



rego*U*niversity 2019

SAN DIEGO

PPM Roadmap | Always
Have a Vision

Your Guides: Jacob Cancelliere and Jon Borden

Introductions

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



Agenda

- Defining the Value of a Strategic Roadmap
- Roadmapping Methodology
- Best Practices
- Real-World Examples
 - Long-Term Focus
 - Short-Term Focus
 - Annual Planning Support

IS YOUR PLAN
CONSISTENT WITH
OUR CORPORATE
STRATEGY?



E-mail: SCOTTADAMS@aol.com

HOW WOULD
I KNOW?



DON'T YOU
KNOW OUR
STRATEGY?



NO,
DO
YOU?



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OF COURSE I DO.
IT'S SOMETHING
ABOUT LEVERAGING
OUR PLATFORMS.



DOES YOUR PLAN
LEVERAGE OUR
PLATFORMS?



NO, BUT I CAN
REWRITE MY PLAN
SO IT SEEMS AS IF
IT DOES.



GOOD. GO BACK
AND DO THAT.



www.dilbert.com

THERE'S NO
POINT IN HAVING
A STRATEGY IF YOU
AREN'T GOING TO
PRETEND TO FOLLOW
IT.



4-11-97

Defining a Strategic Roadmap

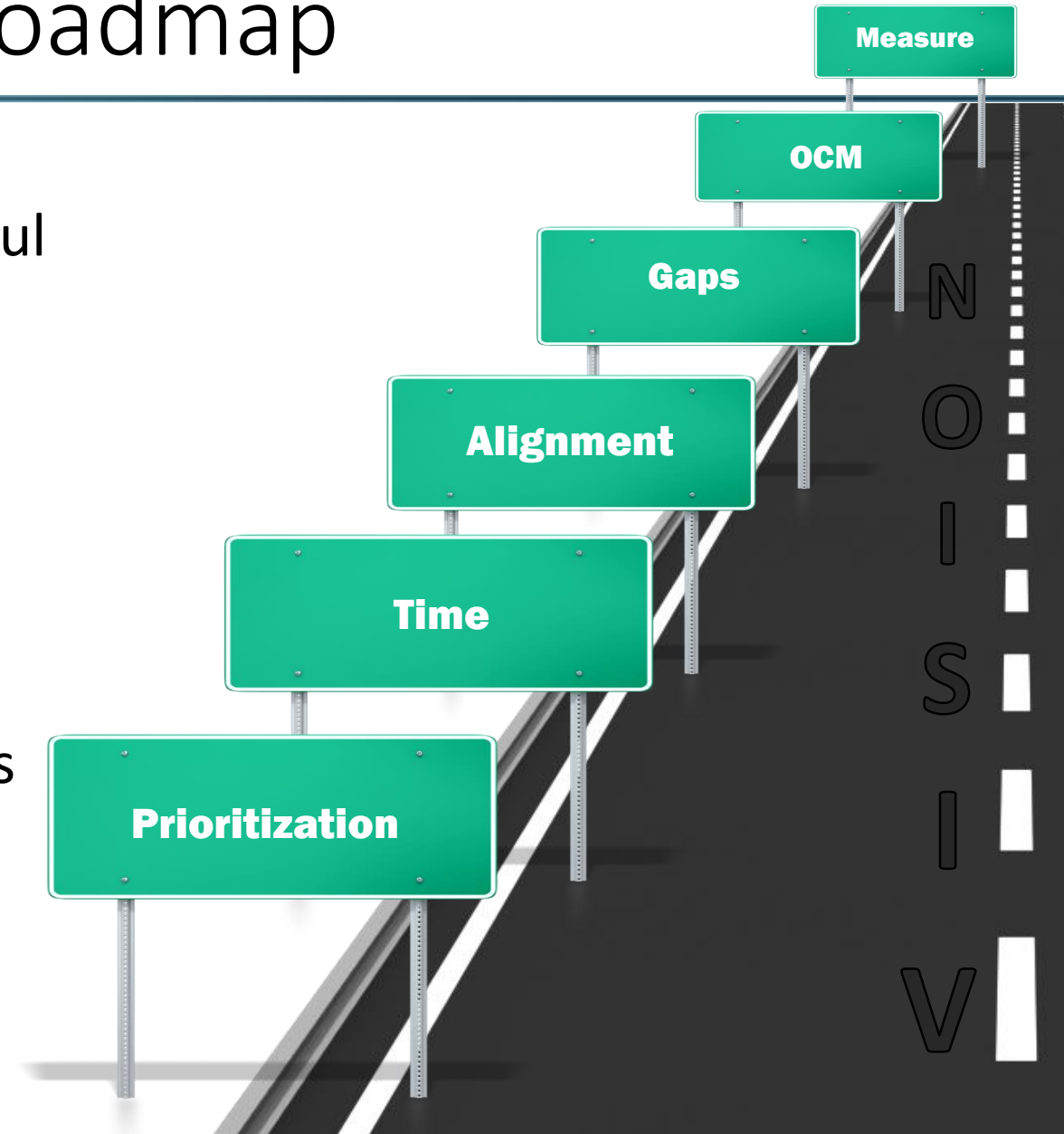
- A roadmap is a strategic plan to guide the continuous maturation of CA PPM as a function of its utilization, adoption, and supporting people and processes.
- Accounts for all organizational variables:
 - Corporate strategy
 - PPM vision and aspirations
 - Process and tool maturity
- Roadmaps can be effectively organized into two categories:
 - Those meant to steer an existing implementation.
 - Those meant to lay the foundation for a new implementation.



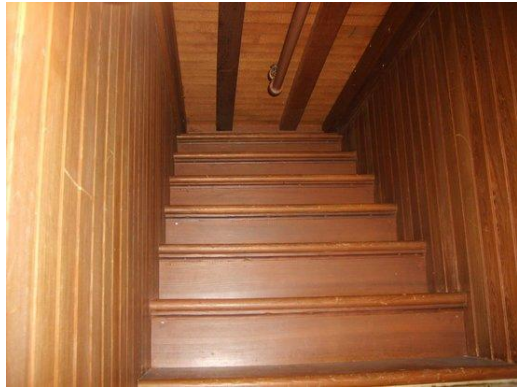
Importance of a Strategic Roadmap

Roadmaps help organizations deliver successful enterprise solutions. A clear roadmap will:

- Execute On A **Vision**
- Force **Prioritization**
- Provide an element of **Time**
- **Align** Business, IT and PPM Processes
- Reveal **Gaps** in PPM processes and functions
- Drive **Common Understanding** and **Shared Ownership (OCM)**
- Provide the ability to **Measure** success



Winchester House



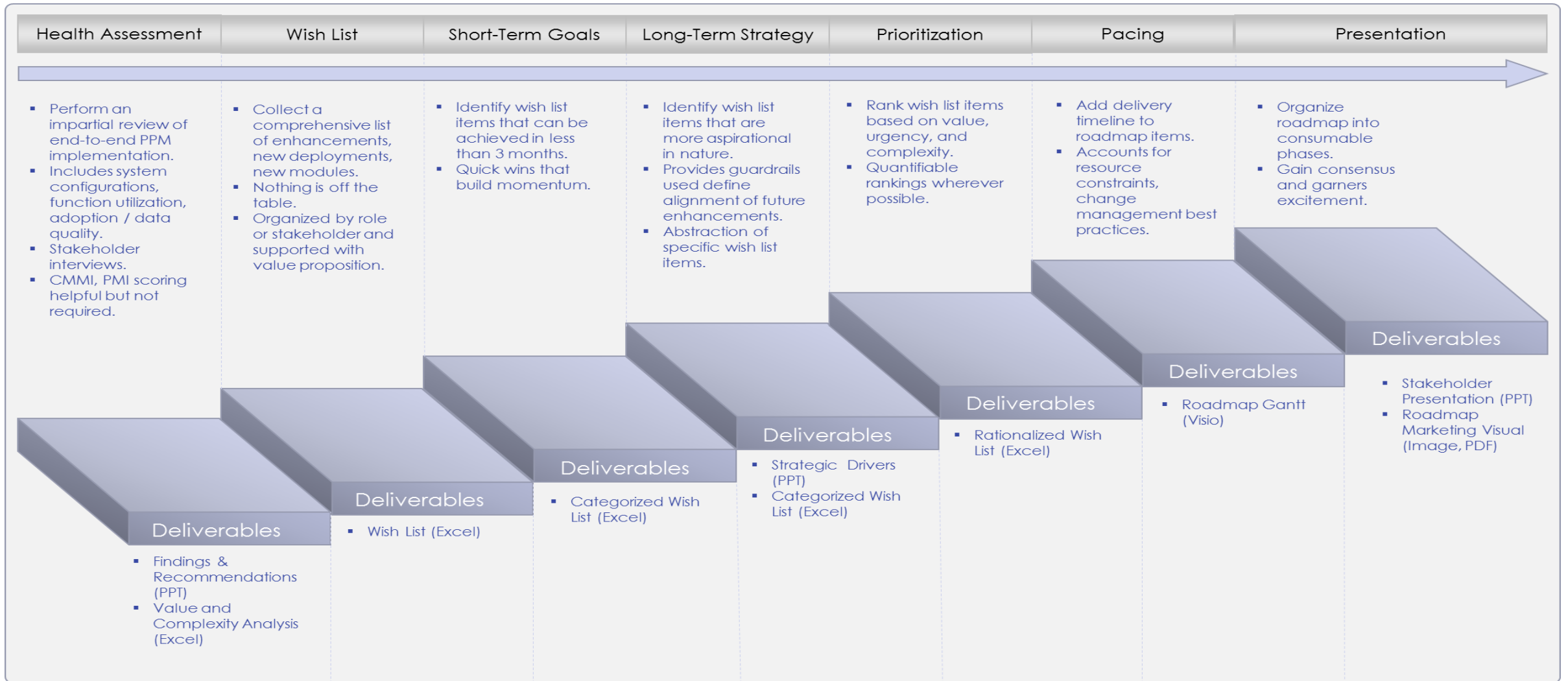
Who needs a blueprint...



...when you can just build?



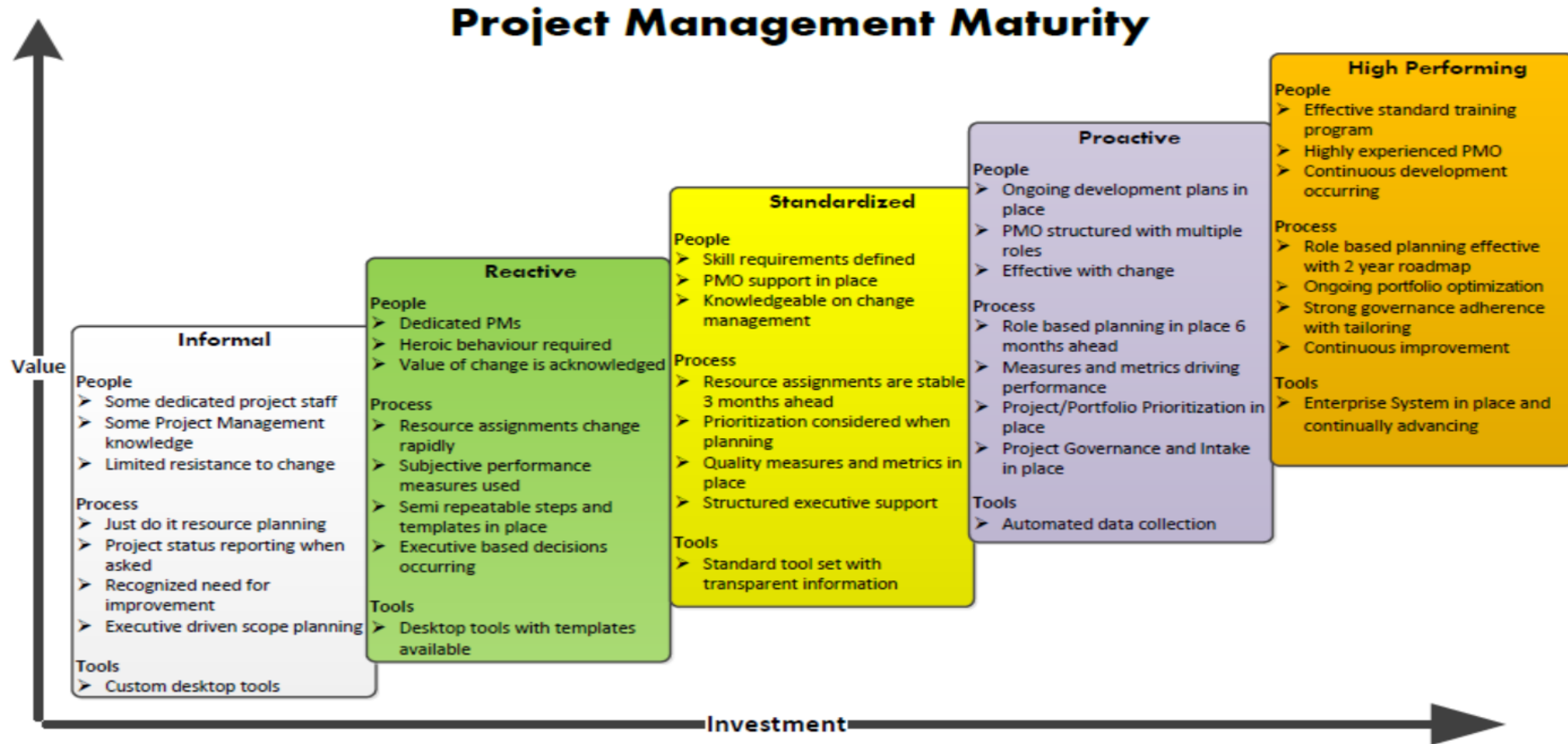
Methodology



Best Practices

1. Take time to **Assess your Current State**
2. **Utilize Themes** when building Roadmaps
3. **Crawl-Walk-Run**, sustainability is key
4. **Try not look beyond 18 months**, business conditions and SW change rapidly
5. **Do not get too detailed** with the wish list. Differentiate between minor enhancements and true roadmap initiatives.
6. **Iterative** is best – Don't let **perfect** get in the way of **better**. Avoid the **Big Bang** approach!

Assess the Current State – Maturity



Set Roadmap Themes

- Utilize themes when building roadmaps
- Working in themes gives allows you to group functionality based on mindsets and explore how you might want to approach each item. It also allow us to prioritize within a specific theme.
- Align personas with themes to enhance adoption and prove “what’s in it

Resource Management

Project Management

Financial Management

Product Management

Craw-Walk-Run

The implementation of an enterprise PPM Solution is generally done in waves/phases corresponding to a Crawl/Walk/Run approach.



Deploying Functionality in Stride



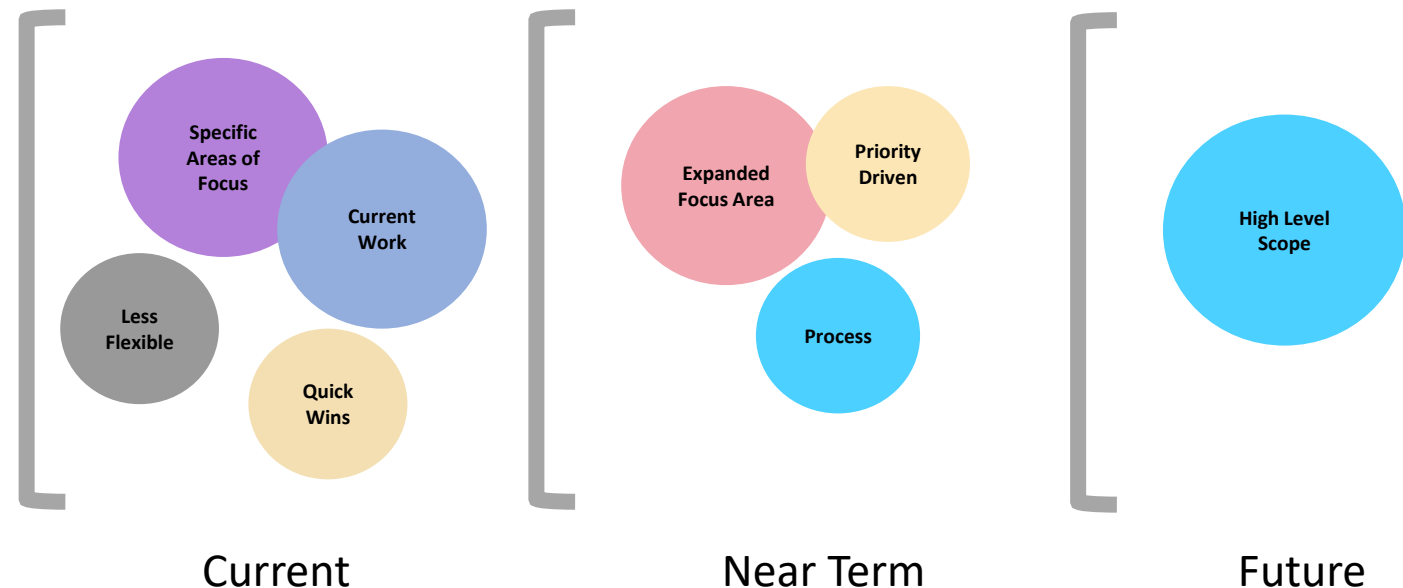
Crawl	Walk	Run
<ul style="list-style-type: none"> • Time Tracking • Demand Mgmt <ul style="list-style-type: none"> • Idea Approval Workflow • Project Mgmt <ul style="list-style-type: none"> • Templates • Status • Baselines • Issues/Risks • Tasks/Key Milestones • Light Portfolio Management • Internal Knowledge Transfer <ul style="list-style-type: none"> • Admin Training • Functional SMEs 	<ul style="list-style-type: none"> • Detailed Financial Mgmt <ul style="list-style-type: none"> • Financial Plans • Rates and Costing • Actuals Import • Integrations <ul style="list-style-type: none"> • HR • Agile • Etc. • Portfolio Mgmt <ul style="list-style-type: none"> • Investment Planning • Waterlining • Enhancements Based on Use <ul style="list-style-type: none"> • Reports, Workflows, Portlets 	<ul style="list-style-type: none"> • Detailed Project Mgmt <ul style="list-style-type: none"> • Changes • MSP Interaction • Assignments and ETC • Utilization • Resource Management <ul style="list-style-type: none"> • Roles • Skills • Allocations/Capacity • Enhancements Based on Use <ul style="list-style-type: none"> • Reports, Workflows, Portlets

Roadmaps and Time Horizons

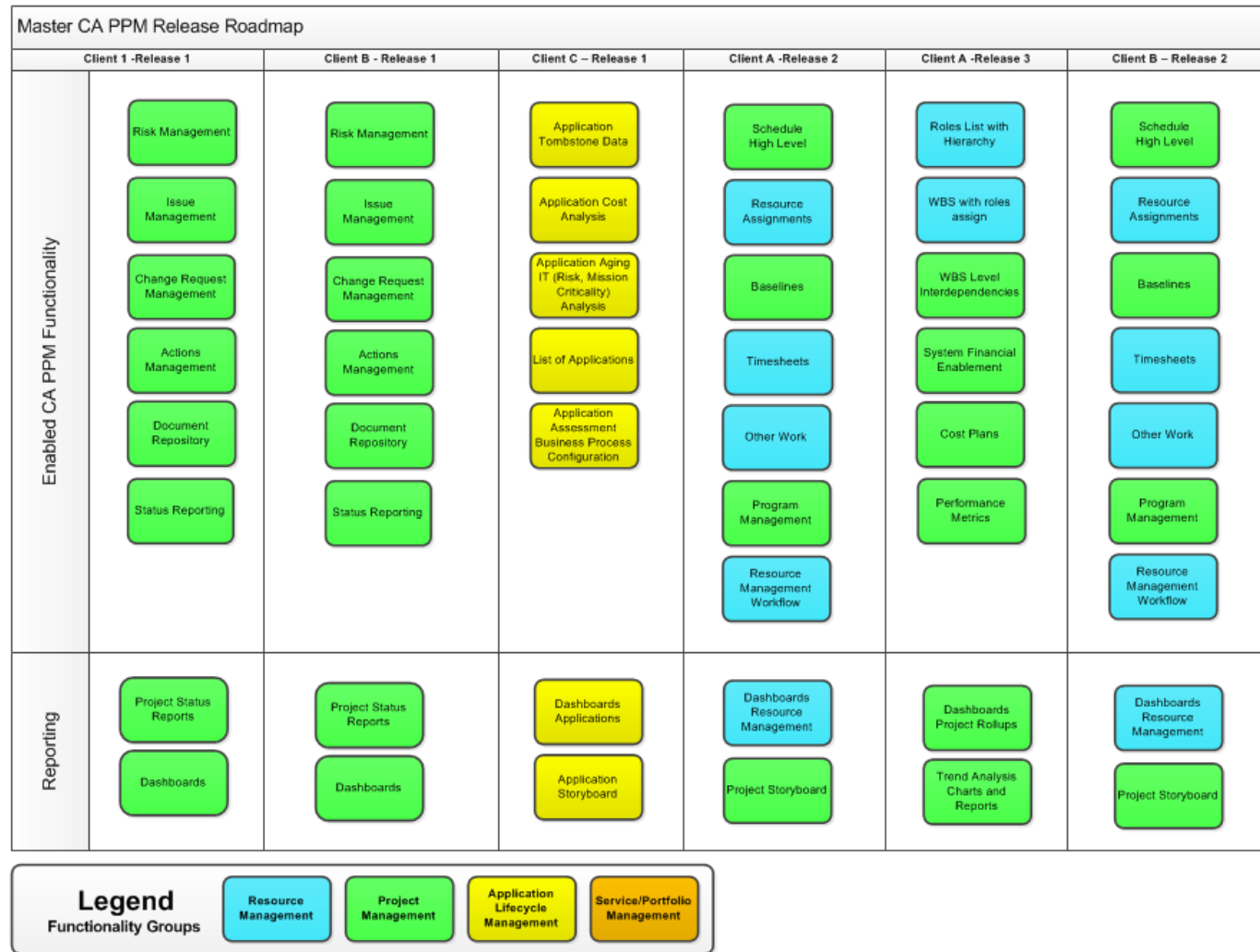
- Defining the time horizons that you want your roadmap to address is one of the first steps in building a successful roadmap.

- The basic time horizons include:

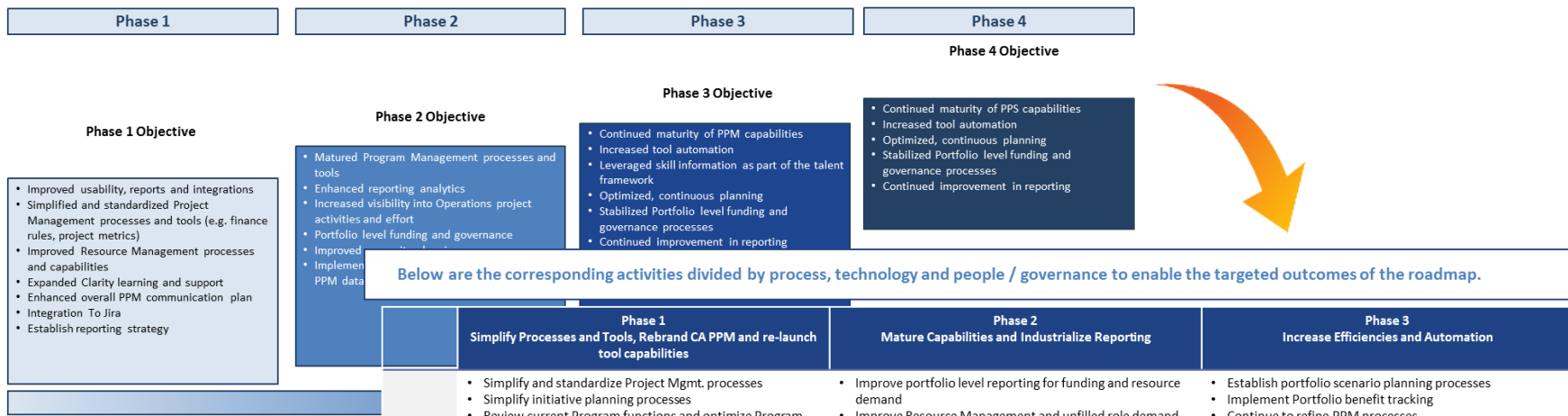
- Current
- Near Term
- Future



Example #1: Detailed Functionality Roadmap



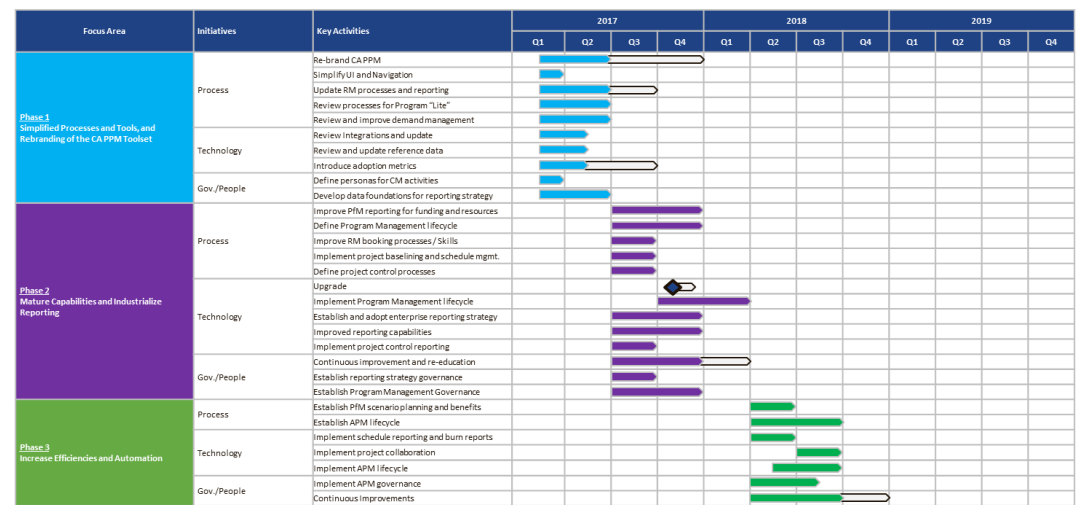
Example #2: Long-Term Roadmap



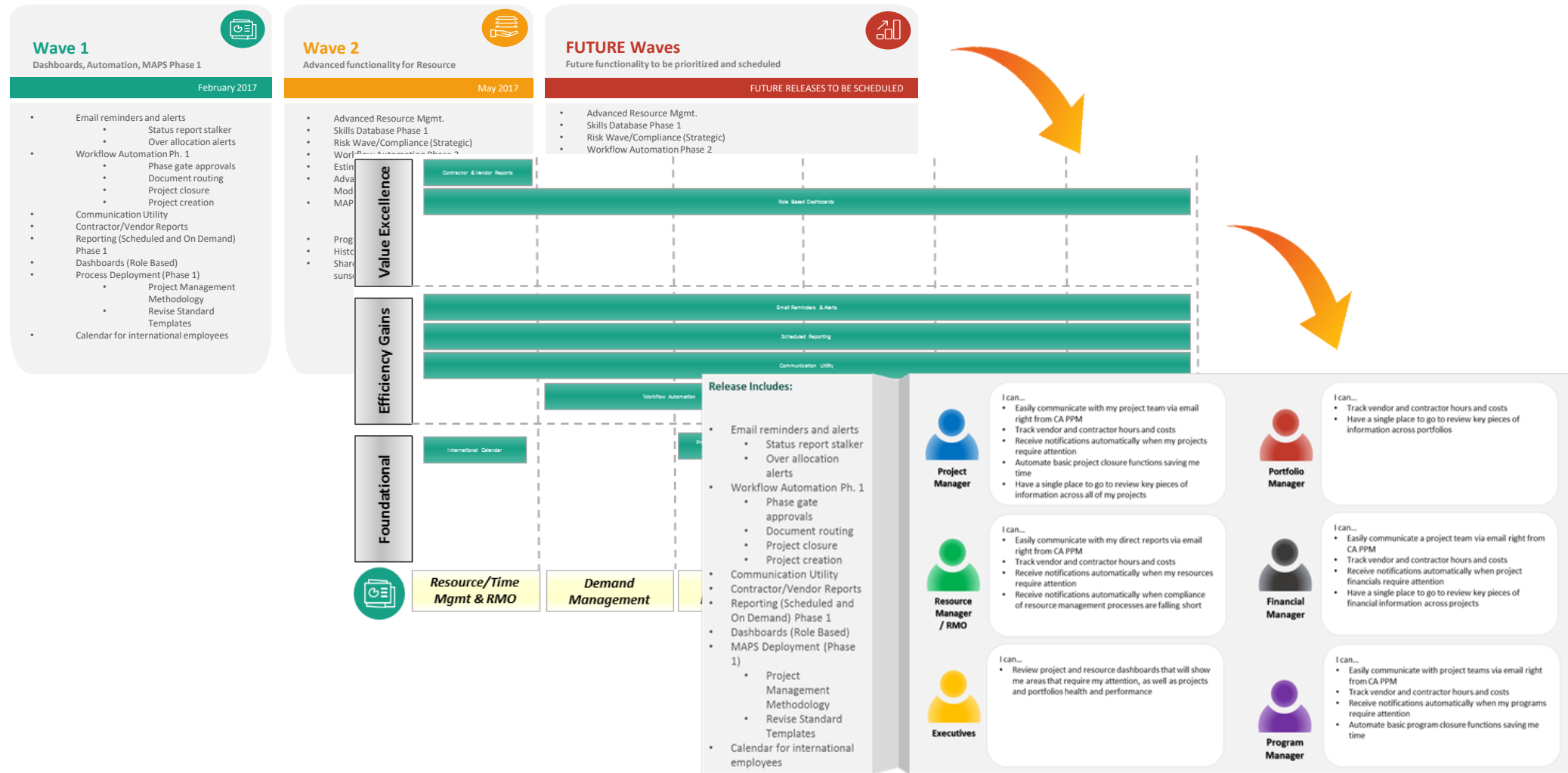
Below are the corresponding activities divided by process, technology and people / governance to enable the targeted outcomes of the roadmap.

	Phase 1 Simplify Processes and Tools, Rebrand CA PPM and re-launch tool capabilities	Phase 2 Mature Capabilities and Industrialize Reporting	Phase 3 Increase Efficiencies and Automation
Process	<ul style="list-style-type: none"> Simplify and standardize Project Mgmt. processes Simplify initiative planning processes Review current Program functions and optimize Program 'Lite' processes Introduce improved Resource Management processes Review and Improve demand management processes Optimize the CA PPM overall user experience Introduce "My Work" for personas identified 	<ul style="list-style-type: none"> Improve portfolio level reporting for funding and resource demand Improve Resource Management and unfilled role demand, booking processes Implement project baselining Implement contractor time reporting Expand Program Management processes Standardize Demand and Resource Mgr Possible implementation of skills 	<ul style="list-style-type: none"> Establish portfolio scenario planning processes Implement Portfolio benefit tracking Continue to refine PPM processes
Technology	<ul style="list-style-type: none"> Improve Clarity reporting Simplify User Interface Improve Clarity integration and automation Review and Improve Financial integrations and reporting Update and release Resource Management reporting Review reference data, such as vendor lookup and locations, to streamline and ensure data of value is present. Integration to Jira 	<ul style="list-style-type: none"> Implement Program Management process Adopt Enterprise reporting solution for Update the Portfolio Management capabilities Build reporting strategy and introduce e based on the strategy. Implement project control reporting (ris 	
People / Governance	<ul style="list-style-type: none"> Rebrand the CA PPM tool Establish user personas to be used for CM activities Expand and Improve the PPM Support and Operating Model (e.g. learning, support, communication) Develop data foundations for Reporting Strategy Introduce Adoption Metrics 	<ul style="list-style-type: none"> Establish Program Management processes Continued re-education of PPM capabilities Establish Reporting strategy governance 	

CA PPM Roadmap – All Phases



Example #3: Short-Term Roadmap



Example #4: Annual Planning Support

Current State Analysis

CA PPM Functionality

What functionality is being used? What is being done outside the system?

- Timesheets are deployed and used universally.
- Status reporting is deployed and used universally.
- Corporate IT has not expanded into anything beyond basic project administration.
- Digital projects progressed into detail financial planning.
- Vendor payments and invoices for Digital projects are sourced from CA PPM.
- Demand management module introduced to support capital planning intake and prioritization for both Digital and Corporate IT.
- Resource allocations are managed for named resource on in-flight projects. Role-based capacity planning, however, has not been introduced as a part of intake or ongoing management.

Short-Term CA PPM Goals (2017)

Optimization

Initiative	Major Deliverables (Technical Complexity / Effort)	Timeline
Corporate IT Alignment	<ul style="list-style-type: none"> • Updated Support & Governance Model (Low / High) <ul style="list-style-type: none"> ◦ CA PPM Administration (Melissa Mascari Backfill) ◦ PMO Standup • Contractor Inclusion (Low / Medium) • Financially Enabled Projects (Low / Low) • Forecasting Process & Training (Low / Medium) • Lawson Feed & Sunset Timesheet Auto-Approvals (Low / Low) 	Q2 2017 – Q2 2018
Fixed Bid Cost	<ul style="list-style-type: none"> • Enhanced Non-Labor Process & Input Screen (Low / Medium) 	Q3 2017
Reporting Enhancement Cadence	<ul style="list-style-type: none"> • Reporting Release Schedule (Low / Low) • Intake Process (Low / Low) 	Q1 2017
ADP Integration (PTO Only)	<ul style="list-style-type: none"> • Outbound Feed from ADP (High / Medium) 	Q4 2017
Chargeback Model	<ul style="list-style-type: none"> • Cost Distribution Analysis (Low / Medium) • CA PPM Configurations (Medium / Medium) 	Q3 2017

Long-Term CA PPM Goals (2018+)



Innovation

- Application Portfolio Management
- Business Deployments (HR, Marketing, Finance)
- Program Management Processes & CA PPM Configurations



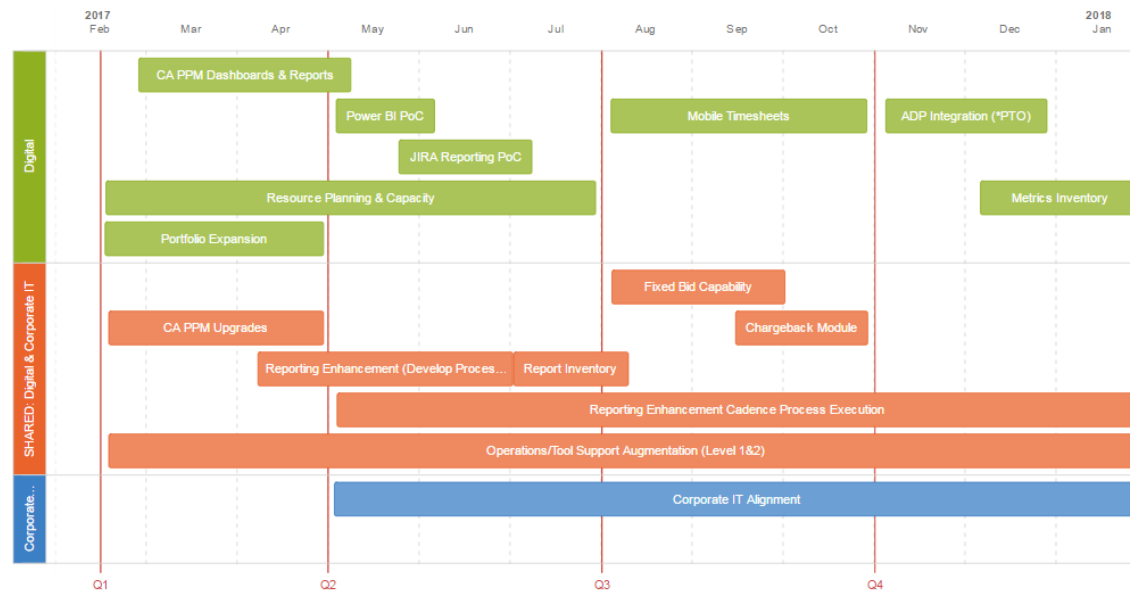
Optimization

- Agile Mapping (Release Management)
- Ariba Integration

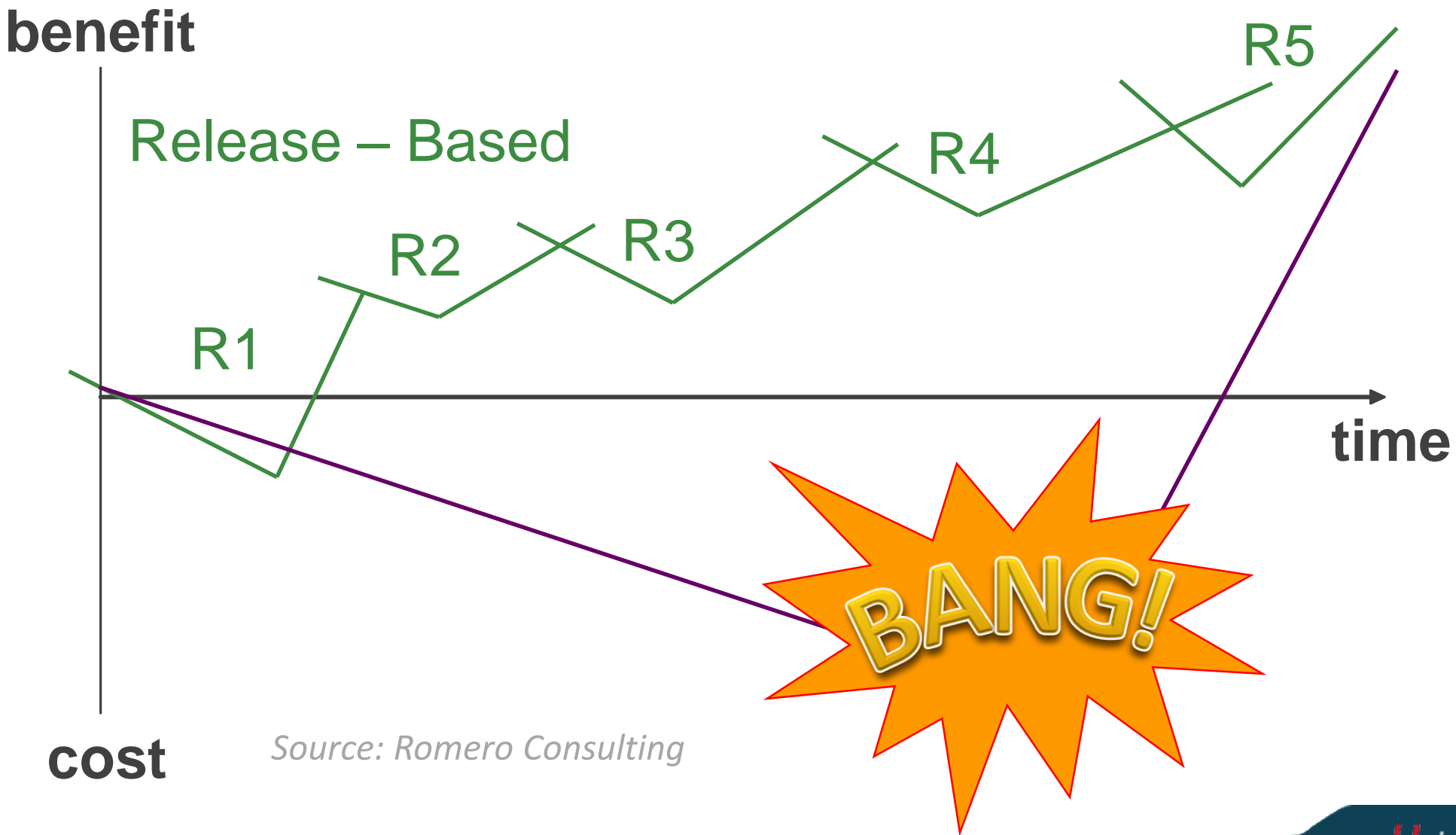


Operations

- Rego University 2018



Avoid the Big Bang – Be Incremental



Source: Romero Consulting

Questions?



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Thank You For Attending regoUniversity

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- Date Started = **Today's Date**
- Date Completed = **Today's Date**
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- Training classes = **Technical**
- Click on **I agree** and **Submit**



Let us know how we can improve!
Don't forget to fill out the class survey.



Phone

888.813.0444



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info@regouniversity.com



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