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NASHVILLE • 2022

Building Your TBM Roadmap

Your Guides:
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Agenda

- 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

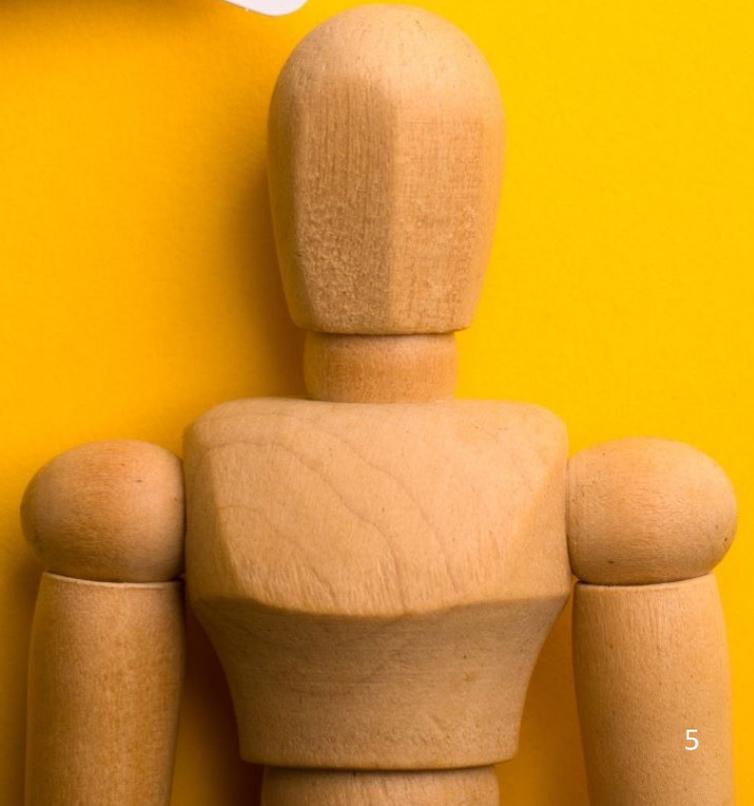


TBM Roadmap



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?

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

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.

www.dilbert.com

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

1-8-07

Defining a Strategic Roadmap

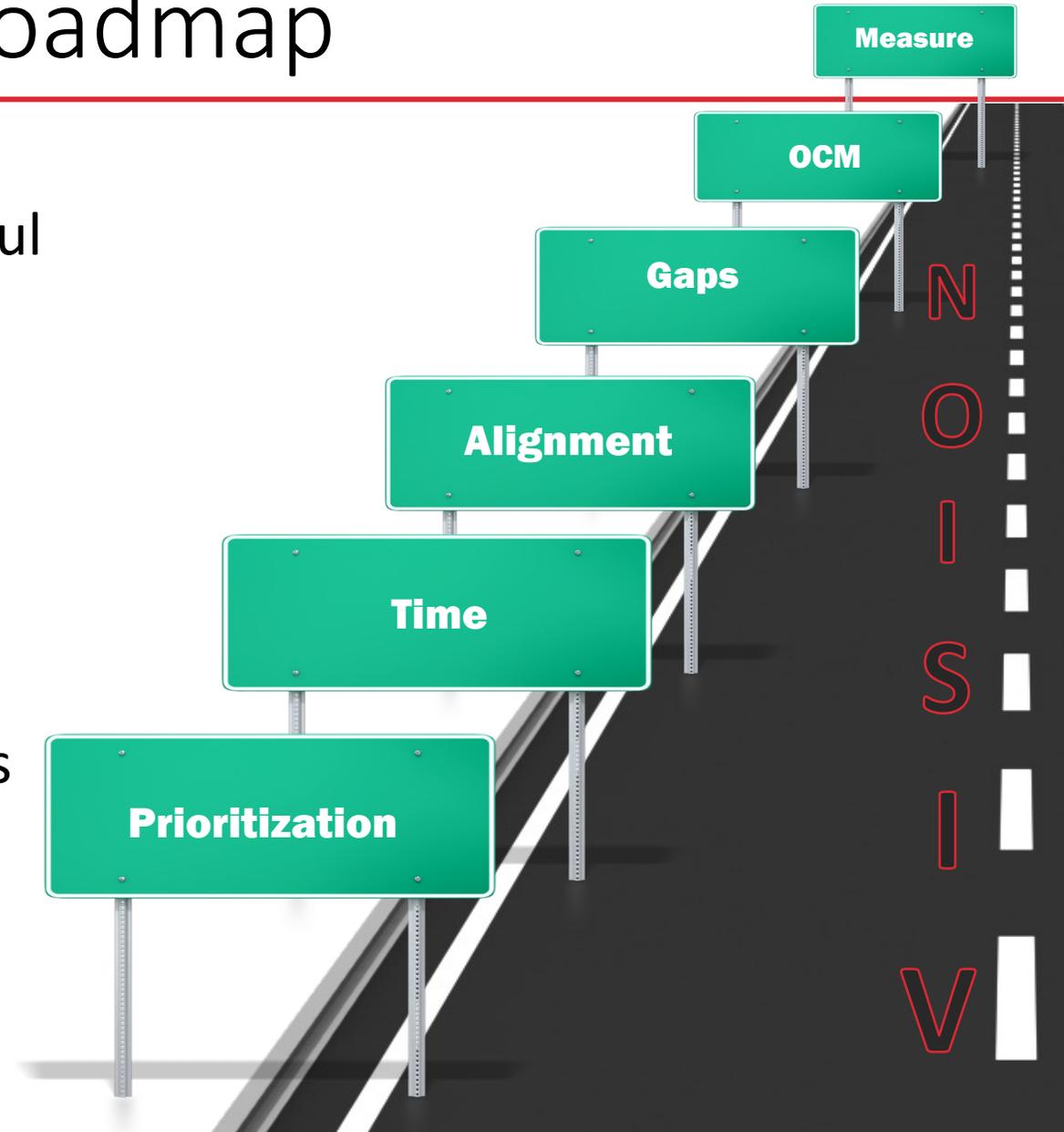
- A roadmap is a strategic plan to guide the continuous maturation of TBM as a function of its utilization, adoption, and supporting people and processes.
- Accounts for all organizational variables:
 - Corporate strategy
 - TBM vision and aspirations
 - Process and tool maturity
- Roadmaps can be effectively 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



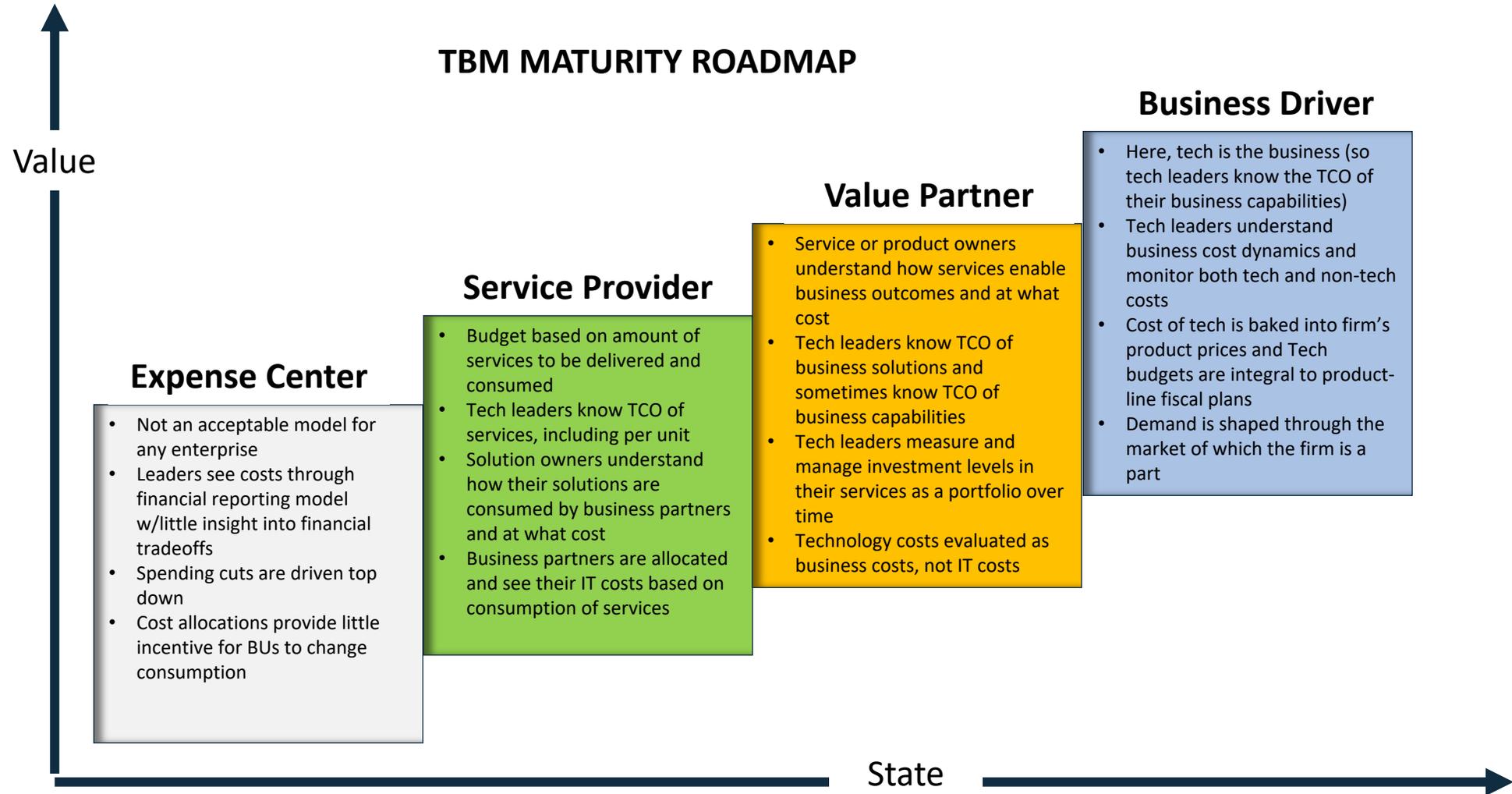


- In what ways have you found a TBM roadmap to be important?
- What do you see as the negative consequences of not having a roadmap?

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.

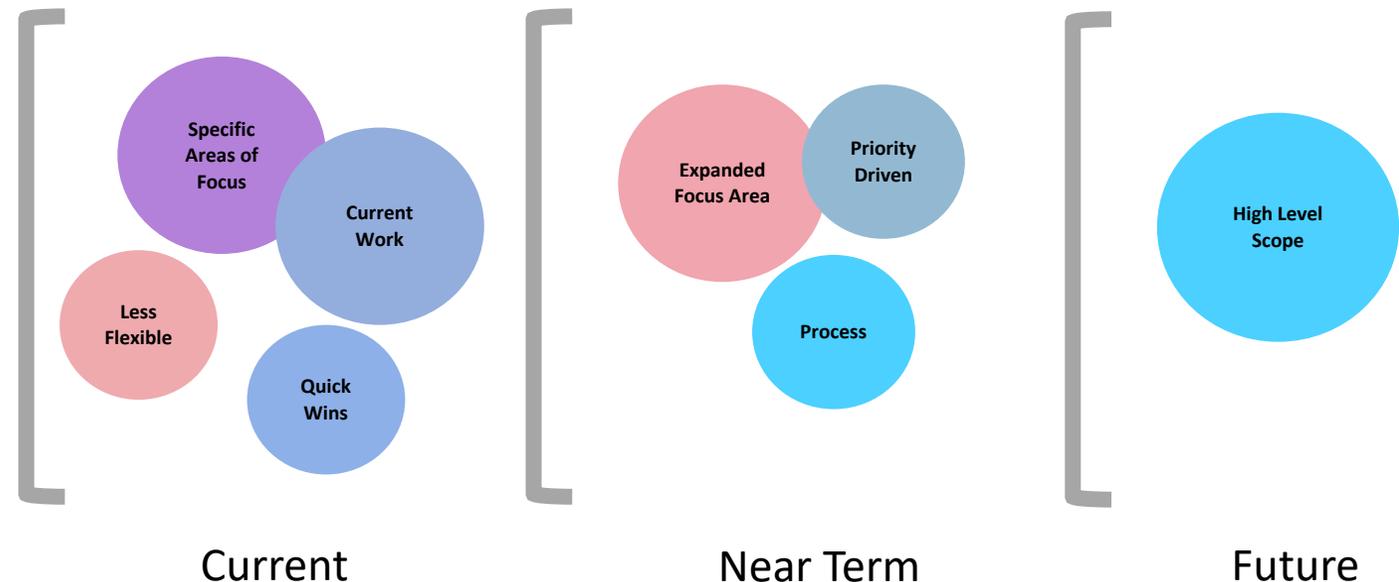


Roadmaps and Time Horizons

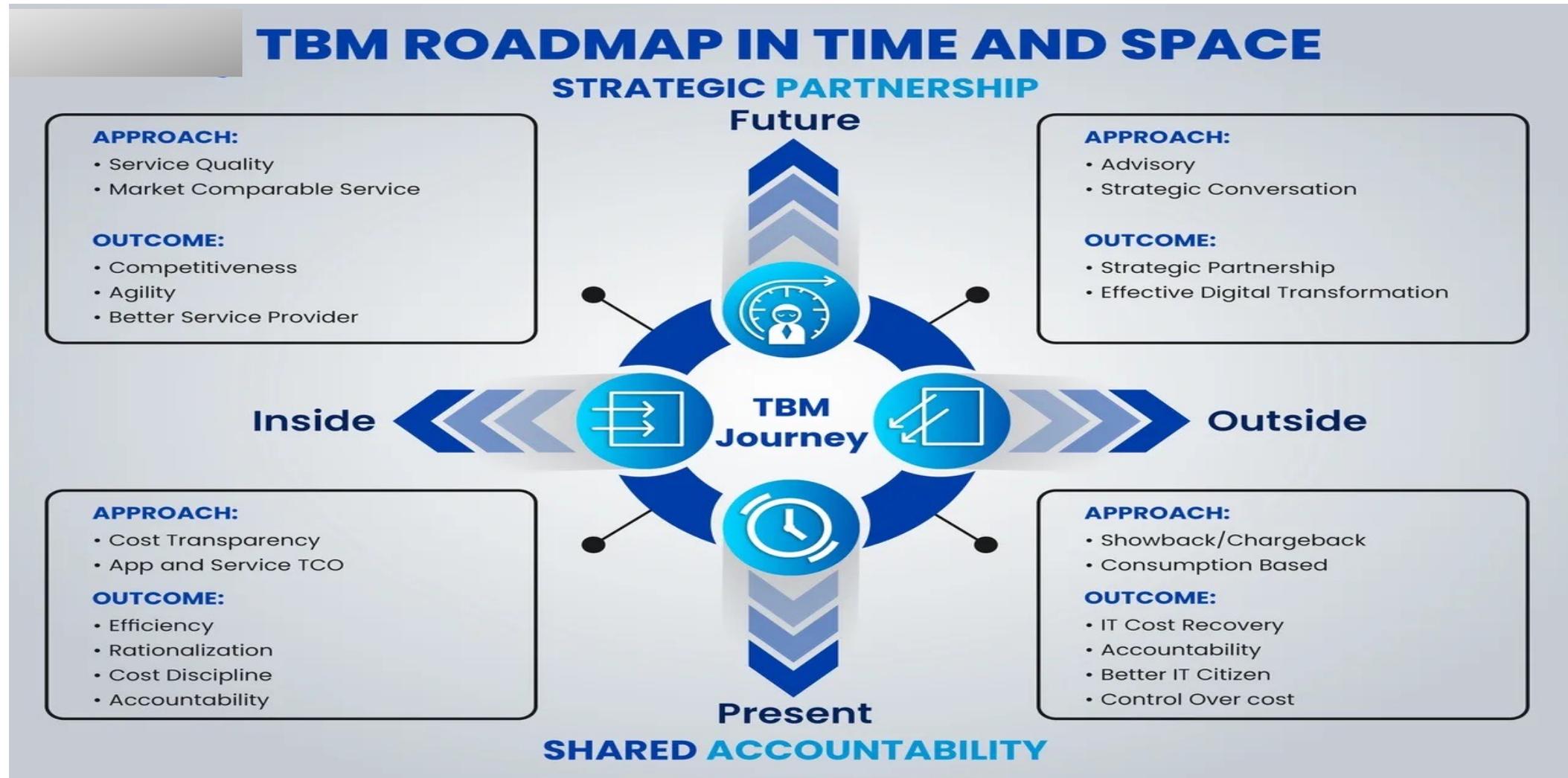
- Defining the time horizons that you want your roadmap to address is one of the first steps in building a successful roadmap.

- The basic time horizons include:

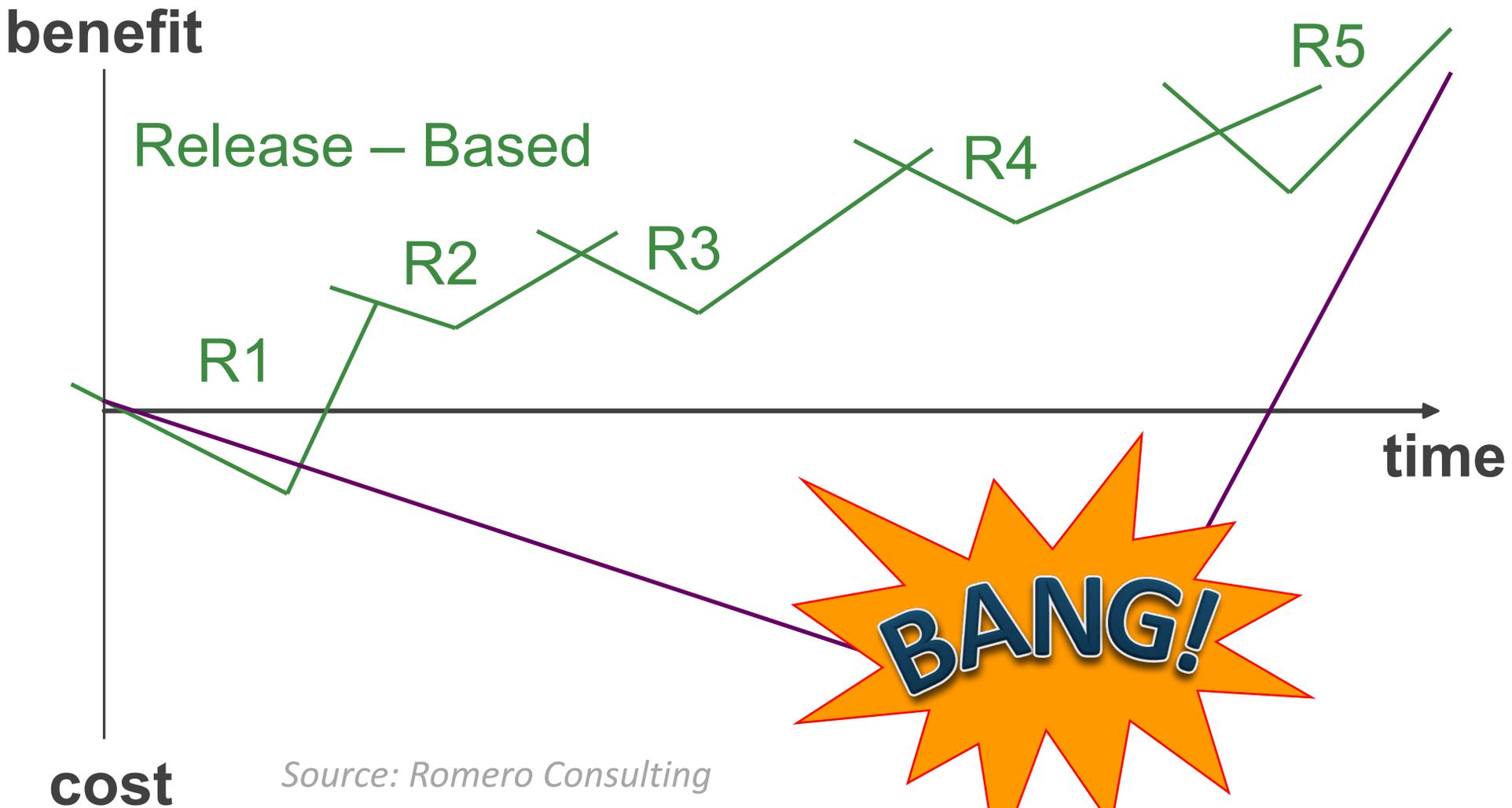
- Current
- Near Term
- Future



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

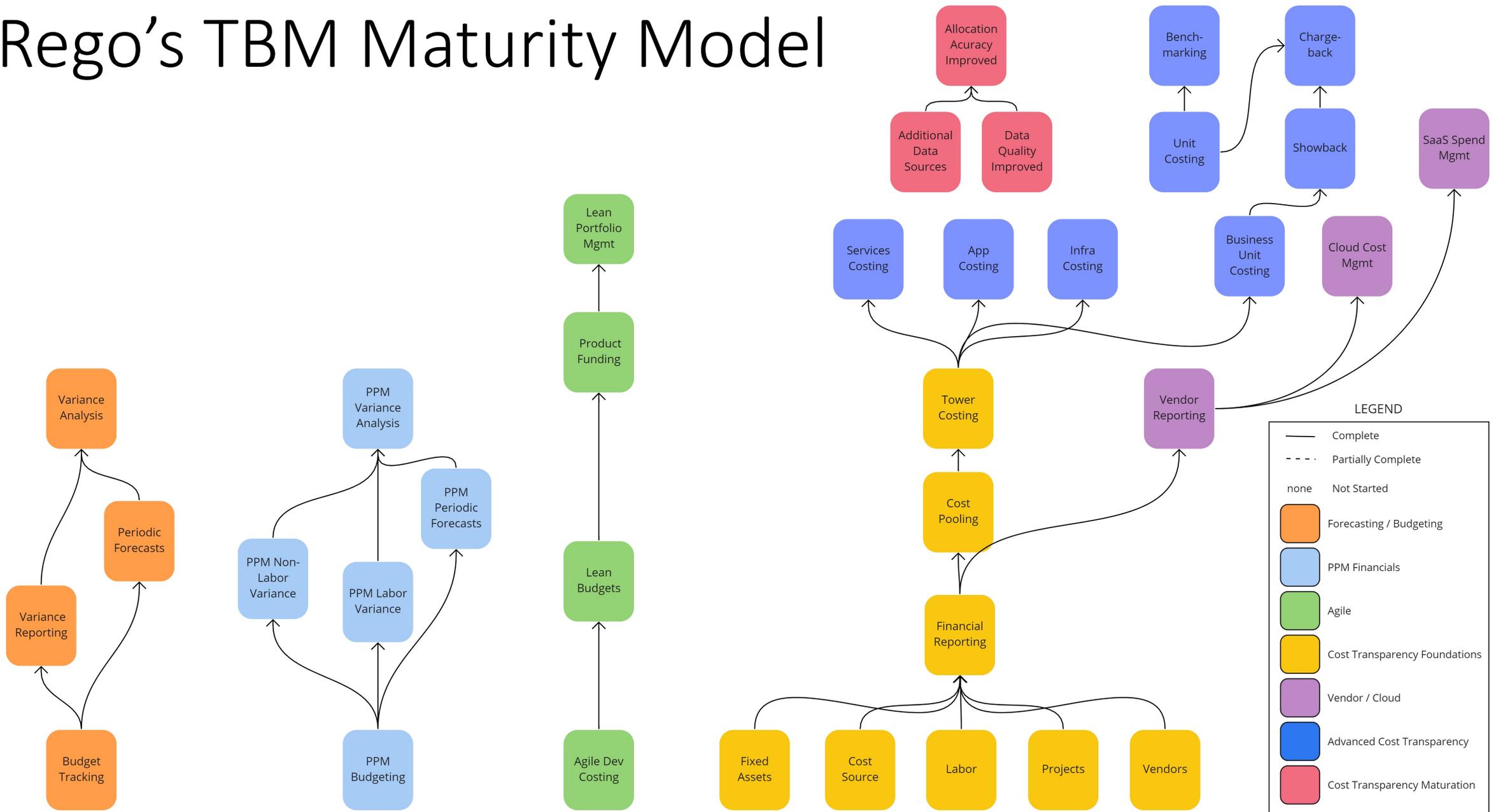


- What other best practices have you found in putting a TBM roadmap together?
- Does anyone have lessons learned they would like to share?

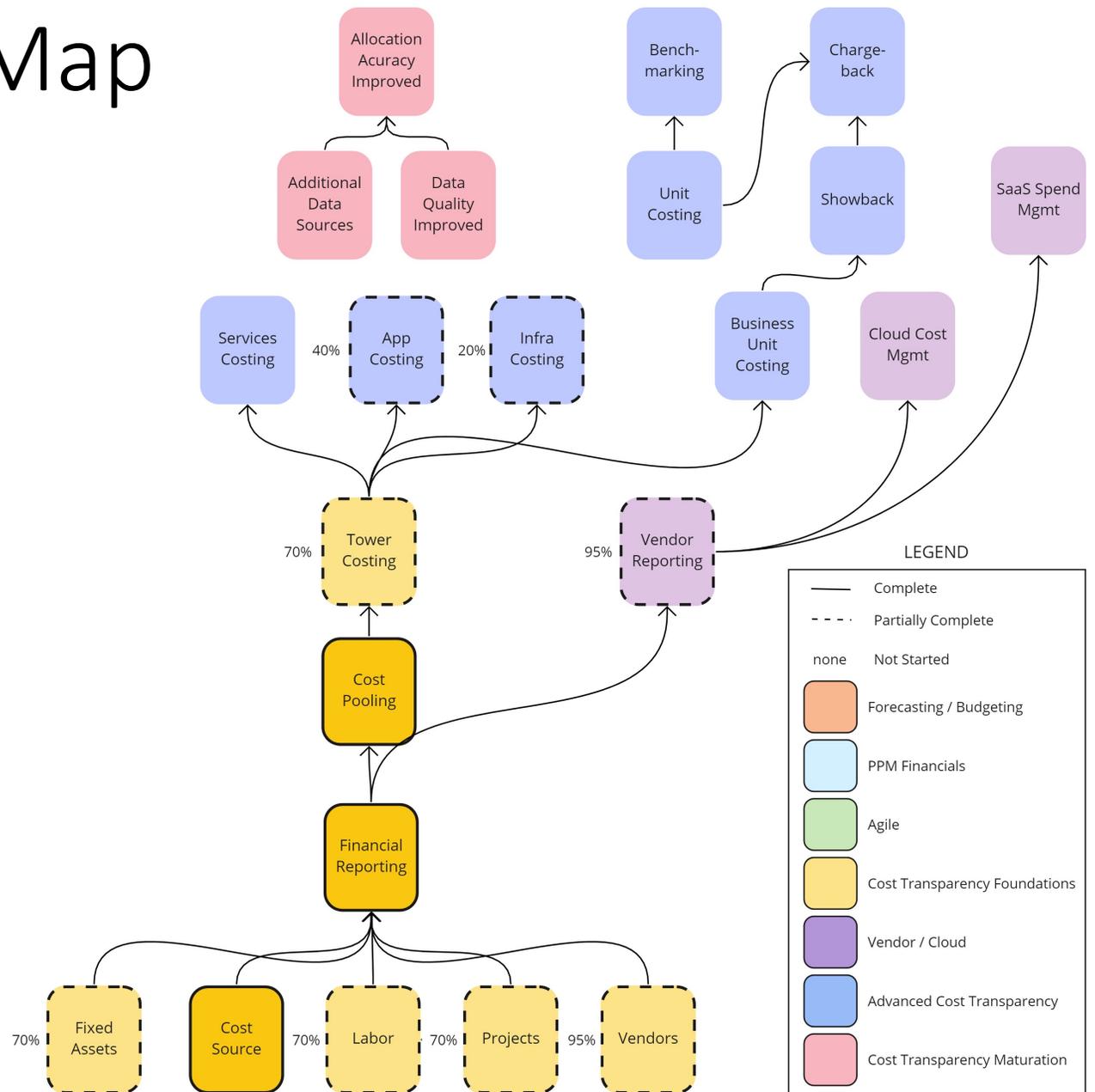
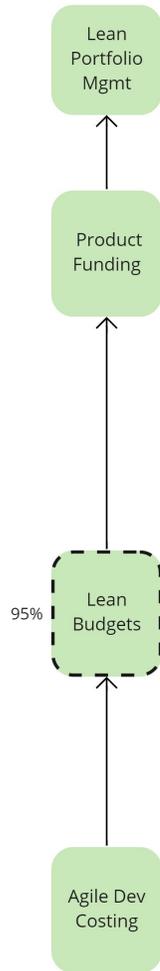
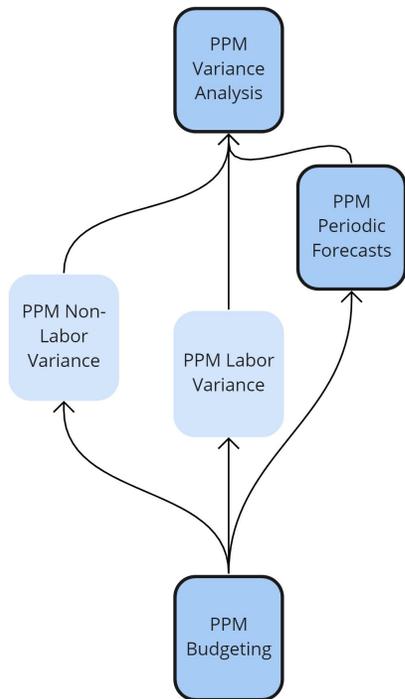
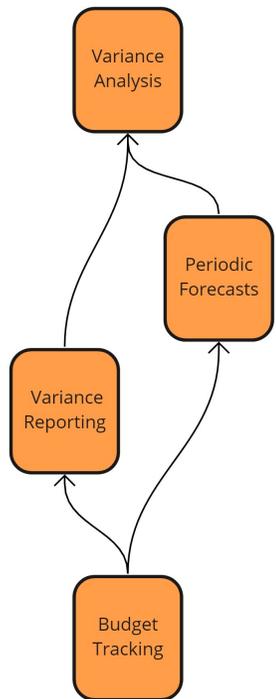
Roadmap Examples



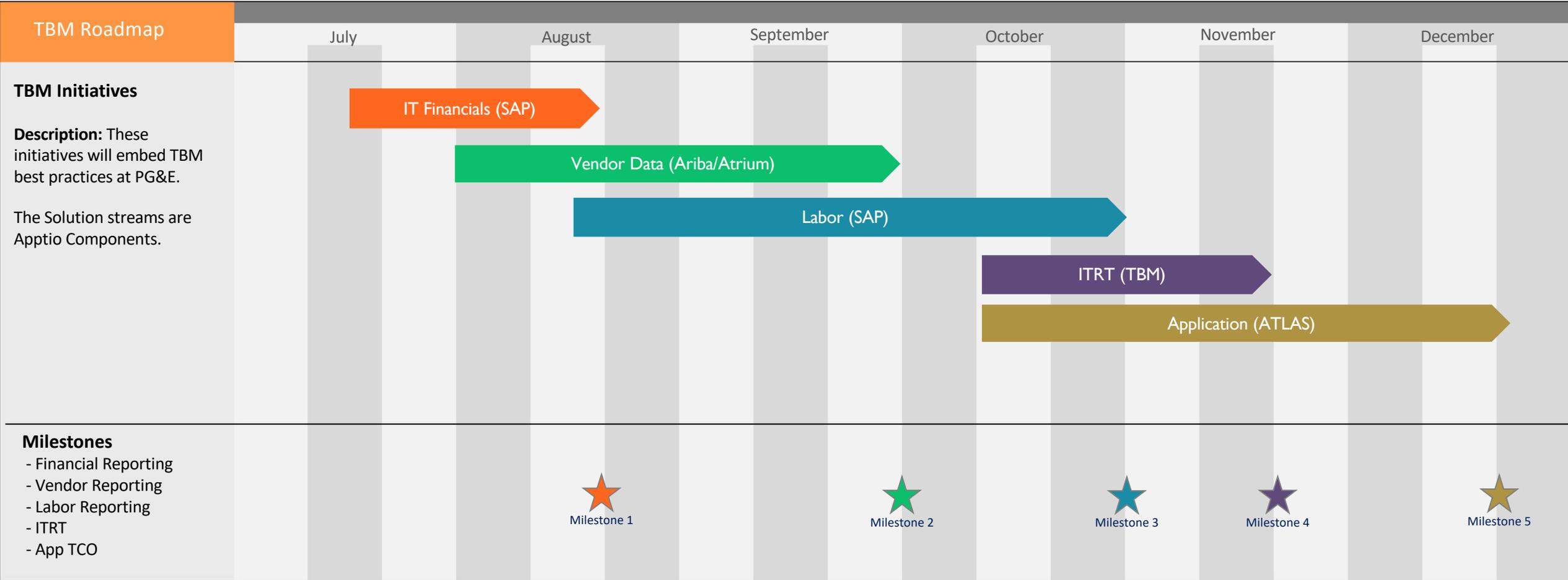
Rego's TBM Maturity Model



Sample TBM Maturity Map



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

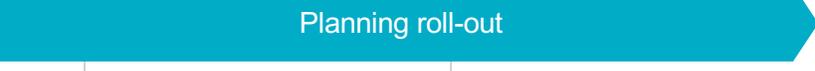


Deployment Timeline

Outcomes and Activities	June	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June
Restructuring PFP <ul style="list-style-type: none"> Identify active project ID list Experience Portfolio -> Project Groups Cost Centers -> Projects 				Restructuring PFP									
Streamline Layouts & PE Processes <ul style="list-style-type: none"> Fewer columns Automation of data Common layout Layouts by portfolio 	Streamline Layouts & PE Processes												
Application Labor and Projects <ul style="list-style-type: none"> Labor headcount/roles Projects and Time Tracking Application Mappings for Labor and Projects 				Application Labor and Projects									
Application Assets and Vendors <ul style="list-style-type: none"> Vendor inventory Fixed assets register (Inc. dep.) Application Mappings for Assets and Vendors 	Application Assets and Vendors												
Infrastructure Analysis <ul style="list-style-type: none"> Data center details Server assets Storage devices Infrastructure to application mappings 								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"> Understand Labor deployment (direct and indirect) Calculate the cost to build a release by product and initiative 													
Plan	<ul style="list-style-type: none"> Create and manage headcount plan Plan for and manage Strategic initiatives and manage actuals 													
														
Total Cost of Ownership	<ul style="list-style-type: none"> Provide labor cost and plan to business unit owners to inform strategic decisions Business unit prioritization of projects and initiatives 													



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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- Course **Description**
- Date Started = **Today's Date**
- Date Completed = **Today's Date**
- Hours Completed = **1 PDU per hour of class time**
- Training classes = **Technical**
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