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SAN DIEGO • 2023

# Roadmaps and Hierarchies

**Your Guides:**

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# Part I: Introduction

# Introductions

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



# Agenda

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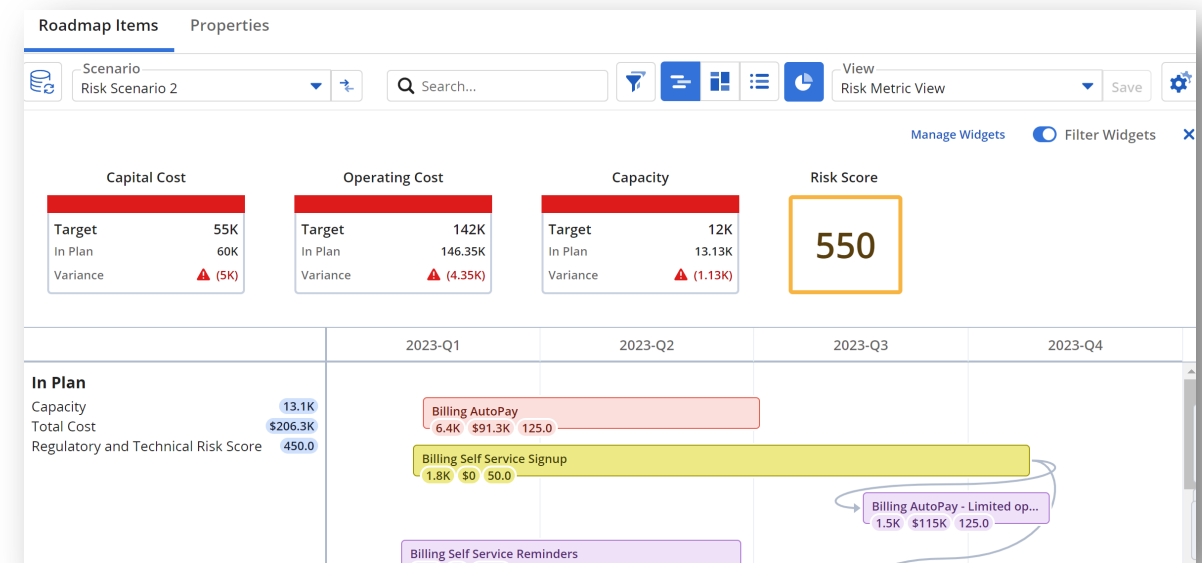
- Introduction to Roadmaps
- Introduction to Hierarchies
- Roadmaps and Hierarchies – Better Together
- Demo
- Best Practices Discussion

# Introduction to Roadmaps

# Introduction to Roadmaps

Roadmaps allow organizations to maximize the value of initiatives and minimize risks by prioritizing and selecting investments that most closely align with corporate goals and realize estimated cost and ROI

- Import and sync Projects, Ideas, Custom Investments, or add placeholders directly in the Roadmap
- Visualize timelines, metrics, and evaluate plans against constraints and targets
- Manipulate Roadmap data to create one or more planning scenarios without impacting underlying data



# Roadmap Example: Strategic Alignment

- Vision
- Prioritization
- Structure

Let's start with the premise that we have a current state and a vision of where we want to be strategically.

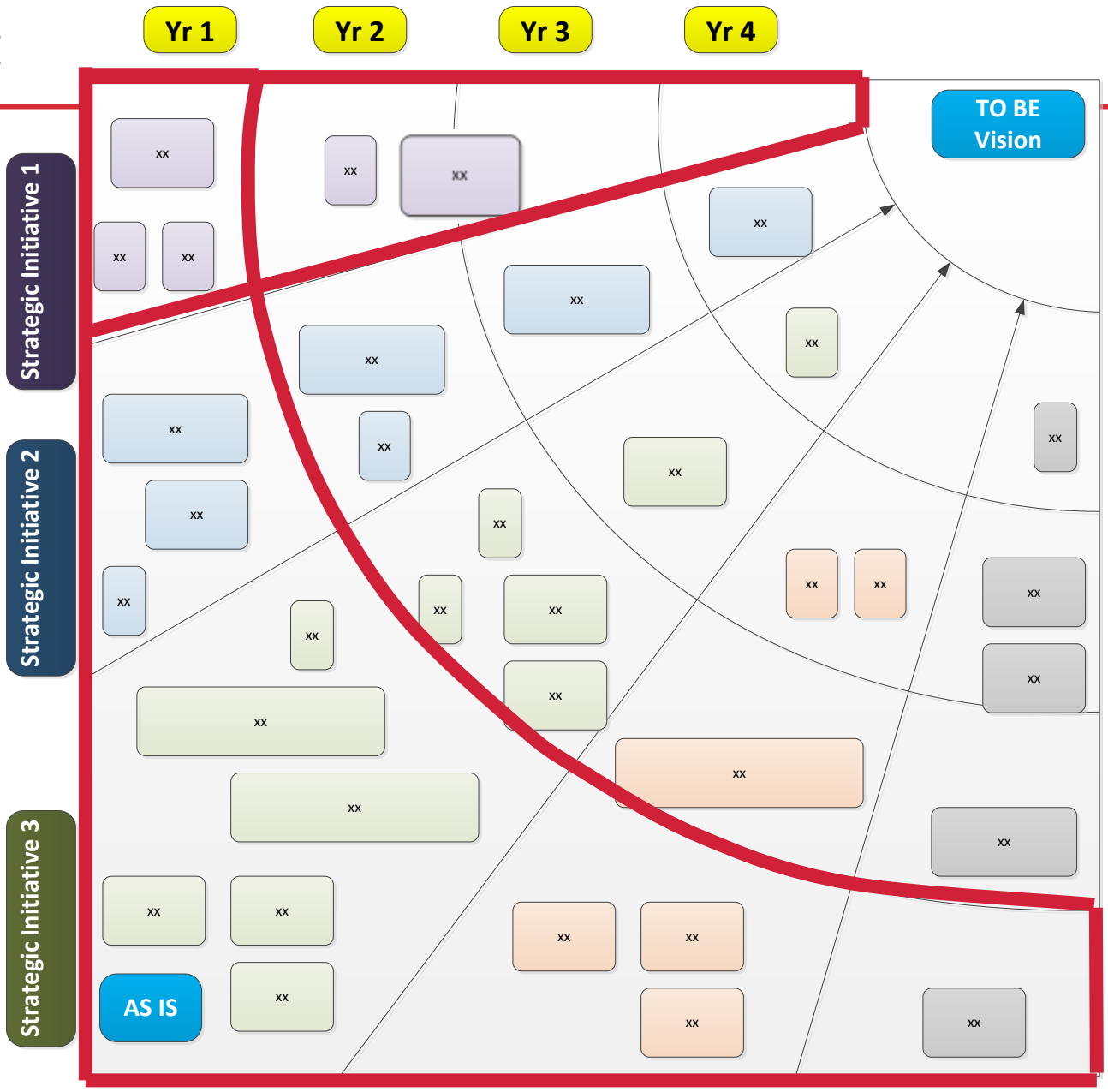
And we know that it is going to take us 4 years to achieve our "to be" vision.

Our investments can then be aligned to the strategic initiatives

We have the ability to organize our Roadmap by strategic initiative across the 4 year horizon (we could look at just one year at a time as well)

But we can also look at our investments annually. How we setup our Roadmaps is driven by how we want to see and report on the data.

- Key Takeaways**
- ✓ It is important to plan how you want to group your investments
  - ✓ If you are tracking costs, who is holding the wallet? Are your Roadmaps organized to reflect this?
  - ✓ Reporting on investments within a Roadmap is driven by how the Roadmap is organized
  - ✓ Consider where the money and/or resources are coming from when grouping investments within a Roadmap.



# Why use Roadmaps?

## Investment Planning and Visualization

- Create high-level plans for a portfolio of Investments
- Create and compare scenarios to determine the right mix and timing to meet targets and constraints
- Create and modify investments directly within the plan\*\*
- Use Roadmaps to communicate with stakeholders and adjust plans
- Use Roadmaps for long-range planning, or to assess the impacts of proposed changes
- Use Roadmaps to help draw the funding or capacity waterline for AOP
- Use Roadmaps to assist during PI planning
- Use Roadmaps to build out Product Roadmaps (new features, sunseting modules, etc)
- Ongoing – sync the Roadmap with underlying investments to check for date changes during execution



# Open Mic

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- For those that are utilizing Roadmaps:
  - How are you structuring the Investments that are included? Product, Strategic, or BU focused?
- What type of Planning Periods are you defining?
  - Annual Planning? Long term Roadmaps?

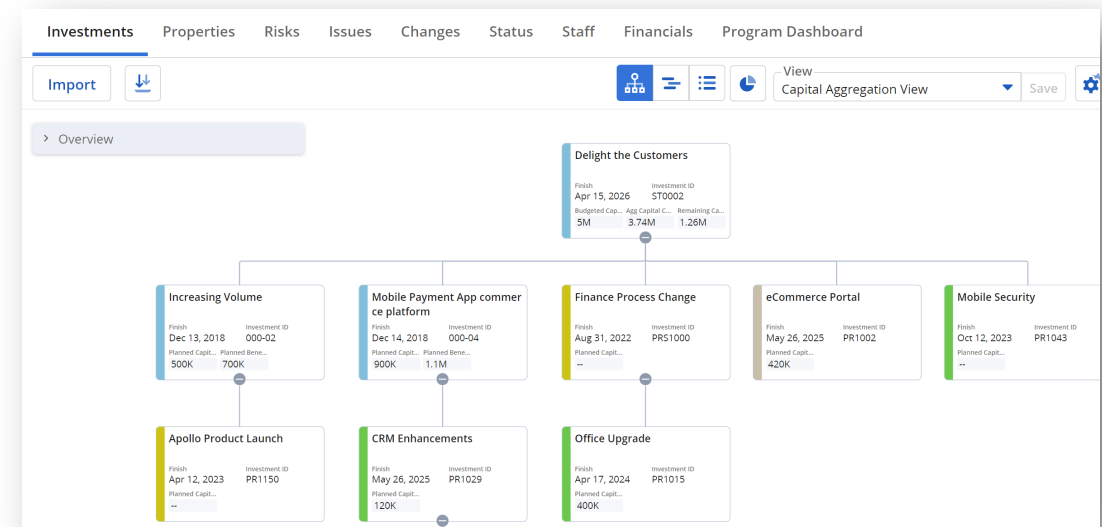
# Introduction to Hierarchies



# Introduction to Hierarchies

Hierarchies allow organizations to examine current investment data aligned to the hierarchical structure of their choosing

- Import Projects, Ideas, or Custom Investments
- Hierarchies show real-time data
- Leaders can view Status, Financials, Teams, Risks, Issues, Changes and other underlying data across all investments in the hierarchy
- Review rollup metrics at various levels of the hierarchy
- Utilize the Parent field to help auto-build hierarchies
- You can get value from using hierarchies WITHOUT organizing investments into a hierarchical structure. There is still value in reviewing Financials, Risks, etc. across a flat list of investments



# Why Use Hierarchies?

## One Stop Shop for Reporting without Reports

Use Hierarchies for:

- Line of Business discussions
- Strategic alignment review
- Defined portfolio monitoring and actions

How?

- Visualize current and planned work with rollup metrics
- Visualize investment timelines
- Understand Status
- Analyze Financials
- Monitor and act on portfolio Risks, Issues, Changes, Financials

The screenshot shows a software interface titled "Delight the Customer Strategy FY24 Alignment". The main navigation bar includes "Investments", "Properties", "Risks", "Issues", "Changes", "Status", "Staff", "Financials", and "Program Dashboard". The "Status" tab is active, displaying a table of investment status reports. The table has columns for "Report Date", "Overall Status", "Name", "Cost And Effort S...", and "Schedule Status". The data rows are as follows:

Report Date	Overall Status	Name	Cost And Effort S...	Schedule Status
Dec 9, 2021	Needs Help	Finance Process Change	On Track	Needs Help
Oct 26, 2021	Needs Help	CRM Enhancements	At Risk	At Risk
Feb 23, 2023	Needs Help	eCommerce Portal	On Track	On Track

Below the table, there is a "Details" section for the selected report "Status Report\_2020-0... (SR\_2020-06-10)". It shows the "Investment Name" as "Finance Process Change", the "Report Date" as "Dec 9, 2021", and the "Overall Status" as "Needs Help" with a count of 40. The "Attachment" is "PRS1000..." and the "Investment Manager" is "Thomas, Brian".

# Open Mic

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- For those that are utilizing Hierarchies:
  - How are you structuring the Investments within your hierarchy?
- How often are you reviewing your Hierarchy to track the health of the body of work?
- Do you structure the Hierarchy the same way as your Roadmap?

# Roadmaps and Hierarchies

Better Together

# Roadmaps and Hierarchies – Better Together



# Best Practices for Roadmaps and Hierarchies

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- How many and what kind? You can create as many Roadmaps or Hierarchies as you need.
- A single investment can be added to multiple Roadmaps, so for coordinated long-range planning, it is best to select one “type” of Roadmap. Avoid approving the same work in different roadmaps.
- Be thoughtful about types of roadmaps used for plan approval. It can be challenging to consolidate roadmaps.
- Automated import in Hierarchies is limited to one structure based on the Parent attribute. Consider how you leverage that attribute; additional types of Hierarchies can be created but relationships must be created manually. Recall that a flat list of investments in a Hierarchy is still valuable.



# Best Practices for Roadmaps and Hierarchies

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## Roadmaps

- 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 drives scenarios and options? (people, timing, planning cycles?)
- How will this information be used?
- Is the granularity appropriate? How many investments are reasonable for planning and monitoring purposes?

## Hierarchies

- Consider aligning a hierarchy with approved Roadmaps
- Use rollup metrics or widgets to track key metrics (costs, benefits, points, resources)

# Creating Structure

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1. What is important to your organization? WHO and WHAT drives decisions?
2. Considering max # investments, create roadmaps for top or second level
3. Evaluate proposed work along with in-flight investments to approve new work and evaluate in-flight work for continue/cancel decisions
4. Create corresponding CITs and Hierarchies to monitor progress and performance

# Creating Structure – Common Approaches

## Agile Structure

- Value Stream – Product – Epic/Initiative

## Capability or Service Type

- Capability Type – Capabilities

## Strategy

- Strategy – Objectives – KPIs

## Funding Structure

- Line of Business – Funding Buckets

## Management Structure

- Line of Business – Department – Program

# What Outcomes can you Achieve?



## Trust

- Transparent Planning
- Alignment to Strategy and Objectives



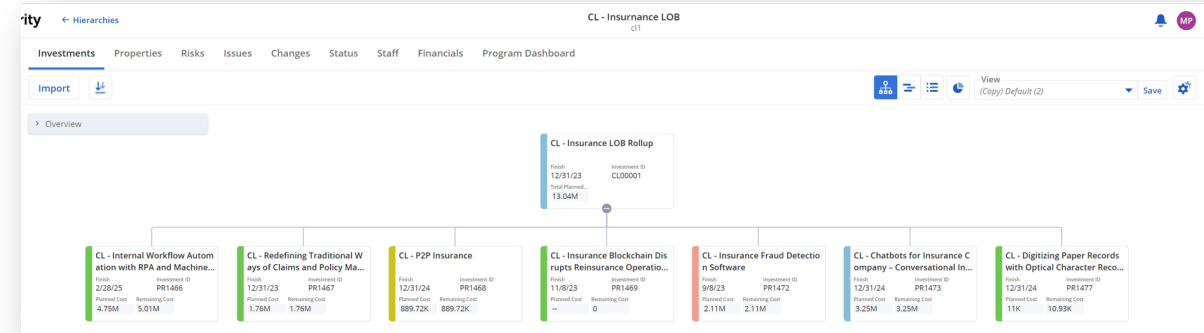
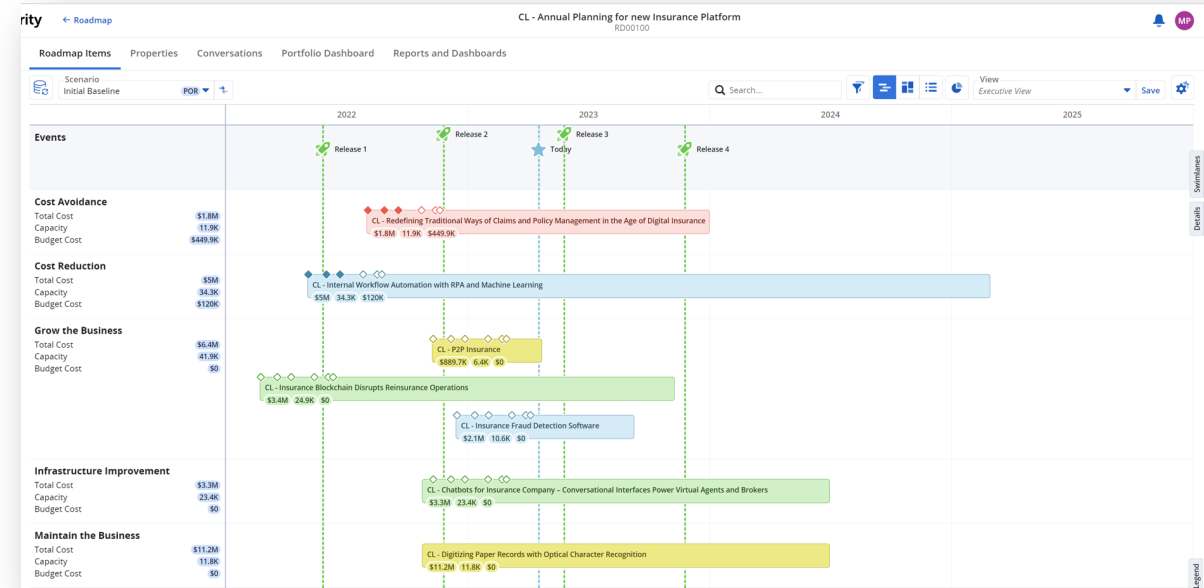
## Integrated Data Management

- Less Data Entry
- Less Waste Searching and Consolidating



## Leadership Insights

- Leverage data you already have for leadership visibility
- Monitor portfolio health and course correct



# Questions?



# Surveys

Please take a few moments to fill out the class survey.  
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