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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

- Defining the Value of a Strategic Roadmap

- Roadmapping Methodology

- Best Practices

- Real-World Examples
  - Long-Term Focus
  - Short-Term Focus
  - Annual Planning Support

Part 1:
Defining the Value

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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 provide a path to follow or direction to point. A clear roadmap will:

- Execute On A **Vision**
- Force **Prioritization**
- Provide an element of **Time**
- **Align** Business, IT and PPM Processes
- Reveal **Gaps** in PPM processes and functions
- Drive **Common Understanding** and **Shared Ownership (OCM)**
- Provide the ability to **Measure** success with a focus on continuous improvement
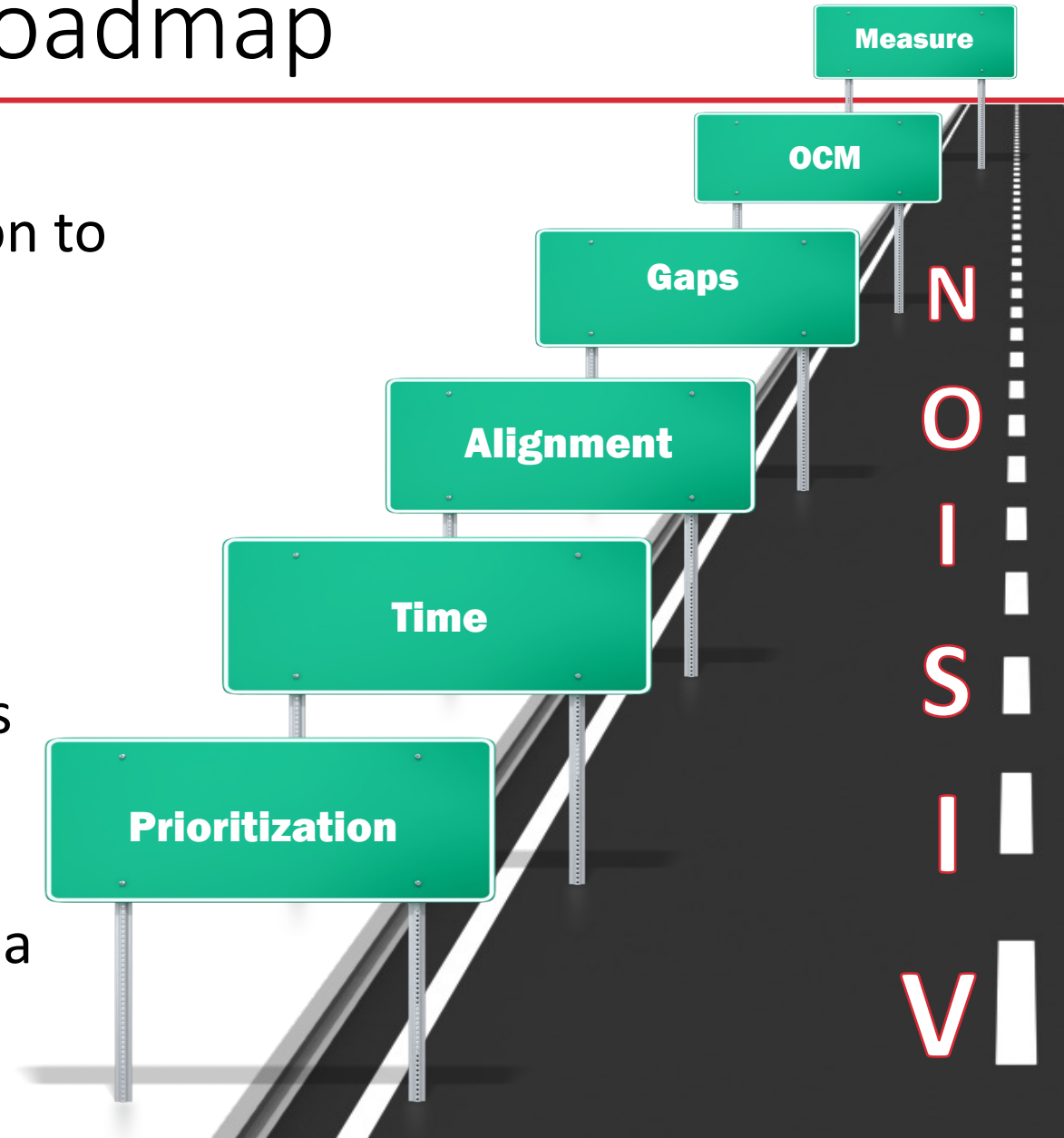
Winchester House

Who needs a blueprint...

...when you can just build?

Open Mic

- How many of you have a PPM roadmap in place currently?

- What purpose did it have in your organization?

- How was it communicated to stakeholders?

- When was it developed and has it been refreshed recently?

Part 2: Methodology

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Assessment Scope

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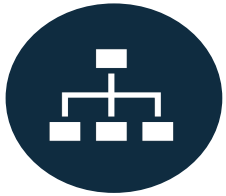
People

- Well defined roles and responsibilities for optimal execution
- Alignment of location and skills to right roles to execute capabilities

Process

- Streamlined and standardized execution processes
- Standardized key decision points, handoffs and interdependencies

Technology

- Aligned technologies that enable planning, execution and measurement
- Ensure data interoperability across all platforms

Governance

- Clearly defined stewardship over platforms, solution capabilities, performance metrics & execution
- Definition and compliance oversight of policies and regulatory requirements

Methodology

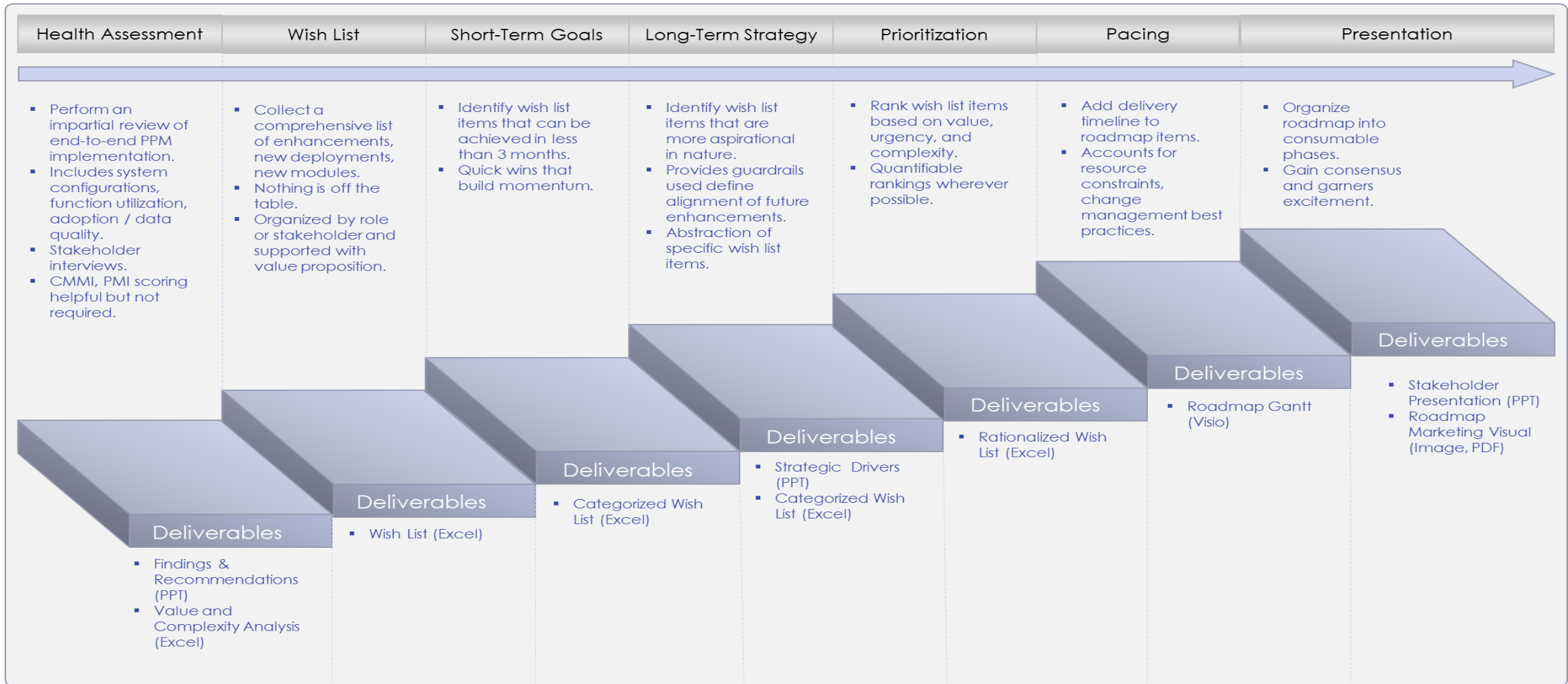| Health Assessment	Wish List	Short-Term Goals	Long-Term Strategy	Prioritization	Pacing	Presentation

- 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)

Part 3:
Best Practices
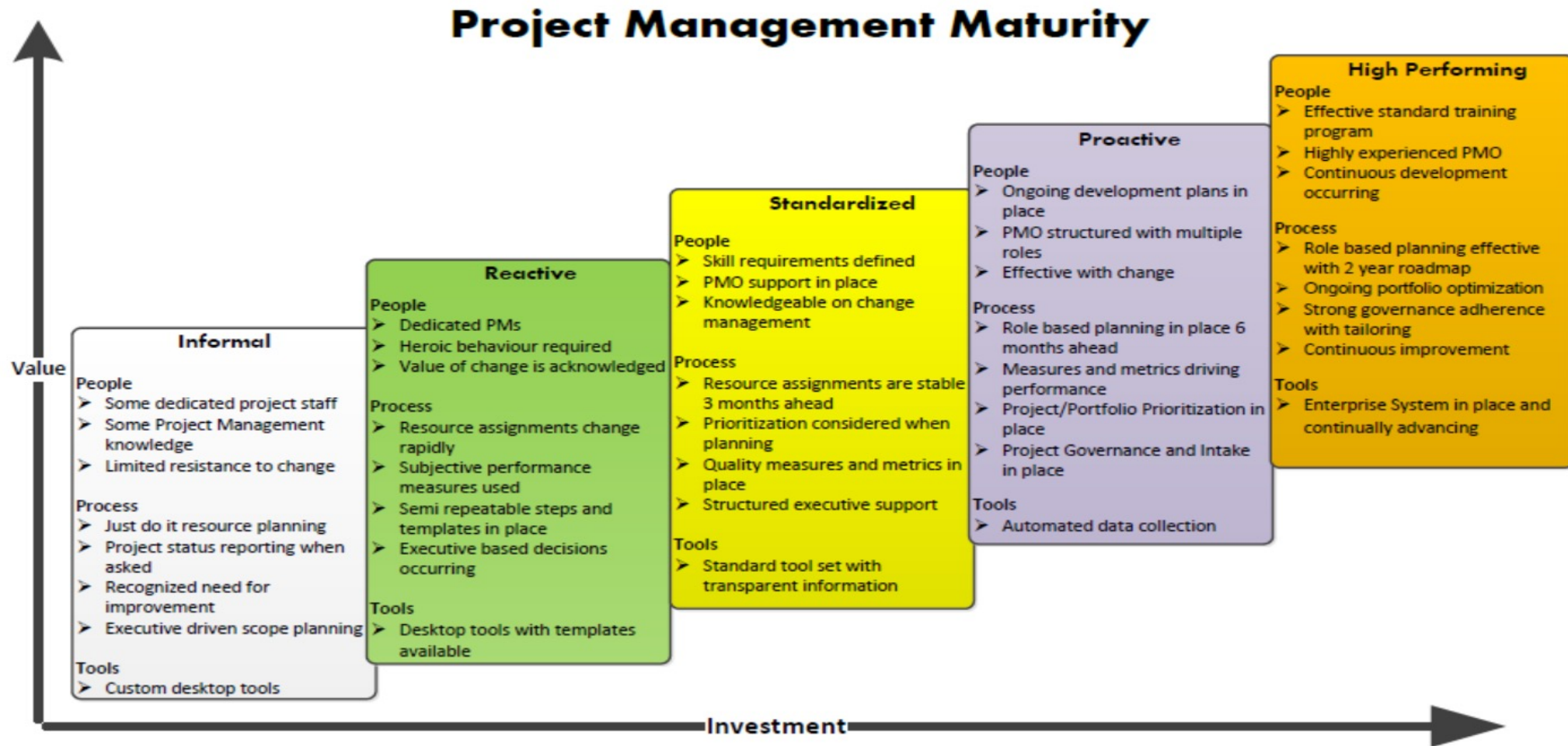
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Best Practices

1. Take time to **Assess your Current State**

2. **Educate** yourself on the planned technology capabilities

3. **Utilize Themes** when building Roadmaps

4. **Crawl-Walk-Run**, sustainability is key

5. **Try not look beyond 18 months**, business conditions and SW change rapidly

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

7. **Iterative** is best – Don't let **perfect** get in the way of **better**. Avoid the **Big Bang** approach!

Open Mic

- What's the current, acceptable horizon for a roadmap?

- Who's best positioned to own the PPM roadmap?

- Suggestions for vetting a roadmap to ensure proper prioritization and alignment with strategy?

Assess the Current State – Maturity

Project Management Maturity

Value ↑

Informal

People
- Some dedicated project staff
- Some Project Management knowledge
- Limited resistance to change

Process
- Just do it resource planning
- Project status reporting when asked
- Recognized need for improvement
- Executive driven scope planning

Tools
- Custom desktop tools

Reactive

People
- Dedicated PMs
- Heroic behaviour required
- Value of change is acknowledged

Process
- Resource assignments change rapidly
- Subjective performance measures used
- Semi repeatable steps and templates in place
- Executive based decisions occurring

Tools
- Desktop tools with templates available

Standardized

People
- Skill requirements defined
- PMO support in place
- Knowledgeable on change management

Process
- Resource assignments are stable 3 months ahead
- Prioritization considered when planning
- Quality measures and metrics in place
- Structured executive support

Tools
- Standard tool set with transparent information

Proactive

People
- Ongoing development plans in place
- PMO structured with multiple roles
- Effective with change

Process
- Role based planning in place 6 months ahead
- Measures and metrics driving performance
- Project/Portfolio Prioritization in place
- Project Governance and Intake in place

Tools
- Automated data collection

High Performing

People
- Effective standard training program
- Highly experienced PMO
- Continuous development occurring

Process
- Role based planning effective with 2 year roadmap
- Ongoing portfolio optimization
- Strong governance adherence with tailoring
- Continuous improvement

Tools
- Enterprise System in place and continually advancing

Investment →

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

Craw-Walk-Run

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

PPM Maturity

Run
With successful processes automated, and champions behind you, it's time to pick up the pace and introduce new features and additional automation.

Walk
Don't get caught up in the pressure to go to fast. Focus on getting the right resources in place to plan for more complex automation. Continue to support the initial rollout and invest in change management to support your strategy.

Crawl
Start out slow: automate a few tasks and get comfortable with the new tool and processes. Generate excitement and leadership buy in.

Run
Mature Project and Portfolio Management

Walk
Advance to Detailed Resource and Portfolio Management

Crawl
Begin with Basic Project, Time, and Resource Management

Deploying Functionality in Stride

| Crawl	Walk	Run

• Time Tracking
• Demand Mgmt
   • Idea Approval Workflow
• Project Mgmt
   • Templates
   • Status
   • Baselines
   • Issues/Risks
   • Tasks/Key Milestones
• Light Portfolio Management
• Internal Knowledge Transfer
   • Admin Training
   • Functional SMEs
	• Detailed Financial Mgmt
	   • Financial Plans
	   • Rates and Costing
	   • Actuals Import
	• Integrations
	   • HR
	   • Agile
	   • Etc.
	• Portfolio Mgmt
	   • Investment Planning
	   • Waterlining
	• Enhancements Based on Use
	   • Reports, Workflows, Portlets
		• Detailed Project Mgmt
		   • Changes
		   • MSP Interaction
		   • Assignments and ETC
		   • Utilization
		• Resource Management
		   • Roles
		   • Skills
		   • Allocations/Capacity
		• Enhancements Based on Use
		   • Reports, Workflows, Portlets

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

Current

Near Term

Future
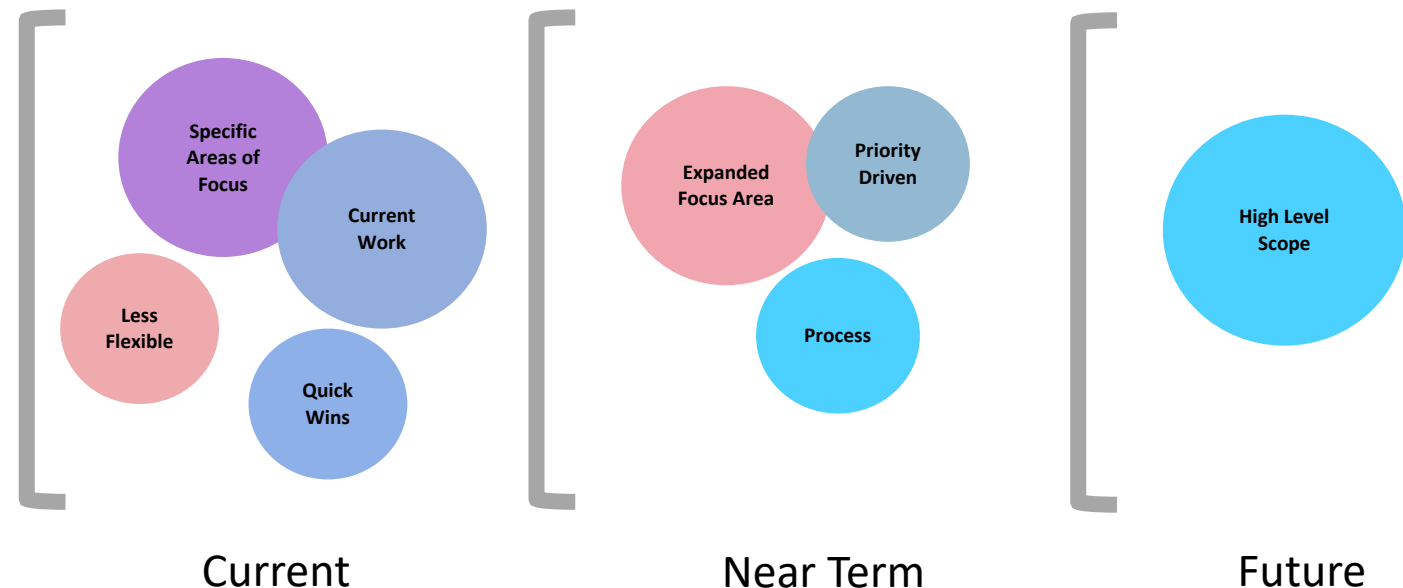
Avoid the Big Bang – Be Incremental

benefit

Release – Based

R5

R4

R3

R2

R1

time

BANG!

cost
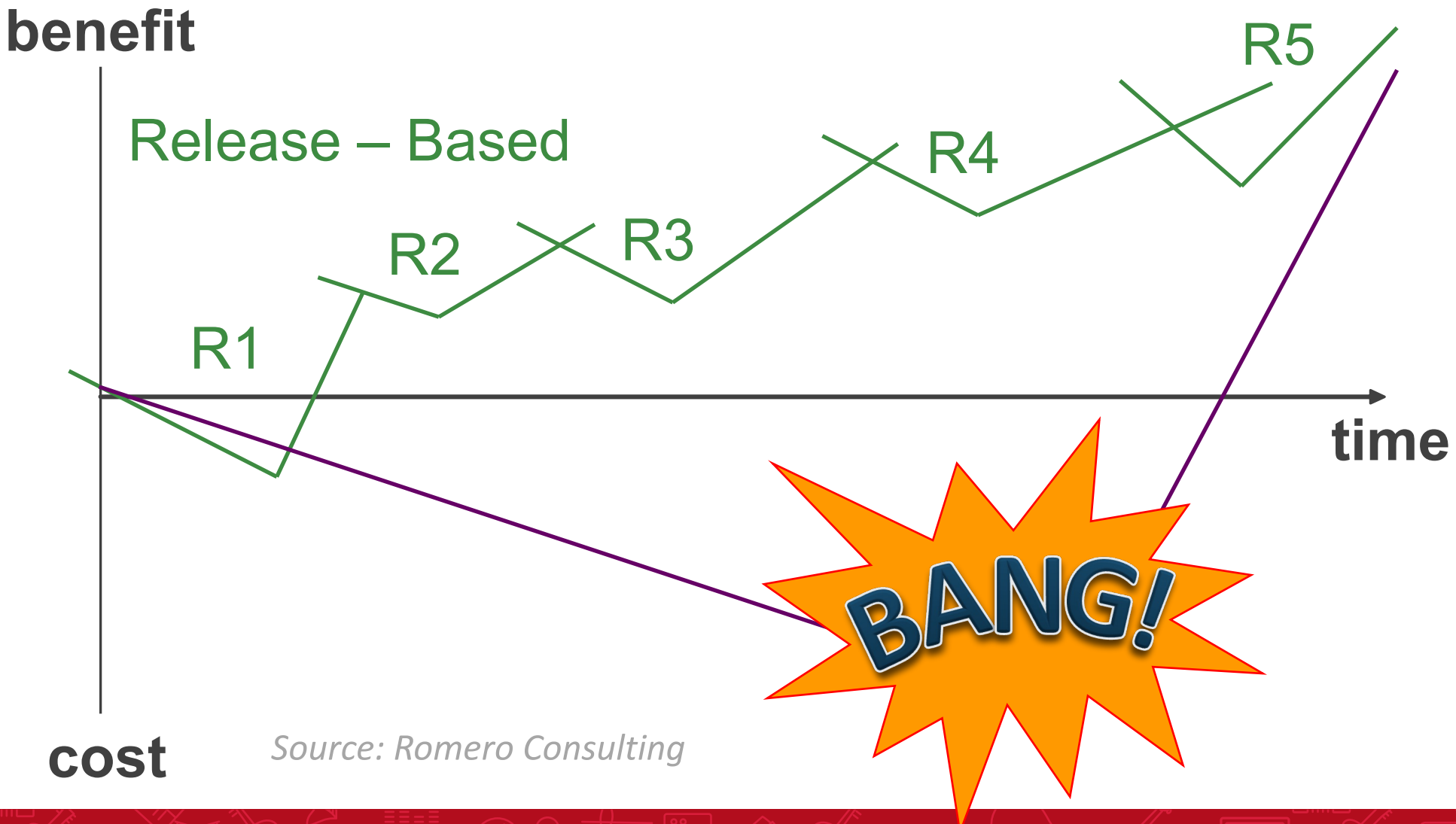
Source: Romero Consulting

Part 4:
Real World Examples

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Open Mic

- Anyone have a roadmap story they'd like to share?

- Good examples or lessons learned?

Example #1: Detailed Functionality Roadmap

Example #2: Long-Term Roadmap

Phase 1	Phase 2	Phase 3	Phase 4

Phase 4 Objective
- Continued maturity of PPS capabilities
- Increased tool automation
- Optimized, continuous planning
- Stabilized Portfolio level funding and governance processes
- Continued improvement in reporting

Phase 3 Objective
- Continued maturity of PPM capabilities
- Increased tool automation
- Leveraged skill information as part of the talent framework
- Optimized, continuous planning
- Stabilized Portfolio level funding and governance processes
- Continued improvement in reporting

Phase 2 Objective
- Matured Program Management processes and tools
- Enhanced reporting analytics
- Increased visibility into Operations project activities and effort
- Portfolio level funding and governance
- Improved ...
- Implemen... PPM data...

Phase 1 Objective
- Improved usability, reports and integrations
- Simplified and standardized Project Management processes and tools (e.g. finance rules, project metrics)
- Improved Resource Management processes and capabilities
- Expanded Clarity learning and support
- Enhanced overall PPM communication plan
- Integration To Jira
- Establish reporting strategy

Below are the corresponding activities divided by process, technology and people / governance to enable the targeted outcomes of the roadmap.
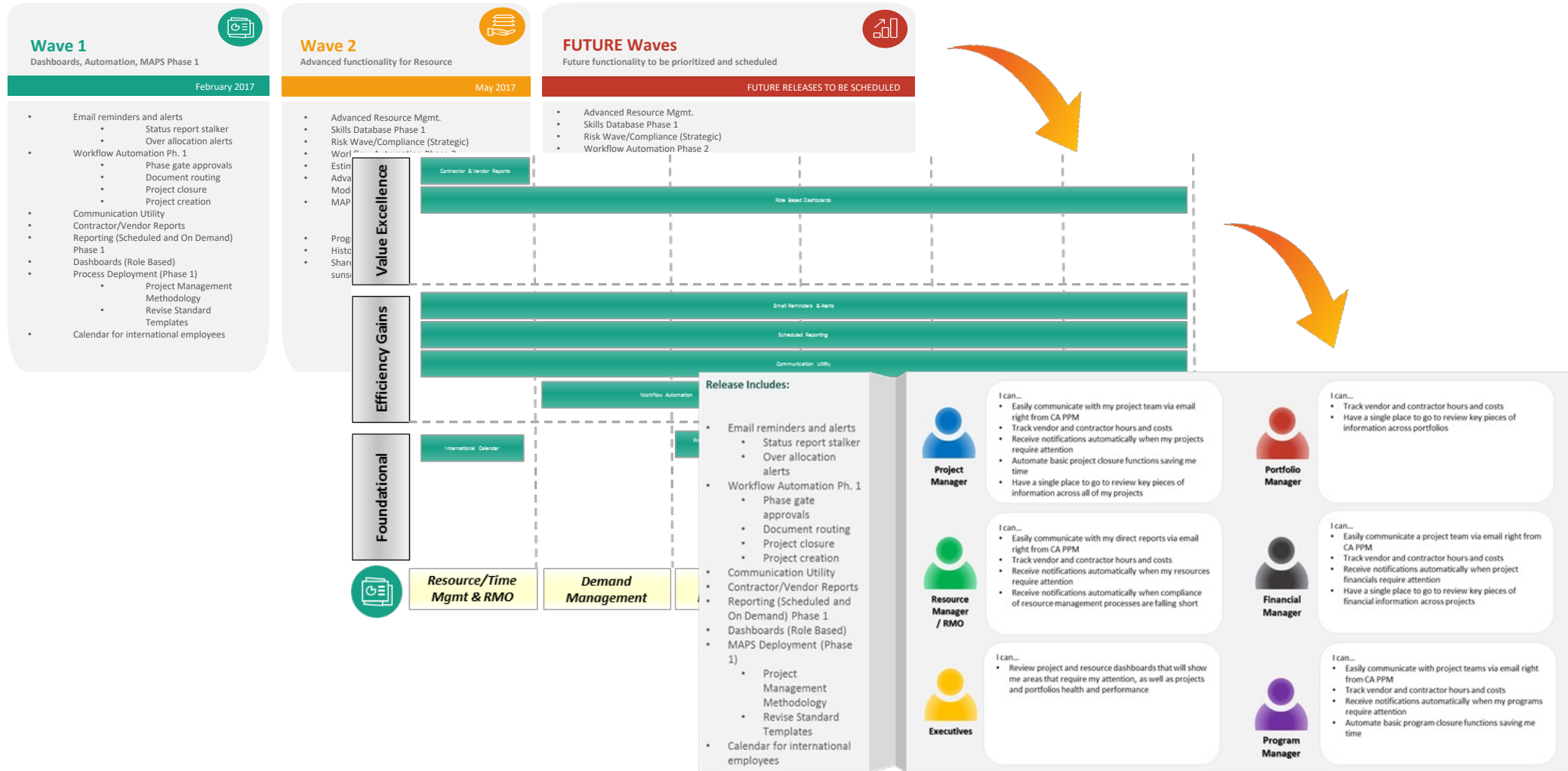
	Phase 1 Simplify Processes and Tools, Rebrand CA PPM and re-launch tool capabilities	Phase 2 Mature Capabilities and Industrialize Reporting	Phase 3 Increase Efficiencies and Automation
Process	• Simplify and standardize Project Mgmt. processes • Simplify initiative planning processes • Review current Program functions and optimize Program 'Lite' processes • Introduce improved Resource Management processes • Review and Improve demand management processes • Optimize the CA PPM overall user experience • Introduce "My Work" for personas identified	• Improve portfolio level reporting for funding and resource demand • Improve Resource Management and unfilled role demand, booking processes • Implement project baselining • Implement contractor time reporting • Expand Program Management processe... • Standardize Demand and Resource Mgm... • Possible implementation of skills	• Establish portfolio scenario planning processes • Implement Portfolio benefit tracking • Continue to refine PPM processes
Technology	• Improve Clarity reporting • Simplify User Interface • Improve Clarity integration and automation • Review and Improve Financial integrations and reporting • Update and release Resource Management reporting • Review reference data, such as vendor lookup and locations, to streamline and ensure data of value is present. • Integration to Jira	• Implement Program Management proc... • Adopt Enterprise reporting solution for... • Update the Portfolio Management capa... • Build reporting strategy and introduce e... based on the strategy. • Implement project control reporting (ris...	
People / Governance	• Rebrand the CA PPM tool • Establish user personas to be used for CM activities • Expand and Improve the PPM Support and Operating Model (e.g. learning, support, communication) • Develop data foundations for Reporting Strategy • Introduce Adoption Metrics	• Establish Program Management process... • Continued re-education of PPM capabili... • Establish Reporting strategy governanc...	

Clarity Roadmap – All Phases

Focus Area	Initiatives	Key Activities	2017				2018				2019			
			Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Phase 1 Simplified Processes and Tools, and Rebranding of the CA PPM Toolset	Process	Re-brand CA PPM												
		Simplify UI and Navigation												
		Update RM processes and reporting												
		Review processes for Program "Lite"												
		Review and improve demand management												
	Technology	Review Integrations and update												
		Review and update reference data												
		Introduce adoption metrics												
	Gov./People	Define personas for CM activities												
		Develop data foundations for reporting strategy												
Phase 2 Mature Capabilities and Industrialize Reporting	Process	Improve PfM reporting for funding and resources												
		Define Program Management lifecycle												
		Improve RM booking processes / Skills												
		Implement project baselining and schedule mgmt.												
		Define project control processes												
	Technology	Upgrade												
		Implement Program Management lifecycle												
		Establish and adopt enterprise reporting strategy												
		Improved reporting capabilities												
		Implement project control reporting												
	Gov./People	Continuous improvement and re-education												
		Establish reporting strategy governance												
		Establish Program Management Governance												
Phase 3 Increase Efficiencies and Automation	Process	Establish PfM scenario planning and benefits												
		Establish APM lifecycle												
	Technology	Implement schedule reporting and burn reports												
		Implement project collaboration												
		Implement APM lifecycle												
	Gov./People	Implement APM governance												
		Continuous improvements												

Example #3: Short-Term Roadmap

Example #4: Annual Planning Support

Current State Analysis

- Clarity 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 Clarity Goals

⊘ Optimization

Initiative	Major Deliverables [Technical Complexity / Effort]	Timeline

Corporate IT Alignment	• Updated Support & Governance Model (Low / High)
	  ○ CA PPM Administration (Melissa Mascari Backfill)
	  ○ PMO Standup
	• Contractor Inclusion (Low / Low)
	• 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 Clarity Goals

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

Clarity

Clarity Functionality
RD00003

Questions?

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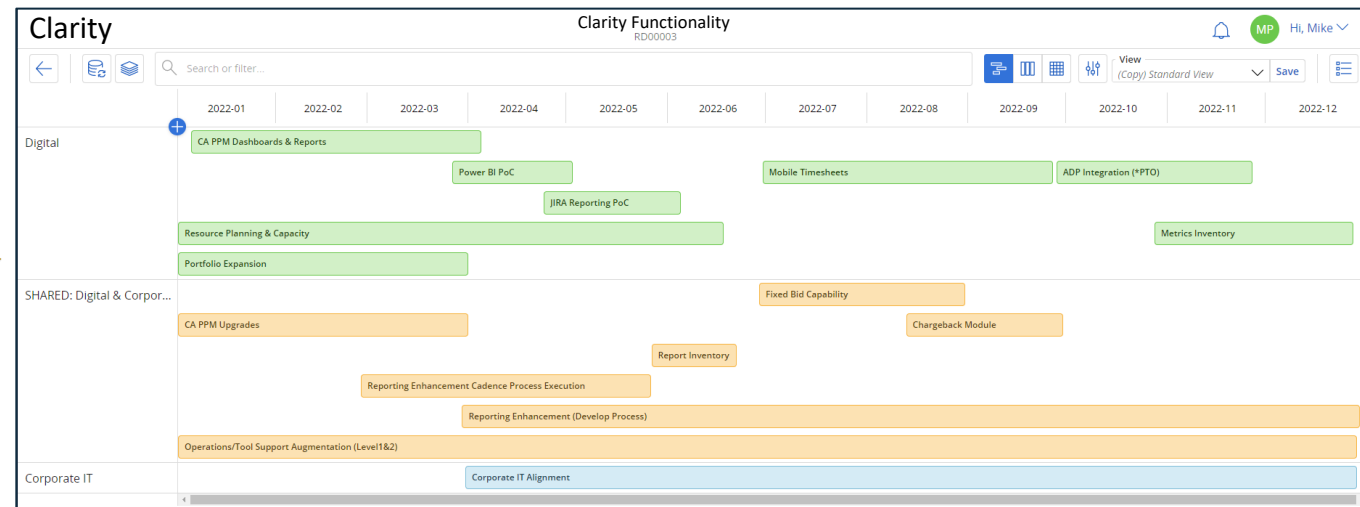
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