regoUniversity 2018

PPM Roadmap |
Always Have A Vision

Your Guide: <Name of Presenters>

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

Open Mic:

How would you define a strategic roadmap?

If you have a roadmap in place, how is it utilized? How often is it reviewed?
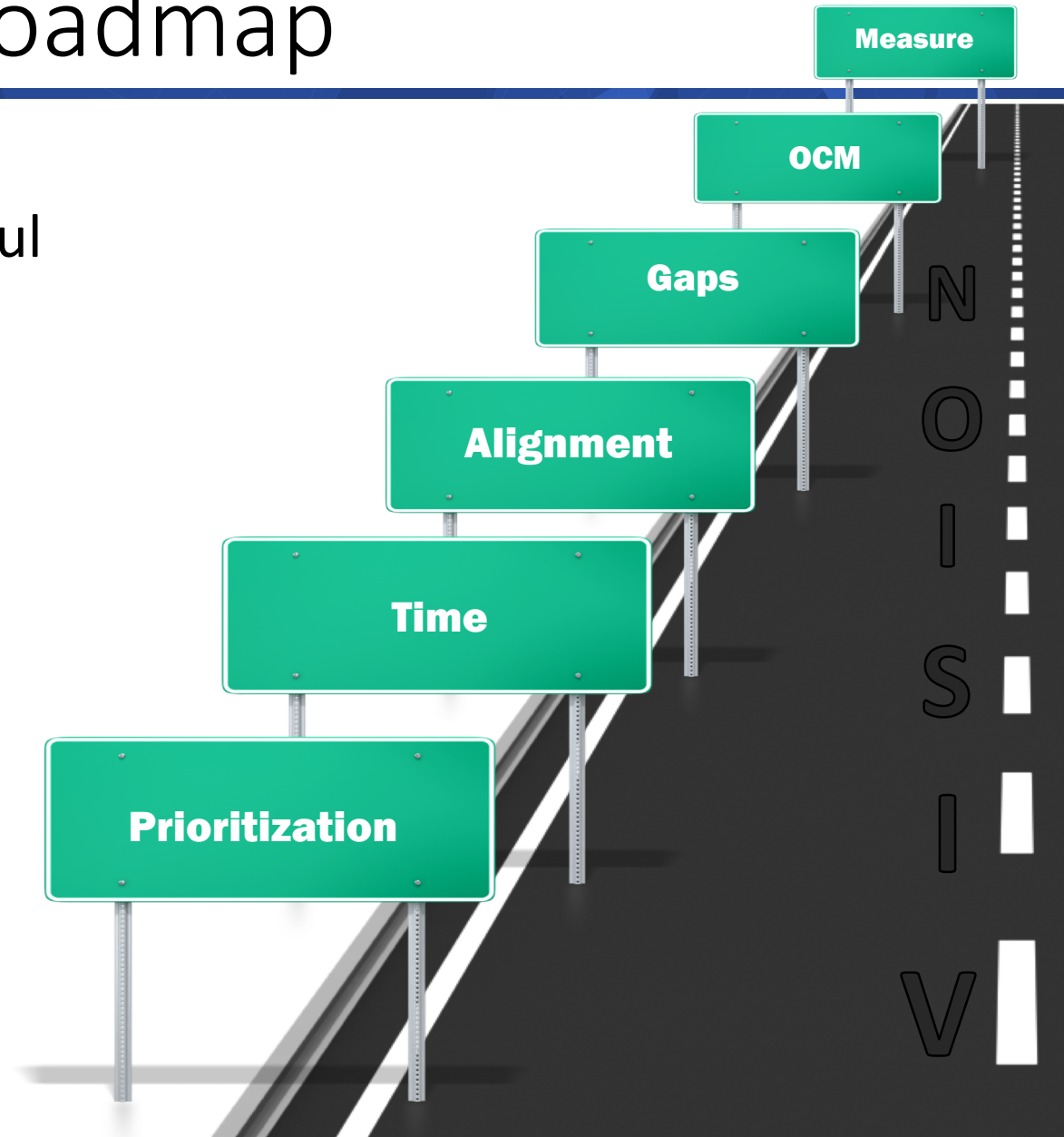
Defining a Strategic Roadmap

- 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.
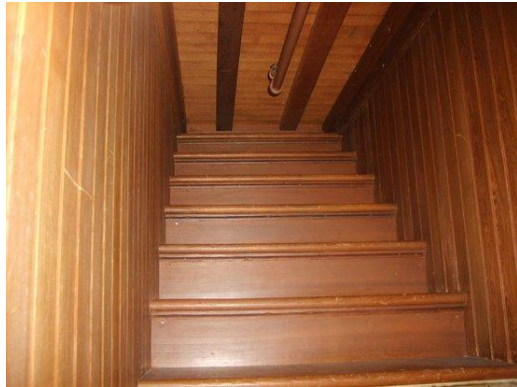

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Importance of a Strategic Roadmap

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 PPS processes and functions

- Drive **Common Understanding** and **Shared Ownership (OCM)**

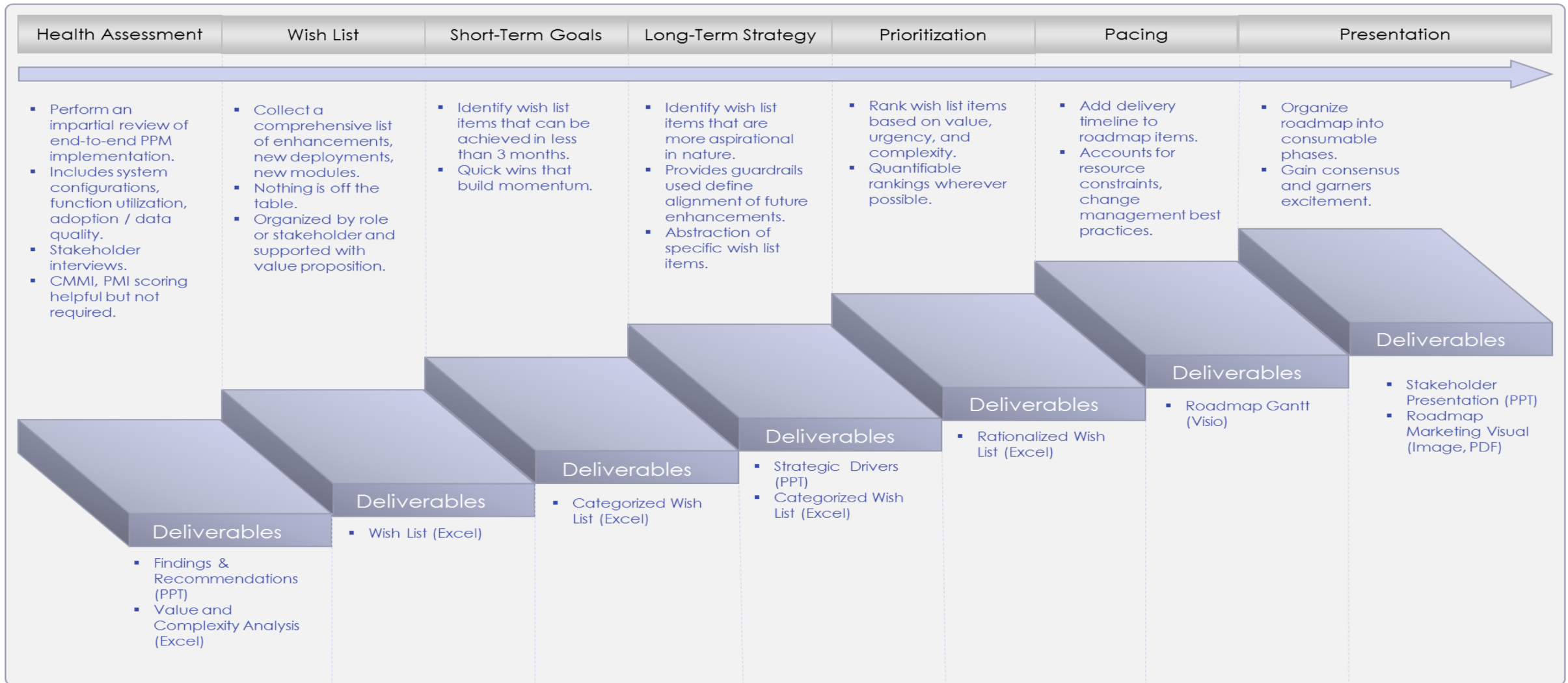- Provide the ability to **Measure** success

Winchester House

Who needs a blueprint…

…when you can just build?

Methodology

Health Assessment	Wish List	Short-Term Goals	Long-Term Strategy	Prioritization	Pacing	Presentation
■ Perform an impartial review of end-to-end PPM implementation. ■ Includes system configurations, function utilization, adoption / data quality. ■ Stakeholder interviews. ■ CMMI, PMI scoring helpful but not required.	■ Collect a comprehensive list of enhancements, new deployments, new modules. ■ Nothing is off the table. ■ Organized by role or stakeholder and supported with value proposition.	■ Identify wish list items that can be achieved in less than 3 months. ■ Quick wins that build momentum.	■ Identify wish list items that are more aspirational in nature. ■ Provides guardrails used define alignment of future enhancements. ■ Abstraction of specific wish list items.	■ Rank wish list items based on value, urgency, and complexity. ■ Quantifiable rankings wherever possible.	■ Add delivery timeline to roadmap items. ■ Accounts for resource constraints, change management best practices.	■ Organize roadmap into consumable phases. ■ Gain consensus and garners excitement.

Deliverables
- Findings & Recommendations (PPT)
- Value and Complexity Analysis (Excel)

Deliverables
- Wish List (Excel)

Deliverables
- Categorized Wish List (Excel)

Deliverables
- Strategic Drivers (PPT)
- Categorized Wish List (Excel)

Deliverables
- Rationalized Wish List (Excel)

Deliverables
- Roadmap Gantt (Visio)

Deliverables
- Stakeholder Presentation (PPT)
- Roadmap Marketing Visual (Image, PDF)

Open Mic:

With whom in your organization would a roadmap resonate and why?

Best Practices

1. Enable a continuous feedback mechanism for proactive course corrections.

2. Do not look beyond 18 months, especially considering CA's relatively short product roadmap.

3. Do not get too detailed with the wish list. Differentiate between minor enhancements and true roadmap initiatives.

4. Balance roadmap items across three fundamental categorizations:
    1. Foundational / Operations
    2. Efficiency / Optimization
    3. Value Excellence / Innovation

5. Waved Approach (Incremental) is best – don't let **perfect** get in the way of **better**.
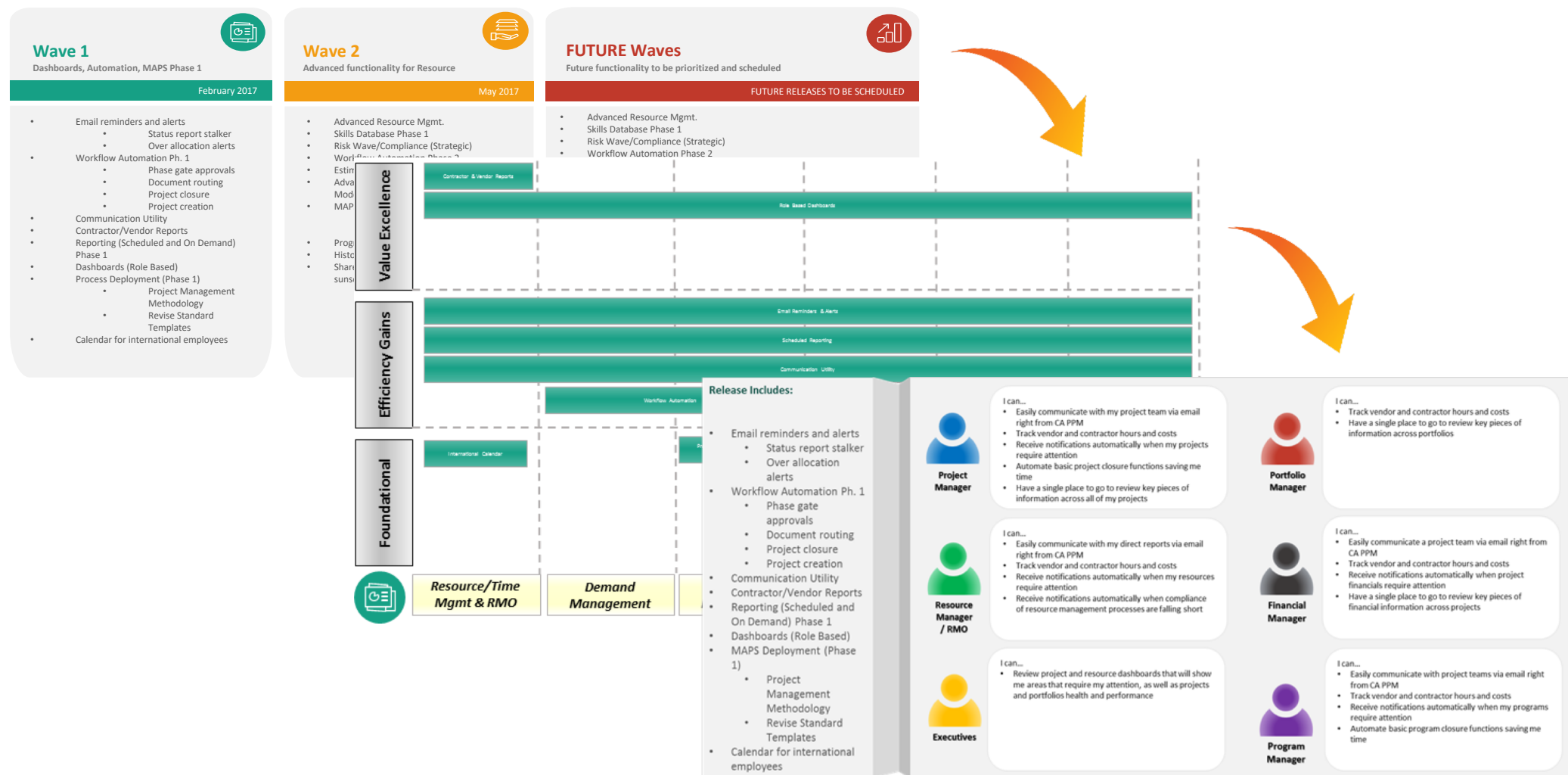
Waved Deployment Approach
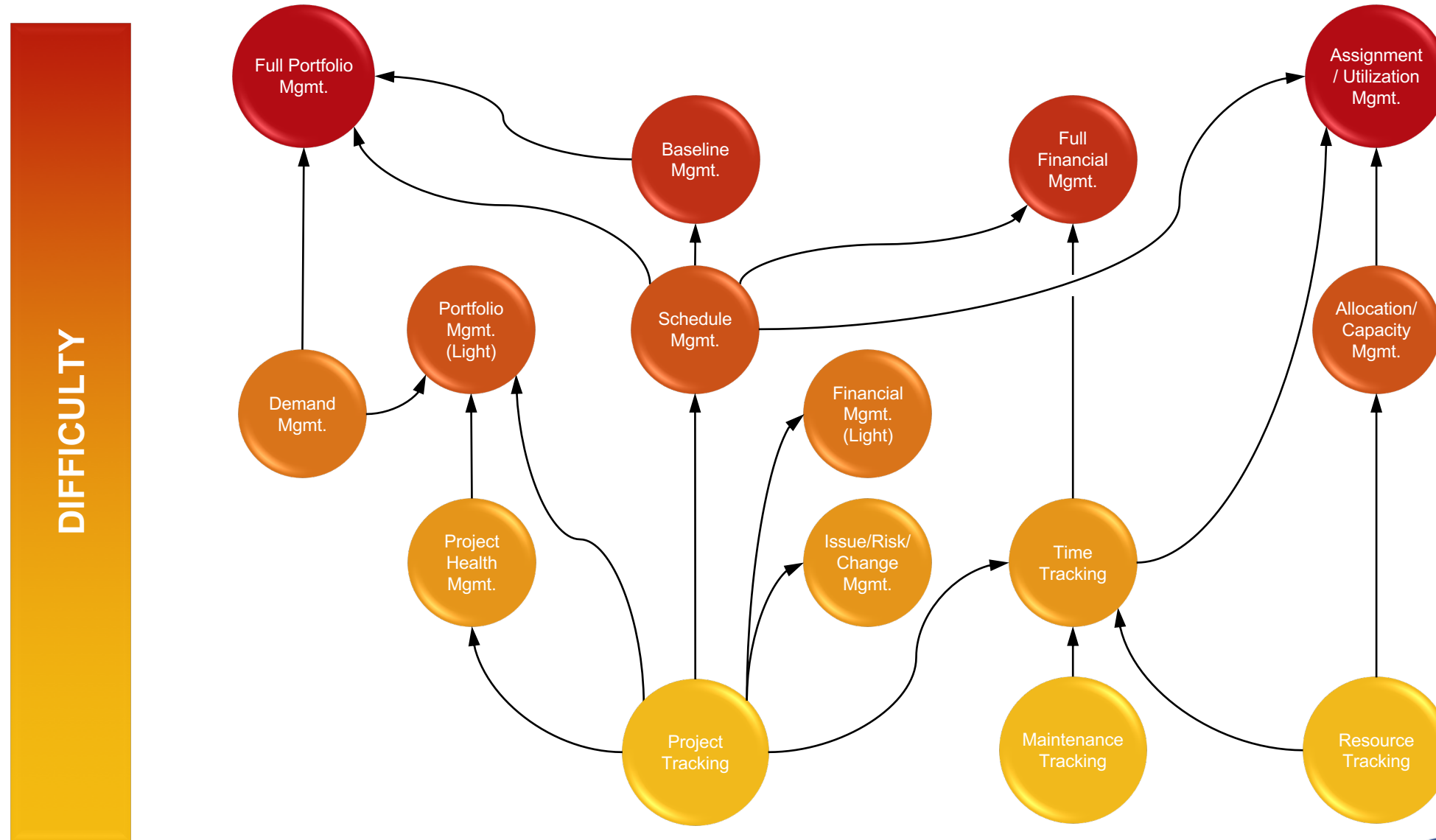
Example #1: Long-Term Roadmap
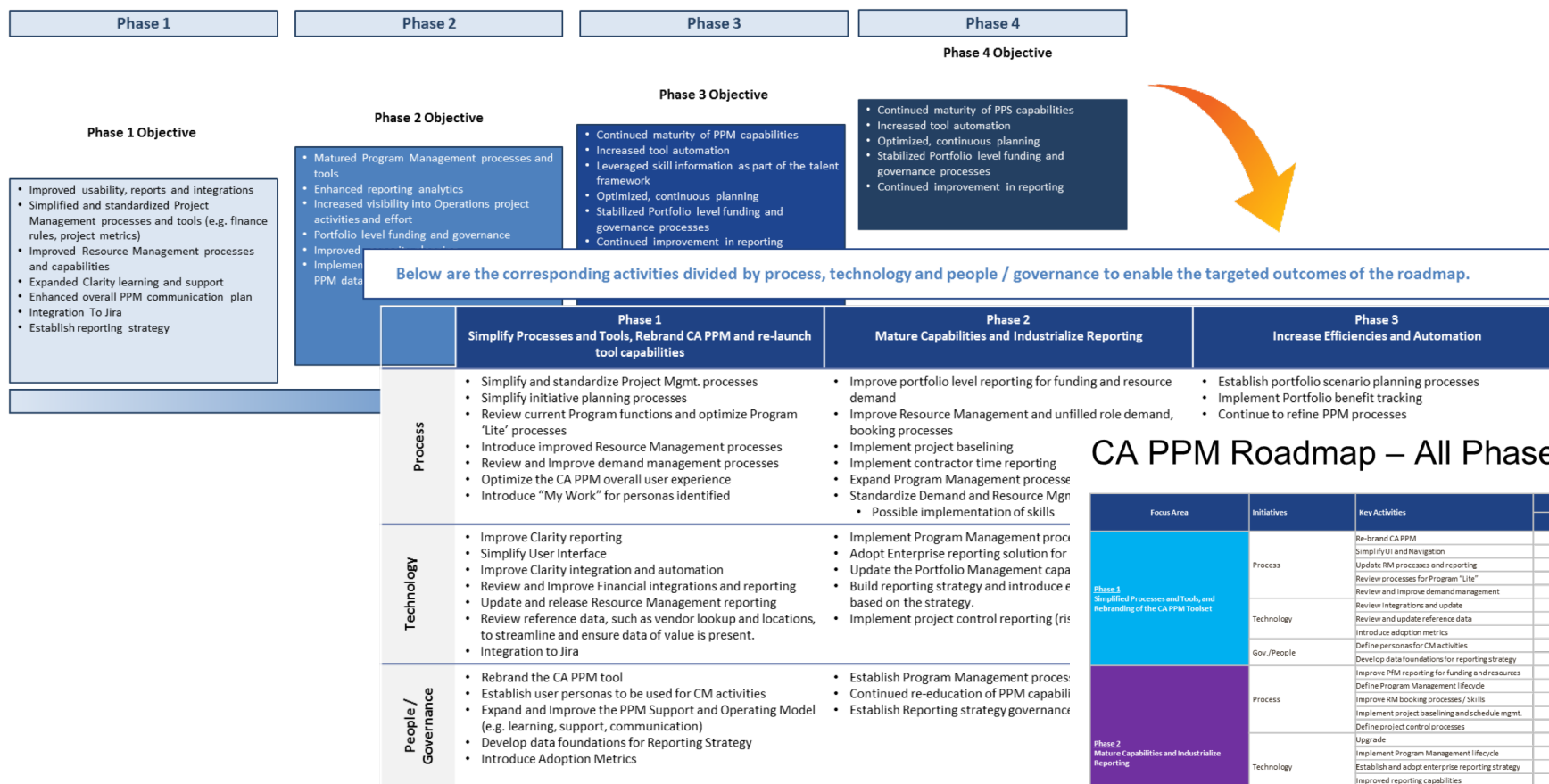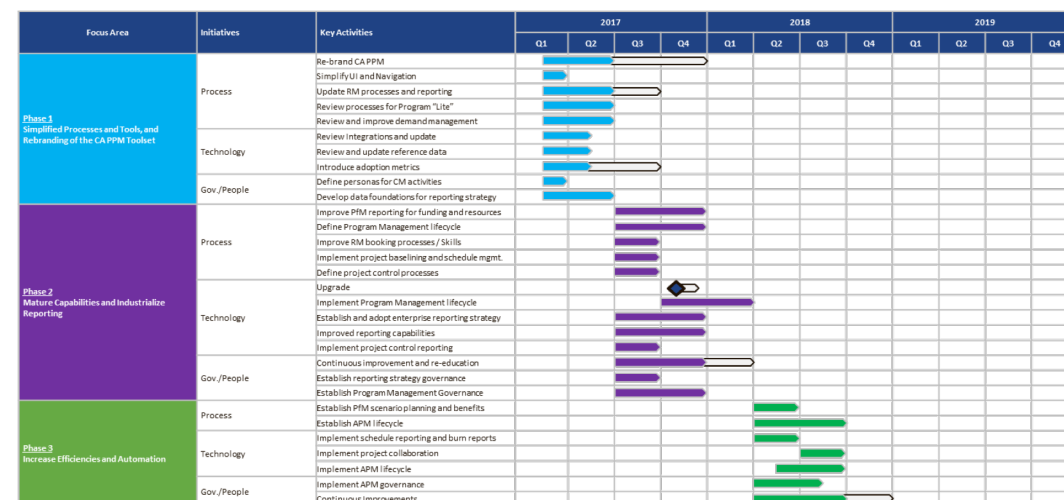
Example #2: Short-Term Roadmap

Example #3: 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	• Updated Support & Governance Model (Low / High)
	   o CA PPM Administration (Melissa Mascari Backfill)
	   o 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	• Enhanced Non-Labor Process & Input Screen (Low / Medium)	Q3 2017
Reporting Enhancement Cadence	• Reporting Release Schedule (Low / Low) • Intake Process (Low / Low)	Q1 2017
ADP Integration (PTO Only)	• Outbound Feed from ADP (High / Medium)	Q4 2017
Chargeback Model	• 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)
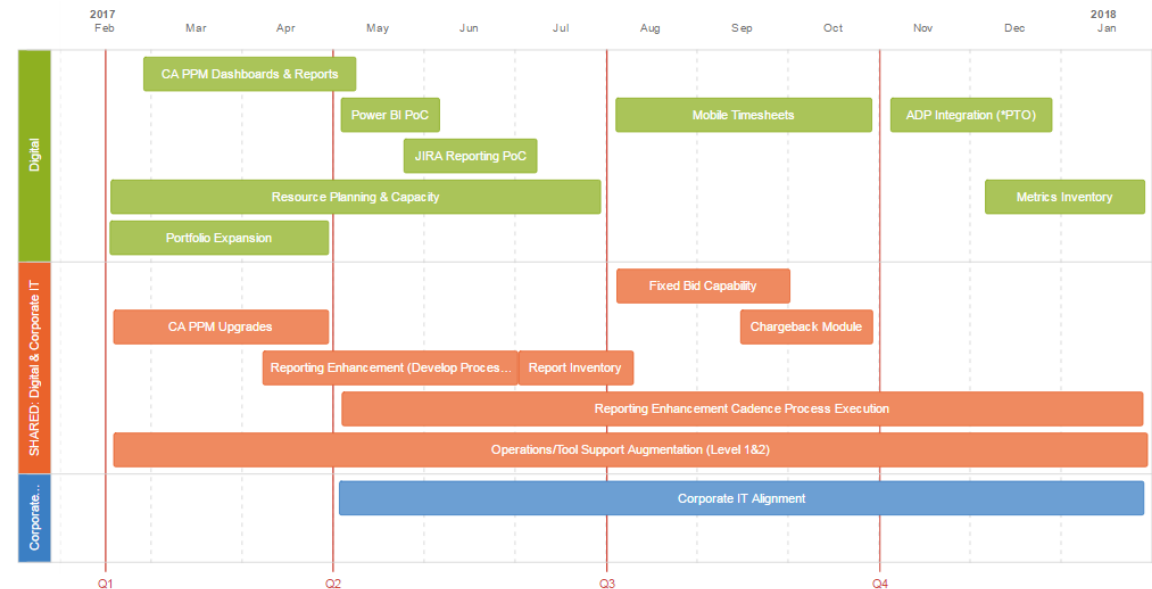- Program Management Processes & CA PPM Configurations

Optimization
- Agile Mapping (Release Management)
- Ariba Integration

Operations
- Rego University 2018

Questions?

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Let Rego be your guide.

Thank You For Attending regoUniversity

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- Date Completed = **Today's Date**
- Hours Completed = **1 PDU per hour of class time**
- Training classes = **Technical**
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Let us know how we can improve!
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