



regoUniversity

NASHVILLE • 2022

Annual Planning in Clarity | Examples/Best Practices

Your Guides:

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Agenda

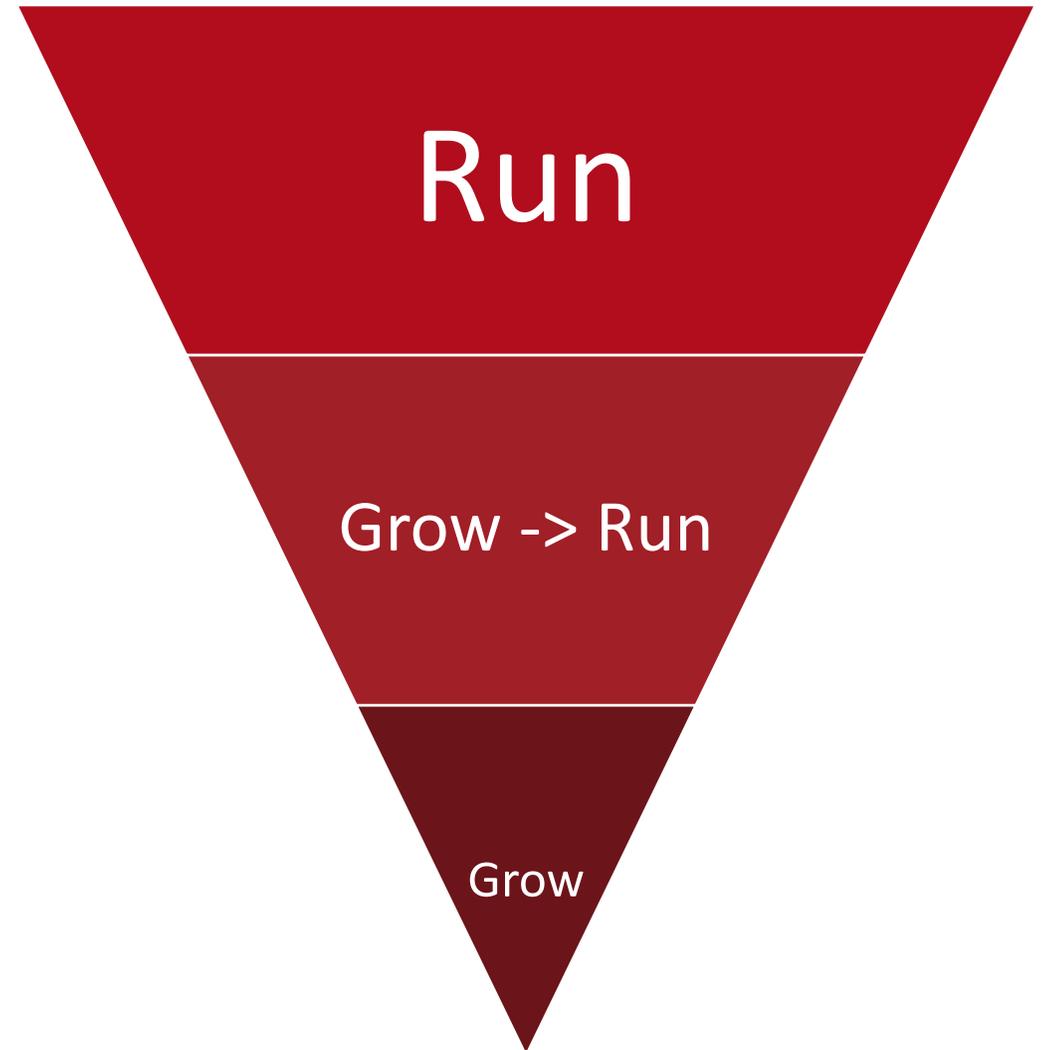
- Introduction
- Annual Planning Basics
- Clarity in Annual Planning
- Investment Tracking
- Resource Planning
- Financial Tracking
- Prioritization

Introductions

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

Annual Planning Basics

- We'll focus Run, Grow to Run and Grow today.
- Examples:
 - Capture Run costs utilizing the previous year's costs/actuals and plan for 5-10% increase YoY
 - Capture Grow to Run by finding the Grow projects that completed in the previous year and grabbing the estimated cost
 - Grow will be captured from selected resources across the organization and current in-flight investments (carryover)



Clarity in Annual Planning



Investment Tracking

Tracking all investments related Annual Planning



Financial Tracking

View capital/operating costs, set targets plan for multi-year investments



Resource Planning

View capacity, set targets, and view demand

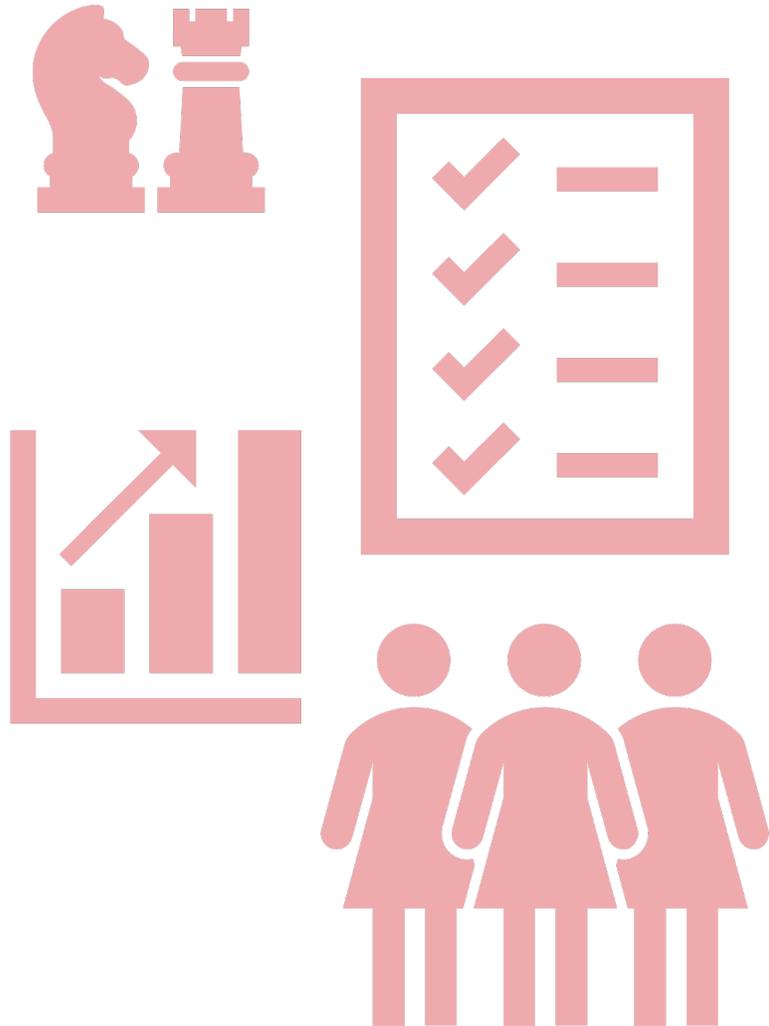


Prioritization

Prioritize investments by including in plan and setting targets

Open Mic

- How are you utilizing Clarity for Annual Planning?



Investment Tracking

Tracking - Run

- Utilize the current list of investments to capture Run costs:
 - Extend Current Run Projects
 - Extend Project Team Members
 - Extend Project Costs
 - Create New Run Projects
 - Add Team Members and update allocations
 - Create simple/detailed financial costs

clarity Roadmap

Annual Investment Roadmap
RD00008

Roadmap Items Properties Reports and Dashboards Portfolio Dashboard Waterline

Scenario Plan of Record POR

Select All Deselect All

Group By

Roadmap Item *	In Plan ^{2*}	Rank ^{1*}	Strategy	Must ... ³	R/G/T	Stakeholder	Start	Finish	ROI ^{2*}	Totals	
										Total Cost	Benefit
<input type="checkbox"/> Pay by Phone	In Plan	1	Mobility	Required	Run	Greg	Apr 30, 2020	Aug 25, 2022	(100%)	900,000	0
<input type="checkbox"/> Return Authorization	In Plan	1	Secure the Ente...	Required	Run	Nikki	Dec 26, 2021	Jun 8, 2022	383%	258,720	1,250,000
<input type="checkbox"/> Import LinkedIn Profile	In Plan	1	Mobility	Required	Run	Greg	Feb 14, 2021	May 13, 2022	636%	169,920	1,250,000
<input type="checkbox"/> Order Suggestions	In Plan	1	BAU	Required	Run	Sanjay	Jan 21, 2021	Apr 18, 2023	1,022%	96,657	1,084,963
<input type="checkbox"/> eCommerce Portal	In Plan	5	BAU	Required	Run	Sanjay	Apr 15, 2019	May 26, 2025	20%	398,656	483,415
<input type="checkbox"/> Eclipse Enhancements	In Plan	6	AI & Analytics	Top Choice	Grow	Angela	May 10, 2019	Jun 18, 2020	24%	233,876	290,000
<input type="checkbox"/> Minimal Online Shopping ...	In Plan	7	Mobility	Top Choice	Grow	Dom	May 3, 2019	Nov 8, 2022	(100%)	1,080,269	0
<input type="checkbox"/> Data Warehouse Perform...	In Plan	8	AI & Analytics	Required	Run	Sanjay	Sep 10, 2021	Jan 20, 2023	41%	289,205	415,286
<input type="checkbox"/> Credit Card Security Impro...	In Plan	9	Secure the Ente...	Required	Grow	Dom	Aug 18, 2020	May 7, 2021	37%	435,000	612,000
<input type="checkbox"/> BI Analytics	In Plan	10	AI & Analytics	Top Choice	Transform	Greg	Mar 16, 2020	Jul 4, 2025	77%	132,128	237,222
<input type="checkbox"/> Executive Dashboard Visib...	In Plan	11	AI & Analytics	Top Choice	Grow	Greg	Oct 16, 2021	Oct 16, 2022	30%	264,400	350,000
<input type="checkbox"/> System Upgrade Release 15	In Plan	12	Secure the Ente...	Required	Run	Sanjay	Feb 17, 2021	Jun 29, 2022	16%	730,600	850,000
<input type="checkbox"/> Social Networking Security...	In Plan	13	BAU	Required	Run	Angela	Jan 18, 2021	Jan 7, 2022	158%	134,040	350,000
<input type="checkbox"/> Order Confirmations	Not In Plan	14	BAU	Top Choice	Grow	Nikki	Mar 27, 2019	Feb 14, 2020	550%	192,400	1,250,000
<input type="checkbox"/> CRM Contact Center Devel...	Not In Plan	15	BAU	Top Choice	Grow	Nikki	Apr 3, 2019	Apr 11, 2022	143%	420,800	1,000,000
<input type="checkbox"/> CRM Enhancements	Not In Plan	16	BAU	Top Choice	Grow	Nikki	Apr 22, 2019	Jun 1, 2022	68%	438,000	750,000
<input type="checkbox"/> Build read-write API for ha...	Not In Plan	17	AI & Analytics	Carryover	Transform	Dom	Mar 17, 2020	Oct 29, 2020	832%	134,160	1,250,000
<input type="checkbox"/> Mobile Advertising	Not In Plan	18	Mobility	Required	Run	Angela	Mar 2, 2022	Jan 1, 2023	11%	263,750	299,262
<input type="checkbox"/> Online to Offline Market	Not In Plan	19	BAU	Required	Run	Sanjay	Sep 7, 2021	Apr 2, 2023	230%	180,120	600,000

Tracking – Grow to Run

- Utilize the current list of investments to capture Grow to Run.
 - Utilize Filtering to find projects that are going live before the close of the year
 - Ensure Project Managers have updated the estimates for Run (roles and dollars)

Select from Project

← ↓ Search... View Demo ES Listing1 Save

Add Filter

Launch Date < Dec 31, 2023 x Template = No x Remove All Match Filters: All Any x

Select All Deselect All

Group By

Project Name *	P * ↑	Launc... ▾	Manager	Work Status	Project Type	Sponsor	Start *	Finish *	Planned C...	MKT Details 1
<input type="checkbox"/> New Product Development - Stage Example	PD1020	Jan 1, 2023	Miles, Paul	Requested	Major Project	Reston, Bobbie	Feb 19, 20...	Oct 6, 2025	596,960	
<input type="checkbox"/> Reduce Application Process Cycle Time	PRB1001	Jun 1, 2023	Thomas, Brian	Active	Transform	Turner, Beth	Sep 13, 20...	May 1, 2022	577,000	
<input type="checkbox"/> Leverage Existing IC for Training	PRB1004	Aug 5, 2023	Brooks, Emma	Requested	Transform	Turner, Beth	Sep 13, 20...	Oct 4, 2022	2,800	
<input type="checkbox"/> Improve Requirements Management	PRB1008	Dec 5, 2023	Beck, Jackson	Requested	Transform	Turner, Beth	Sep 9, 2021	Feb 10, 2023	1,157,880	
<input type="checkbox"/> Streamline Onboarding Process	PRB1010	May 4, 2023	Thomas, Brian	Requested	Transform	Turner, Beth	Jul 1, 2019	Oct 12, 2022	367,735	
<input type="checkbox"/> New Branding Initiative - NA Region	PRB1012	Aug 9, 2023	Alvarez, Corine	Requested	Transform	Turner, Beth	Sep 8, 2021	Nov 2, 2022	779,725	
<input type="checkbox"/> New Branding Initiative - AsiaPac Region	PRB1021	Jun 20, 2023	Core, Elizabeth	Requested	Transform	Turner, Beth	Sep 8, 2021	Dec 1, 2022	986,881	
<input type="checkbox"/> Point of Sale System Upgrade	PR1390	Apr 23, 2022	Administrator, Clarity	Requested	Major Project	Roberts, Beth	Feb 6, 2022	Aug 26, 20...	0	

Columns Details

Tracking Grow - Roadmaps

• PROS:

- Quickly enter in information, spread out over a period to visualize on timeline
- Quickly pull information from existing investments
- Create a multi-year roadmap (5 year strategic) and pull investments out once they're ready to become projects

• CONS:

- Everyone editing the same roadmap which may cause issues
- Not easy to break apart the roadmap (16.0.3 helps)
- No OOTB way to convert roadmap items to other investments

← Roadmap Annual Investment Roadmap RD00008

Roadmap Items Properties Reports and Dashboards Portfolio Dashboard Waterline

Scenario Plan of Record POR Search... View Strategy & Stakeholder Save

Select All Deselect All

Group By

Roadmap Item *	In Plan 37	Rank 17	Strategy	Must ... 7	R/G/T	Stakeholder	Linked To
<input type="checkbox"/> Pay by Phone	In Plan	1	Mobility	Required	Run	Greg	Level 1 Training
<input type="checkbox"/> Return Authorization	In Plan	1	Secure the Ente...	Required	Run	Nikki	
<input type="checkbox"/> Import LinkedIn Profile	In Plan	1	Mobility	Required	Run	Greg	
<input type="checkbox"/> Order Suggestions	In Plan	1	BAU	Required	Run	Sanjay	
<input type="checkbox"/> eCommerce Portal	In Plan	5	BAU	Required	Run	Sanjay	eCommerce Portal
<input type="checkbox"/> Eclipse Enhancements	In Plan	6	AI & Analytics	Top Choice	Grow	Angela	Eclipse Enhancements
<input type="checkbox"/> Minimal Online Shopping Site	In Plan	7	Mobility	Top Choice	Grow	Dom	Minimal Online Shopping Site
<input type="checkbox"/> Data Warehouse Performance Tuning	In Plan	8	AI & Analytics	Required	Run	Sanjay	Data Warehouse Performance Tuning
<input type="checkbox"/> Credit Card Security Improvements	In Plan	9	Secure the Ente...	Required	Grow	Dom	Credit Card Security Improvements
<input type="checkbox"/> BI Analytics	In Plan	10	AI & Analytics	Top Choice	Transform	Greg	
<input type="checkbox"/> Executive Dashboard Visibility	In Plan	11	AI & Analytics	Top Choice	Grow	Greg	Executive Dashboard Visibility
<input type="checkbox"/> System Upgrade Release 15	In Plan	12	Secure the Ente...	Required	Run	Sanjay	System Upgrade Release 15
<input type="checkbox"/> Social Networking Security Upgrade	In Plan	13	BAU	Required	Run	Angela	Social Networking Security Upgrade
<input type="checkbox"/> Order Confirmations	Not In Plan	14	BAU	Top Choice	Grow	Nikki	
<input type="checkbox"/> CRM Contact Center Development	Not In Plan	15	BAU	Top Choice	Grow	Nikki	CRM Contact Center Development
<input type="checkbox"/> CRM Enhancements	Not In Plan	16	BAU	Top Choice	Grow	Nikki	CRM Enhancements
<input type="checkbox"/> Build read-write API for handling Orders	Not In Plan	17	AI & Analytics	Carryover	Transform	Dom	

Tracking Grow - Ideas

- PROS:

- Have all the functionality to grab costs, plan team members
- Easily converted to a project post-AOP
- Can be pulled into a roadmap easily

- CONS:

- Some clients think that clogging up ideas module with what-if investments that may never happen is a bad approach
- Would most likely need a new status to target items as part of the AOP process VS. just ideas that are flowing through the process during the year

Subject *	Work Status	Start Date	Sponsor	Status *	AOP Year	Idea Priority	Planned Cost
<input type="checkbox"/> Lost Device	Requested	Jun 1, 2022	Roberts, Beth	Unapproved	AOP 2023	High	5,500,000
<input type="checkbox"/> Data Review	Authorized	Oct 18, 2021	Roberts, Beth	Unapproved	AOP 2023	Low	2,500,000
<input type="checkbox"/> Tablet roll out	Authorized	Jun 1, 2019	Roberts, Beth	Unapproved	AOP 2022	High	4,500,000
<input type="checkbox"/> Software Update	Authorized	Jul 1, 2019	Roberts, Beth	Unapproved	AOP 2024	High	2,500,000
<input type="checkbox"/> Recycling Device	Requested	Jul 1, 2019	Roberts, Beth	Unapproved	AOP 2022	High	2,500,000
<input type="checkbox"/> Tech center upgrade	Requested	Jun 1, 2019	Roberts, Beth	Unapproved	AOP 2023	High	4,500,000
<input type="checkbox"/> SSO standard	Requested	Jul 1, 2019	Roberts, Beth	Unapproved	AOP 2023	High	3,500,000
<input type="checkbox"/> Regulatory Reporting Opport...	Requested	Mar 1, 2019	Travis, Peter	Unapproved	AOP 2023	Low	113,669
<input type="checkbox"/> Report Writer Enhancements	Requested	Sep 1, 2021	Travis, Peter	Submitted for App...	AOP 2024	Medium	250,000
<input type="checkbox"/> Reduce Number of Develop...	Requested	Jun 2, 2021	Brooks, Barbara	Unapproved	AOP 2022	High	500,000
<input type="checkbox"/> Improve Employee Moral	On Hold	Jun 23, 2021	Bhatt, Rakesh	Submitted for App...	AOP 2024	Medium	35,000
<input type="checkbox"/> Reduce HR Request Cycle Time	Requested	Jun 23, 2021	McCarthy, John	Unapproved	AOP 2024	Medium	250,000
<input type="checkbox"/> Increase On Premise Custom...	Requested	Jun 23, 2021	Loucks, Ana	Unapproved	AOP 2023	Low	575,000
<input type="checkbox"/> Upgrade SAP Financials Project	Requested	Jan 6, 2022	Roberts, Beth	Unapproved	AOP 2023	High	
<input type="checkbox"/> New Approach for Lighting M...	Requested	Jan 12, 2022	Roberts, Beth	Unapproved	AOP 2023	Low	
<input type="checkbox"/> Integration with SAP	Requested	Feb 16, 2022	Benning, Adam	Unapproved	AOP 2023	Low	750,000
<input type="checkbox"/> Upgrade Service Manageme...	Requested	Feb 16, 2022	Pierre, Nicole	Unapproved	AOP 2022	Medium	750,000
<input type="checkbox"/> Integrate with new Financial ...	Requested	Feb 18, 2022	Adams, Benjamin	Unapproved	AOP 2024	Low	750,000
<input type="checkbox"/> Oracle Netsuite Integration	Requested	Apr 4, 2022	Monroe, Tim	Unapproved	AOP 2023	Low	347,160
<input type="checkbox"/> System for revenue generation	Requested	Apr 12, 2022	Sutherland, Joy	Unapproved	AOP 2023	Medium	750,000

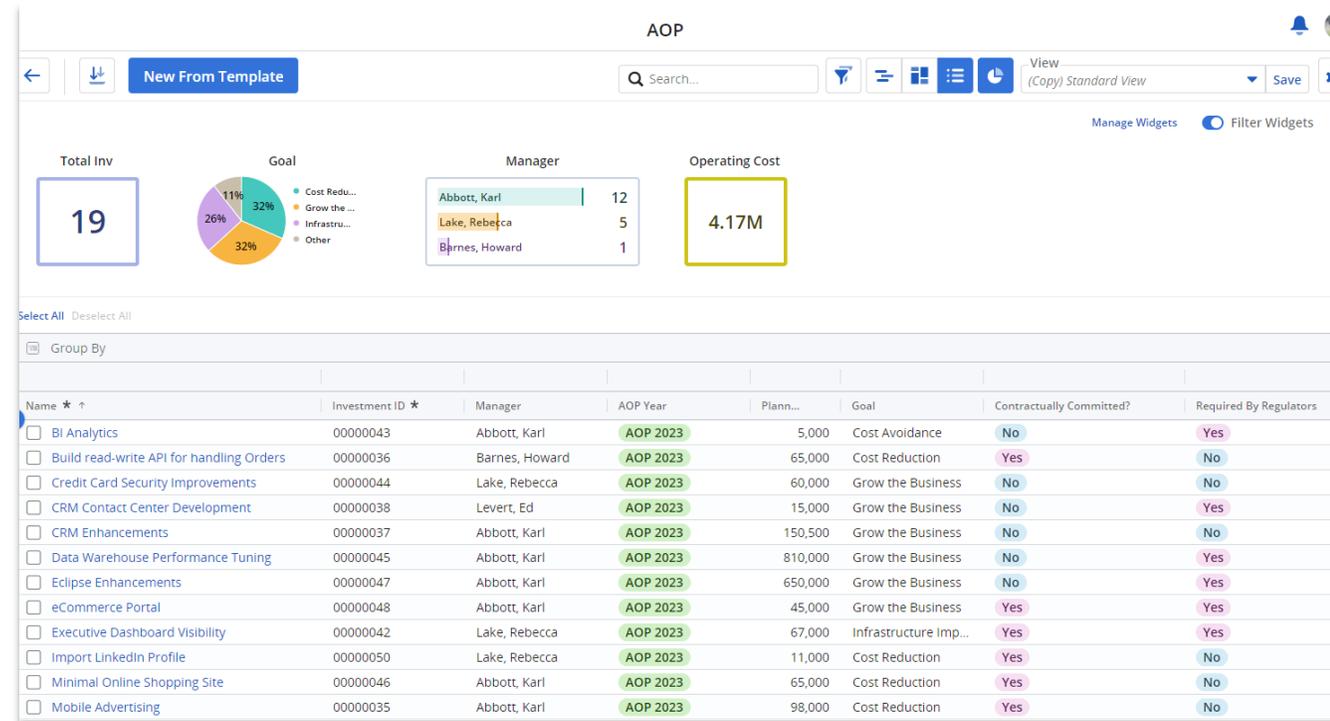
Tracking Grow – Custom Investments

• PROS:

- Have all the functionality to grab costs, plan team members
- More flexibility with field creation, security, etc
- Can be pulled into a roadmap

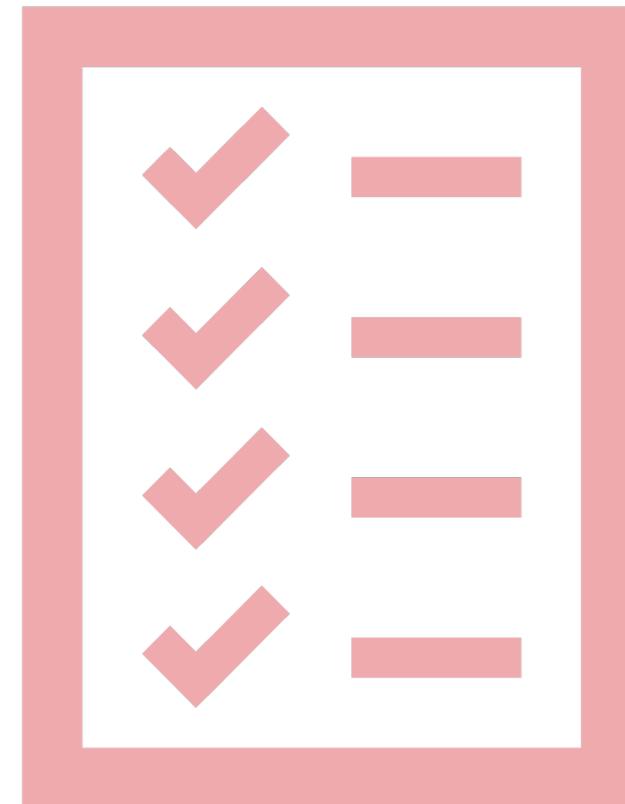
• CONS:

- New area/tile that would require some training
- Would need a custom process if you wanted these to convert into ideas/projects



Open Mic

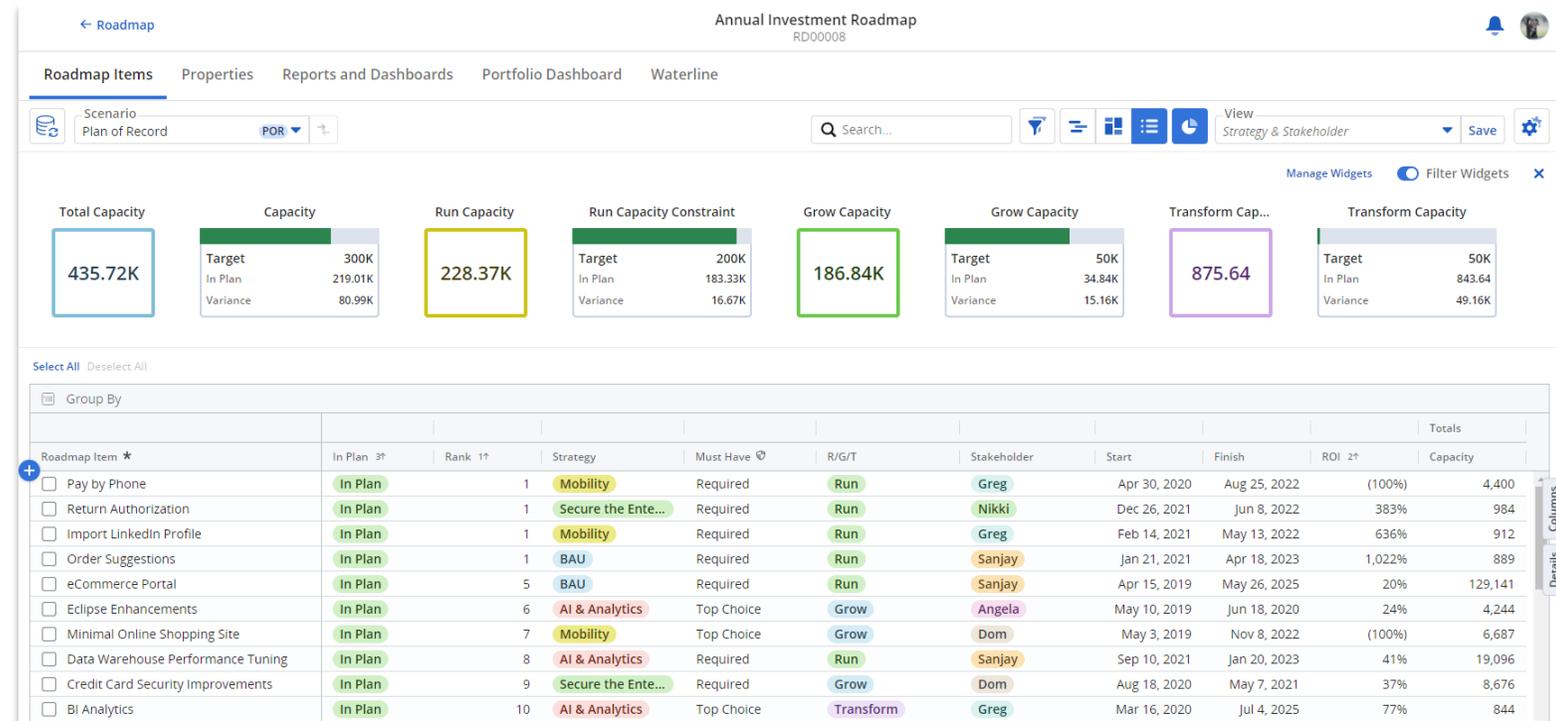
- Where do you typically track AOP Investments?



Resource Planning

Capacity

- Roadmaps will display overall Capacity for an investment by aggregating the demand on the team tab. This can also be entered manually within the roadmap
- Capacity can be swapped between hours and FTE



Capacity - Roles In Roadmaps

- Utilize the Rego add-on from RegoXchange to capture capacity information by role
- Grab the top-most utilized roles and quickly set targets against them and understand when capacity runs out

Roadmap Items Properties

Scenario Planning Scenario 1

Search...

View (Copy) Standard View

Architect Allocation	Business Analyst All...	Developer Allocation	Project Manager Allo...	Benefit	Total Cost
TARGET 13,200	TARGET 4,700	TARGET 17,000	TARGET 15,600	TARGET 30,000,000	TARGET 1,700,000
IN PLAN 13,178	IN PLAN 4,908	IN PLAN 17,226	IN PLAN 15,588	IN PLAN 20,060,000	IN PLAN 1,636,296
VARIANCE 22	VARIANCE (208)	VARIANCE (226)	VARIANCE 12	VARIANCE 9,940,000	VARIANCE 63,704

Select All Deselect All

Group By

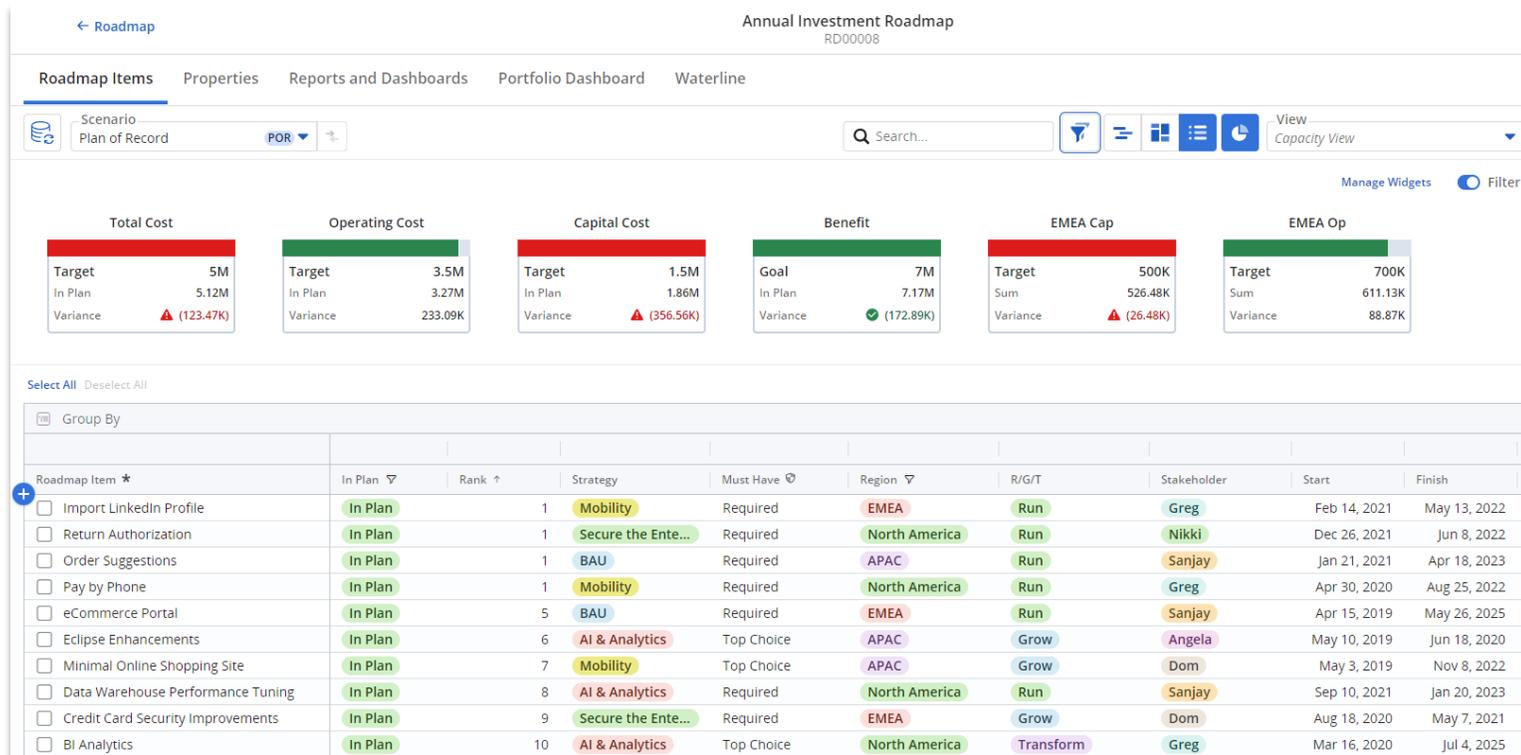
In Plan	Rank	*Roadmap Item	Must Have	Sponsor	Start	Finish	Capacity	Total Cost	Capital Cost
<input type="checkbox"/> In Plan	1	CRM Enhancements	Carryover	Roberts, Beth	Apr 22, 2019	Jun 2, 2023	5	97,015	0
<input type="checkbox"/> In Plan	1	eCommerce Portal	Required	Quinn, Randy	Apr 15, 2019	Jul 18, 2023	16	31,156	0
<input type="checkbox"/> In Plan	2	Meeting Reservati...	Top Choice	Roberts, Beth	Apr 13, 2022	Jul 28, 2023	4	0	0
<input type="checkbox"/> In Plan	3	Brightlight - Project	Required	Butler, Cheryl	Jan 12, 2022	Apr 4, 2023	10	261,057	60,862
<input type="checkbox"/> In Plan	4	Adventurer - New ...	Top Choice	Roberts, Beth	Jan 17, 2022	Jan 20, 2023	16	56,474	0
<input type="checkbox"/> Not In Plan	12	A Finance Process ...	Carryover	Schmidt, Rae	Apr 15, 2020	Jul 29, 2024	3	162,685	0
<input type="checkbox"/> In Plan	5	Online Banking V2.4	Carryover	Chasen, Nicole	Dec 21, 2020	Mar 7, 2022	1	163,392	0
<input type="checkbox"/> In Plan	6	ERP Integration	Top Choice	Quincy, Randy	Jan 10, 2022	May 17, 2023	4	80,591	0
<input type="checkbox"/> In Plan	7	Global Application ...	Top Choice	Quincy, Randy	Mar 16, 2020	Apr 4, 2023	4	13,419	0

[RegoXchange – Roles in the Roadmap](#)

Financial Tracking

Financials

- Utilize simple capital and operating information entered by investment in total or over a period
- Quickly import existing investments and their financial information
- Utilize widgets and view to summarize and group views

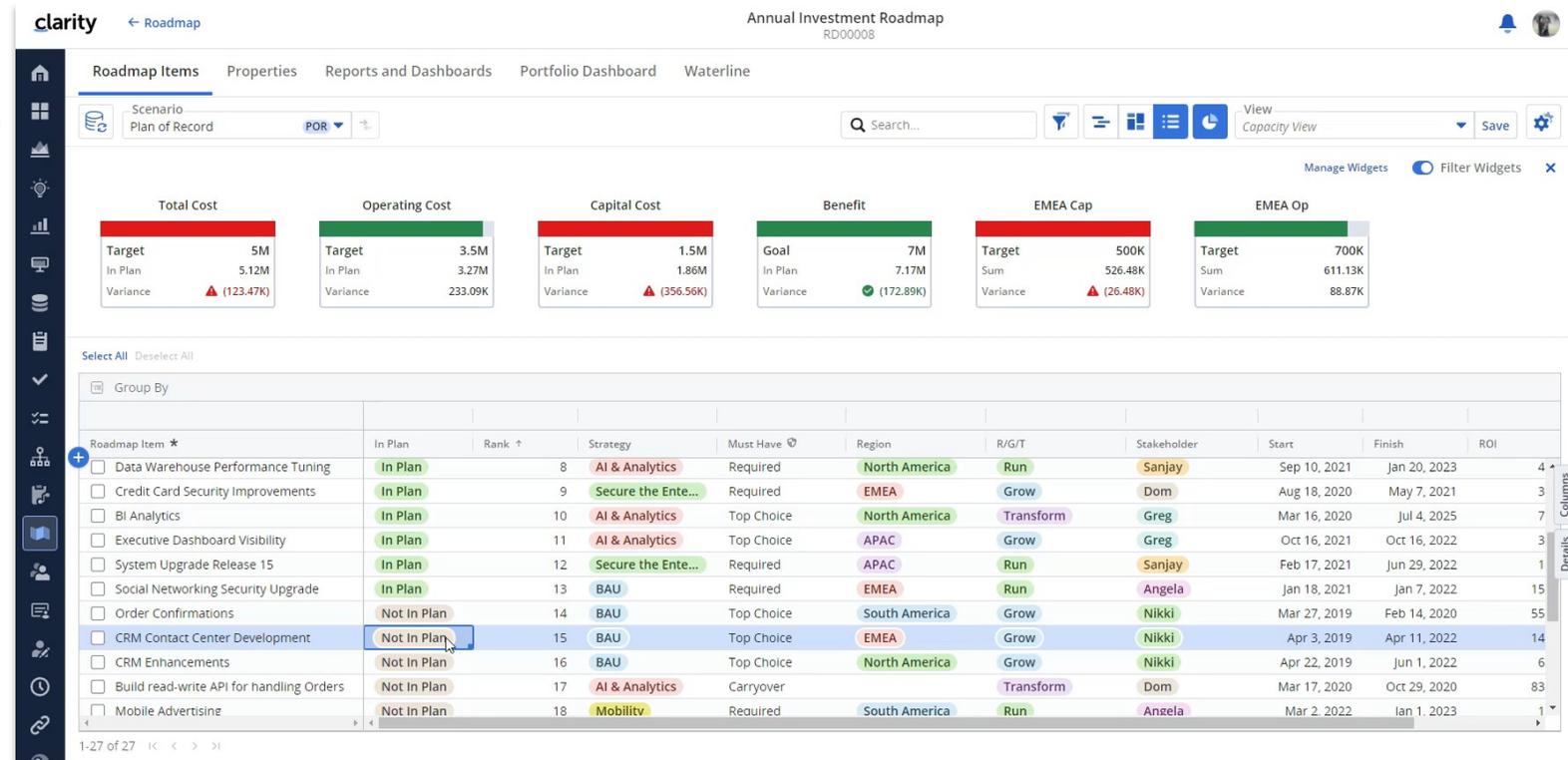


Prioritization



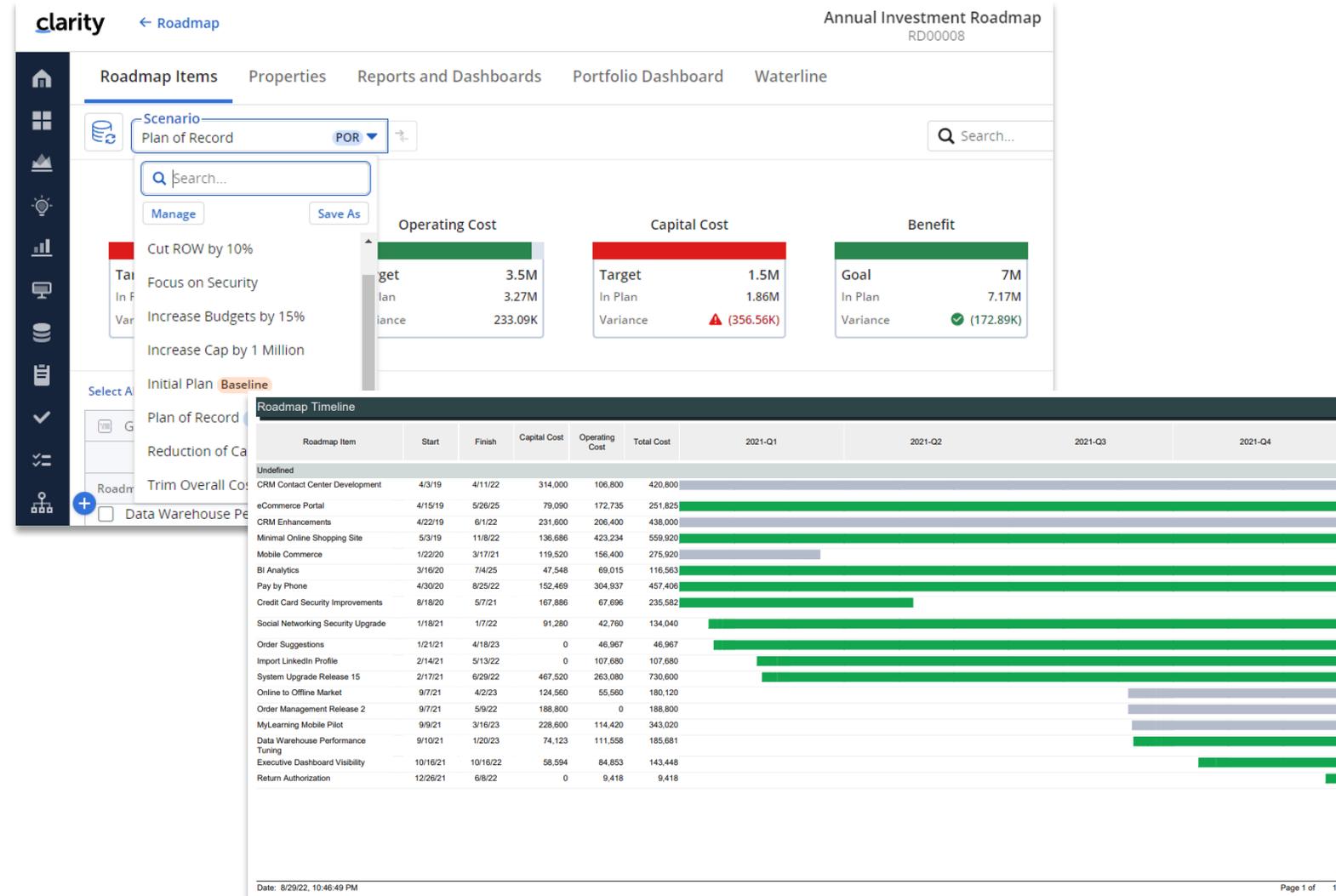
Prioritization – Roadmap Features

- Utilize the *In Plan* field within Roadmaps to calculate values against your targets
- Create filtered widgets to quickly segment data by Region, Strategy, etc
- Use multi-sort to quickly arrange investments and prioritize
- Capture prioritization type questions (Required by Regulators, Patient Safety, etc)



Prioritization – Roadmap Features

- Create several scenarios to adjust targets, execute what-if planning or include/exclude investments
- Use reports to quickly grab metrics, schedule and In Plan information for sharing



Questions?



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- Click on **Report PDU's**
- Click on **Course or Training**
- Class Provider = **Rego Consulting**
- Class Name = **regoUniversity**
- Course **Description**
- Date Started = **Today's Date**
- Date Completed = **Today's Date**
- Hours Completed = **1 PDU per hour of class time**
- Training classes = **Technical**
- Click on **I agree** and **Submit**



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