



# PPM Roadmap | Always Have A Vision

**Your Guides:**

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# Introductions

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



# Agenda

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



# Defining a Strategic Roadmap

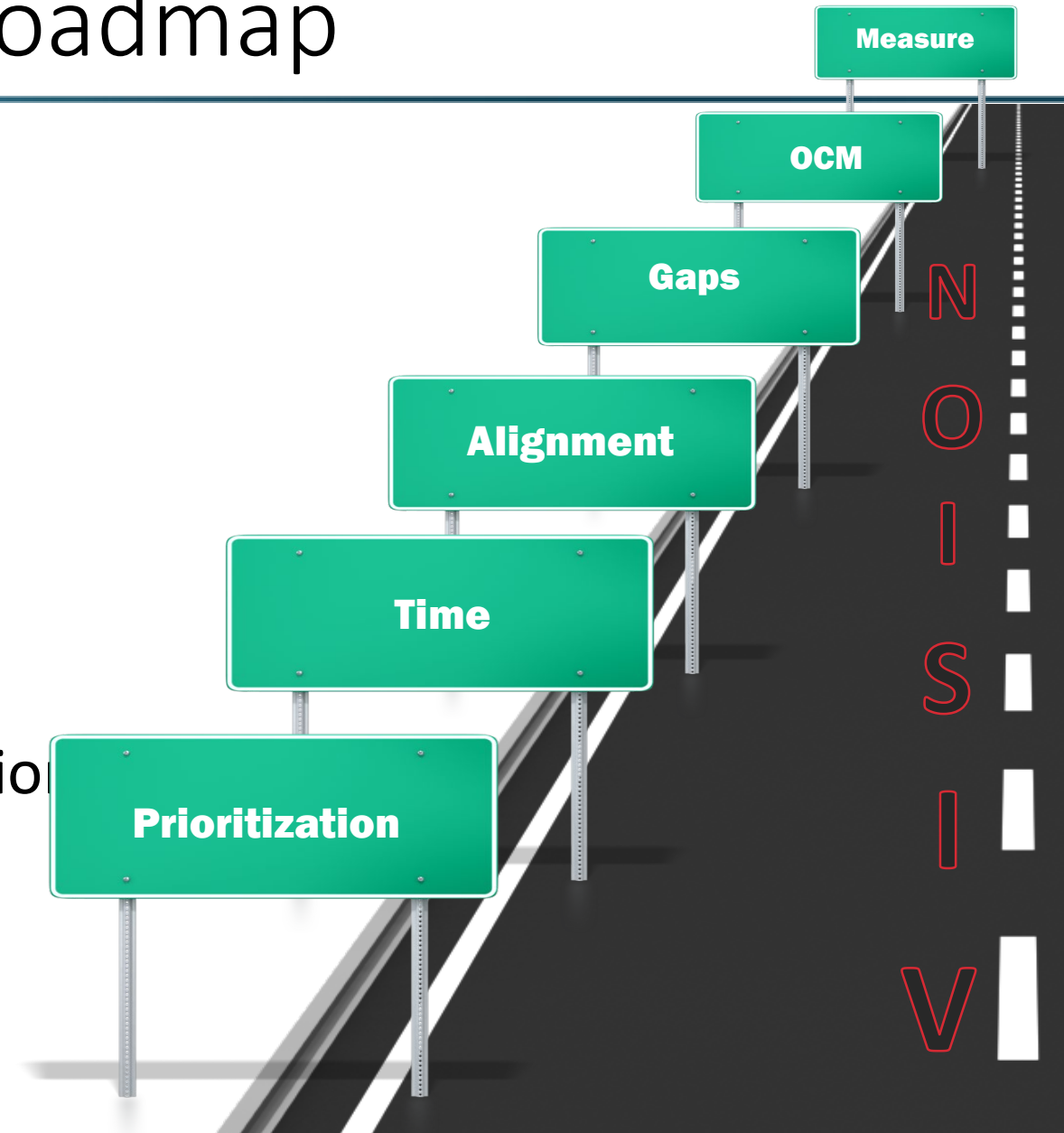
- A roadmap is a strategic plan to guide the continuous maturation of Clarity as a function of its utilization, adoption, and supporting people and processes.
- Accounts for all organizational variables:
  - Corporate strategy
  - PPM vision and aspirations
  - Process and tool maturity
- Roadmaps can 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**
- Secure **Investment** in PPM
- **Align** Business, IT and PPM Processes
- Reveal **Gaps** in PPM processes and functions
- Provide the ability to **Measure** success



# Why do we need a Roadmap?



We need a path to follow or direction to point

Continuous Improvement needs to be re-enforced



A holistic assessment can evaluate the current state of your project management practices across the following 4 areas to compare against industry best practice.



People



Process



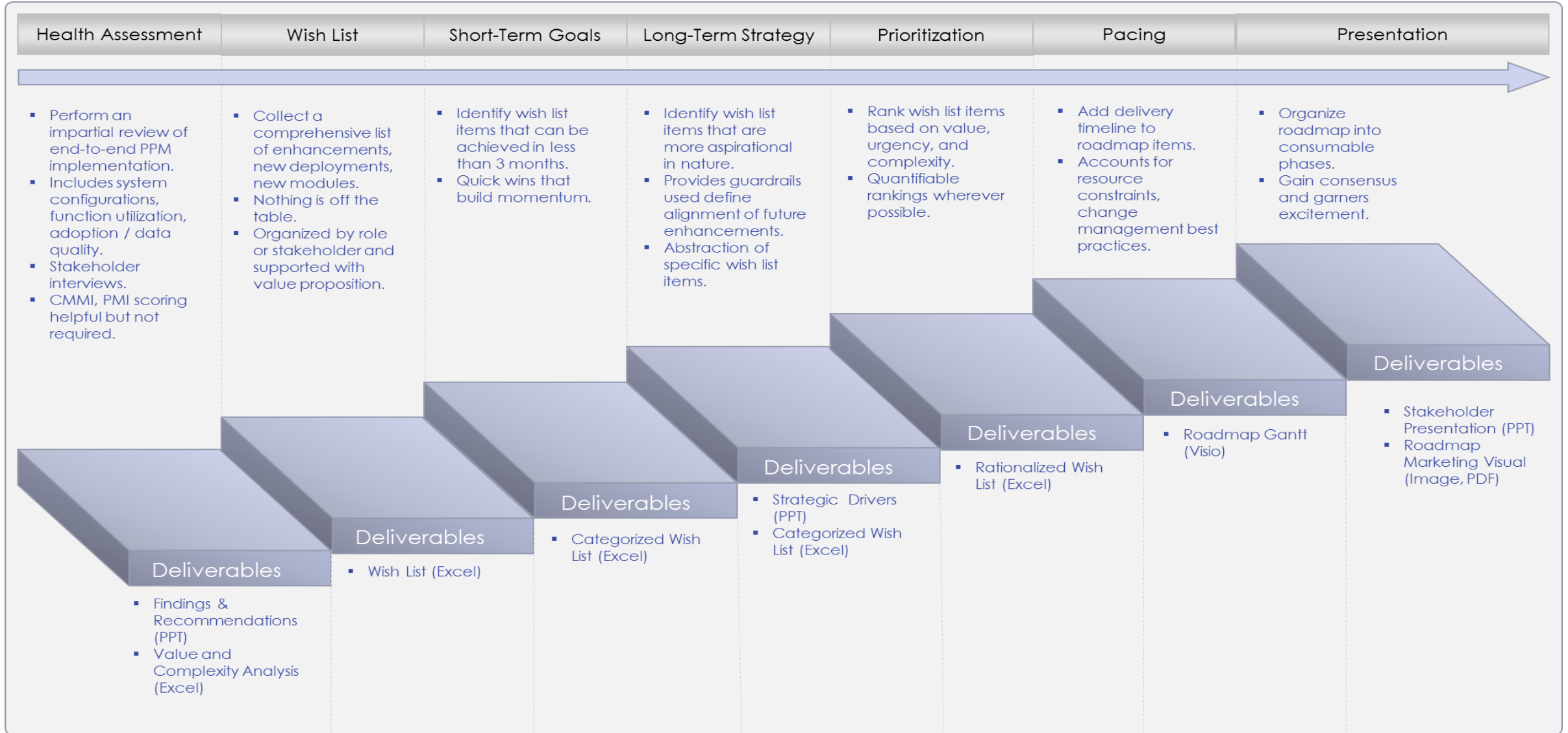
Technology



Governance

# Methodology

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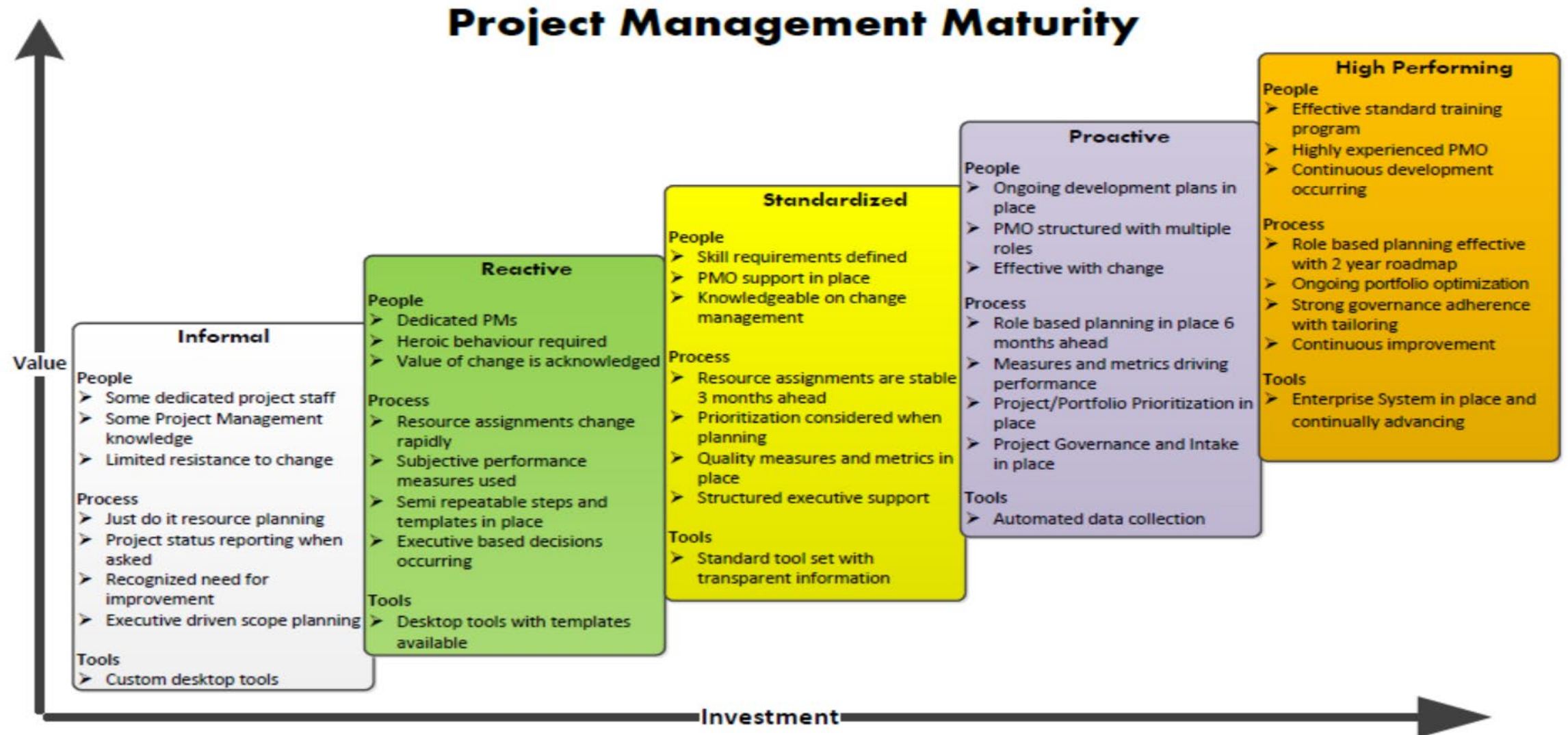


# Best Practices

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 for me?”

**Resource Management**

**Project Management**

**Financial Management**

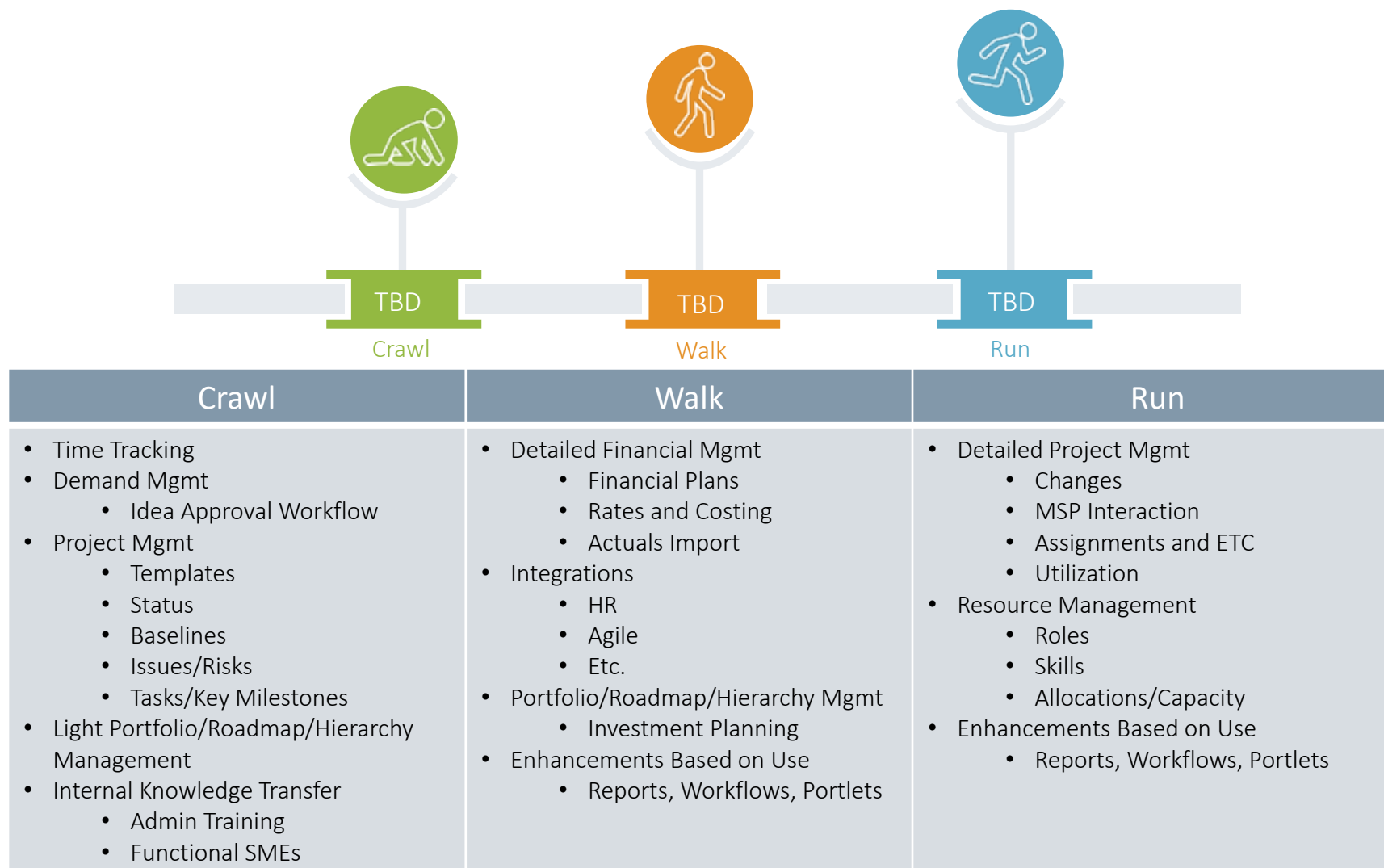
**Product Management**

# Crawl-Walk-Run

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



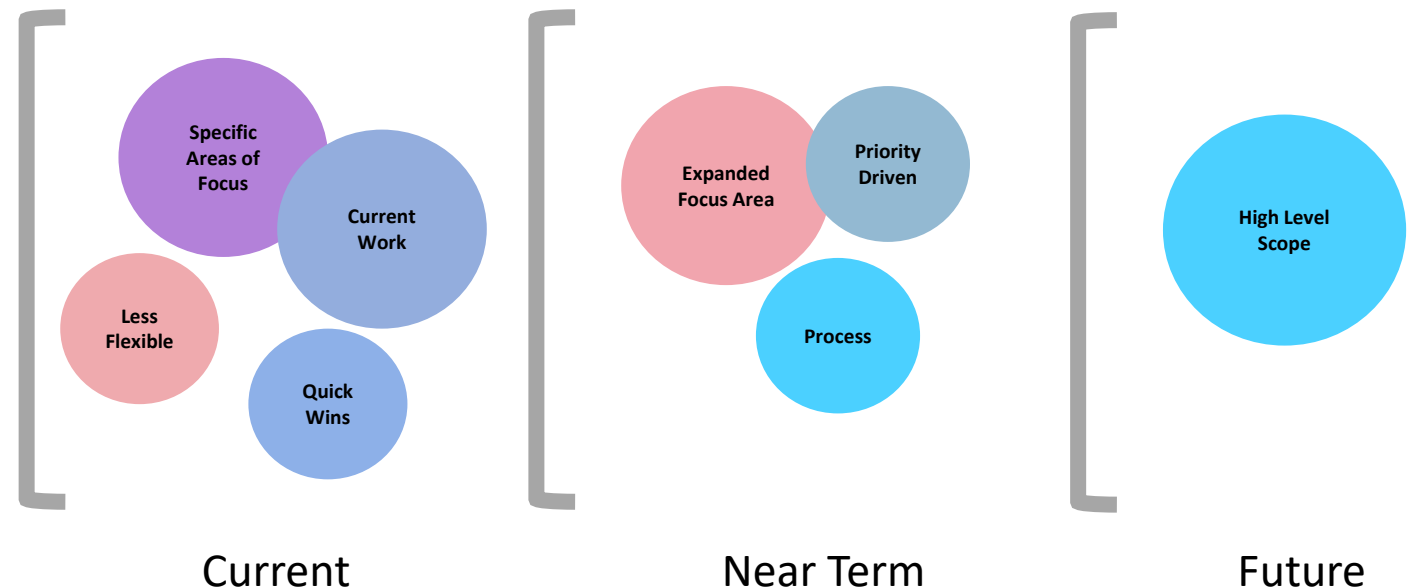
# Deploying Functionality in Stride



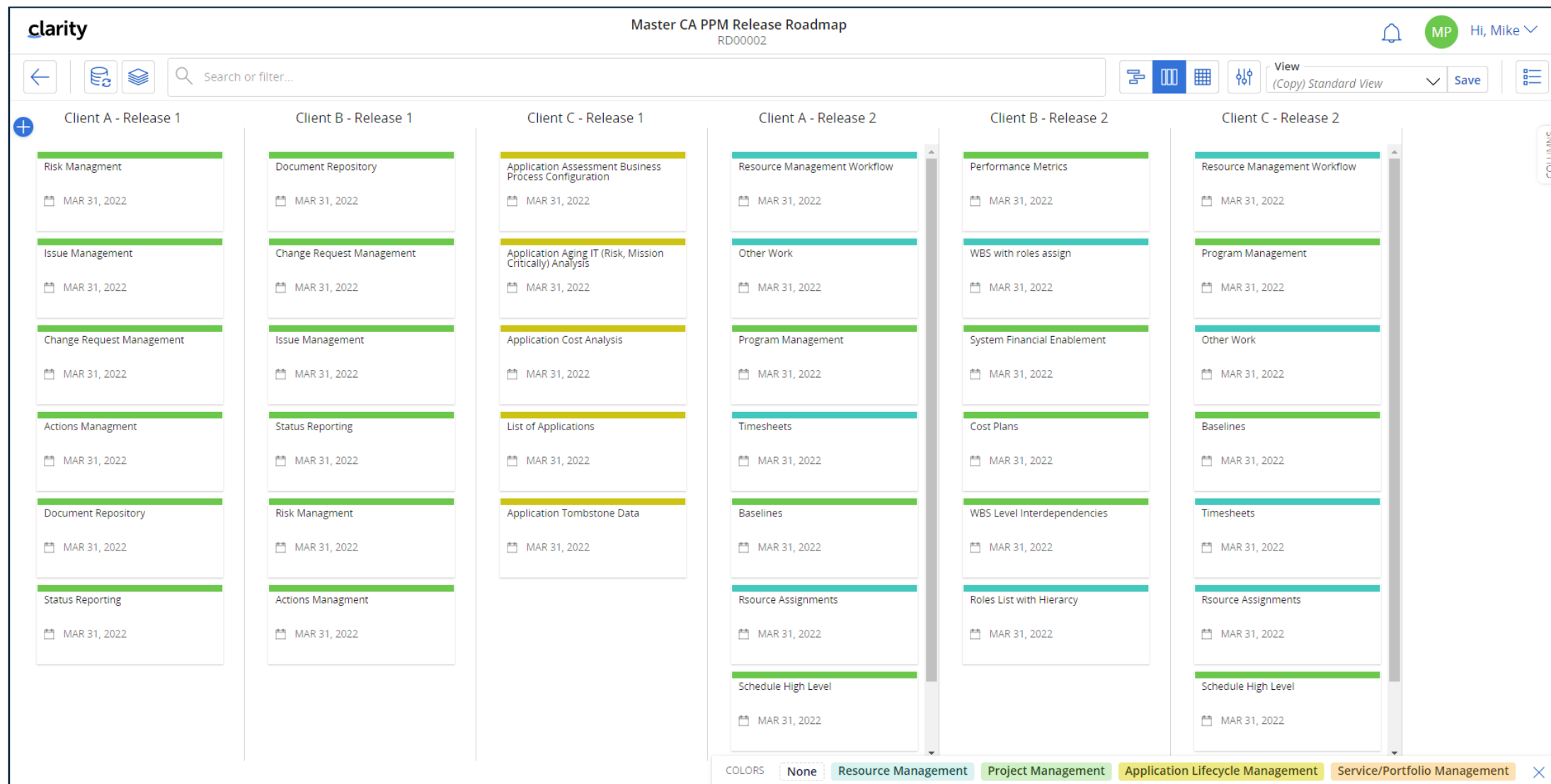


# Roadmaps and Time Horizons

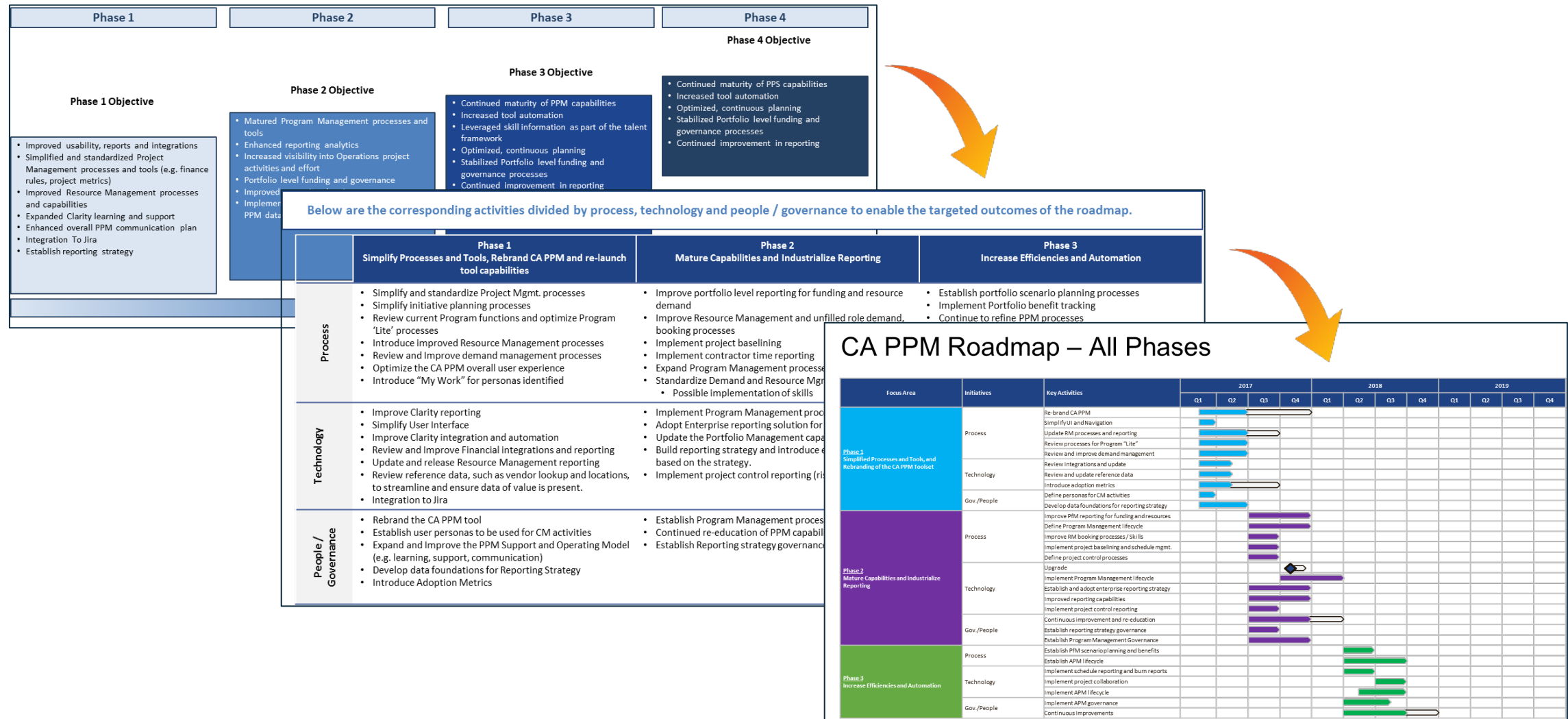
- Defining the time horizons that you want your roadmap to address is one of the first steps in building a successful roadmap.
- The basic time horizons include:
  - Current
  - Near Term
  - Future



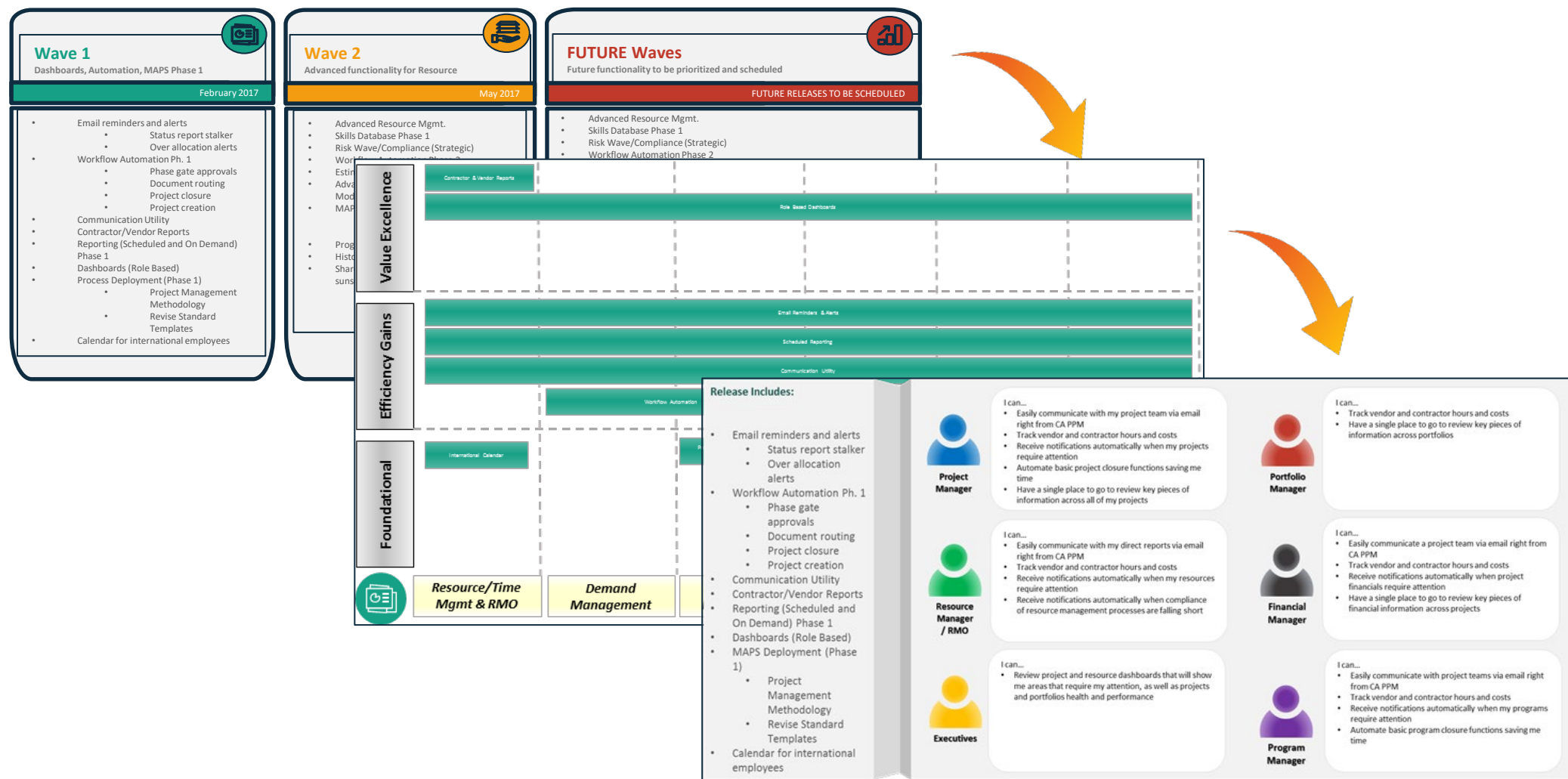
# Example #1: Detailed Functionality Roadmap



# Example #2: Long-Term Roadmap



# 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

### Optimization

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

## Long-Term CA PPM Goals



### Innovation

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



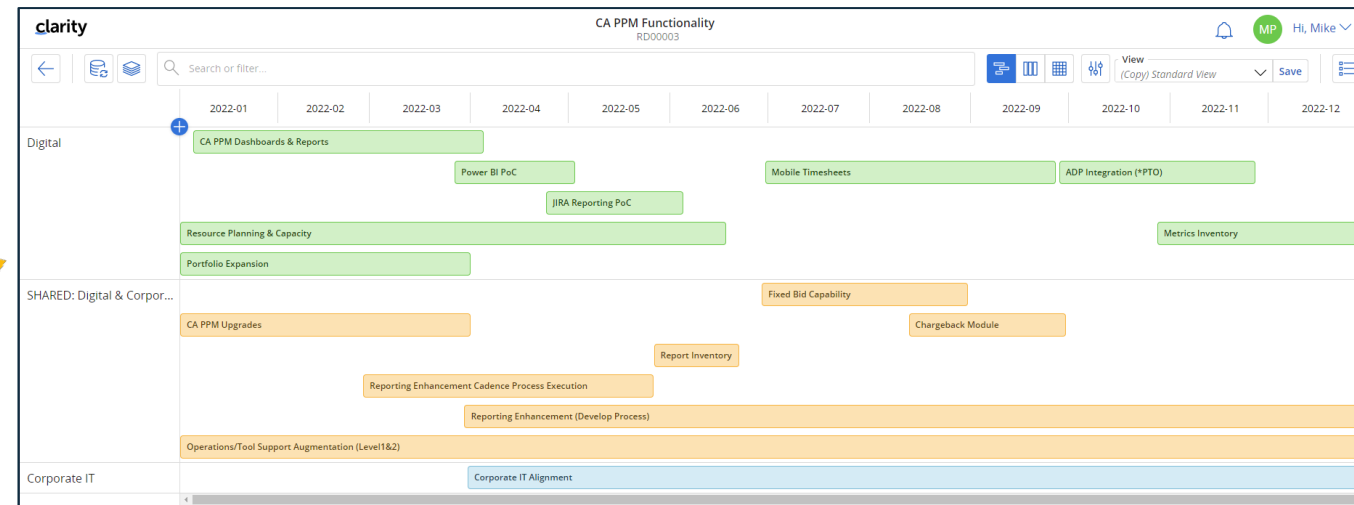
### Optimization

- Agile Mapping (Release Management)
- Arriba Integration



### Operations

- Rego University 2018



# Questions?



Let Rego be your guide.

# Thank You For Attending regoUniversity

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- Click on **Report PDU's**
- Click on **Course or Training**
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- Course Number = **Session Number**
- Date Started = **Today's Date**
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- Hours Completed = **1 PDU per hour of class time**
- Training classes = **Technical**
- Click on **I agree** and **Submit**



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