



rego*U*niversity 2019

SAN DIEGO

Capturing Value and Strategic Planning

Your Guides: Krupa Shah and Michelle Merriam-Day

Agenda

- Why Do We Track Success?
- Define and Track Benefit Metrics
 - Investment
 - Monetary vs. Non-Monetary
- Strategic Planning
 - Defining Your Vision
 - Tracking Metrics
 - Configuration and Reporting
- Overview

Introductions

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



Part 1: Why Do We Track Success?



Let Rego be your guide.

Tracking Success

- We are always asked to execute on projects and track metrics. Those KPIs usually reflect corporate goals and vision
 - These can come from the CEO, SVP, Business Unit Directors, etc.
 - Typical Questions:
 - Are we doing the work that actually achieve these goals?
 - How are our project mapped to those goals?
- Ideally, we would like to proactively capture progress on these KPIs
 - What is working? What is not working? How do we get back on track or stay on track?
- Financial benefits feed into this, however we often must track non-monetary benefits



Supporting Our Vision

Track the Success of Your Investments



Support

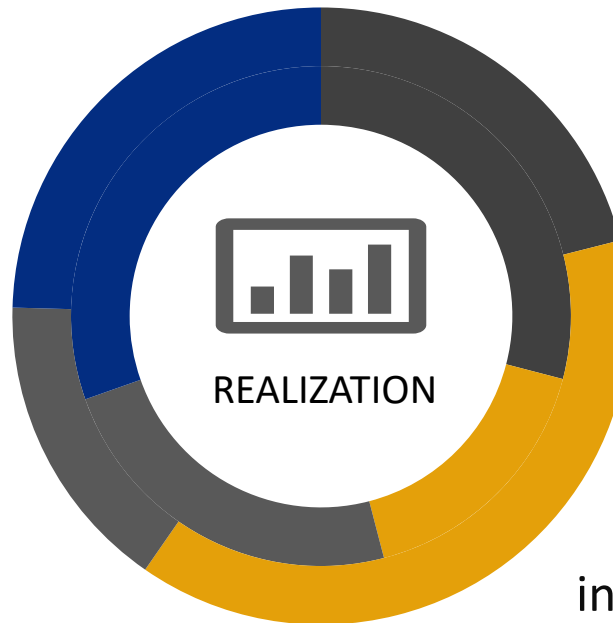
Support the annual planning process with meaningful metrics

Access

Access real-time actionable analytics on status and realized benefits

View

View online real-time dashboards and executive reports



Analyze

Analyze savings and forecasts by individual, initiative, savings category, department, location, product line, or process

Part 2:

Define and Track Benefit Metrics



Let Rego be your guide.

How Do We Define Benefits?

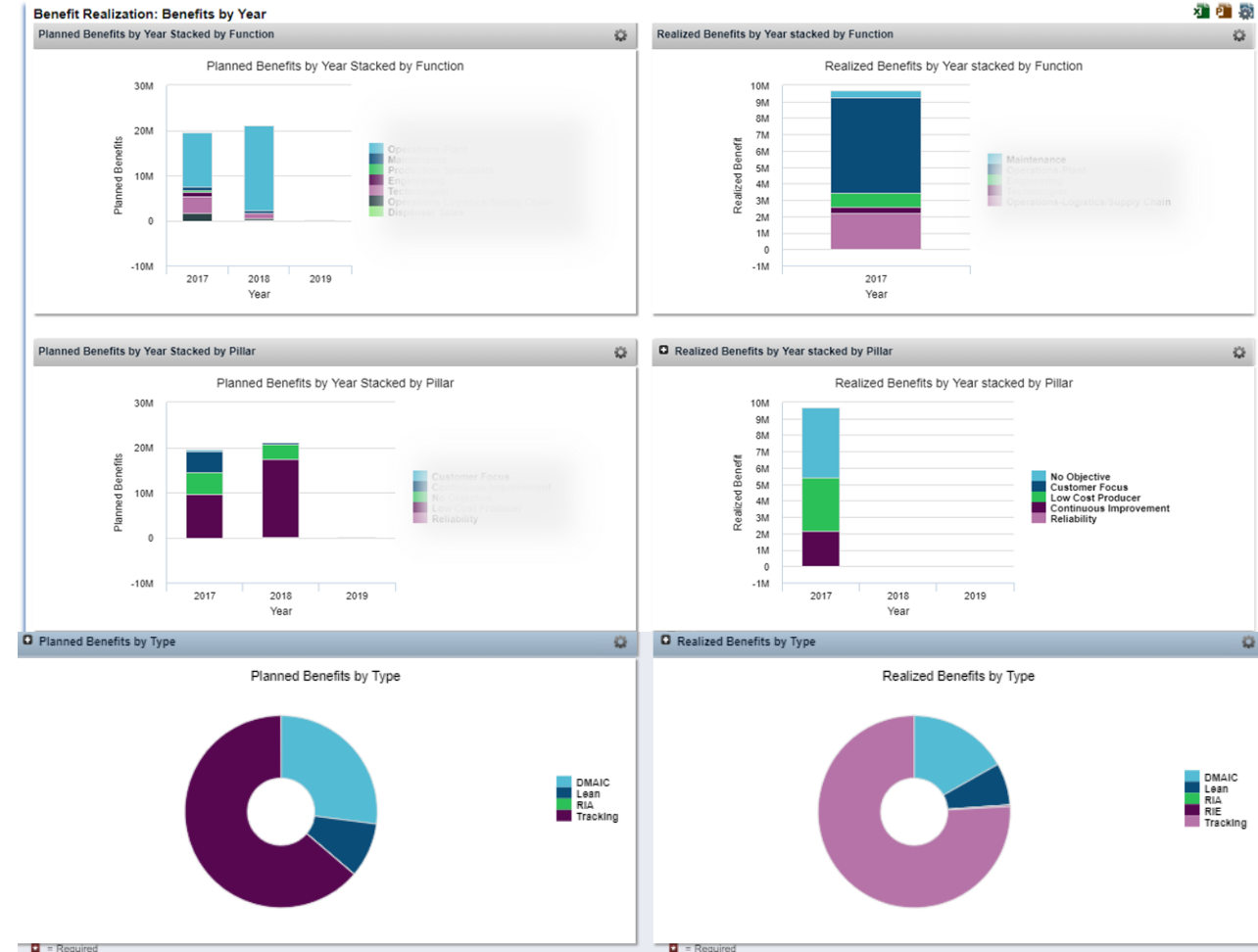
- Benefits need to be thought about as more than just having monetary value
 - We can easily track monetary benefits like reducing hardware cost and selling more product
 - What about Employee Engagement? Customer Satisfaction Scores? Number of New Website Hits?
- These company or business unit wide metric(s) can be tracked at an investment level or system level over time and rolled-up through reporting
 - We can set a baseline, a target, and track our progress towards those results
- We can gain more insight into these quantifiable metrics which can help us correct our projects and make better decisions to achieve our overall goals

Example of Trackable Benefits

Benefit	Question
Monetary	Are we achieving our perceived ROI?
Customer Satisfaction Score	Are the customers happy with the product and services we are providing?
Number of Web Hits	Are we getting more web traffic?
Number of New Web Sales	Do we have increased visibility? Is our marketing working?
Employee Engagement	Do our employees follow our vision? Are our employees happy with the culture and atmosphere?
Average Amount of Time to Close an Incident	Are we improving and remediating issues in a timely manner?
New App Downloads	Are users responding to our new features?

Executing and Visualizing the Benefits

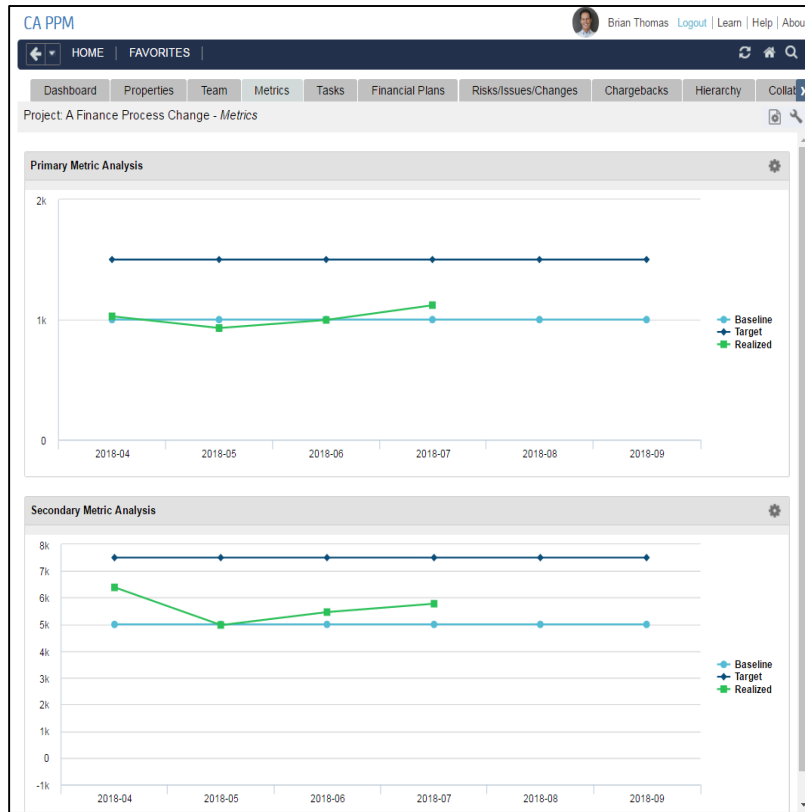
- Without clear visibility into benefit realization, it's a challenge to determine what efforts have delivered the most value to the business.
- Through the use of out of the box and custom objects, we can track any number of monetary and non-monetary benefits
- Management can visualize these benefits at an Investment level, Portfolio level, or a Global Level
 - Portlets, Reports, and now Roadmaps can be used to see your Benefit Targets vs. Realized Benefits



Executing and Visualizing the KPI Benefits

11

- Through the use of custom objects we can track KPI benefits at the project level



CA PPM

FY18 Plan Advanced Technologies BU

SCENARIO **Plan of Record**

Search or Filter...

4 Working View - D...

Hi, Dana

Benefit		Total Cost		Capital Cost		Operating Cost		Headcount	
TARGET	15,000,000	TARGET	12,250,000	TARGET	9,500,000	TARGET	3,500,000	TARGET	1,325
IN PLAN	15,275,000	IN PLAN	12,025,000	IN PLAN	9,495,000	IN PLAN	2,530,000	IN PLAN	1,236
VARIANCE	(275,000)	VARIANCE	225,000	VARIANCE	5,000	VARIANCE	970,000	VARIANCE	89

In Plan	Rank	Row	Must Have	Outcome	Stakeholder	Start	Finish	Spend Cat...	Total Cost	Capital Cost	Operating C...	Benefit	ROI	Headcount
<input checked="" type="checkbox"/>	1	Authentication	Top Choice	Security & Re...	Lydia Jones	Feb 01 2018	May 31 2018	Grow	1,350,000	850,000	300,000	2,000,000	71%	19
<input checked="" type="checkbox"/>	2	Cyber Threat ...	Required	Security & Re...	Eric Gulse	Jul 25 2018	Oct 25 2018	Run	1,950,000	1,500,000	450,000	2,500,000	28%	19
<input checked="" type="checkbox"/>	3	FedRamp Com...	Required	Security & Re...	Eric Gulse	Jan 10 2018	Jan 05 2018	Run	575,000	125,000	450,000	650,000	11%	1
<input checked="" type="checkbox"/>	4	Regulatory En...	Required	Security & Re...	Dario Ferrara	May 27 2018	Sep 08 2018	Run	375,000	375,000	0	425,000	12%	1
<input checked="" type="checkbox"/>	5	Predictive Ana...	Top Choice	Maintain Mark...	Lydia Jones	Feb 20 2018	Jul 21 2018	Run	1,000,000	750,000	250,000	1,350,000	28%	10
<input checked="" type="checkbox"/>	6	Peer to Peer P...	Top Choice	WOW Our Cos...	Dario Ferrara	Jul 07 2018	Dec 21 2018	Grow	1,600,000	1,300,000	300,000	1,800,000	11%	11
<input checked="" type="checkbox"/>	7	Micro Lending...	Carryover	Mobile	Dario Ferrara	Jan 21 2018	Apr 01 2018	Transform	700,000	670,000	30,000	850,000	15%	1
<input checked="" type="checkbox"/>	8	Co-Op/Capital...	Carryover	WOW Our Cos...	Eric Gulse	Jun 10 2018	Sep 30 2018	Transform	725,000	725,000	0	900,000	19%	7
<input checked="" type="checkbox"/>	9	LATAM Digital...	Top Choice	Maintain Mark...	Lydia Jones	Feb 15 2018	Aug 02 2018	Run	350,000	350,000	0	450,000	22%	1
<input checked="" type="checkbox"/>	10	Rolling Mobile...	Carryover	Maintain Mark...	Lydia Jones	Jan 30 2018	Apr 29 2018	Grow	600,000	350,000	250,000	800,000	7%	6
<input checked="" type="checkbox"/>	11	Mobile BI Any...	Top Choice	Mobile	Dario Ferrara	Mar 29 2018	Sep 27 2018	Transform	850,000	450,000	400,000	950,000	10%	6
<input checked="" type="checkbox"/>	12	Market Launch	Top Choice	Mobile	Eric Gulse	Nov 06 2018	Dec 09 2018	Grow	1,500,000	1,500,000	0	1,800,000	18%	15
<input type="checkbox"/>	13	One Click Ord...	Top Choice	WOW Our Cos...	Dario Ferrara	Jan 29 2018	Apr 13 2018	Transform	650,000	550,000	100,000	800,000	19%	10
<input type="checkbox"/>	14	Mobile Cash A...	Top Choice	Mobile	Eric Gulse	Jun 01 2018	Jul 24 2018	Transform	140,000	100,000	40,000	1,000,000	25%	5
<input type="checkbox"/>	15	User Transfer...	Top Choice	Mobile	Eric Gulse	Jun 01 2018	Aug 10 2018	Grow	700,000	500,000	200,000	1,300,000	42%	10
<input type="checkbox"/>	16	Digital Branch...	Top Choice	WOW Our Cos...	Lydia Jones	Dec 01 2018	Feb 01 2019	Grow	1,000,000	695,000	305,000	1,250,000	22%	10
<input type="checkbox"/>	17	Enterprise Se...	Top Choice	Mobile	Eric Gulse	Dec 01 2018	Mar 01 2019	Grow	200,000	200,000	0	300,000	45%	2
<input type="checkbox"/>	18	Data Warehou...	Top Choice	Maintain Mark...	Lydia Jones	Sep 01 2018	Oct 31 2018	Grow	900,000	450,000	450,000	1,200,000	26%	7

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HOME FAVORITES

Dashboard Properties Team Metrics Tasks Financial Plans Risks/Issues/Changes Chargebacks Hierarchy Col

Project: A Finance Process Change - Properties - Main - Metrics

Open in Scheduler Scenario: [-Select-]

Filter: System Default

Name	Type	Baseline	Target	Realized
Number of new Web Sales	Primary	1,000	1,000	1,000
Number of Web hits	Secondary	5,000	5,000	5,000

Displaying 1 - 2 of 2

Save New Delete Return

Part 3: Strategic Planning



Let Rego be your guide.

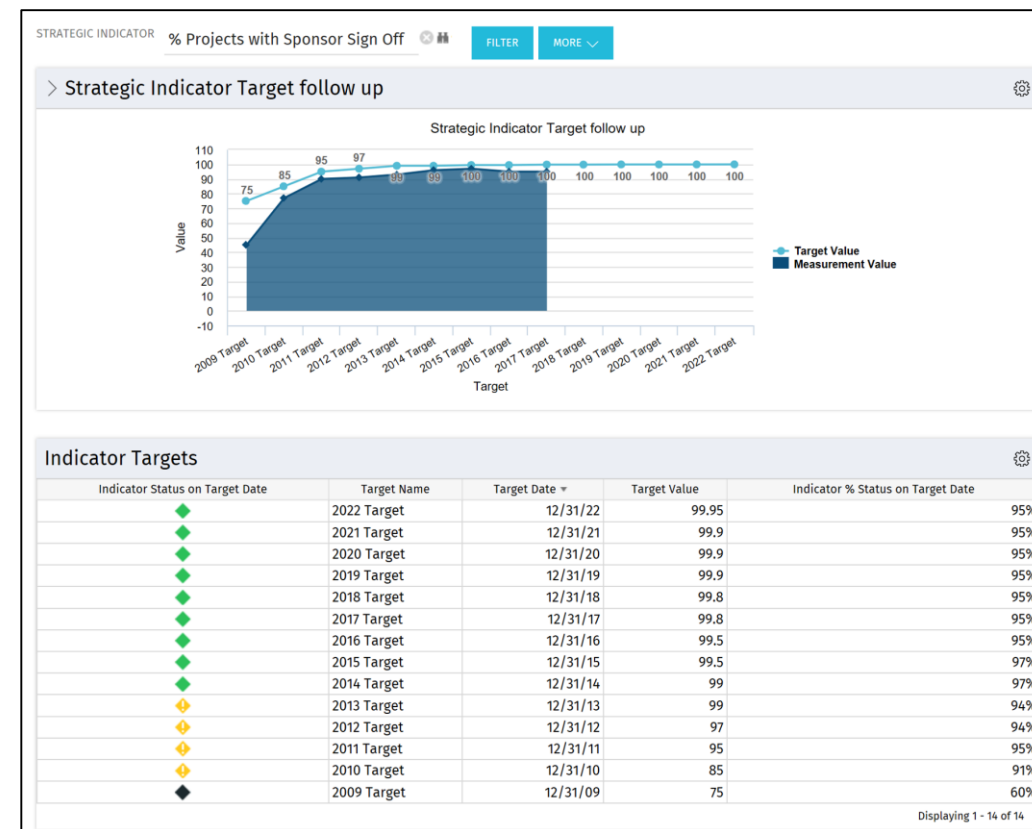
Strategic Planning

- As part of the Corporate Vision, organization's define strategy and need to make decisions on funding and allocating resources to their supporting investments
- This involves a set of hierarchical objectives that are achieved through execution
 - Top down planning - Plan -> Theme(s) -> Goal(s) -> Initiative(s)
- With our full strategy defined, we can focus on investments that are working to achieve our goals and make informed decisions about where we put our time and money
 - How are we tracking against our targets? Do we see negative trends that need correction?
- This functionality is available as part of the Strategic Planning Module.



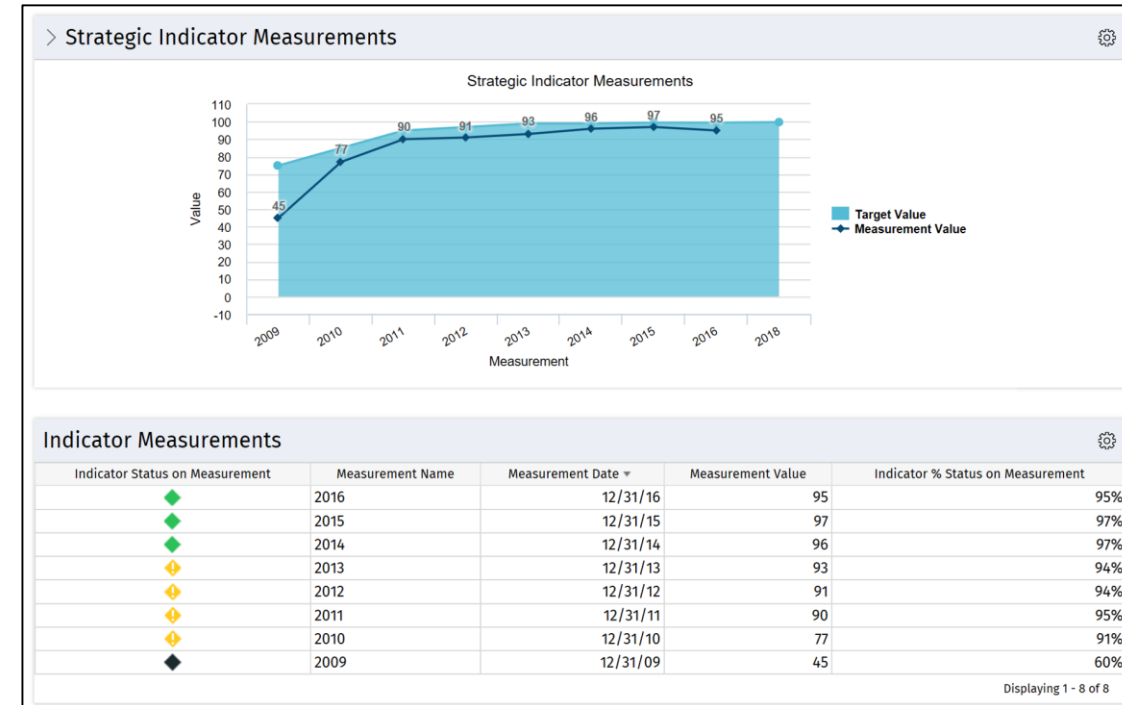
Strategic Planning Targets

- Once we define our strategy and supporting details, we can track our targets (plan) and measurements (actuals)
- These targets or KPIs can be reviewed and adjusted as part of the continuous strategic planning review process
 - We can update our targets based on this planning cycle to adjust and gain insight on how our goals are changing



Strategic Planning Measurements

- After the Strategic Planning Review Cycle establishes the targets we want to meet, we can start executing and measuring our success
- The investments that are aligned to our strategic goals need to be monitored as they will indicate to us how we are measuring against our targets
 - By being proactive on our investments, we can help eliminate risks, funding concerns, or resource constraints that hinder us meeting the strategic targets we set up
- By measurements on a continuous cycle, we can start to see a trend on our data which will feed back into our investment execution and help the organization be more proactive on what is or isn't working



Strategic Planning Hierarchy and Rollup

- Now that our supporting goals and initiatives are measuring against our targets, we can see how that is going to affect our overall Strategic Plan
- The status of our initiatives can be automatically rolled up to our goals, then up to our themes, and ultimately up to our Strategic Plan
- This helps our organization see what specific initiatives are impacting our overall plan based on our measurements so we can start to course correct if need be

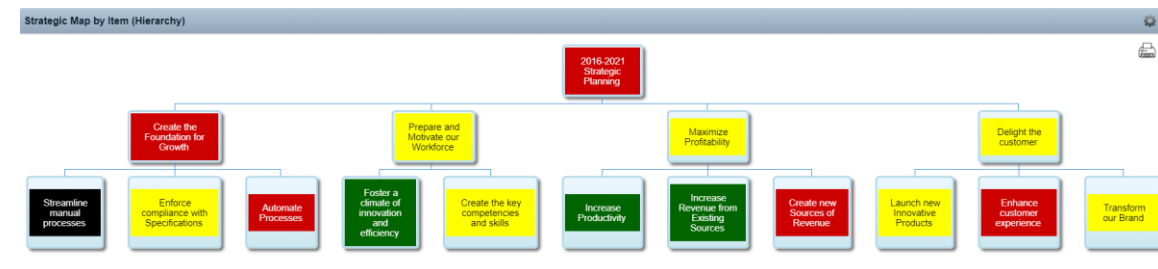
Strategic Indicator Hierarchy

Indicator	ID	Level	Periodicity	Sign	Current Target	Last Measurement	Last Measurement Status	Target x Measurement	Rollup Method	Rollup from Children	Status Definition	Indicator % Status	Indicator Status
Operations Efficiency Index	10045	3	At the End of Every Quarter	Higher is Better	0	0	0	0%	Average	104%	From Children Roll-Up	104%	Green
IT Efficiency Index	10029	3	At the End of Every Quarter	Higher is Better	0	0	0	0%	Maximum Value	125%	From Children Roll-Up	125%	Blue
IT Development Efficiency Index	10050	2	At the End of Every Quarter	Higher is Better	0	0	0	0%	Maximum Value	125%	From Children Roll-Up	125%	Blue
IT Emergency Software Changes	10047	1	At the End of Every Quarter	Lower is Better	1	1	1	100%	Maximum Value	100%	From Target x Measurement	100%	Green
IT Project Efficiency	10048	1	At the End of Every Quarter	Lower is Better	4	3	3	125%	Maximum Value	125%	From Target x Measurement	125%	Green
IT Operations Efficiency Index	10046	2	At the End of Every Quarter	Higher is Better	0	0	0	0%	Minimum Value	103%	From Children Roll-Up	103%	Green
IT Emergency Changes	10023	1	At the End of Every Quarter	Lower is Better	1	1	1	100%	Maximum Value	100%	From Target x Measurement	100%	Green
IT Operations Budget %	10021	1	At the End of Every Quarter	Lower is Better	40	38	38	105%	Maximum Value	105%	From Target x Measurement	105%	Green
IT Budget Variance versus Plan	10020	1	At the End of Every Quarter	Lower is Better	1	1	1	100%	Maximum Value	100%	From Target x Measurement	100%	Green
Online Operations Efficiency Index	10044	2	At the End of Every Quarter	Higher is Better	0	0	0	0%	Average	83%	From Children Roll-Up	83%	Yellow
Employee Training Index	10015	1	At the End of Every Quarter	Higher is Better	48	41	41	85%	Average	88%	From Target x Measurement	85%	Yellow

% Increase in Membership Growth
of critical talent gaps filled

Strategic Plan with Indicators

Plan / Item / Indicator	ID	Perspective	Related Plan	Parent on Related Plan	Current Target	Last Measurement	Last Measurement Status	Status %	Item Status
2016-2021 Strategic Planning	S10001							29%	Red
Create the Foundation for Growth	S10004	Internal Processes						29%	Red
Automate Processes	S10012	Internal Processes						69%	Red
Automation Index	10010				39	27	69%	69%	Red
Enforce compliance with Specifications	S10014	Internal Processes						86%	Yellow
% Projects with Sponsor Sign Off	10024				99.8	95	95%	95%	Green
Departments with ISO 9002 Certification	10012				65	40	62%	62%	Green
IT Emergency Changes	10023				1	1	100%	100%	Green
Operations Efficiency Index	10045				0	0	104%	104%	Green
Streamline manual processes	S10013	Internal Processes						67%	Red
Delight the customer	S10003	Customer						79%	Yellow
Customer Satisfaction Index	10002				95	65	68%	68%	Yellow
Enhance customer experience	S10009	Customer						68%	Yellow
Launch new Innovative Products	S10011	Customer						88%	Yellow
Transform our Brand	S10010	Customer						82%	Yellow
Maximize Profitability	S10002	Financial						86%	Yellow
Prepare and Motivate our Workforce	S10005	Learning and Growth						90%	Yellow



Part 4: Overview



Let Rego be your guide.

Achieving Our Goals

- Whether it is a corporate vision or a business unit's specific goals, we need to be able to track, visualize, and execute on our initiatives and benefits
- This allows us strategically fund and staff our investments while being proactive about capturing real time data.
- Through the use of custom benefit tracking or the strategic planning module, we can achieve the above in various ways to make our organizations successful and moving in the right direction



Questions?



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- Class Name = **regoUniversity**
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- Date Started = **Today's Date**
- Date Completed = **Today's Date**
- Hours Completed = **1 PDU per hour of class time**
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- Click on **I agree** and **Submit**



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