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ITBM Roadmap | Always Have a Vision

Your Guides: Jerry Dolak & Mark Lundquist

Part I: Introduction

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Introductions

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



Agenda

- Roadmap Principals
- Capability Alignment
- Evaluate Your Organization

Part II: Roadmap Principals

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Have a plan

The implementations that struggle, have cost overruns and poor results typically lack organizational direction and goals.

- Why are we doing this?
- What are the problems we are solving?
- Who is responsible for getting us to each of the objectives?
- How do we get there?

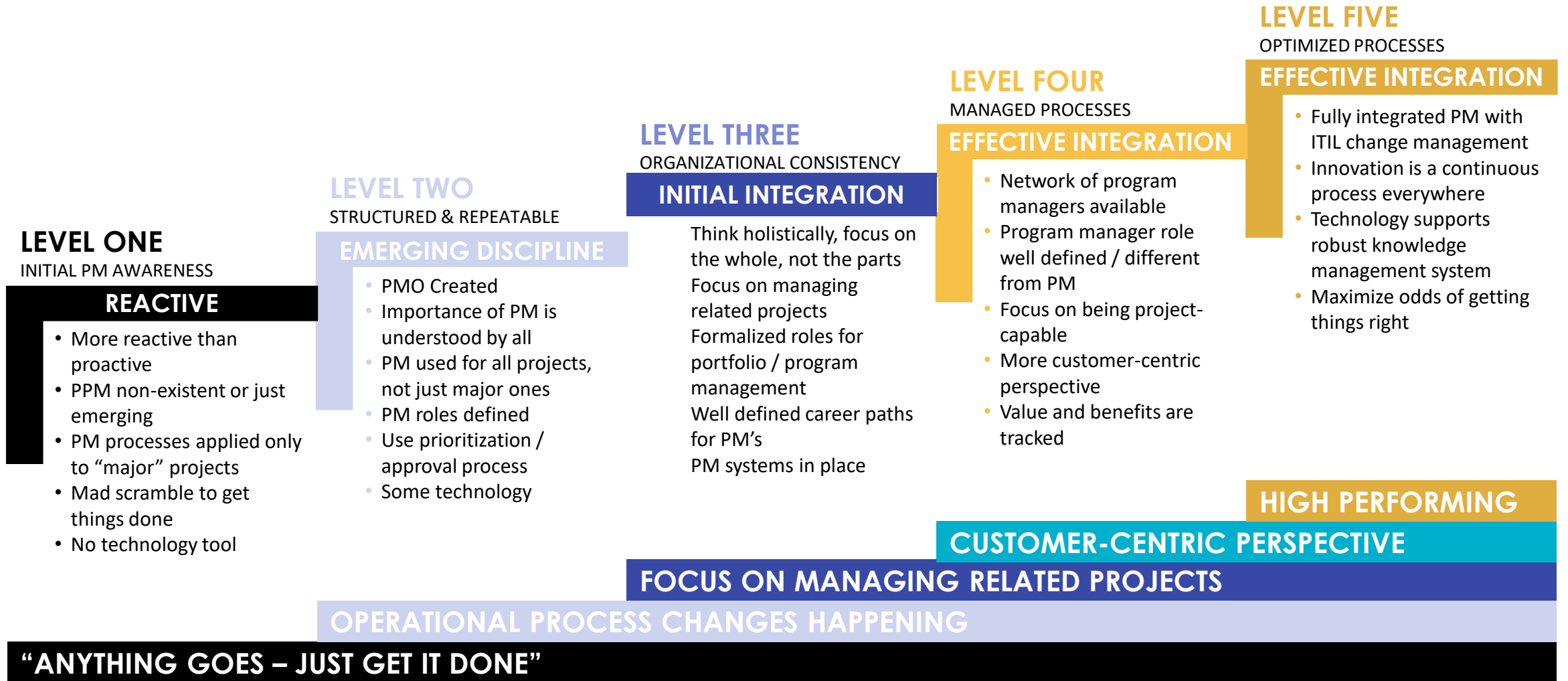
Roadmaps are guides for hitting the objectives, but, need the commitment to follow and adjust. Anyone can build a plan, it takes leadership to deliver on it.

Crawl-Walk-Run Roadmap

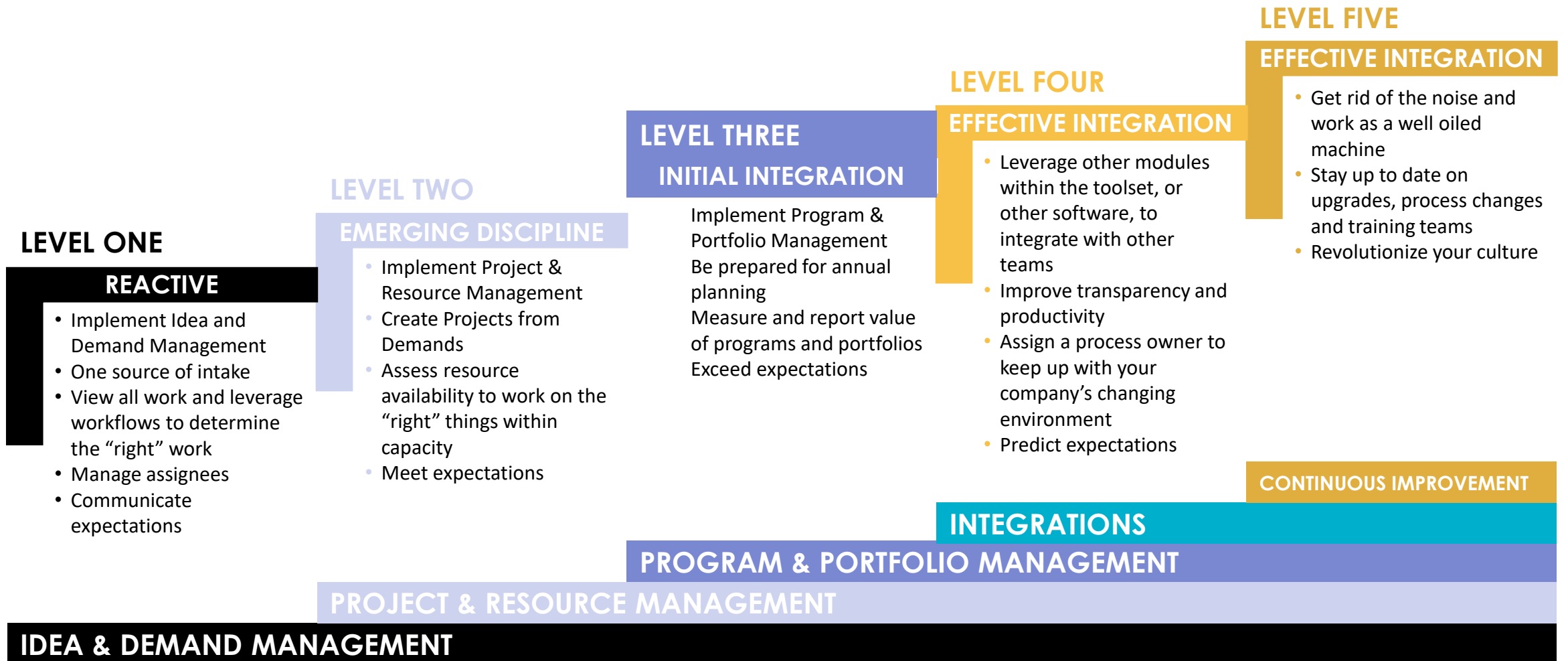
The implementation of an enterprise PPM Solution is generally done in waves/phases corresponding to a Crawl/Walk/Run approach.



Starting where you are



Example Functionality Alignment



Part III: Capability Alignment

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PPM capability reference model

PURPOSE

The purpose of this model is to establish a common way of discussing the elements of PPM and clarifying scope around certain elements of PPM.

These PPM capabilities are aligned with the Project, Program, and Portfolio Standards (Third Edition) from the Project Management Institute.

PROJECT PORTFOLIO MANAGEMENT

1 - Portfolio

1.1 Demand Management	1.2 Portfolio Prioritization	1.3 Portfolio Selection	1.4 Capacity/ Capability Mgmt	1.5 Portfolio Authorization	1.6 Portfolio Governance
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2 - Program

2.1 Integration Mgmt	2.2 Scope Management	2.3 Financial Management	2.4 Resource Management	2.6 Time Management	2.5 Program Controls	2.7 Communications Mgmt
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3 - Project

3.1 Integration Mgmt	3.2 Scope Management	3.3 Financial Management	3.4 Resource Management	3.5 Time Management	3.6 Project Controls	3.7 Communications Mgmt
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Foundational

4.1 Reporting and Analytics	4.2 Standards & Process Govern.
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Operational

5.1 Operational Resource Planning	5.2 Operational Time Tracking
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Dependent

6.1 Corporate Finance	6.2 Human Resources	6.3 Procurement
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Capability definitions

Portfolio

1.1 Demand Management	1.2 Portfolio Prioritization	1.3 Portfolio Selection	1.4 Capacity/capability Mgmt	1.5 Portfolio Authorization	1.6 Portfolio Governance
Maintain an inventory of ideas and requested work	Prioritize that work	Select the work aligned to strategy	Make sure resources (labor and financial) and capabilities are available	Authorize and fund the portfolio	Provide oversight and optimize the portfolio
The set of processes used to track, organize, and disposition work requests. The work requests could be new ideas, enhancements, or changes in operational demand.	Method used to evaluate and rank the components of the portfolio. Informs ongoing decisions such as which work takes precedence, and whether or not work should continue based on alignment.	Portfolio Selection results in a set of selected work components that are designed to achieve a defined organizational strategy and objectives.	The set of processes used to determine the labor capacity and capabilities needed by an organization to satisfy the changing demand for that labor.	A set of activities that results in an approved set of portfolio components that are funded and staffed.	Activities for monitoring the portfolio's performance and gathering data to support decision-making including optimizing the portfolio.

Program

2.1 Integration Mgmt	2.2 Scope Management	2.3 Financial Management	2.4 Resource Management	2.6 Time Management	2.5 Program Controls	2.7 Communications Mgmt
Identify all of the program components, gather estimates, secure funding, and provide overall control	Establish the program hierarchy and monitor outcomes	Secure funding sources and monitor program financials	Ensure projects have the needed resources	Define and monitor the overall program schedule	Provide cross-project oversight of project controls (risks, issues, changes)	Keep stakeholders informed
Includes the activities needed to identify, define, and coordinate the multiple components within the program.	The activities necessary to decompose the program into project deliverable components. This includes establishing the program hierarchy.	The activities involved in identifying the program's financial sources, integrating the project budgets, and controlling costs throughout the program.	Ensuring that all projects have the necessary resources to deliver the benefits successfully.	Determining the roadmap for the program, identifying project dependencies, and monitoring major program milestones.	The activities associated with monitoring project control activities and providing cross-project oversight that might not otherwise take place at the project level.	The timely collection, generation, and distribution of program information.

Project

3.1 Integration Mgmt	3.2 Scope Management	3.3 Financial Management	3.4 Resource Management	3.5 Time Management	3.6 Project Controls	3.7 Communications Mgmt
Deliver using effective processes and bring everything together	Identify and control the scope of the project	Estimate and control costs	Organize and manage the project team	Scheduling and timesheets	Control risks, issues, and change controls	Keep stakeholders informed
The activities used to identify, define, and coordinate the various processes and project management activities.	The activities associated with ensuring that the project includes all the work required, and only the work required to complete the project successfully.	The activities necessary to plan, estimate, budget, and control project costs.	The activities included in identifying, allocating, assigning, and managing the project team.	The activities used to identify work and assignment estimates and maintain control of the scheduling using progress updates and actuals.	The activities necessary to maintain appropriate control over risks, issues, and changes to the project.	The timely collection, generation, and distribution of project information.

Capability definitions

Foundational

4.1 Reporting and Analytics	4.2 Standards & Process Govern.
Provide metrics, information, and insight	Develop, maintain, and enforce standards
The set of activities involved with producing regular views, reports, and dashboards as well as ad hoc reporting services.	The set of activities to required to effectively develop standards and processes so that PPM processes are consistent and repeatable.

Operational

5.1 Operational Resource Planning	5.2 Operational Time Tracking
Allocate resources to non-project time	Track time for non-project work
The set of activities necessary to track the amount of time resources are allocated to non-project work. This is important for the purposes of having a complete view of labor resource capacity.	The set of activities necessary to capture the amount of time resources spend on non-project work.

Dependent

6.1 Corporate Finance	6.2 Human Resources	6.3 Procurement
Capture or provide project financial information	Capture or provide labor resource information	Capture or provide contractor information
The set of activities and/or integrations needed to capture or provide project financial information. Data usually includes: timesheet info, capital and operating costs, forecasts, etc.	The set of activities and/or integrations needed to maintain data such as: resource OBS, resource costs, skills, etc.	The set of activities and/or integrations needed to maintain data on contractors.

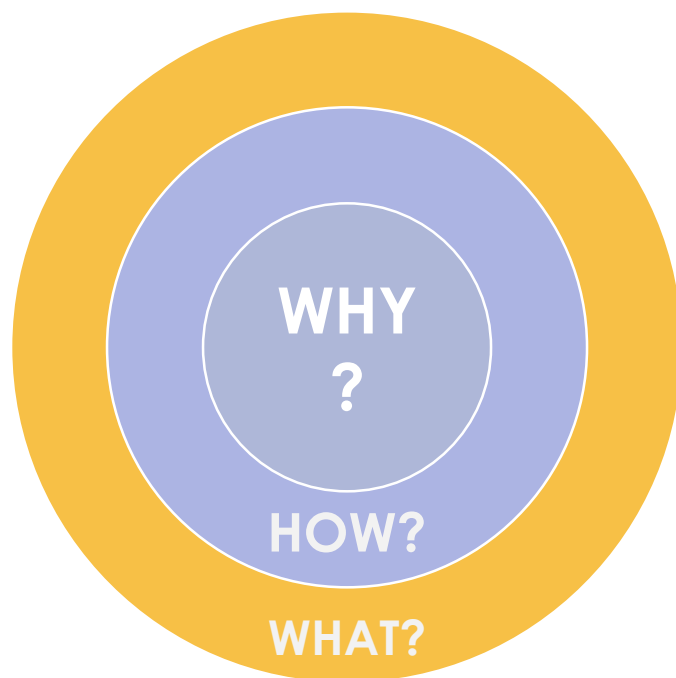
Part IV: Evaluation

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Start with why

- Decide WHY you're doing this
- Support the WHY
- Where you are coming FROM and where you want to get TO



Providing the discipline that helps us anticipate and respond to changes in business needs with agility and control

From	To
Reactively addressing demand in a short-sided manner; unclear demands	So that we can proactively address our demand in a way to meets our strategy; trade-offs
Prioritizing demand in silos, as a result...	Prioritizing across the entire GBT function and achieving the right balance to maximize business outcomes
Having difficulty collaborating	Efficiently collaborating through clear meetings and systems

In order to support the “why”

From	To
Reactively addressing demand in a short-sided manner; unclear demands	So that we can proactively address our demand in a way to meets our strategy; trade-offs
Prioritizing demand in silos, as a result...	Prioritizing across the entire GBT function and achieving the right balance to maximize business outcomes
Having difficulty collaborating	Efficiently collaborating through clear meetings and systems
Not having the ability to shift direction	Being able to shift direction/resources more quickly
Not fully understanding dependencies	Understanding how work impacts other work

In order to support the “why”

From	How	To
Reactively addressing demand in a short-sided manner; unclear demands	Gain a real view into our backlog and active commitments	So that we can proactively address our demand in a way to meets our strategy
Prioritizing demand in silos	Prioritize the demand	Prioritizing across the entire GBT function and achieving the right balance to maximize business outcomes
Having difficulty collaborating	Process and tools	Efficiently collaborating through clear meetings and systems
Not having the ability to shift direction	Better articulating the smaller components of our work	Being able to shift direction/resources more quickly

Evaluate the why to action - example

Strategy	From	To	Operating Model	Platform & Tools
Why are we doing this?			What are we doing? How are we doing it?	What platforms or tools are needed to support this?
We cannot be Agile if we dedicate resources to large “Titanic” investments—we need to break these down; we cannot even understand what is in-flight vs not	Not having the ability to shift direction	Being able to shift direction/resources more quickly	We can identify what has been finished to help make trade-off decisions Our projects will articulate features or packages of work in smaller chunks	
We are terrible at communicating within the organization which...	Having difficulty collaborating	Efficiently collaborating through clear meetings and systems	We will have mechanisms to encourage better communication horizontally and vertically	
We say “yes” to everything which causes...	Reactively addressing demand in a short-sided manner; unclear demands Overcommitting and underdelivering	So that we can proactively address our demand in a way to meets our strategy; trade-offs Delivering what we committed		
We don’t have a good way to estimate demand and if we did we would...	Prioritizing demand in silos Not fully understanding dependencies	Prioritizing across the entire GBT function and achieving the right balance to maximize business outcomes Understand how work impacts other work		
In order to effectively and efficiently prioritize investments a group/function is needed to harmonize the data and information			We will introduce processes/governance to create a disciplined standard process that...	

Finalize with a objective - Example

The Mission of the Strategy Realization Office is:

- To enable 2021 Global Business Strategy, the SRO is responsible for supporting decision-makers by providing visibility, methods, and structure around PPM
- To drive better communication and collaboration that makes us more efficient and aligned
- Providing the discipline that helps us anticipate and respond to changes in business needs with agility and control

Questions?



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Thank You For Attending regoUniversity

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- Click on **Report PDU's**
- Click on **Course or Training**
- Class Name = **regoUniversity**
- Course Number = **Session Number**
- Date Started = **Today's Date**
- Date Completed = **Today's Date**
- Hours Completed = **1 PDU per hour of class time**
- 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



Email

info@regouniversity.com



Website

www.regouniversity.com