



Responsive Product Portfolio Management

# The Ultimate Guide For Accelerating Outcomes

For teams who want to connect objectives with initiatives, build data-driven roadmaps, and start delivering outcomes



# Executive Summary

The onset of Agile Project Management radically changed how businesses operate today, allowing development teams to iterate on the fly to meet dynamic market demands. But Agile has a crucial weakness: visibility. Agile focuses on resources completing bite-sized tasks for efficiency and speed. Still, this compartmentalization forces development teams to operate as silos — without context from each other or overall business strategy and goals.

**Responsive Product Portfolio Management** (Responsive PPM) allows organizations to align strategy and execution. How? By providing product managers the visibility, context, and real-time insights they need to visualize business priorities and available development resources. The Responsive PPM framework allows organizations to allocate resources responsively to market needs, transforming traditional methods into agile, customer-focused teams delivering outcomes instead of features that fall flat.

In this whitepaper, we cover:

- ✓ **The madness of Agile**
- ✓ **How to connect OKRs with Agile execution**
- ✓ **The five principles of Responsive PPM**
- ✓ **The need for a single source of truth**
- ✓ **Remote work and Responsive PPM**
- ✓ **An invite to hear directly from the experts**

There is a lot to cover — let's jump in!

## About the Author



# Becky Flint

Founder & CEO, Dragonboat.io

Becky Flint is the Founder and CEO of Dragonboat, a leading Responsive PPM platform adopted by hundreds of innovative companies from Fortune 500 to startups globally. Before founding Dragonboat, Becky held multiple executive roles as VP of Product Programs at Feedzai, VP of Strategic Planning and Programs at Bigcommerce, Head of Program Management at Shutterfly, and Head of Global Payments & Credit PMO at PayPal.



Connect with Becky on LinkedIn

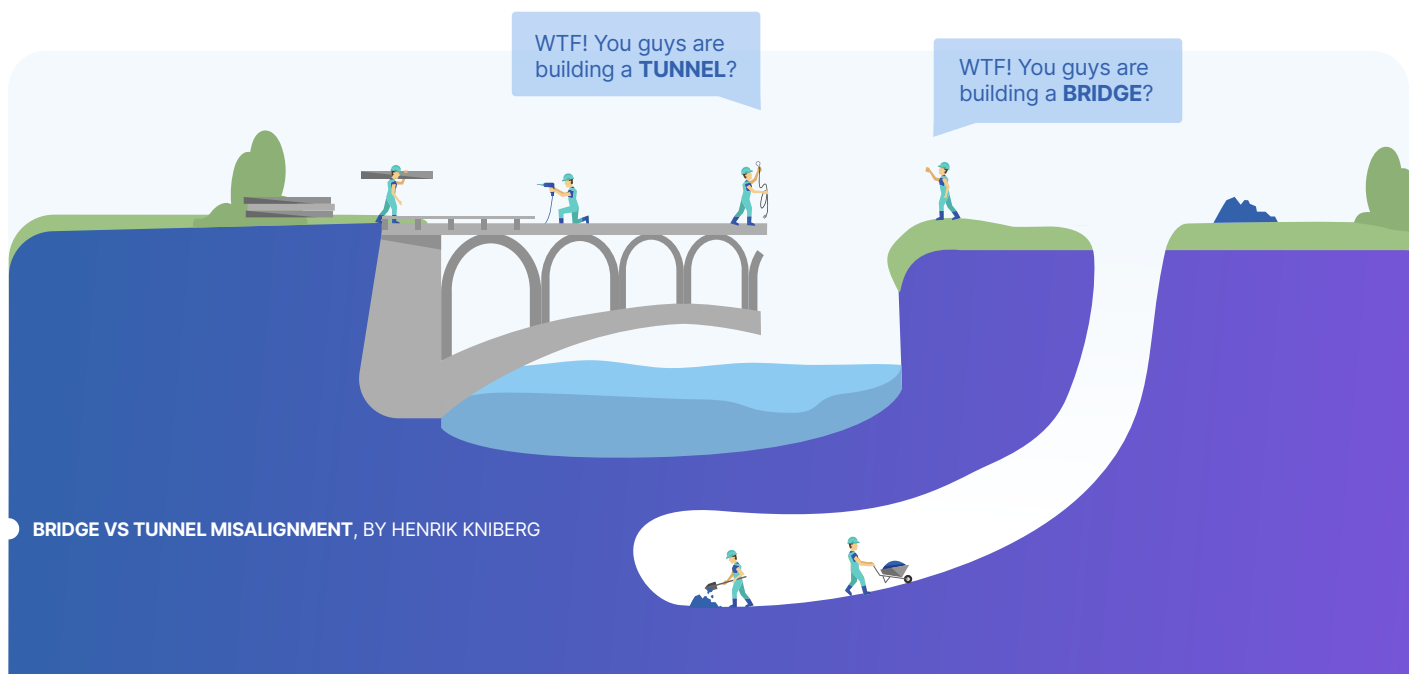
# Agile Madness

At the start, Agile development significantly increased team productivity. Teams autonomously perform rapid iterations based on feedback from internal and external stakeholders.

However, team agility can quickly become “agile madness” due to competing demands, dependencies between teams, and a lack of strategic understanding of the big picture. Companies adopted a top-down goal-setting approach known as Objectives and Key Results (OKRs) to address these challenges. With OKR goal-setting, executives could define and share objectives with the rest of the organization to align everyone towards the same destination.

However, OKRs alone could not resolve agile madness due to three gaps:

- 01 Missing strategic alignment:** Teams are left to align on objectives on their own, and ultimately there ends up being a lack of a true understanding of desired outcomes.
- 02 Competing objectives:** One team often needs to fulfill multiple objectives, making it challenging to prioritize efforts.
- 03 Disconnect on resource allocation:** Each objective may require a different amount or resource type. This disconnect between objective and resource allocation often causes bottlenecks that delay multiple teams.



OKRs alone won't cut it in today's fast-changing world. Executives, teams, and every type of knowledge worker are looking for a better way to stay aligned and deliver outcomes. This need has led to the rise of **Responsive Product Portfolio Management** (Responsive PPM).

# Connecting OKRs With Agile Execution

**Responsive Product Portfolio Management** is the new portfolio management framework connecting OKRs with Agile execution.

Unlike traditional portfolio project management, which creates a fixed scope and strict top-down approach, Responsive PPM combines bi-directional top-down, cross-functional, and bottom-up processes. The framework makes an iterative strategic planning and agile execution phase that involves and empowers functional leaders in both phases.



Responsive Product Portfolio Management also replaces the list of pre-defined project portfolios with a list of outcome-driven initiatives that allow adjustment of scope based on the outcome of execution.

Responsive Product Portfolio Management empowers functional leaders to connect goals and execution. It adopts three-time horizons, enables dynamic prioritization using Metric over Available Resources ([MoAR](#)), and applies a portfolio allocation method.

# #05

## Five Principles of Responsive PPM

Whether you have one product or a hundred, the organizations driving the most significant outcomes take a portfolio approach. Here are five ways Responsive Product Portfolio Management redefines how teams accelerate outcomes.

### Principle #01

## Multi-Dimensional Portfolio

A [product portfolio](#) should be viewed and assessed in multiple dimensions:

- 01 Customer:** Reflects your customer type. For example, new, existing, enterprise, SMB, or domestic are just a few. Additionally, the customer dimension often relates to solutions and use cases of the same product.
- 02 Objective:** This dimension represents the goals the product portfolio desires to achieve, such as growing new customers, retaining existing customers, or delivering innovations.
- 03 Engineering:** Defines your portfolio's solution options or resource requirements.

Assessing your portfolio through a multi-dimensional lens allows you to create various roadmaps using the same dataset. You can quickly shift perspective and focus on the dimension that matters most. Comparing and contrasting multiple dimensions helps you make the best business decisions with the most significant impact.

## Principle #02

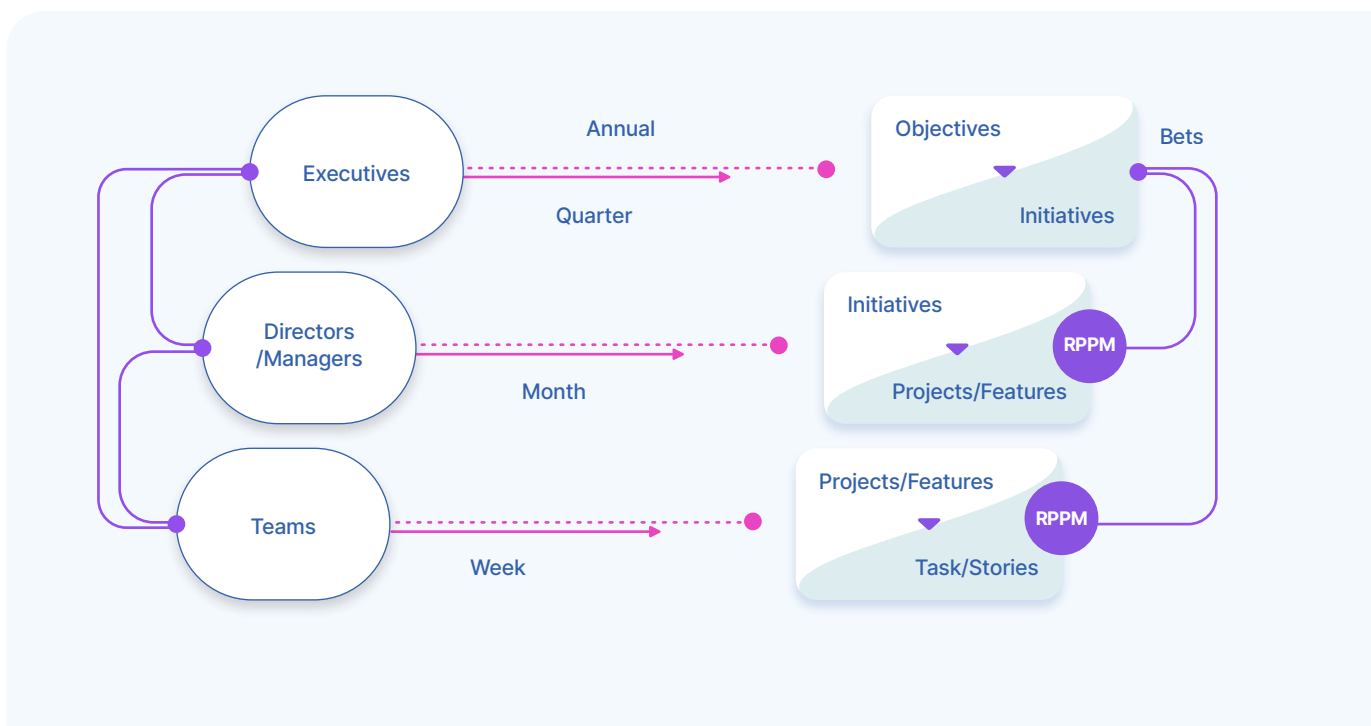
# Three Time Horizons

Operating across three time horizons provides long-term, midterm, and near-term goals. At the Agile team level, goals are scheduled in two-week sprints, focusing on tasks towards the sprint goals and providing short-term goals.

At the Executive level, the goals are often one year out, with a focus on initiatives in a quarterly range and providing the overall long-term goals.

Functional leaders across the org need to connect these two areas of focus by collaborating with executives to align strategies and quarterly milestones towards annual goals. This provides midterm goal posts for the organization. Functional leaders must also steer and enable agile teams to align their sprints towards these quarterly milestones.

Let's look at how Responsive Product Portfolio Management connects across three levels and prevents strategic misalignment.



Like Agile teams use daily standups to assess outcomes and adjust their activities, functional leaders use product or operational reviews to evaluate quarterly execution and adapt strategies and allocations based on product outcomes.

It's important to note that these aren't once a year or once a quarter planning sessions. It's a continuous cycle by various organization members that forces executives, leaders, and teams to look out one year, one quarter, or two weeks from that moment.

### Principle #03

## Double Diamond Strategy

The Responsive Product Portfolio Management process has two interconnected phases corresponding to the discovery and delivery cycles of building outcome-driven products: strategy and execution.

The portfolio roadmap process has two distinct and interlinked phases: the strategic and execution cycles. In addition, each cycle focuses on a different time horizon at the same operating level.

For instance, the strategic cycle has its inner cycle of defining objectives, evaluating opportunities, and assessing resource allocation.

The outputs of the strategic cycle become the goal for the execution cycle.

### Principle #04

## Metrics over Available Resources (MoAR)

ROI (Return on Investment) is no longer the best or only metric to prioritize product development. [MoAR](#) allows teams to connect benefits directly to the goals associated with the product initiative while comparing efforts that require the same resources.



The return in ROI refers to Profit, which is often difficult to attribute to a product feature. Nor is profit the only metric a company values. There are also things like innovation for the long term or NPS scores from customers.

Conversely, financial investment does not directly contribute to the product outcome. The sacred resources required here are people with specific skill sets. An iOS engineer's time is more valuable for an iOS application but less so for a machine learning-based feature.

Responsive PPM uses a much more immediate and robust metric called MoAR, or Metric over Available Resources to evaluate features and move the needle.

When multiple features compete for the same resources, their estimated impact (benefit) on a given metric is scored from 0 to 100. The score is then divided by the resourcing needs to reach a MoAR number.

MoAR gives portfolio managers the transparency they need to ensure resource allocation contributes directly to business goals measured by the relevant metrics.

The bottom line? MoAR leads to better resource alignment and identifies areas where there may be resource shortage or underutilization.

## Principle #05

# Responsive Re-Allocation

Traditional project portfolios allocate budgets to projects. Responsive product portfolios give multidimensionality so that adjustments can be made towards the most impactful area once the desired outcome is achieved.

Instead of applying a single prioritization framework to compare feature A with feature B, which may contribute to competing goals, Responsive PPM adopts a multidimensional portfolio allocation approach. This method considers the need for a portfolio of goals and a portfolio of customers or market segments.

During the strategic phase of Responsive PPM, leaders collaborate with a holistic

view of competing objectives and competing customer needs. They adjust strategies and resource allocation based on shifting market needs and progress towards OKRs. Once the allocation towards objectives is in place, the MoAR framework prioritizes features with the same goal and available resources.

This holistic and responsive approach allows leaders to help individual teams focus and provide the resources needed—allowing everyone to work in the same direction rather than competing for finite resources.



# Single Source of Truth

OKR and Agile need to be connected to fit today's dynamic and distributed business environment.

Responsive PPM enables tech leaders to align strategies and allocate resources from the top and provide progress visibility from the bottom. The bi-directional collaboration allows the entire organization to work together to achieve true agility and accelerate outcomes.

Many product, program, and engineering leaders follow the Responsive PPM method, including teams at Netflix, Spotify, Amazon, and PayPal. However, these practices are carried out via a trial and error approach using various spreadsheets, chat apps, and whiteboard sessions.

[Dragonboat](#) is built upon the Responsive PPM framework to enable a consistent practice with automated workflows. It gives organizations a single source of truth for strategy and execution. It allows leaders to align people and ideas to goals, forecast and adjust staffing needs, automatically update and predict progress, and enable clarity and visibility across portfolios.

Responsive PPM elevates middle management to a leading role in steering highly-responsive strategic planning and agile execution.

With Dragonboat, everyone, from functional leaders, to executives, teams, and their colleagues, can easily access strategic context and progress visibility any time they want, from anywhere they are. That way, their organization can make better decisions faster.

Dragonboat can be utilized as a standalone Responsive PPM platform or integrated with team tools such as Jira, Github, Asana, and Clubhouse to keep the existing agile workflow intact.

## Dragonboat Enables

See some of the proven benefits of Dragonboat below:



**Align products with strategies**



**Allocate and forecast resources with confidence**



**Automate visibility at all levels**



**Assess tradeoff scenarios instantly**



**Single source of truth on strategy and execution across the company**



**Scale in the cloud as your needs grow**

The results are extraordinary. On average, Dragonboat customers can improve agility by 10X, ship 50% more features, and save two days a week through automation of previously manual processes.

Most importantly, they transform their business into more responsive, agile, and customer-focused outcomes.

Responsive PPM offers a proven framework for functional leaders to connect objectives, initiatives, resources, and execution holistically and iteratively to accelerate value creation.

# Remote Work and the Need for Responsive PPM

Even before the devastating Covid-19 global pandemic, knowledge workers were becoming more distributed. Mission-critical business tools were moving to the cloud, and users accessed corporate data from anywhere. But remote work was still the exception.

That is, until the Spring of 2020. Suddenly billions of people were ordered to shelter in place, shutting offices overnight and forcing everyone to work from home. The pandemic transformed the modern workplace. Strategic decisions couldn't rely on walk-the-hall or impromptu whiteboard sessions. Teams cobbled together web-based collaboration tools to communicate and attempt to stay aligned. Despite endless conference calls or chat messages, context and direction got lost.

The accelerated pace of remote work has only exacerbated the disconnect between objectives and execution. As a result, the workday is loaded with over-communication and meetings, significantly inhibiting agility.

Responsive PPM via Dragonboat eases the transition to the new normal by empowering portfolio collaboration in a single source of truth platform that can be accessed and referenced by stakeholders across the organization. This leads to better product and resource decisions in a time when aligning across products, teams, departments, and locations is more important than ever.

[Start for Free](#)

[See Dragonboat in Action](#)

# Hear From the Experts

Are you skeptical about the Responsive PPM framework? It's understandable if you are — it's a lot to unpack, especially if you're accustomed to building feature after feature because that's how things have always been done.

So, don't take our word for it. We invite you to hear directly from Chief Product Officers from market-leading companies like Pendo and Procore as they share their unique insights and experiences on all aspects of product leadership, product strategies, product operations, and product careers.



**Melissa Perri**

CEO, ProduxLabs



**Lydia Varmazis**

Interim CPO, Former  
CPO, Chechr



**Spiros Theodossiou**

CPO, Dext



**Trisha Price**

CPO, Pendo



**Ketan Babaria**

CPO, M1 Finance,  
ex-CPO, Roofstock



**Wyatt Jenkins**

SVP Product, Procore,  
ex-Patreon,  
Shutterstock



**Aniket Gune**

CPO, SmartAsset



**Archie Abrams**

VP Product, Shopify,  
ex-Udemy CPO



**Avin Arumugam**

Former CPO, One Inc



**Shelley Perry**

Former CPO, NTT,  
Managing Director,  
Scalelogix Ventures



**Cory Gaines**

CPO, Blackhawk  
Network



**Ryan Polk**

Former CPO, Carbon  
Black, CA Technologies

## The CPO Series

[Learn More](#)



Visit [dragonboat.io](https://dragonboat.io) to learn how you can  
implement Responsive PPM with Dragonboat