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SAN DIEGO • 2023

Best Practice Use of Clarity for Roadmap Management

Your Guides:

Ross Hensel and Matthew Palicki

Agenda

- Introduction
- Value Proposition for Roadmaps
- BEFORE the Roadmap – Considerations
- Creating a Roadmap – Do's and Don'ts
- The latest “bells and whistles”
- Roadmap Demo
- A sharing of ideas

Value Proposition for Roadmaps (WIIFM)

- Long-term Strategic Planning (Solution Roadmaps)
- Complex Program Management
- Constraint-based Prioritization
- Visual depiction of sequencing, dependencies
- Visual depiction of Demand vs Capacity (financial & people)
- “What-If” Scenario-based planning
- SAFe LPM / Lean Budgeting
- Product Management / PI Planning (Broadcom Software, Rego DEA Program)

Informal Poll: Who has explored Roadmap capabilities in Clarity?
Who is using Roadmaps in Production today?

Before Getting Started With Roadmaps

While you may create as many Roadmaps as you want, you aren't restricted to a number –

- This means to thoughtfully plan your roadmaps to match investments (i.e. is this a strategic roadmap or a product one?)
- What metrics and constraints will be used? (costs, benefits, points, resources?)
- What level(s) of granularity will you include?
- What time period will your Roadmaps entail, and what cadence of review?
- What drives scenarios and options? (people, timing, planning cycles?)
- How will this information be used?

- Open Discussion -

Do's and Don'ts of the Roadmap

Don'ts

- Don't try to make one huge roadmap that includes everything in your FY plan – as it can become unruly
- Get overwhelmed or concerned if you don't have all of the metrics figured out
- Hand-out edit access like candy. Since users will be able to sync, modify scenarios and update data, it's best to maintain a limited set of edit users for a roadmap.

Do's

- Instead, break out the roadmaps at their corresponding levels
- Give it a try and experiment! The beauty of the roadmap is it requires far less data capture than a portfolio for good decision planning
- Leverage Views! This will help users of the roadmap narrow down the information to a specific set of investments, widgets or grouping.

Open Share – Experiences of what has and hasn't worked?

Some of the New Bells and Whistles to Leverage:

For any experienced roadmap warriors, have you leveraged the latest enhancements?

- Canvas now available for Roadmaps
- Swimlane Groups and Collapse/Expand
- Events – Both roadmap and investment level
- Board view updated to 2.0
- Agreements – Exposed in the roadmap
- Widgets – based on your criteria?
- ★• Widgets – Rego's Resource/Roles in the Roadmap?
- Schedule Sync – Always come back to an updated Roadmap
- ★• Order from Sort – Leverage sorted items to rank investments
- ★• Copy Roadmap / Share Roadmap
- PowerBI Reporting – New PowerBI Reports from Rego

- Open Discussion -

Live Demo of a Roadmap

Let Rego be your guide.

Discussion Points: What has worked with you?

Additional Resources

Some Related RegoU Sessions

[“Drive Adoption with Modern UX Features” – Tuesday 11:20am, Commodore A](#)

[“Adoption Roundtable” – Tuesday 1:40pm, Constellation B](#)

[“Latest Clarity Release Overview” – Tuesday 3:50pm, Constellation B](#)

Product Articles / E-Books / Webinars

<https://www.broadcom.com/products/software/value-stream-management/clarity>

<https://academy.broadcom.com/valueops/clarity>

<https://info.regoconsulting.com/clarity-roadmaps-fastest-route-to-success>

<https://info.regoconsulting.com/portfolio-v-roadmaps-white-paper-2020>

<https://info.regoconsulting.com/portfolio-and-roadmaps-clarity-october-2020>

Books

[Accelerate: Building Strategic Agility for a Faster-Moving World, John P. Kotter](#)

[Out of the Crisis, W. Edwards Deming](#)

[Value Stream Mapping: How to Visualize Work and Align Leadership for Organizational Transformation, Martin/Osterling](#)

[The 4 Disciplines of Execution, McChesney/Covey/Huling](#)

SAFe

<https://scaledagileframework.com/lean-portfolio-management/>

<https://scaledagileframework.com/portfolio-flow/>

<https://scaledagileframework.com/roadmap/>

<https://info.regoconsulting.com/safe-expand-to-the-value-stream-may-2022>

Personal Growth

[From Strength to Strength, Arthur C. Brooks](#)

[The Seven Spiritual Laws of Success, Deepak Chopra](#)

[The Last Arrow, Erwin McManus](#)

[Mindset: The New Psychology of Success, Carol S. Dweck, Ph.D.](#)

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Questions?



Surveys

Please take a few moments to fill out the class survey.
Your feedback is extremely important for future events.



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