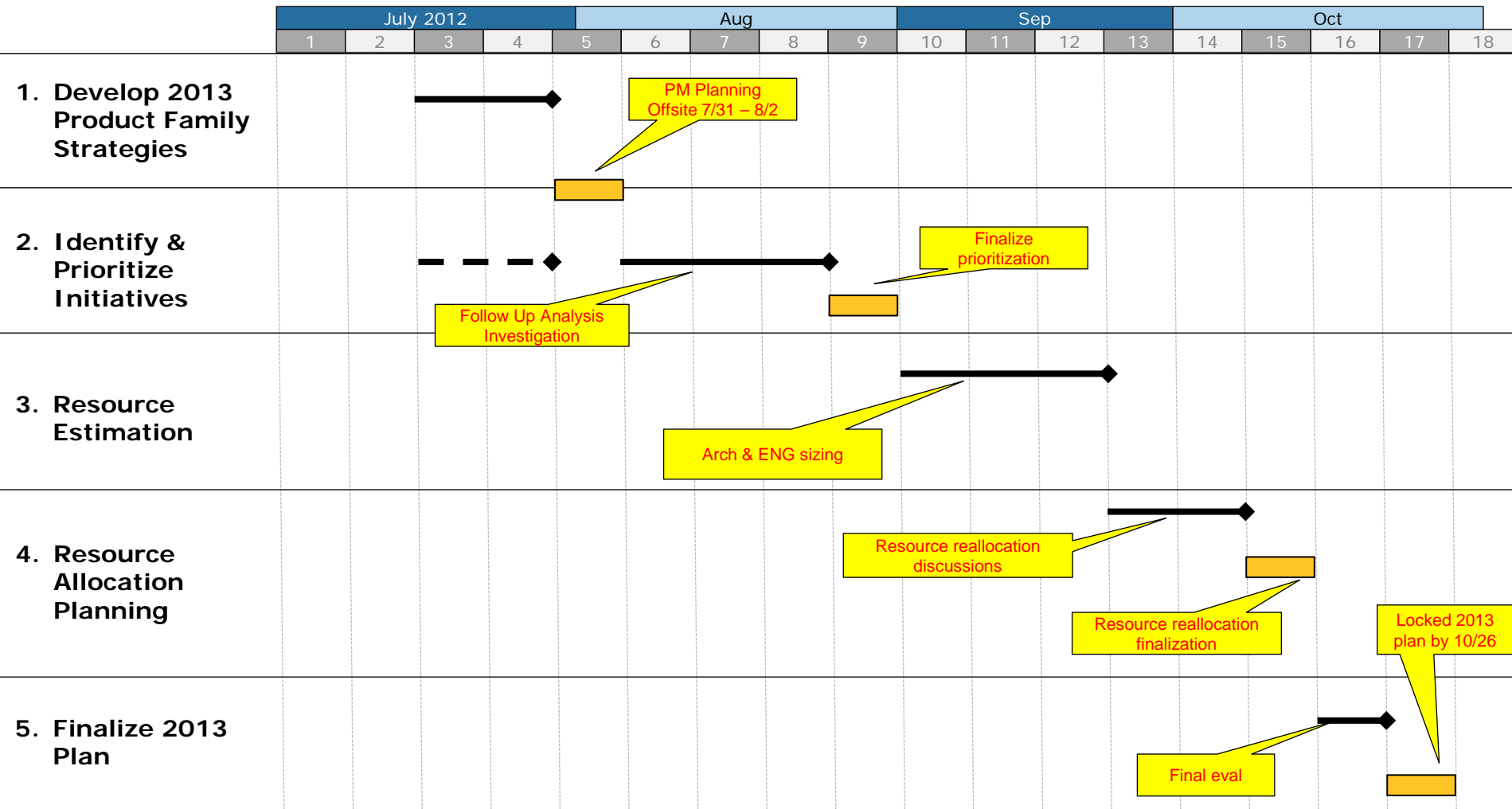
Step 4:

- Products resources will be reallocated as follows:
 - **[50%]** of existing resource allocation remains with existing product families
 - **[35%]** goes to fund new initiatives across all needed functions (e.g. Arch, ENG, PM)
 - **[10%]** goes to fund unfunded functional gaps
- The percentages above may change if/when
 - We get additional resources from IIG eStaff as resources are redeployed in a more optimal fashion, and/or
 - We conclude some products can/should take deeper cuts
- Having the pre-existing lists of agreed-upon priorities, will hopefully help make it easier to have these very difficult discussions/decisions

After the offsite

Proposed Timeline: ~14 Weeks

Major Meetings



Next Milestones

- | | |
|------------------|---|
| July 26 | Decks submitted by all product groups & initiative owners |
| July 27 – Jul 30 | Decks available for review prior to meeting |
| July 31 – Aug 2 | Offsite planning meeting |

Key Investment Areas – DRAFT Solutions / Cross-Product Initiatives

Functional Gap	Description / Comments	Owner
1. Extended Enterprise Collaboration	<ul style="list-style-type: none"> Offering complete content management solutions to SMB customers via the public cloud 	Fiona
2. SMB SaaS Solutions	<ul style="list-style-type: none"> Offering complete content management solutions to SMB customers via the public cloud 	Fiona
3. All-Digital Document Lifecycle	<ul style="list-style-type: none"> Seamless integration of Documentum, DocSci and Captiva for all-digital document handling 	Melissa
4. Private Cloud Deployment	<ul style="list-style-type: none"> Expanding xMS for use across all IIG products 	David (Randy)
5. Telemetry	<ul style="list-style-type: none"> VOS-like approach across all IIG products 	Fiona (Patrick)
6. Enterprise Records Management	<ul style="list-style-type: none"> Comprehensive, automated records management within the Enterprise (i.e. RMS & Kazeon integration) 	Prashanth
7. Assisted Upgrade	<ul style="list-style-type: none"> Programmatic effort to compel customers to upgrade to the latest version of their software – likely includes migration tools, incremental testing, and services/assistance 	David
8. Big Content and Big Data Enabled Applications	<ul style="list-style-type: none"> Extend IIG application capabilities to enhance support for Big Content (Atmos) and Big Data (Greenplum). Productize Big Data solutions 	David

Key Investment Areas – DRAFT Solutions / Cross-Product Initiatives

Functional Gap	Description / Comments	Owner
9. Enterprise Archiving	<ul style="list-style-type: none">Offering to connect to enterprise systems of record (ERP, Healthcare, etc.)	Phil
10. Enterprise Search	<ul style="list-style-type: none">Productizing xPlore for sales as an enterprise search play	Phil
11. Capture-enabled D2 & xCP	<ul style="list-style-type: none">Tightly integrated ad-hoc and high-volume batch capture with simplified configuration, administration and reporting	Daren (Justin)
12. VCE / vBlock Integration	<ul style="list-style-type: none">Embed IIG platform, application stack on solution with vBlock and gain VCE leverage	n/a?

Key Functional Gaps – DRAFT

Functional Gap	Description / Comments
1. GTM Team	<ul style="list-style-type: none"> As discussed
2. Solutions Team	<ul style="list-style-type: none"> Need to shift focus toward delivering customer-ready solutions; also need to enable field & marketing on the same Likely results in a matrix of product and solutions PMs
<ul style="list-style-type: none"> Strategy, Implementation (PM) Enablement 	
3. Competitive Intelligence	<ul style="list-style-type: none"> PM needs to markedly strengthen our competitive intelligence – not only for the purposes of building great products, but also enabling the field to improve win rate
<ul style="list-style-type: none"> Technical evaluation / teardowns Business & product strategy 	
4. Technical Field Enablement	<ul style="list-style-type: none"> Dedicated bandwidth for creating and implementing training of SEs
5. Ensuring Customer Success	<ul style="list-style-type: none"> Dedicated bandwidth to ensure customers are fully realizing the value of their investment post-sale – no other organization has the skills, incentives, and ownership to do this
6. Product & Solution Evangelism	<ul style="list-style-type: none"> Currently done out-of-hide by PMs; likely benefits from centralization and dedicated resources
7. Business Analytics	<ul style="list-style-type: none"> Need to augment and potentially centralize the ownership of the key questions driving the analytics; potentially offload the execution of the same from Ops
8. Sales Training	<ul style="list-style-type: none"> Currently done out-of-hide by PMs; likely benefits from centralization and dedicated resources
9. NPS / PQI Operations	<ul style="list-style-type: none"> Currently done out-of-hide by PMs; likely benefits from centralization and dedicated resources