

# Demand/Portfolio Management | Best Practices

Your Guides: <Name of Presenters>

# Introductions

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



# Open Mic

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- The goal of identifying and implementing best practices is to have a successful demand/portfolio management implementation. What do you think success looks like?
- What Prevents Success?
- For those that have a successful implementation of demand/portfolio management – what are some of your best practices?



# Some Rego Thoughts...

## What is Success

- Accurate data
- Complete date
- All demand captured in PPM
- Demands map to strategic objectives
- Objective scoring
- Investment decisions made using Portfolio Mgmt
- No other tools used to evaluate demand (Excel, SharePoint)

## Stumbling Blocks

- Accurate financial and resource data in projects
- Goldilocks for demand – what is the right amount of data
- Business users are not in CA PPM
- Over-engineering demand process
- How do you decrement Idea demand once converted to a Project?



# Format of This Session

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- In the next set of slides, Rego has compiled a set of best practice points related to functionality.
- It may seem choppy, because it is
- Each slide is a different best practice point, so there is not a “flow” between slides in many cases.

# Some Rego Best Practices | Demand Management

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# Gathering Demand Best Practices

- Implementing Annual Planning Drives Standardization of Forms and Required Data Points. Defining Standard Idea Formats will help capture the required reporting requirements from Idea to Portfolio down to project.
- Two main methods exist for gathering demand:

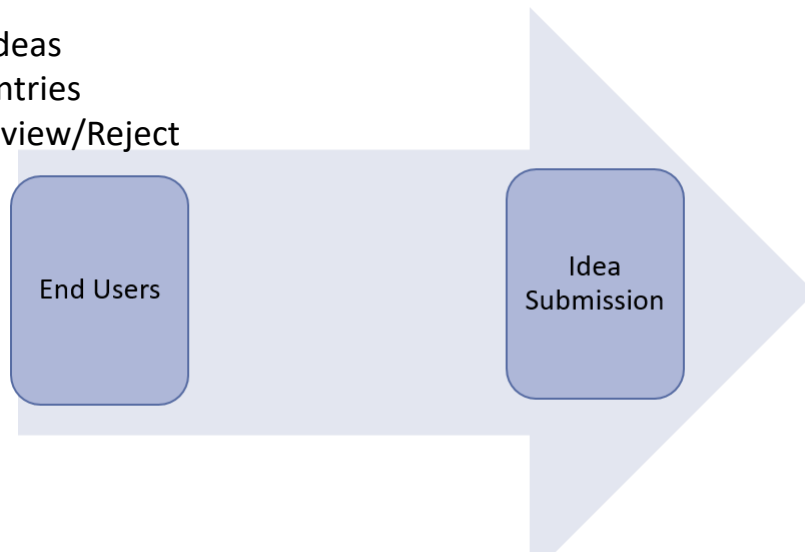
## All User Entry Model

Pro

- Transparent Disposition of All Ideas

Con

- Duplicate Ideas
- Frivolous Entries
- Effort to Review/Reject



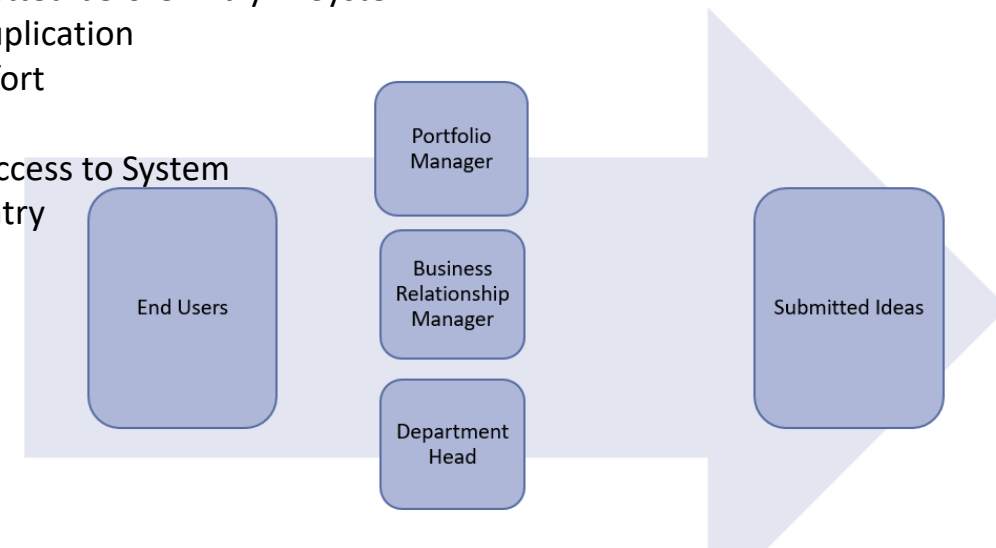
## Moderated Entry Model

Pro

- Ideas are Vetted before Entry in System
- Reduced Duplication
- Reduced Effort

Con

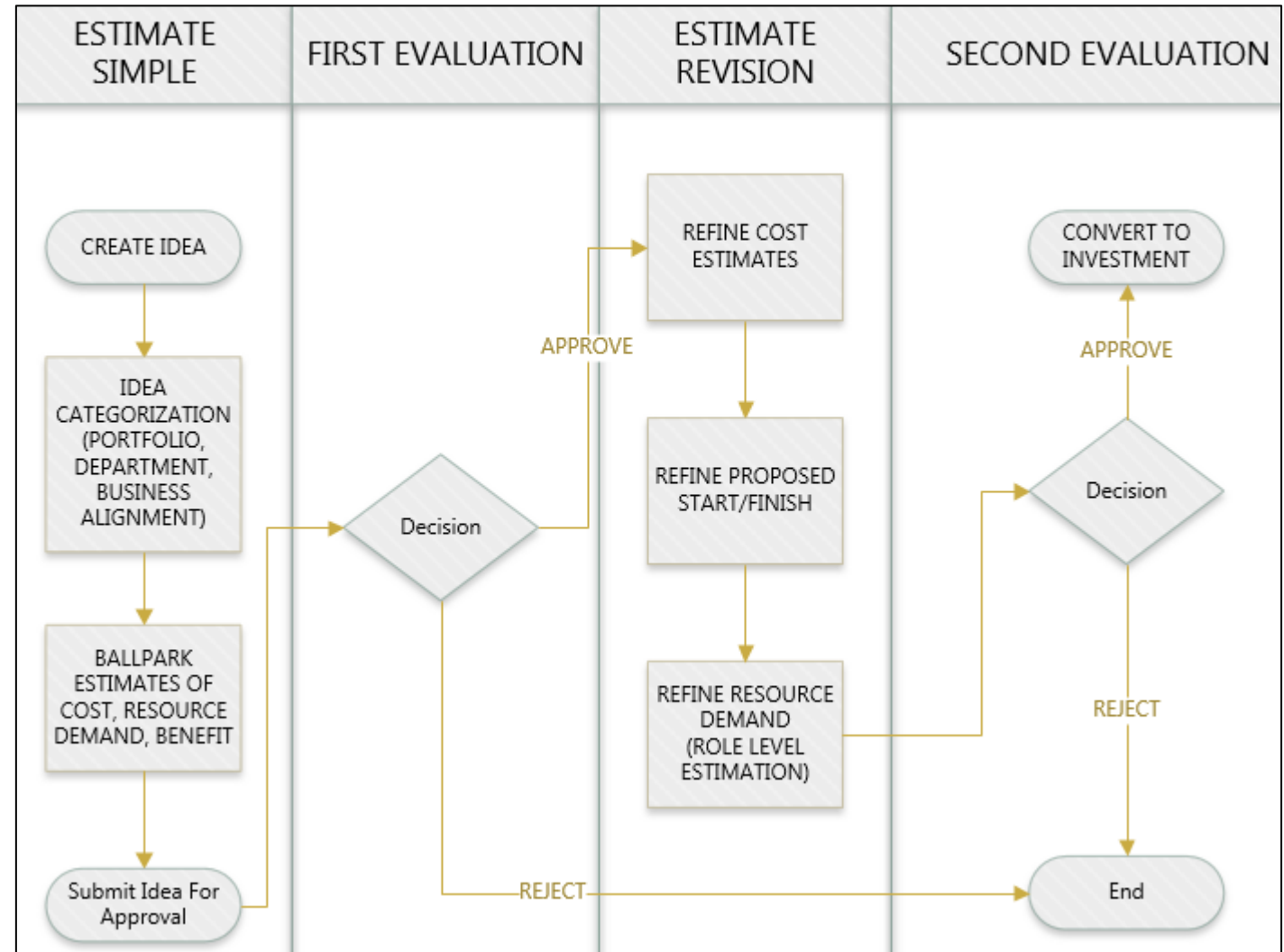
- No Direct Access to System
- Delays in Entry





# Idea Approval Best Practices

- Build a custom process to align to your organizational needs. But, simple approvals work best.
- Try to weed out ideas that should not move forward quickly – see sample
- When converting to a project, inactivate the idea – no duplication of financials or allocations in portfolios
- Use a template when converting



# Idea Data Entry Best Practices

- Differentiate Annual Planning from Standard Idea Intake: Custom Type Fields (Annual Planning, Project, Application, Service, Support Project)
- Create Simple Create Screen
- Define Available Subpages by Idea Type (limit fields by type)
- Use the OOTB portfolio categorization fields, goal, strategy, and OBS
- Put fields common between idea and project on Investment object – I recommend all fields put on investment in case you want to use ideas later
- Capture additional fields that would assist in portfolio planning (e.g., Target Start – Fiscal Year / Quarter)

# Idea Financial Estimate Best Practices

- Keep it light – you do not have enough information at this stage to have accurate costs – remember this is a  $\pm 100\%$  usually at this stage
- Don't try to fully mimic finance business case excel sheet – maybe import?
- Be consistent on the types of costs you plan to forecast (i.e. labor/non labor)
- Be consistent at the level you capture estimates



# Some Rego Best Practices | Portfolio Management

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# Portfolio Structure Best Practices

- A portfolio Should be Created to Evaluate all Annual Ideas.  
Portfolios can be created by Department or Line of Business as well. However an Enterprise Level Portfolio will allow comparison of all ideas in one place (Unless you are using Meisterplan on top of CA PPM that has true portfolio hierarchies)
- Portfolio Architecture allows multiple views of Timed Investments:
  - New Portfolios can be created that represent future years
  - All Active Investment Types Should be included to understand total enterprise commitment

# Portfolio Reporting Best Practices

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- Leverage OBS for categorizations on investments – it is built into every OOTB portlet
- Create Portlets that mirror your Annual Planning Process.  
Creating Pre-Filtered Portlets are easy to create and are great to advance Adoption and User Experience.



# Annual Planning Best Practices

- Ensure portfolios are not entered once and left. Portfolio management should involve an annually or quarterly planning process. Each portfolio should have an owner and the Portfolio Management team should own the overall portfolio used for annual planning
- You create a portfolio, but want to save different versions as snapshots as they go thru the approval process –New portfolio each time? Plans within a portfolio?
- Mid year I have a re-plan – do I just create a new portfolio, or create a new plan in the existing portfolio?

# Top Down Funding Best Practices

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- If your company is planning on funding at the Portfolio Level – It is unlikely you will use Ideas to evaluate any cost benefit or categorization that would apply at the Portfolio level.
- It is more likely the funds are distributed prior to individual investment planning. This distribution will serve as the targets for our portfolio level planning.

# Some Rego Best Practices | Using Incidents

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# Incident Best Practices

- Leverage Incidents to perform tasks that you typically need creator license to do:
  - Self-Add to team
  - Make changes to fields on projects
- Leverage Incidents to manage CA PPM enhancement requests and break fix
  - Allows users to enter CA PPM based requests directly in the application
  - CA PPM admin team can manage updates within CA PPM and use for communication back to requester

# Questions?



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### Phone

888.813.0444



### Email

[info@regouniversity.com](mailto:info@regouniversity.com)



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