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SAN DIEGO · 2023

Roadmap Management Roundtable

Your Guides:

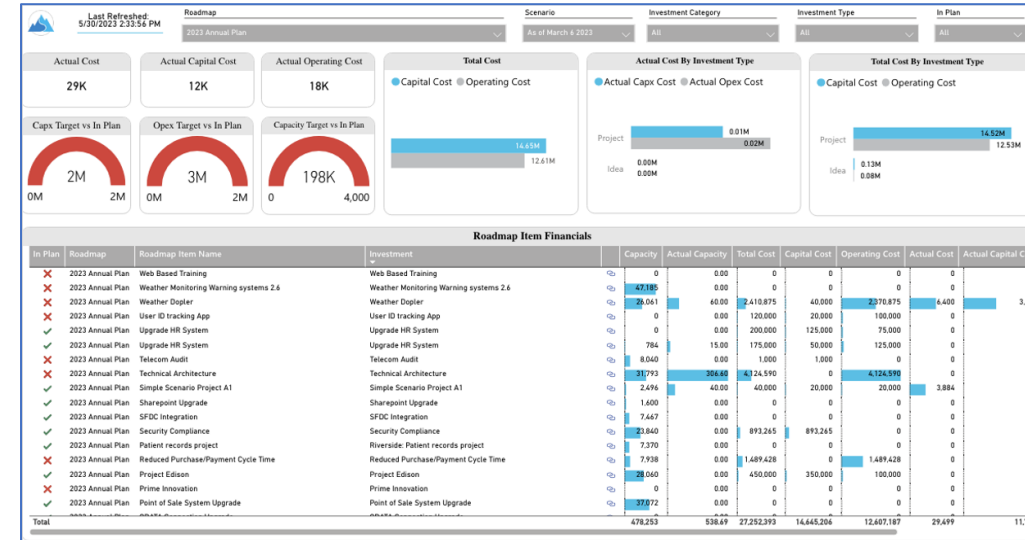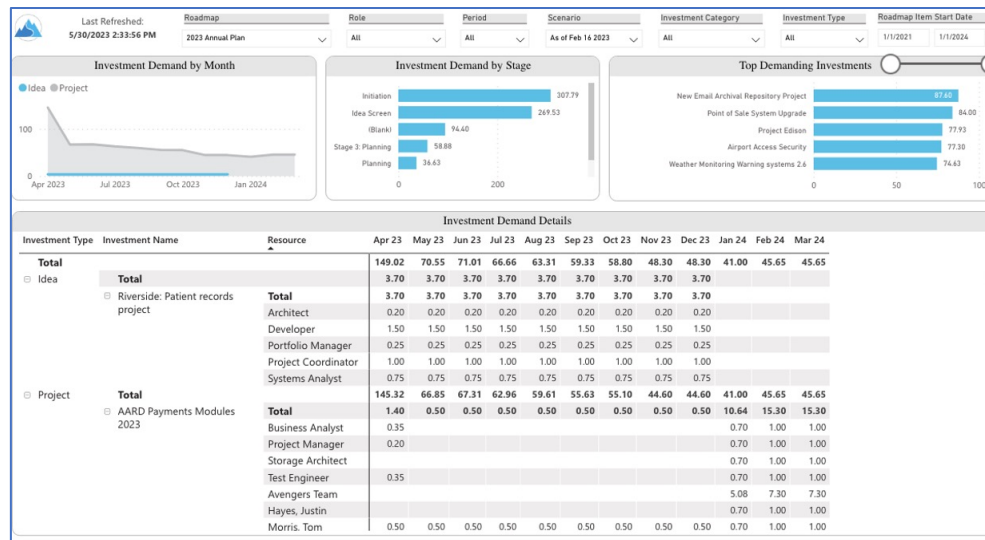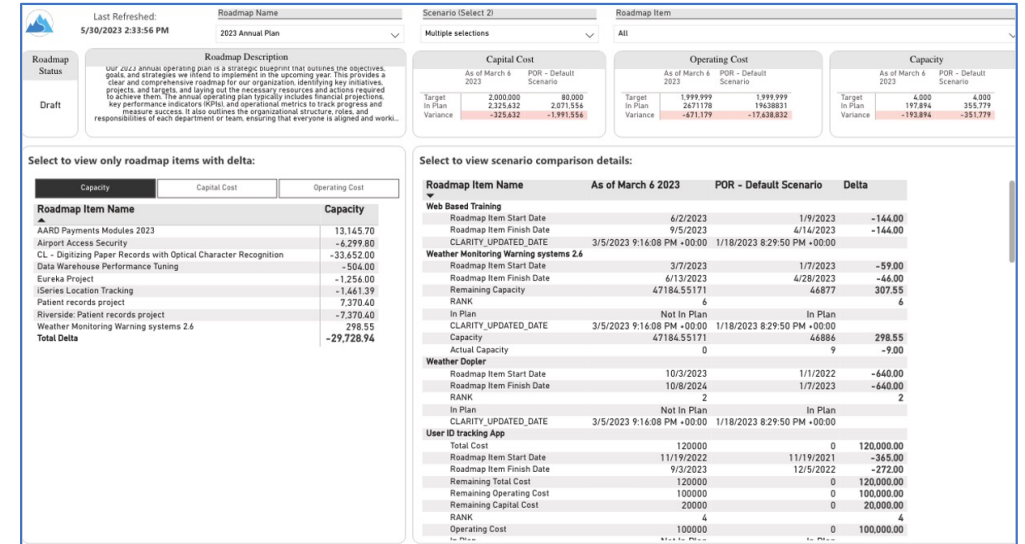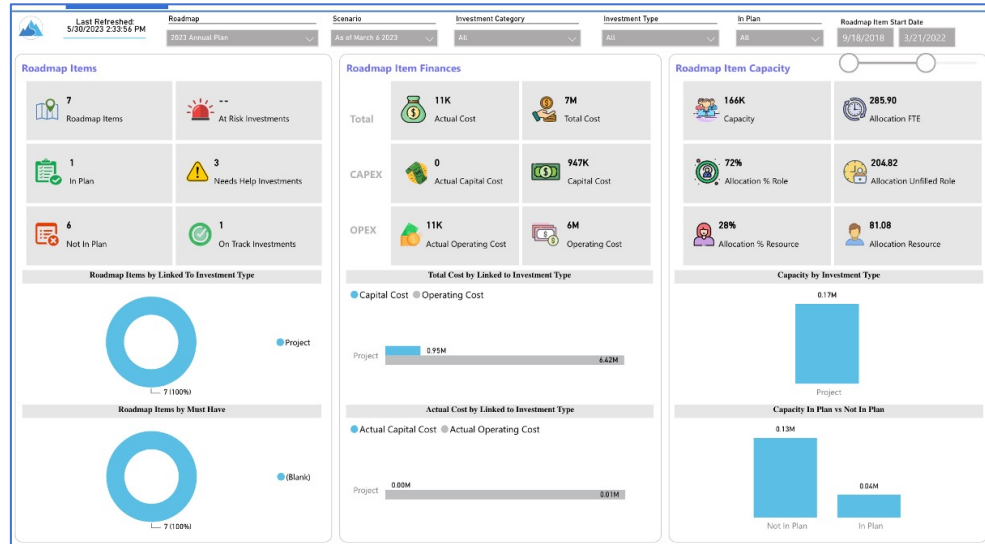Mike Pokorny and Michelle Merriam-Day

Introductions

- Take 5 Minutes

- Turn to a Person Near You

- Introduce Yourself

- Business Cards

Here Are a Few of the Questions We've Heard...

- How are you organizing your Investments for Roadmapping and Planning?
  - Strategic? Product? By Business Unit?

- Are you planning against financial constraints? Resource constraints? Both?

- What cadence are you roadmapping against?
  - Annual planning? Multi-year planning?

- What type of resources are involved in the roadmapping process?
  - Roadmap Manager? PMO? Leadership?

- How are you reporting out on your Roadmaps?

RegoXchange – Investment Roadmap Summary Dashboard

Investment Roadmap Summary Dashboard (Power BI) - RegoXchange (regoconsulting.com)

RegoXchange

- ## Roles in Roadmaps
  - This Roadmap add-on provides configurable Role-based metrics that can be used in the grid view as targets and constraints.

- ## Convert Roadmap Items to Investments
  - Create any Investment from a manually created Roadmap Item

- ## Push/Sync Roadmap Item Data to Investments
  - After changes have been made to Investment data within a Scenario, either push the changes to the Live Investments and email the manager of the changes or notify the manager of the changes asking for them to manually make the updates.

- ## Roadmap Population
  - Utilize views/filters as criteria to automatically populate Roadmaps with Investments and keep them up to date (power filter)

Questions?

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Let us know how we can improve!
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