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# Building Your TBM Roadmap

**Your Guides:**

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# Agenda

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- Introduction
- Defining the Value of a Strategic Roadmap
- Roadmapping Methodology
- Best Practices
- TBM Roadmap Examples

# Introductions

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

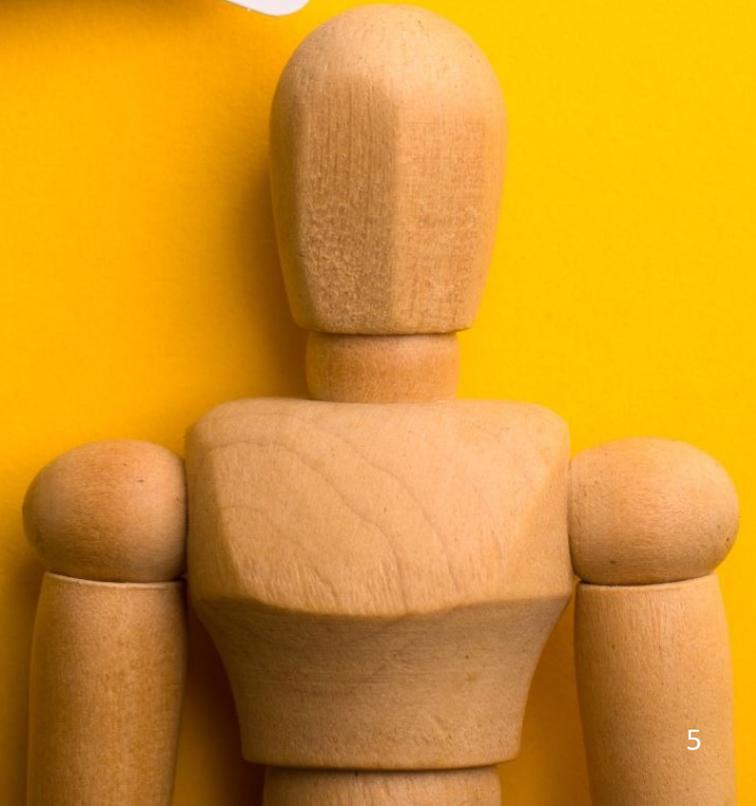


# TBM Roadmap



# Quick Poll

- Do you have a roadmap for TBM / Apptio in place already?
- How closely do you follow it?



IS YOUR PLAN CONSISTENT WITH OUR CORPORATE STRATEGY?

E-mail: SCOTTADAMS@AOL.COM

HOW WOULD I KNOW?

DON'T YOU KNOW OUR STRATEGY?

NO. DO YOU?

OF COURSE I DO. IT'S SOMETHING ABOUT LEVERAGING OUR PLATFORMS.

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DOES YOUR PLAN LEVERAGE OUR PLATFORMS?

NO, BUT I CAN REWRITE MY PLAN SO IT SEEMS AS IF IT DOES.

GOOD. GO BACK AND DO THAT.

THERE'S NO POINT IN HAVING A STRATEGY IF YOU AREN'T GOING TO PRETEND TO FOLLOW IT.

www.dilbert.com  
1-8-07

# Defining a Strategic Roadmap

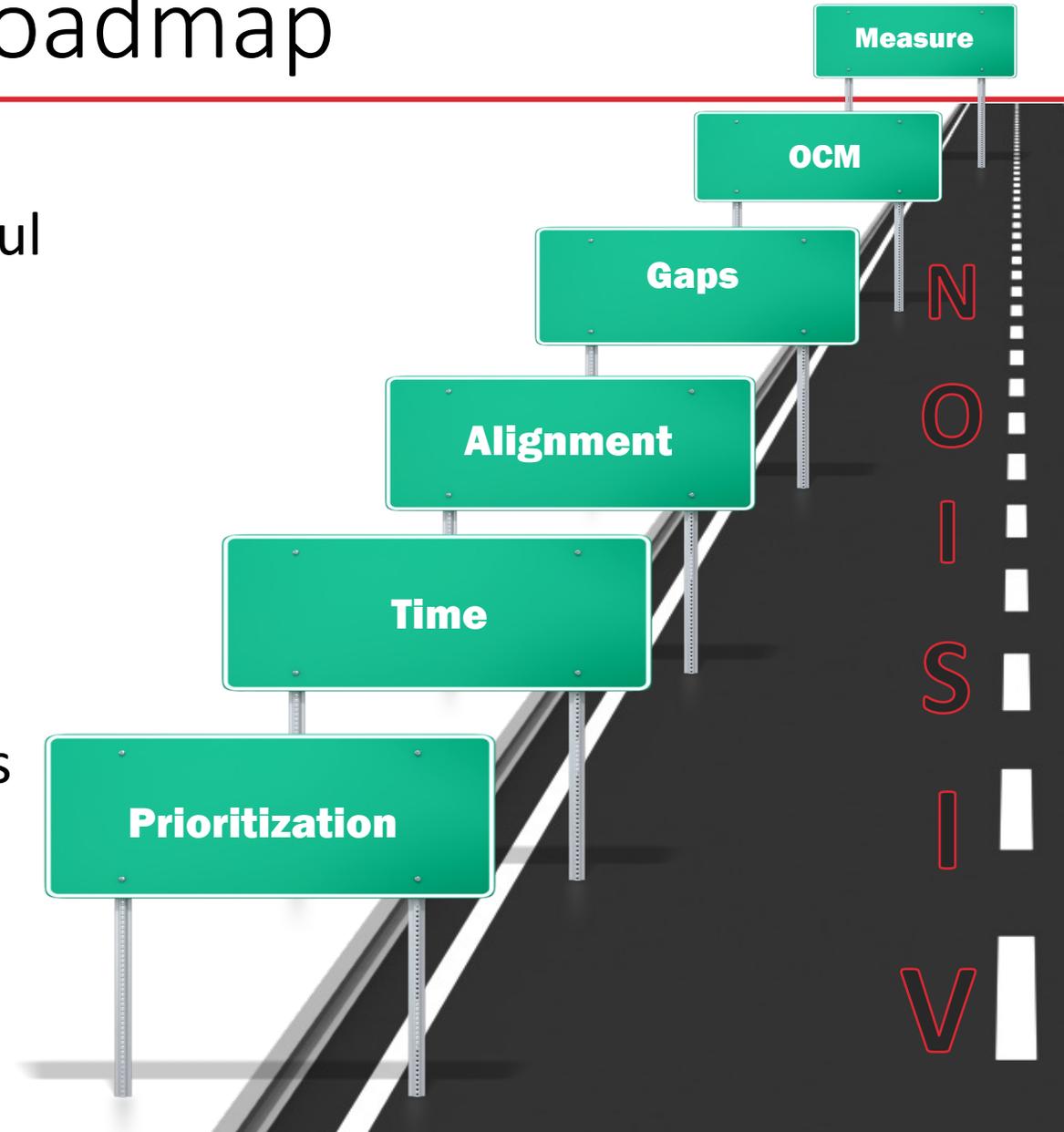
- A roadmap is a strategic plan to guide the continuous maturation of TBM as a function of its utilization, adoption, and supporting people and processes.
- Accounts for all organizational variables:
  - Corporate strategy
  - TBM vision and aspirations
  - Process and tool maturity
- Roadmaps can be 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**
- Force **Prioritization**
- Provide an element of **Time**
- **Align** Business, IT and Finance Processes
- Reveal **Gaps** in TBM processes and functions
- Drive **Common Understanding** and **Shared Ownership (OCM)**
- Provide the ability to **Measure** success



# Open Mic

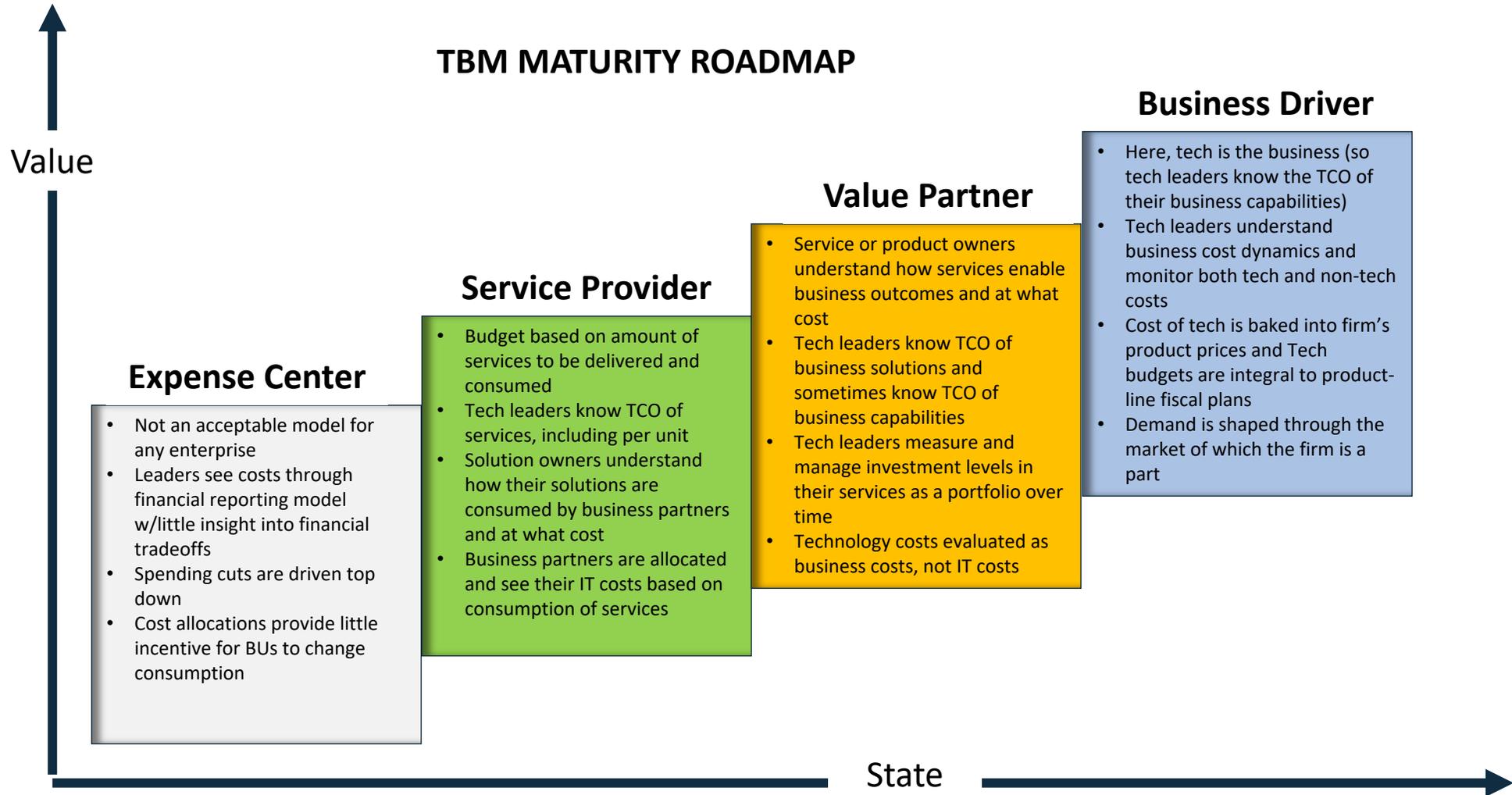


- In what ways have you found a TBM roadmap to be important?
- What do you see as the negative consequences of not having a roadmap?

# Methodology



# 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

**Planning & Forecasting**

**Cost Transparency (TCO)**

**Automation**

**Consumption Based  
Billing**

# Crawl-Walk-Run

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

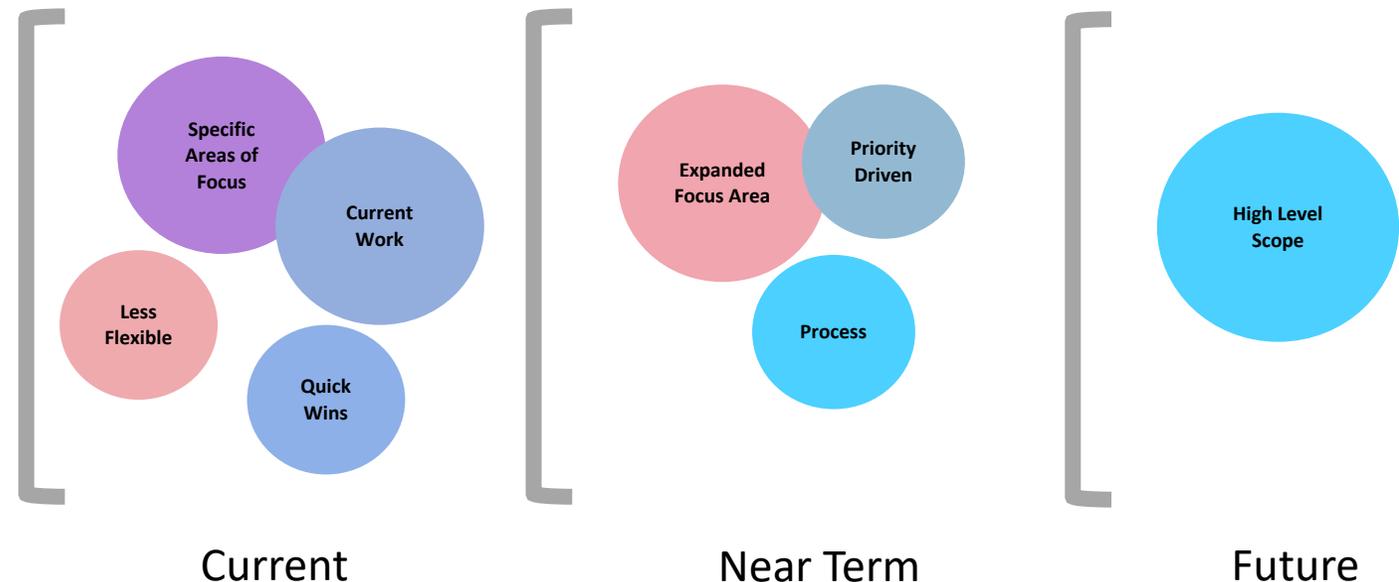


# Roadmaps and Time Horizons

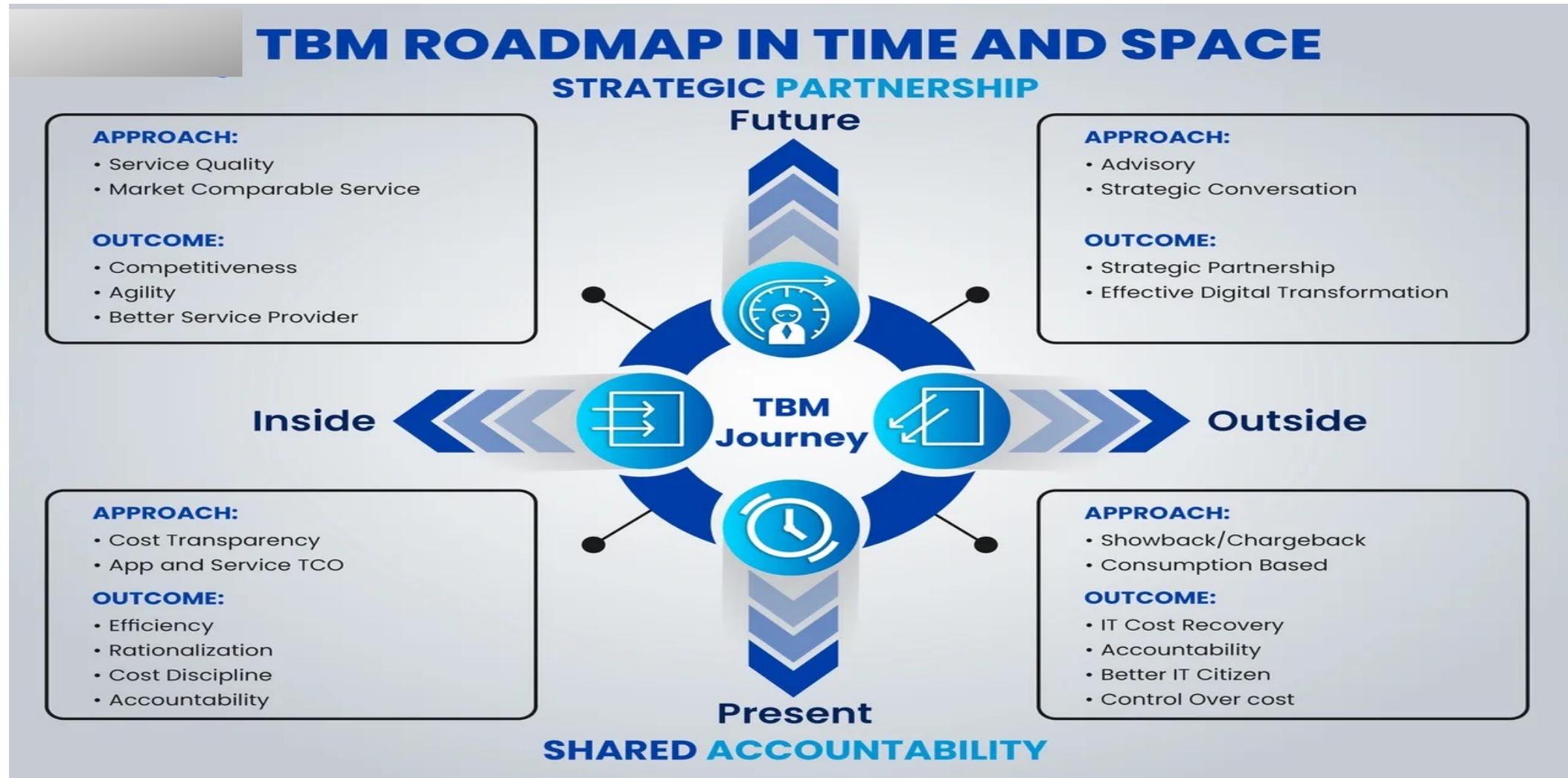
- Defining the time horizons that you want your roadmap to address is one of the first steps in building a successful roadmap.

- The basic time horizons include:

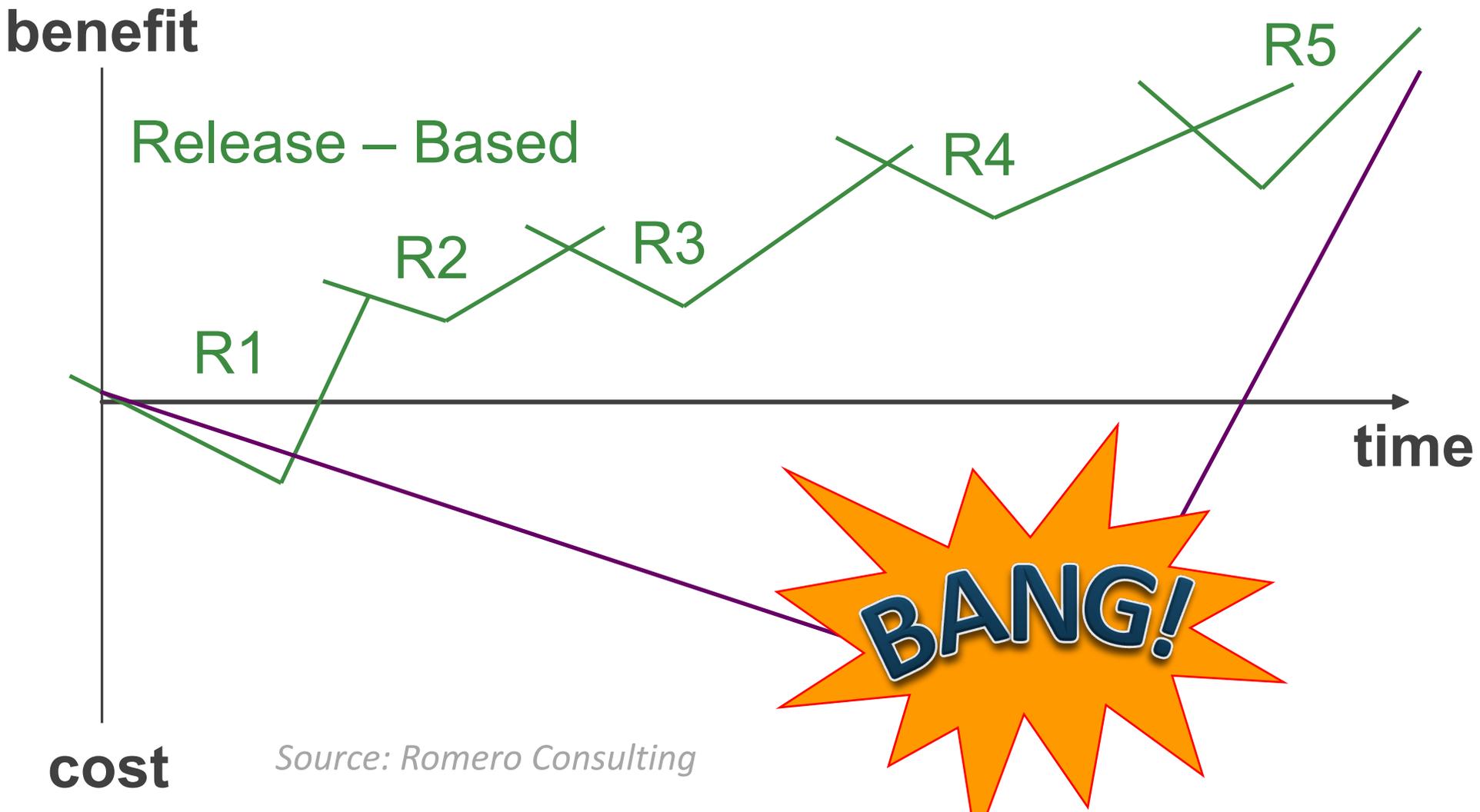
- Current
- Near Term
- Future



# Roadmap: Time and Space View



# Avoid the Big Bang – Be Incremental



Source: Romero Consulting

# 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!

# Open Mic

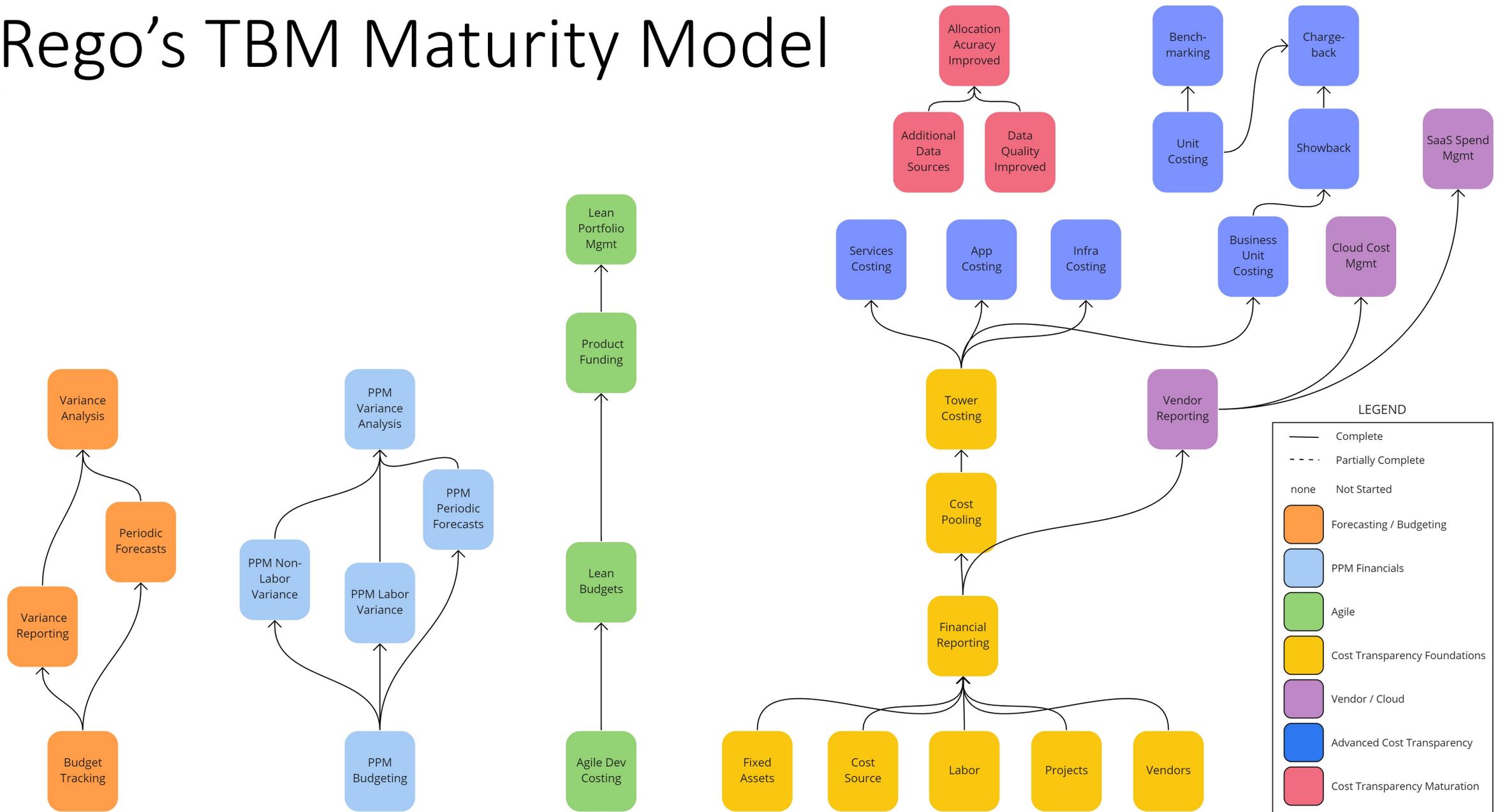


- What other best practices have you found in putting a TBM roadmap together?
- Does anyone have lessons learned they would like to share?

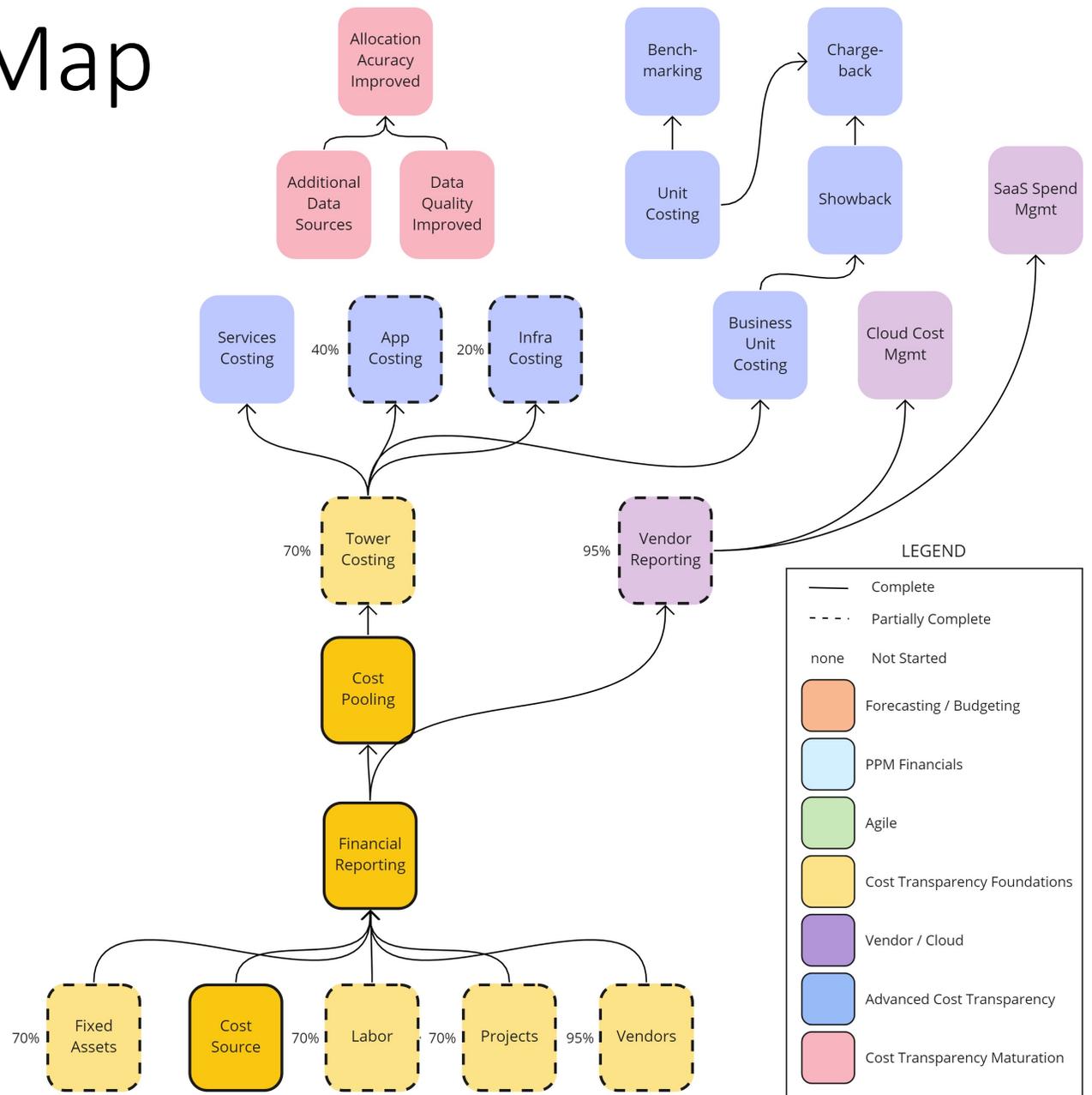
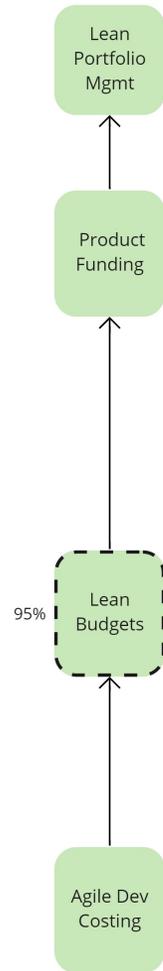
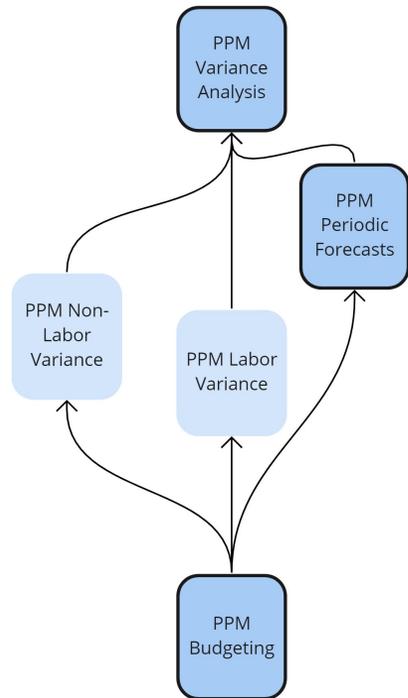
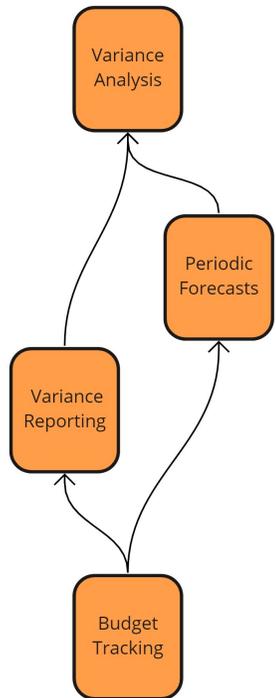
# Roadmap Examples



# Rego's TBM Maturity Model



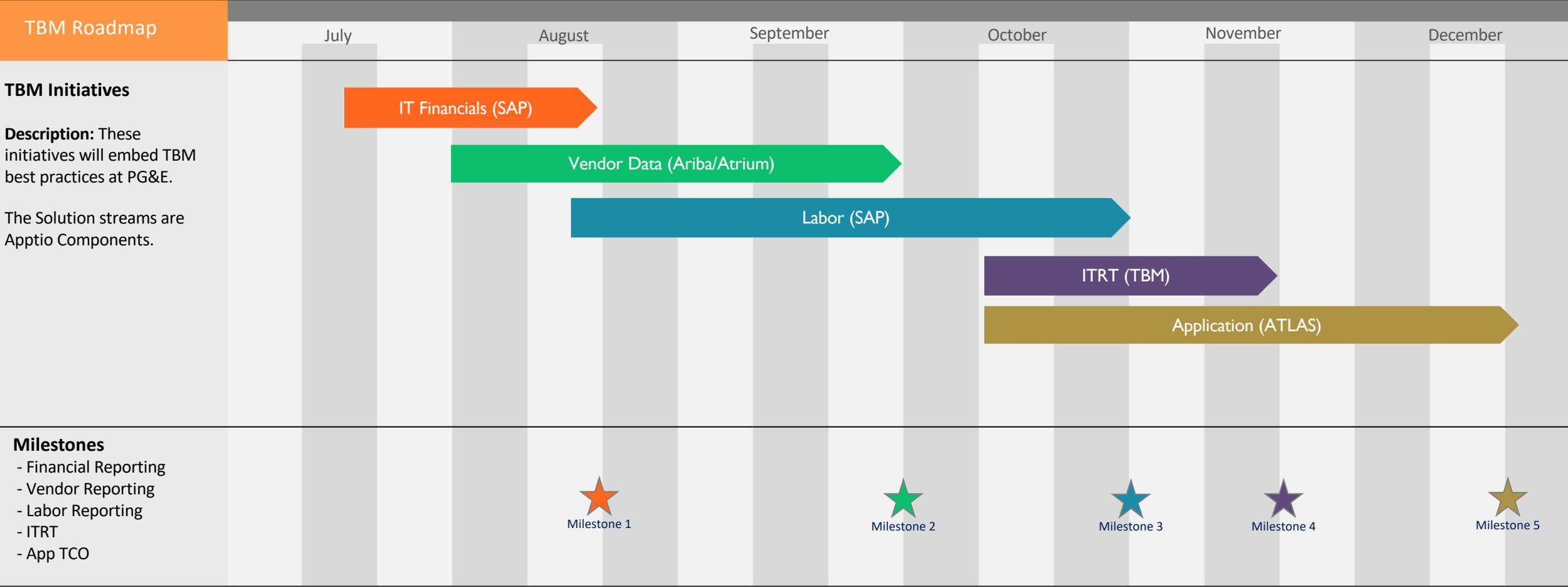
# Sample TBM Maturity Map



**LEGEND**

- Complete
- - - Partially Complete
- none Not Started
- Forecasting / Budgeting (orange)
- PPM Financials (blue)
- Agile (green)
- Cost Transparency Foundations (yellow)
- Vendor / Cloud (purple)
- Advanced Cost Transparency (light blue)
- Cost Transparency Maturation (pink)

# TBM Roadmap 2021



**TBM Initiatives**

**Description:** These initiatives will embed TBM best practices at PG&E.

The Solution streams are Apptio Components.

- Milestones**
- Financial Reporting
  - Vendor Reporting
  - Labor Reporting
  - ITRT
  - App TCO

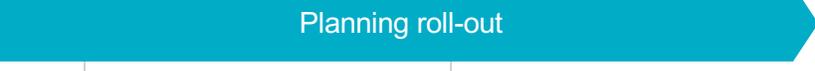


# Deployment Timeline

Outcomes and Activities	June	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June
<b>Restructuring PFP</b> <ul style="list-style-type: none"> <li>Identify active project ID list</li> <li>Experience Portfolio -&gt; Project Groups</li> <li>Cost Centers -&gt; Projects</li> </ul>				Restructuring PFP									
<b>Streamline Layouts &amp; PE Processes</b> <ul style="list-style-type: none"> <li>Fewer columns</li> <li>Automation of data</li> <li>Common layout</li> <li>Layouts by portfolio</li> </ul>	Streamline Layouts & PE Processes												
<b>Application Labor and Projects</b> <ul style="list-style-type: none"> <li>Labor headcount/roles</li> <li>Projects and Time Tracking</li> <li>Application Mappings for Labor and Projects</li> </ul>				Application Labor and Projects									
<b>Application Assets and Vendors</b> <ul style="list-style-type: none"> <li>Vendor inventory</li> <li>Fixed assets register (Inc. dep.)</li> <li>Application Mappings for Assets and Vendors</li> </ul>	Application Assets and Vendors												
<b>Infrastructure Analysis</b> <ul style="list-style-type: none"> <li>Data center details</li> <li>Server assets</li> <li>Storage devices</li> <li>Infrastructure to application mappings</li> </ul>								Infrastructure Analysis					

# Draft Phased Roadmap & Apptio Solutions

To be refined based on further discussions

Phase	Outcomes	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr
Resource Cost Alignment	<ul style="list-style-type: none"> <li>Understand Labor deployment (direct and indirect)</li> <li>Calculate the cost to build a release by product and initiative</li> </ul>												
Plan	<ul style="list-style-type: none"> <li>Create and manage headcount plan</li> <li>Plan for and manage Strategic initiatives and manage actuals</li> </ul>												
													
Total Cost of Ownership	<ul style="list-style-type: none"> <li>Provide labor cost and plan to business unit owners to inform strategic decisions</li> <li>Business unit prioritization of projects and initiatives</li> </ul>												



# Delivery Stream 1: Standardize & Streamline ITP / PFP

Automation of feeds, leveraging more out-of-the-box functionality, and reducing customization & manual work

## Work Items

## Value Delivered

### Restructuring PFP

- Experience Portfolio -> Project Groups
- Cost Centers -> Projects
- Identify active project ID list

- Enables management and planning of portfolios of projects
- Enables Aptio OOB reporting and functionality, such as Portfolio Investment Planning
- Removes need for some manual processes (Dimensions tables)

### Streamline Layouts & PE Processes

- Fewer columns
- Automation of data (e.g., ServiceNow, SAP feeds)
- Common layout based on understanding of each PE's method
- Layouts by portfolio
- Change management for adding new columns

- Reduce planning cycle times
- Improve and enhance customer (PEs) experience
- Improve data quality
- Spend more time on analysis, leading to cost reductions

# Delivery Stream 2: Application and Infrastructure TCO

Ability to view and analyze the costs of applications, infrastructure, and portfolios of apps

## Work Items

## Value Delivered

### Application Labor and Projects

- Labor headcount/role
- Time tracking data (if available) and list of employees
- Project inventory
- Application inventory
- Application Mappings for Labor and Projects

- Review and manage labor spend and resources tied to Application Development and Support
- Understand Labor and Project spend by App Cost Transparency

### Application Assets and Vendors

- Vendor inventory
- Fixed assets register including monthly depreciation cost
- Application Mappings for Assets and Vendors

- Review and manage Vendor and Contract spend, including impact per Application
- Understand 'Direct' applications costs, leveraging General Ledger
- Manage and rationalize Applications leveraging visibility of Addressable/Non-Addressable spend

### Infrastructure Analysis

- Data center details (e.g. location, tier, square footage, square footage)
- Server assets (including physical servers, hypervisors, and virtual servers)
- Storage devices and associated storage
- Infrastructure to application mappings (e.g. CMDB)

- Visibility into Labor, Asset, Project and Vendor spend for Servers, Storage, and Data Center
- Ability to rationalize apps with Total Cost of Ownership

# Open Mic



- Any roadmap examples you'd like to share?  
Or that you would like feedback on?

# Questions?



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