



regoUniversity 2019

SAN DIEGO

Portfolio/Roadmap Management | Best Practices

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Introductions

- Take 5 Minutes
- Turn to a Person Near You
- Introduce Yourself
- Business Cards



Agenda

- Introduction
- Key Differences Between Portfolios and Roadmaps
 - Definitions
 - Key Differences - General
 - Key Differences - Analysis
- Strategic Planning and Your Organization
 - General Strategic Planning
 - The Functionality “Fork in the Road”
- Roadmap Case Study
 - The Rego Approach (with a San Diego spin!)
- Portfolio Case Study
 - The Rego Approach (with a San Diego spin!)
- Discussion
- Questions

Part II: Key Differences

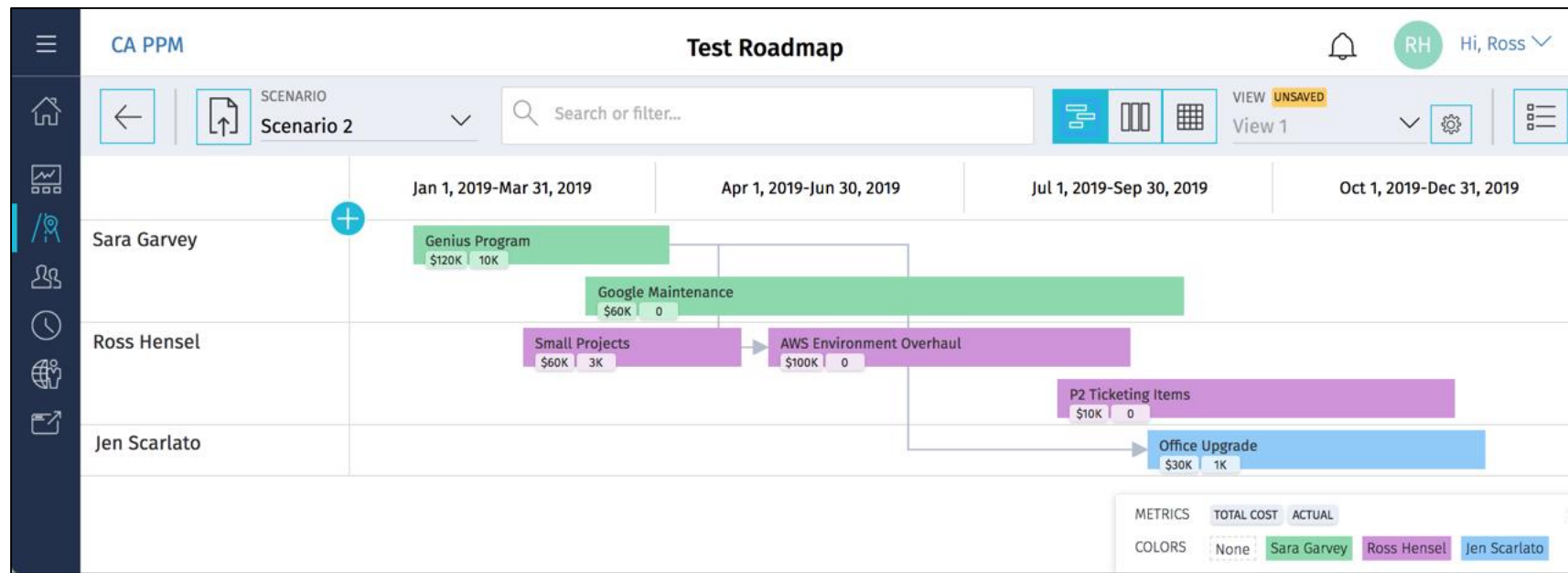
Dive into the differences between Clarity PPM Roadmaps and Portfolios



Let Rego be your guide.

What is a Clarity Roadmap?

- Provide portfolio managers with top-down planning for the launch of new products, services, applications or other company investments.
- Utilize the fields within Roadmaps to categorize items as in plan, status, rank, etc



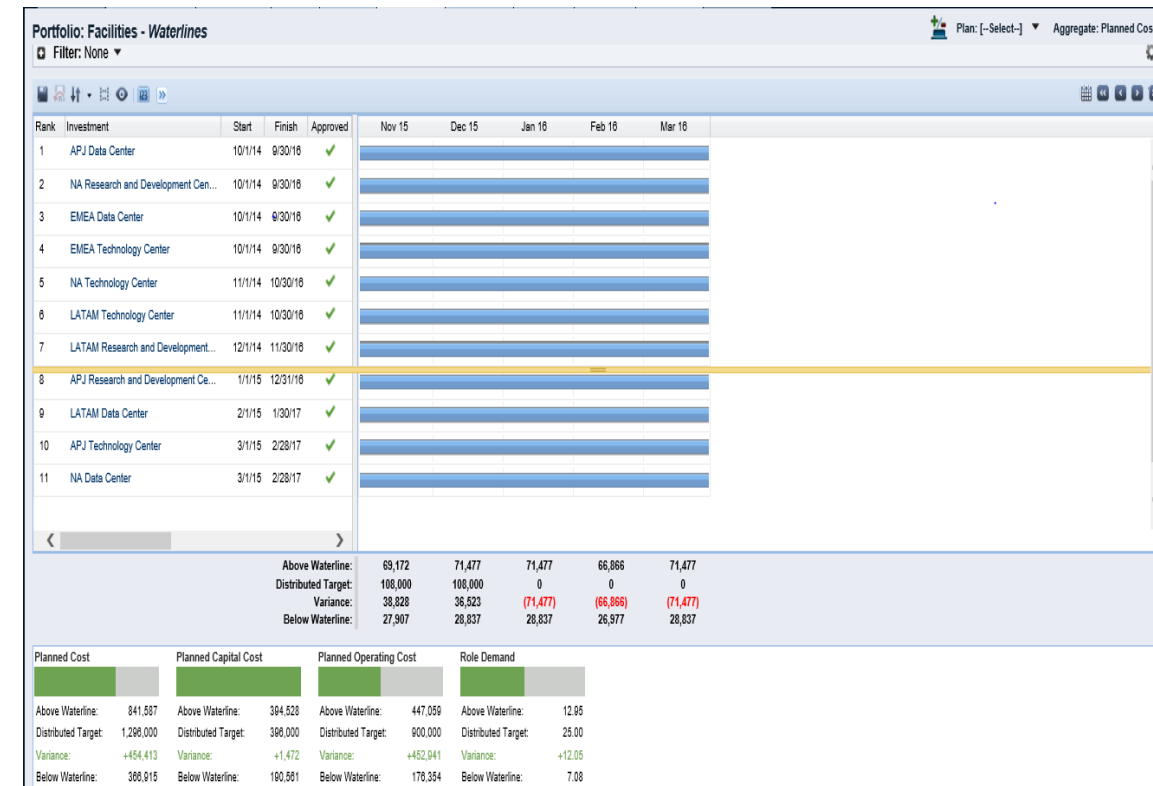
What is a Clarity Portfolio?

Portfolios are collections of Programs, Projects and Operations (NPIOs) designed to maximize the value of initiatives and minimize risks by prioritizing and selecting investments that most closely align with corporate goals and realize estimated cost and ROI

- A portfolio exists to achieve one or more organizational strategies
- May consist of past, current, and planned or future components
- Potentially longer term, with new investments rotating into the portfolio
- An organization may have more than one portfolio, each addressing unique organizational needs
- Portfolios may contain investments, programs or possibly sub-portfolios



NPIO – Non Project Investment Object (Applications, Assets, Products, Other Work, Ideas and Services)



Key Differences Between Portfolios and Roadmaps

- This class outlines key differences between Portfolios in the Clarity PPM Classic UX and Roadmaps in the Modern UX.
- Roadmaps continue to evolve, so columns delineate the version in which different pieces of functionality became available.
- Where distinct advantages exist for Portfolio vs. Roadmap or vice versa, the line item is called out with green highlighting on the next slides.

Key Differences – General

	Classic	15.5.0	15.5.1	15.6	15.6.1	15.7
	Portfolios	Roadmaps				
Can include Projects	✓	✓	✓	✓	✓	✓
Can include Programs	✓					
Can include OOTB Ideas	✓			✓	✓	✓
Can include NPIOs	✓					
Can include Custom Investments (New UX Only)			✓			
Can add items by OBS	✓	✓	✓	✓	✓	
Can add items by Name	✓	✓	✓	✓	✓	
Can add items using other filter criteria (e.g., Manager, Power Filter, etc.)	✓					
Can manually add/include items that don't exist elsewhere in Clarity PPM		✓				
Can sync data from Investments – OOTB Fields	✓	Financials, Dates, Availability only				
Can sync data from Investments – Custom Fields	✓			✓ *known defect	✓	✓
Can associate with OBS, and use OBS for Security	✓			✓	✓	✓
Can schedule Sync of included items, instead of having to sync manually to update Investment data	✓					
Will continue to be enhanced in future Clarity PPM Releases		✓				

Key Differences – Analysis

	Classic	15.5.0	15.5.1	15.6	15.6.1	15.7
	Portfolios	Roadmaps				
Supports analysis using Fiscal Time periods		✓				
Can set Targets	✓	✓	✓	✓	✓	✓
Can distribute targets as desired across time horizon	✓					
Can delineate between Targets (do not exceed) and Goals (target to hit, e.g., Benefits)	✓	✓	✓	✓	✓	✓
Includes Waterlining functionality	✓	✓ Via Targets/In Plan checkbox				
Can create and save scenarios	✓	✓	✓	✓	✓	✓
Can create different views		✓				
Provides a Grid View	✓			✓	✓	✓
Provides a Timeline View	✓			✓	✓	✓
Provides a Board View		✓				
Includes Ranking Rules	✓					
Can analyze by individual/specific roles	✓					
Can group and utilize color to analyze data		✓				
Can make modifications to Investment data within the Roadmap/portfolio (e.g., Dates, financials, etc.)	✓	✓	✓	✓	✓	✓
Can push the above changes back to the underlying Investment						
Additional OOTB Reporting on data – Portlets, reports, etc.	✓		Some light reporting			

Part III: Strategic Planning and Your Organization

Dive into the functionality specifics of Roadmaps and Portfolios to find the one that fits your organizational planning



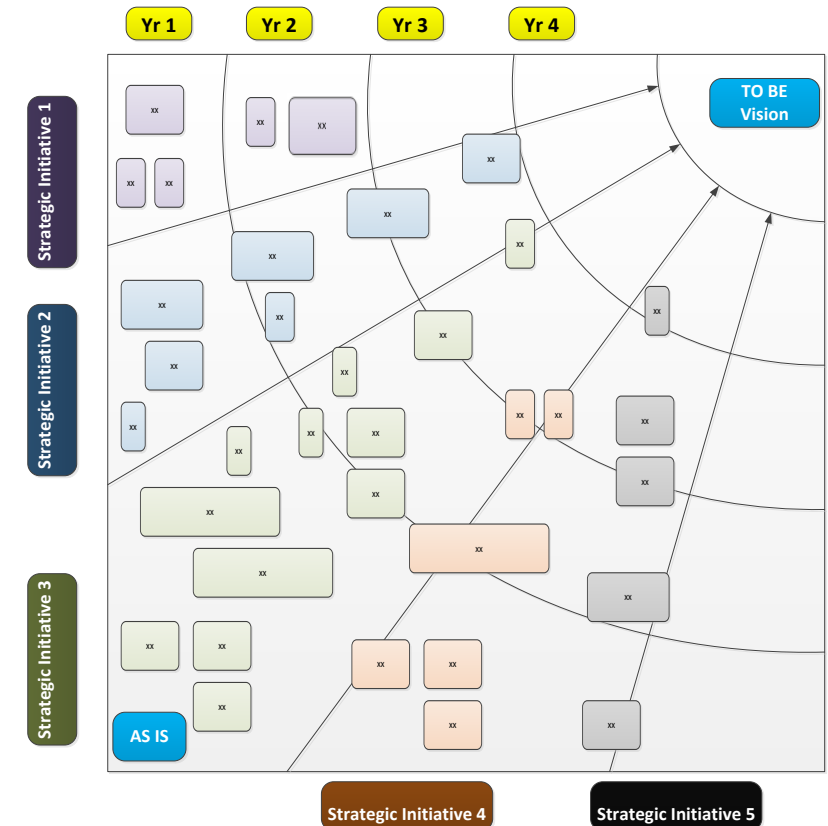
Let Rego be your guide.

Strategic Planning

No matter the avenue, starting your strategic planning journey will have the same building blocks with both Portfolios and Roadmaps.

Start with the premise that we have a current state and a vision of where we want to be strategically.

- Define your planning horizon (1 year, 5 years, etc.)
- Define how you want to group your investments. Consider what ties them together. Where are the money and/or resources coming from?
- If you are tracking costs, who is holding the wallet? Your planning will need to reflect this.
- Define how you need to report on the data. Reporting on investments within a portfolio is driven by how the portfolio is organized



The Functionality “Fork in the Road”

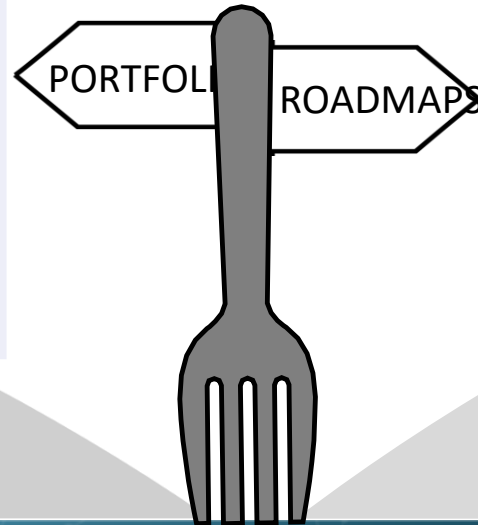
Now that you know your TO BE Visions, which Clarity Functionality Fits Your Organization?
Both **Portfolios** and **Roadmaps** have strengths and weaknesses to their functionality.

Ultimately, the choice of which functionality fits your organization should be based on your overall planning need.

For the following strict requirements:

Utilize Portfolios

- Need to include Programs or other NPIO's
- Need the ability to Power Filter or filter on complex criteria
- Need a Grid or Timeline view and not on 15.6
- Need custom fields and not on 15.6
- Need to define Ranking Rules
- Need to plan by specific Resource or Roles
- Need additional OOTB Reporting on data – Portlets, reports, etc.
- Only working in Classic UX



Utilize Roadmaps

- Need a new and agile way of viewing work and strategic planning
- Need to include custom investments
- Need to manually add/include items that don't exist elsewhere in Clarity PPM
- Need a Board View with drag and drop capabilities
- Need to group and utilize color to analyze data
- Need to be able to create custom picklists on the fly

Part IV:

Roadmapping Case Study

Let's take a look at real world examples of a customer success story utilizing Roadmapping.



Let Rego be your guide.

Roadmapping Case Study



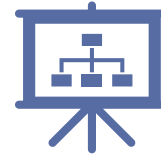
Ricky is in charge of Software Development. He usually does strategic planning on a white board or using sticky notes.



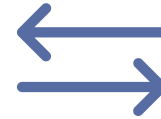
He wants a quick and easy way to show the new efforts that his development teams have underway as well as what's in the pipeline.



He needs to provide a clear picture of the work to the different types of Stakeholders in a fresh way to keep them engaged.



He needs to be able to toggle between views and logically group data. He wants to be ready for any scenario or question the stakeholders may throw his way



He wants to dynamically add new items / work or move existing items in real time based on feedback.



He wants to provide visibility into work and be a successful strategic planner

The Rego Approach to Roadmapping (San Diego Style)

Crawl

Playing in the Sand!

Pull existing Projects and Ideas into his Roadmap as well as custom investments

Create Stakeholder specific views.

Add new items in real time.

Check items as “In Plan”

Use color coding to analyze the data

Walk

Dive In!

Pull financial information into the Roadmap

Move work from quarter to quarter.
Complete fiscal year planning and/or strategic planning.

Add dependencies and additional Clarity fields.

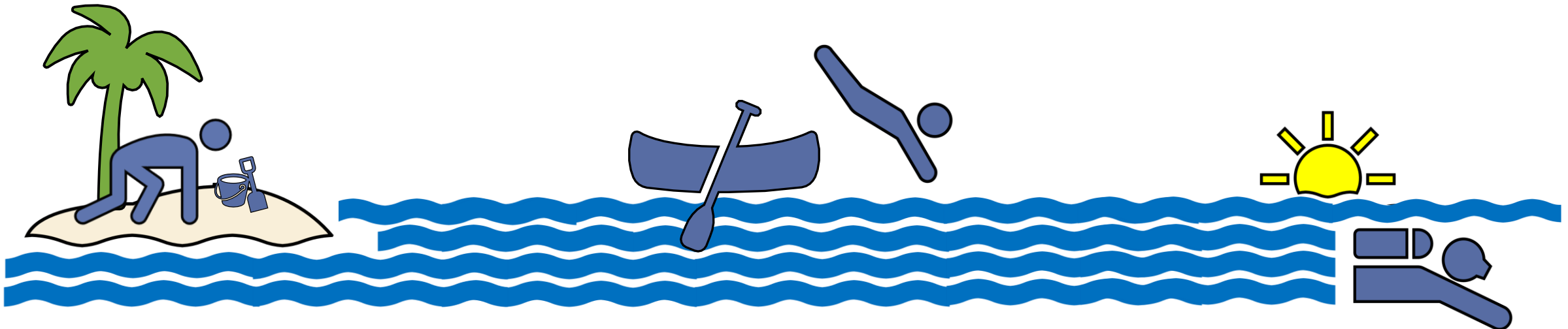
Run

Explore the depths of the ocean!

Create custom picklists to sort and organize work

Set total targets and goals at a high level.

Change dates and financial data within the Roadmap for further analysis



Part V: Portfolio Case Study

Let's take a look at real world examples of a customer success story
utilizing Portfolios.



Let Rego be your guide.

Portfolio Case Study



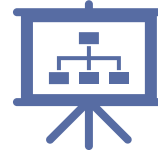
Becky is in charge of IT. Her direct reports send spreadsheets of the different work being completed in the different areas for yearly planning.



Becky needs a better way to compile this data across the departments and see a rollup of Costs and Team efforts



She wants to bring stakeholders into the conversation for ranking investments based on the Cost and Team demand.



She wants to see a portfolio rollup of Programs and other work for the entire organization



Becky needs to be able to create different planning scenarios and drag and drop the rank in real time to see changes in the plan.



She needs to see the whole puzzle of in-flight work as well as new work to efficiently make informed decisions for yearly planning.



She wants to provide visibility into work and be a successful strategic planner

The Rego Approach to Portfolios (with a San Diego Spin!)

Crawl

Playing in the Sand!

Create a simple portfolio with a collection of projects, ideas, and all necessary NPIO's

Focus on a specific target, either costs or resource demands, to begin with, rather than trying to track against all possible constraints.

Focus on the accuracy of the source data so that the right decisions are made when prioritizing the portfolio

Rank and Prioritize work

Walk

Dive In!

Focus on a both targets and data accuracy for costs and resource demands

Capture inflight and pipeline work (Utilize Ideas)

Rank and prioritize work and begin the process of analyzing to push and pull the investments based on the constraint data

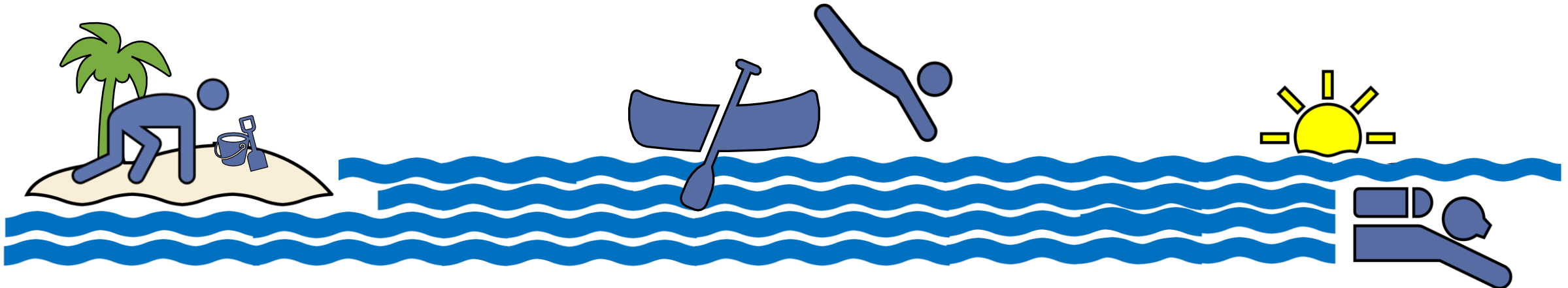
Run

Explore the depths of the ocean!

Create Plans and different strategic scenarios.

Create and run ranking rules to dynamically rank work

Utilize OOTB Jaspersoft reports to compare, analyze and evaluate plan changes to understand the implications of the changes as if the plans are real



Part VI: Discussions

Open the floor up for discussions and examples that attendees are seeing within their daily responsibilities.



Let Rego be your guide.

Open Mic

Questions?



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Thank You For Attending regoUniversity

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- Class Name = **regoUniversity**
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- Date Started = **Today's Date**
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Let us know how we can improve!
Don't forget to fill out the class survey.



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