



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

- 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



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

Resource Planning

View capacity, set targets, and view demand



Prioritize investments by including in plan and setting targets

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Let Rego be your guide.



• How are you utilizing Clarity for Annual Planning?



Let Rego be your guide.

Investment Tracking



- 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

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	Roadmap Item *	In Plan 3↑	Rank 1↑		Strategy	Must Ø	R/G/T	Stakeholder	Start	Finish	ROI 21	Total Cost	Benefit
-	Pay by Phone	In Plan		1	Mobility	Required	Run	Greg	Apr 30, 2020	Aug 25, 2022	(100%)	900,000	C
	Return Authorization	In Plan		1	Secure the Ente	Required	Run	Nikki	Dec 26, 2021	Jun 8, 2022	383%	258,720	1,250,000
	Import LinkedIn Profile	In Plan		1	Mobility	Required	Run	Greg	Feb 14, 2021	May 13, 2022	636%	169,920	1,250,000
	Order Suggestions	In Plan		1	BAU	Required	Run	Sanjay	Jan 21, 2021	Apr 18, 2023	1,022%	96,657	1,084,963
/	eCommerce Portal	In Plan		5	BAU	Required	Run	Sanjay	Apr 15, 2019	May 26, 2025	20%	398,656	483,415
	Eclipse Enhancements	In Plan		6	AI & Analytics	Top Choice	Grow	Angela	May 10, 2019	Jun 18, 2020	24%	233,876	290,000
Ξ	Minimal Online Shopping	In Plan		7	Mobility	Top Choice	Grow	Dom	May 3, 2019	Nov 8, 2022	(100%)	1,080,269	(
2	Data Warehouse Perform	In Plan		8	AI & Analytics	Required	Run	Sanjay	Sep 10, 2021	Jan 20, 2023	41%	289,205	415,286
ŏŏ	Credit Card Security Impro	In Plan		9	Secure the Ente	Required	Grow	Dom	Aug 18, 2020	May 7, 2021	37%	435,000	612,000
r -	BI Analytics	In Plan		10	AI & Analytics	Top Choice	Transform	Greg	Mar 16, 2020	Jul 4, 2025	77%	132,128	237,222
	Executive Dashboard Visib	In Plan		11	AI & Analytics	Top Choice	Grow	Greg	Oct 16, 2021	Oct 16, 2022	30%	264,400	350,000
	System Upgrade Release 15	In Plan		12	Secure the Ente	Required	Run	Sanjay	Feb 17, 2021	Jun 29, 2022	16%	730,600	850,000
۰.	Social Networking Security	In Plan		13	BAU	Required	Run	Angela	Jan 18, 2021	Jan 7, 2022	158%	134,040	350,000
_	Order Confirmations	Not In Plan		14	BAU	Top Choice	Grow	Nikki	Mar 27, 2019	Feb 14, 2020	550%	192,400	1,250,000
-4	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
	CRM Enhancements	Not In Plan		16	BAU	Top Choice	Grow	Nikki	Apr 22, 2019	Jun 1, 2022	68%	438,000	750,000
	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
9	Mobile Advertising	Not In Plan		18	Mobility	Required	Run	Angela	Mar 2, 2022	Jan 1, 2023	1196	263,750	299,262
ລ	Online to Offline Market	Not In Plan		19	BAU	Required	Run	Sanjay	Sep 7, 2021	Apr 2, 2023	230%	180,120	600.000

- 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)

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Project Name *	P \star 🕆	Launc 🗸	Manager	Work Status	Project Type	Sponsor	Start *	Finish ★	Planned C	MKT Details 1	
New Product Development - Stage Example	PD1020	Jan 1, 2023	Miles, Paul	Requested	Major Project	Reston, Bobbie	Feb 19, 20	Oct 6, 2025	596,960		
Reduce Application Process Cycle Time	PRB1001	Jun 1, 2023	Thomas, Brian	Active	Transform	Turner, Beth	Sep 13, 20	May 1, 2022	577,000		
Leverage Existing IC for Training	PRB1004	Aug 5, 2023	Brooks, Emma	Requested	Transform	Turner, Beth	Sep 13, 20	Oct 4, 2022	2,800		
Improve Requirements Management	PRB1008	Dec 5, 2023	Beck, Jackson	Requested	Transform	Turner, Beth	Sep 9, 2021	Feb 10, 2023	1,157,880		
Streamline Onboarding Process	PRB1010	May 4, 2023	Thomas, Brian	Requested	Transform	Turner, Beth	Jul 1, 2019	Oct 12, 2022	367,735		
New Branding Initiative - NA Region	PRB1012	Aug 9, 2023	Alvarez, Corine	Requested	Transform	Turner, Beth	Sep 8, 2021	Nov 2, 2022	779,725		
New Branding Initiative - AsiaPac Region	PRB1021	Jun 20, 2023	Core, Elizabeth	Requested	Transform	Turner, Beth	Sep 8, 2021	Dec 1, 2022	986,881		
	DD1200	Apr 23, 2022	Administrator Clarity	Requested	Major Project	Roberts Beth	Feb 6, 2022	Aug 26, 20	0		

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				Annua	I Investment Ro RD00008	admap		ŧ
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Roadmap Item ★	In Plan 3↑	Rank 1↑		Strategy	Must 🕅	R/G/T	Stakeholder	Linked To
Pay by Phone	In Plan		1	Mobility	Required	Run	Greg	Level 1 Training
Return Authorization	In Plan		1	Secure the Ente	Required	Run	Nikki	
Import LinkedIn Profile	In Plan		1	Mobility	Required	Run	Greg	
Order Suggestions	In Plan		1	BAU	Required	Run	Sanjay	
eCommerce Portal	In Plan		5	BAU	Required	Run	Sanjay	eCommerce Portal
Eclipse Enhancements	In Plan		6	AI & Analytics	Top Choice	Grow	Angela	Eclipse Enhancements
Minimal Online Shopping Site	In Plan		7	Mobility	Top Choice	Grow	Dom	Minimal Online Shopping Site
Data Warehouse Performance Tuning	In Plan		8	AI & Analytics	Required	Run	Sanjay	Data Warehouse Performance Tuning
Credit Card Security Improvements	In Plan		9	Secure the Ente	Required	Grow	Dom	Credit Card Security Improvements
BI Analytics	In Plan		10	AI & Analytics	Top Choice	Transform	Greg	
Executive Dashboard Visibility	In Plan		11	AI & Analytics	Top Choice	Grow	Greg	Executive Dashboard Visibility
System Upgrade Release 15	In Plan		12	Secure the Ente	Required	Run	Sanjay	System Upgrade Release 15
Social Networking Security Upgrade	In Plan		13	BAU	Required	Run	Angela	Social Networking Security Upgrade
Order Confirmations	Not In Plan		14	BAU	Top Choice	Grow	Nikki	
CRM Contact Center Development	Not In Plan		15	BAU	Top Choice	Grow	Nikki	CRM Contact Center Development
CRM Enhancements	Not In Plan		16	BAU	Top Choice	Grow	Nikki	CRM Enhancements
Build read-write API for bandling Orders	Not In Plan		17	AL& Analytics	Carpyover	Transform	Dom	

Let Rego be your guide.

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

Image: New From Template		Q Sea	arch	7 - II :	E C Deman	d State	▼ Save
Select All Deselect All							
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Subject *	Work Status	Start Date	Sponsor	Status *	AOP Year	Idea Priority	Planned Cost
Lost Device	Requested	Jun 1, 2022	Roberts, Beth	Unapproved	AOP 2023	High	5,500,000
Data Review	Authorized	Oct 18, 2021	Roberts, Beth	Unapproved	AOP 2023	Low	2,500,000
Tablet roll out	Authorized	Jun 1, 2019	Roberts, Beth	Unapproved	AOP 2022	High	4,500,000
Software Update	Authorized	Jul 1, 2019	Roberts, Beth	Unapproved	AOP 2024	High	2,500,000
Recycling Device	Requested	Jul 1, 2019	Roberts, Beth	Unapproved	AOP 2022	High	2,500,000
Tech center upgrade	Requested	Jun 1, 2019	Roberts, Beth	Unapproved	AOP 2023	High	4,500,000
SSO standard	Requested	Jul 1, 2019	Roberts, Beth	Unapproved	AOP 2023	High	3,500,000
Regulatory Reporting Opport	Requested	Mar 1, 2019	Travis, Peter	Unapproved	AOP 2023	Low	113,669
Report Writer Enhancements	Requested	Sep 1, 2021	Travis, Peter	Submitted for App	AOP 2024	Medium	250,000
Reduce Number of Develop	Requested	Jun 2, 2021	Brooks, Barbara	Unapproved	AOP 2022	High	500,000
Improve Employee Moral	On Hold	Jun 23, 2021	Bhatt, Rakesh	Submitted for App	AOP 2024	Medium	35,000
Reduce HR Request Cycle Time	Requested	Jun 23, 2021	McCarthy, John	Unapproved	AOP 2024	Medium	250,000
Increase On Premise Custom	Requested	Jun 23, 2021	Loucks, Ana	Unapproved	AOP 2023	Low	575,000
Upgrade SAP Financials Project	Requested	Jan 6, 2022	Roberts, Beth	Unapproved	AOP 2023	High	
New Approach for Lighting M	Requested	Jan 12, 2022	Roberts, Beth	Unapproved	AOP 2023	Low	
Integration with SAP	Requested	Feb 16, 2022	Benning, Adam	Unapproved	AOP 2023	Low	750,000
Upgrade Service Manageme	Requested	Feb 16, 2022	Pierre, Nicole	Unapproved	AOP 2022	Medium	750,000
Integrate with new Financial	Requested	Feb 18, 2022	Adams, Benjamin	Unapproved	AOP 2024	Low	750,000
Oracle Netsuite Integration	Requested	Apr 4, 2022	Monroe, Tim	Unapproved	AOP 2023	Low	347,160
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

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ect All Deselect All							
lame ★ ↑	Investment ID *	Manager	AOP Year	Plann	Goal	Contractually Committed?	Required By Regulat
BI Analytics	00000043	Abbott, Karl	AOP 2023	5,000	Cost Avoidance	No	Yes
Build read-write API for handling Orders	0000036	Barnes, Howard	AOP 2023	65,000	Cost Reduction	Yes	No
Credit Card Security Improvements	00000044	Lake, Rebecca	AOP 2023	60,000	Grow the Business	No	No
CRM Contact Center Development	0000038	Levert, Ed	AOP 2023	15,000	Grow the Business	No	Yes
CRM Enhancements	0000037	Abbott, Karl	AOP 2023	150,500	Grow the Business	No	No
Data Warehouse Performance Tuning	00000045	Abbott, Karl	AOP 2023	810,000	Grow the Business	No	Yes
Eclipse Enhancements	00000047	Abbott, Karl	AOP 2023	650,000	Grow the Business	No	Yes
eCommerce Portal	00000048	Abbott, Karl	AOP 2023	45,000	Grow the Business	Yes	Yes
Executive Dashboard Visibility	00000042	Lake, Rebecca	AOP 2023	67,000	Infrastructure Imp	Yes	Yes
Import LinkedIn Profile	0000050	Lake, Rebecca	AOP 2023	11,000	Cost Reduction	Yes	No
Minimal Online Shopping Site	00000046	Abbott, Karl	AOP 2023	65,000	Cost Reduction	Yes	No



• Where do you typically track AOP Investments?



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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

← Roadmap					Annual In	RD00008					÷	(
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Total Capacity	Capac	ity	Run Capacity	Run Capacity C	onstraint	Grow Capacity	Grow Capa	city Tra	ansform Cap	Transform	Capacity	
435.72K	Target In Plan Variance	300K 219.01K 80.99K	228.37K	Target In Plan Variance	200K 183.33K 16.67K	186.84K	Target In Plan Variance	50K 34.84K 15.16K	875.64	Target In Plan Variance	50K 843.64 49.16K	
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dman Itom #		In Plan 21	Pank 10	Stratom	Must Have 🕅	P/G/T	Stakobaldar	Ctout	Finish	POL 20	Totals	
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Paturn Authorization		In Plan	1	Secure the Ente	Required	Run	Nikki	Apr 30, 202	0 Aug 25, 2022	(100%)	4,400	, ,
Import LinkedIn Profile		In Plan	1	Mobility	Required	Run	Greg	Eeb 14 202	1 Jun 0, 2022	636%	912	2
Order Suggestions		In Plan	1	BAU	Required	Run	Sanjay	lan 21, 202	1 Apr 18, 2023	1,022%	889	9
eCommerce Portal		In Plan	5	BAU	Required	Run	Sanjay	Apr 15, 201	9 May 26, 2025	20%	129,141	1
Eclipse Enhancements		In Plan	6	AI & Analytics	Top Choice	Grow	Angela	May 10, 201	9 Jun 18, 2020	24%	4,244	4
Minimal Online Shoppin	ng Site	In Plan	7	Mobility	Top Choice	Grow	Dom	May 3, 201	9 Nov 8, 2022	(100%)	6,687	7
Data Warehouse Perform	mance Tuning	In Plan	8	AI & Analytics	Required	Run	Sanjay	Sep 10, 202	1 Jan 20, 2023	41%	19,096	6
Credit Card Security Imp	provements	In Plan	9	Secure the Ente	Required	Grow	Dom	Aug 18, 202	0 May 7, 2021	37%	8,676	5
BLAnalytics		In Plan	10	AI & Analytics	Top Choice	Transform	Greg	Mar 16, 202	0 Jul 4, 2025	77%	844	4

- 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

Roa	dmap Item	s Prope	erties										
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In Pla	in	Rank	*	Roadmap Item	Must Have	Spon	sor	Start	Finish	Capacity	1	Total Cost	Capital Cost
	In Plan		1 (CRM Enhancements	Carryover	Robe	erts, Beth	Apr 22, 201	9 Jun 2, 2	2023	5	97,015	0
	In Plan		1 e	Commerce Portal	Required	Quir	nn, Randy	Apr 15, 201	9 Jul 18, 2	2023	16	31,156	0
	In Plan		2 1	Meeting Reservati	Top Choice	Rob	erts, Beth	Apr 13, 202	2 Jul 28, 2	2023	4	0	0
	In Plan		3 8	Brightlight - Project	Required	Butl	er, Cheryl	Jan 12, 202	2 Apr 4, 2	2023	10	261,057	60,862
	In Plan		4 /	Adventurer - New	Top Choice	Robe	erts, Beth	Jan 17, 202	2 Jan 20, 2	2023	16	56,474	0
	Not In Plan		12 A	A Finance Process	Carryover	Schr	nidt, Rae	Apr 15, 202	0 Jul 29, 2	2024	3	162,685	0
	In Plan		5 (Online Banking V2.4	Carryover	Chas	sen, Nicole	Dec 21, 202	0 Mar 7, 2	2022	1	163,392	0
	In Plan		6 E	RP Integration	Top Choice	Quir	ncy, Randy	Jan 10, 202	2 May 17, 2	2023	4	80,591	0
	In Plan		7 (Global Application	Top Choice	Quir	ncy, Randy	Mar 16, 202	0 Apr 4, 2	2023	4	13,419	0

<u>RegoXchange – Roles in the Roadmap</u>

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

← Roadmap						Annual Inves	t ment Roadmap				
Roadmap Items Proper	ties Report	s and Dashbo	ards	Portfolio	Dashboard Wate	erline					
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Total Cost	C	perating Cost			Capital Cost	B	enefit	EMEA Cap		EMEA Op	
Target 5M In Plan 5.12M Variance ▲ (123.47K)	Target In Plan Variance	23	3.5M 3.27M 3.09K	Target In Plan Varianc	1.5M 1.86M a (356.56K)	Goal In Plan Variance	7M 7.17M ♥ (172.89K)	Target Sum 5 Variance ▲ (2	500K T 26.48K S 26.48K) V	Target 700K um 611.13K Variance 88.87K	
Select All Deselect All Group By											
Roadmap Item *		In Plan 🔽	Rank	↑	Strategy	Must Have 🕏	Region ⊽	R/G/T	Stakeholder	Start	Finish
Import LinkedIn Profile		In Plan		1	Mobility	Required	EMEA	Run	Greg	Feb 14, 2021	May 13, 2022
Return Authorization		In Plan		1	Secure the Ente	Required	North America	Run	Nikki	Dec 26, 2021	Jun 8, 2022
Order Suggestions		In Plan		1	BAU	Required	APAC	Run	Sanjay	Jan 21, 2021	Apr 18, 2023
Pay by Phone		In Plan		1	Mobility	Required	North America	Run	Greg	Apr 30, 2020	Aug 25, 2022
eCommerce Portal		In Plan		5	BAU	Required	EMEA	Run	Sanjay	Apr 15, 2019	May 26, 2025
Eclipse Enhancements		In Plan		6	AI & Analytics	Top Choice	APAC	Grow	Angela	May 10, 2019	Jun 18, 2020
Minimal Online Shopping Si	te	In Plan		7	Mobility	Top Choice	APAC	Grow	Dom	May 3, 2019	Nov 8, 2022
Data Warehouse Performar	nce Tuning	In Plan		8	AI & Analytics	Required	North America	Run	Sanjay	Sep 10, 2021	Jan 20, 2023
Credit Card Security Improv	ements	In Plan		9	Secure the Ente	Required	EMEA	Grow	Dom	Aug 18, 2020	May 7, 2021
BI Analytics		In Plan		10	AI & Analytics	Top Choice	North America	Transform	Greg	Mar 16, 2020	Jul 4, 2025

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)

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⊒ ₽	Target 5M In Plan 5.12M Variance ▲ (123.47K)	: 3.5M Targ 3.27M In Pla ce 233.09K Varia	et 1.5M in 1.86M nce 🛦 (356.56K)	Goal In Plan Variance	7M 7.17M ✔ (172.89K)	Target 500 Sum 526.4 Variance ▲ (26.48)	OK Target BK Sum (K) Variance	700K 611.13K 88.87K			
	Select All Deselect All										
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~=	Roadmap Item *	In Plan Rank ↑	Strategy	Must Have 🕏	Region	R/G/T	Stakeholder	Start	Finish	ROI	
ᅲ	Data Warehouse Performance Tuning	In Plan 8	AI & Analytics	Required	North America	Run	Sanjay	Sep 10, 2021	Jan 20, 2023		4 - 10
2	Credit Card Security Improvements	In Plan 9	Secure the Ente	Required	EMEA	Grow	Dom	Aug 18, 2020	May 7, 2021		3 5
	BI Analytics	In Plan 10	AI & Analytics	Top Choice	North America	Transform	Greg	Mar 16, 2020	Jul 4, 2025		7 0
	Executive Dashboard Visibility	In Plan 11	AI & Analytics	Top Choice	APAC	Grow	Greg	Oct 16, 2021	Oct 16, 2022		3
2	System Upgrade Release 15	In Plan 12	Secure the Ente	Required	APAC	Run	Sanjay	Feb 17, 2021	Jun 29, 2022		1 Det
	Social Networking Security Upgrade	In Plan 13	BAU	Required	EMEA	Run	Angela	Jan 18, 2021	Jan 7, 2022		15
Ę	Order Confirmations	Not In Plan 14	BAU	Top Choice	South America	Grow	Nikki	Mar 27, 2019	Feb 14, 2020		55
2,	CRM Contact Center Development	Not In Plan 15	BAU	Top Choice	EMEA	Grow	Nikki	Apr 3, 2019	Apr 11, 2022		14
-/-	CRM Enhancements	Not In Plan 16	BAU	Top Choice	North America	Grow	Nikki	Apr 22, 2019	Jun 1, 2022		6
\odot	Build read-write API for handling Orders	Not In Plan 17	AI & Analytics	Carryover		Transform	Dom	Mar 17, 2020	Oct 29, 2020		83
A	← Mobile Advertising →	Not In Plan 18	Mobility	Required	South America	Run	Angela	Mar 2. 2022	lan 1. 2023		1*
~	1-27 of 27 I< < > >1										

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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Instructions for PMI credits

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- Click on Visit CCR's button under the Report PDU's ٠
- 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 ٠
- Hours Completed = 1 PDU per hour of class time
- Training classes = **Technical** ٠
- Click on I agree and Submit



Let us know how we can improve! Don't forget to fill out the class survey.

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