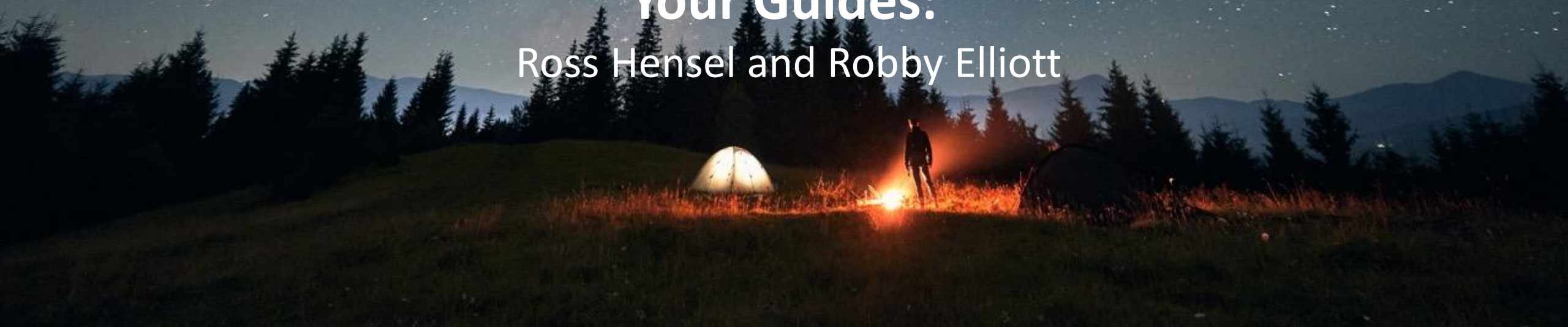




Roadmap Management | OOTB Introduction

Your Guides:

Ross Hensel and Robby Elliott



Agenda

- Introduction
- Portfolio vs Roadmaps
- Demo

Part I: Introduction

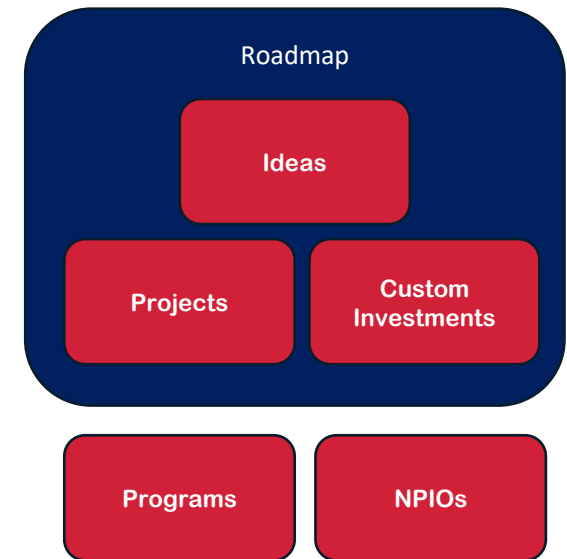


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Purpose of Roadmaps

Roadmaps allow organizations to maximize the value of initiatives and minimize risks by prioritizing and selecting investments that most closely align with corporate goals and realize estimated cost and ROI

- Roadmaps help organizations achieve one or more organizational strategies
- May consist of past, current, and planned or future components
- Potentially longer term, with new investments rotating into the Roadmap
- An organization likely has many Roadmaps, each addressing unique organizational needs
- Roadmaps may contain Ideas, Projects and Custom Investments. No Programs or NPIOs



NPIO – Non Project Investment Object (Applications, Assets, Products, Other Work, Ideas and Services)

Portfolios vs Roadmaps



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Roadmaps vs. Portfolios – General

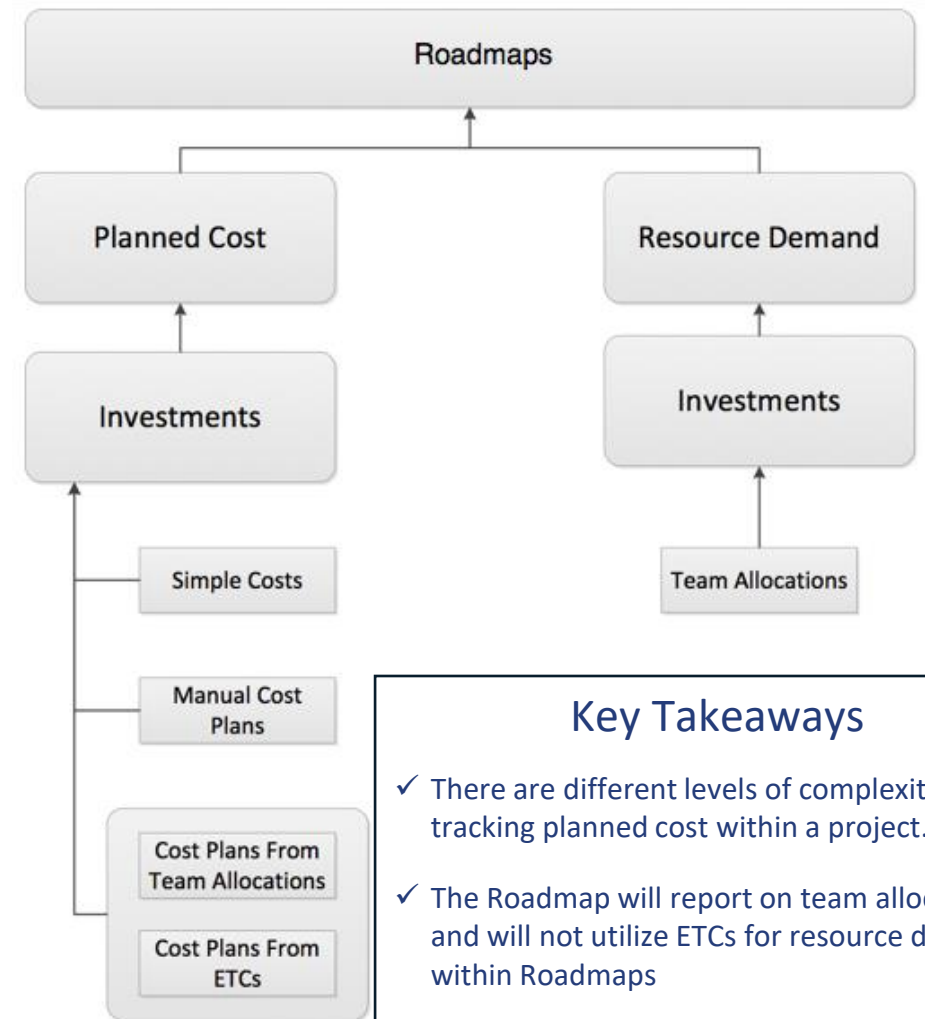
	Classic	Roadmaps
Can include Projects	✓	✓
Can include Programs	✓	
Can include OOTB Ideas	✓	✓
Can include NPIOs	✓	
Can include Custom Investments (New UX Only)		✓
Can add items by OBS	✓	✓
Can add items by Name	✓	✓
Can add items using other filter criteria (e.g., Manager, Power Filter, etc.)	✓	✓
Can manually add/include items that don't exist elsewhere in Clarity PPM		✓
Can sync data from Investments – OOTB Fields	✓	✓
Can sync data from Investments – Custom Fields	✓	✓
Can associate with OBS, and use OBS for Security	✓	✓
Can schedule Sync of included items, instead of having to sync manually to update Investment data	✓	
Will continue to be enhanced in future Clarity PPM Releases		✓

Roadmaps vs. Portfolios– Analysis

	Classic	Roadmaps
Supports analysis using Fiscal Time periods		✓
Can set Targets	✓	✓
Can distribute targets as desired across time horizon	✓	
Can delineate between Targets (do not exceed) and Goals (target to hit, e.g., Benefits)	✓	✓
Includes Waterlining functionality	✓	✓
Can create and save scenarios	✓	✓
Can create/easily share different views		✓
Provides a Grid View	✓	✓
Provides a Timeline View	✓	✓
Provides a Board View		✓
Includes Ranking Rules	✓	
Can analyze by individual/specific roles	✓	
Can group and utilize color to analyze data		✓
Can make modifications to Investment data within the Roadmap/portfolio (e.g., Dates, financials, etc.)	✓	✓
Can push the above changes back to the underlying Investment		
Additional OOTB Reporting on data – Portlets, reports, etc.	✓	1 Report

Data Used In Roadmaps

- Roadmaps use:
 - Investment Data
 - Planned Costs (simple budget or cost plans)
 - Resource Demand (allocations/assignments)
- Minimum data needed:
 - Simple: Investment Data - Simple grouping of projects
 - Medium: Grouping of projects with either planned cost or resource data
 - High: Project, financial and team data to provide a deep-drive into what is/is not possible from a resource, timeline and cost perspective



Key Takeaways

- ✓ There are different levels of complexity when tracking planned cost within a project.
- ✓ The Roadmap will report on team allocations and will not utilize ETCs for resource demand within Roadmaps

Demo!



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Questions?



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- Date Started = **Today's Date**
- Date Completed = **Today's Date**
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Email

info@regouniversity.com



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