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Best Practice Use of Clarity for Roadmap Management

Your Guides:

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(AKA "MP Squared")

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

Roadmaps

Value Proposition for Roadmaps (WIIFM)

- Long-term Strategic Planning (Solution Roadmaps)
- Value Stream Management
- 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 Roadmap?)
- What metrics and constraints will be used? (costs, benefits, points, resources?)
- What level(s) of granularity will you include?
- What is the right volume of data to include? Should you use a single Roadmap or consolidate with Roadmap Groups?
- What time period will your Roadmaps entail, and what will be the cadence of review?
- What drives scenarios and options? (people, timing, planning cycles?)
- How will this information be used?

\- Open Discussion -

Roadmap Example: Strategic Alignment

- Vision
- Prioritization
- Structure

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.

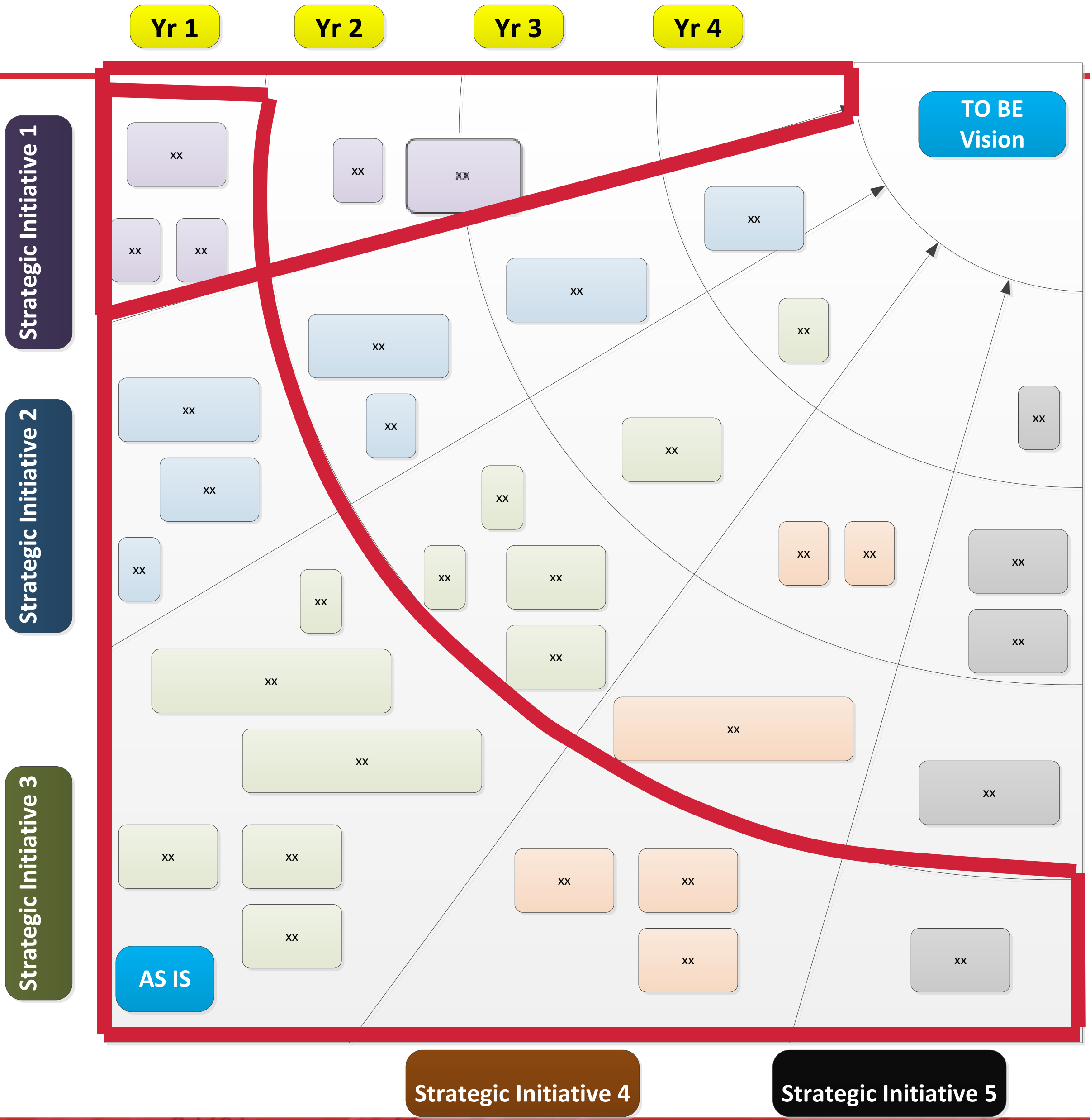
Let's start with the premise that we have a current state and a vision of where we want to be strategically.

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.



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.
- Don’t get overwhelmed or concerned if you don’t have all the metrics figured out.
- Don’t 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?

- ★ Checklists in Roadmaps – 16.2.2
- "Pin" Events Row – 16.2.2
- Swimlane filtering/visibility controls – 16.1.1
- ★ Roadmaps Groups – 16.2.0
- ★ Canvas now available for Roadmaps – 16.1.3
- ★ Swimlane Groups and Collapse/Expand – 16.1.3
- Events – Both Roadmap and Investment level – 16.1.3
- Schedule Sync for linked investments – 16.1.3
- ★ Order from Sort – Leverage sorted items to rank Investments – 16.1.0
- ★ Copy Roadmap / Share Roadmap – 16.0.3
- PowerBI Reporting – New PowerBI Reports from Rego

- Open Discussion -

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.

  https://xchange.regoconsulting.com/product/roles-in-the-mux-roadmap/
  - Now support for Teams Investments as well!!

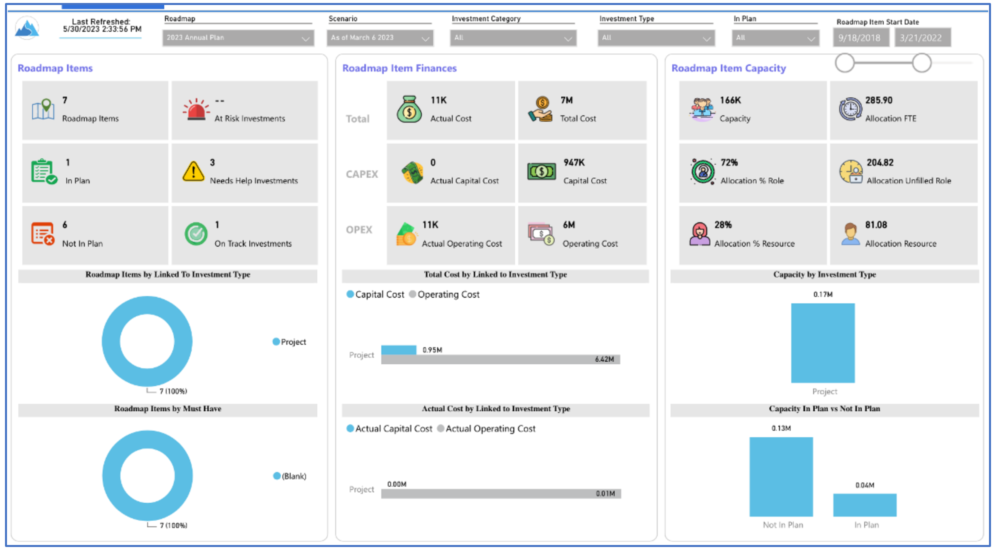
  https://xchange.regoconsulting.com/product/teams-allocations-data-in-the-roadmap-oracle-postgres/
- Convert Roadmap Items to Investments
  - Create any Investment from a manually created Roadmap Item

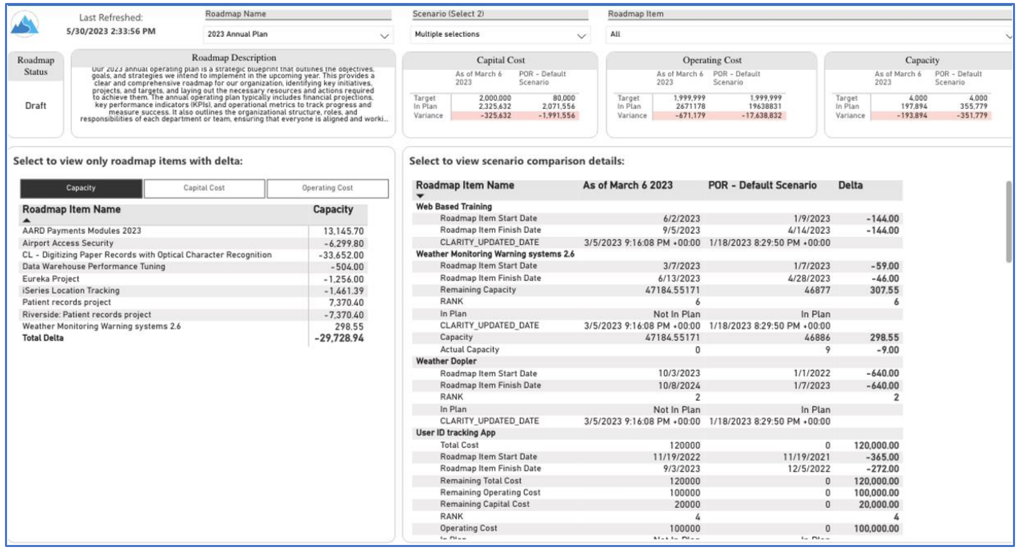
  https://xchange.regoconsulting.com/product/rego-roadmap-conversion/
- Push/Sync Roadmap Item Data to Investments
  - After changes have been made to Investment data within a Scenario, either push the changes to the Live Investments and email the manager of the changes or notify the manager of the changes asking for them to manually make the updates.

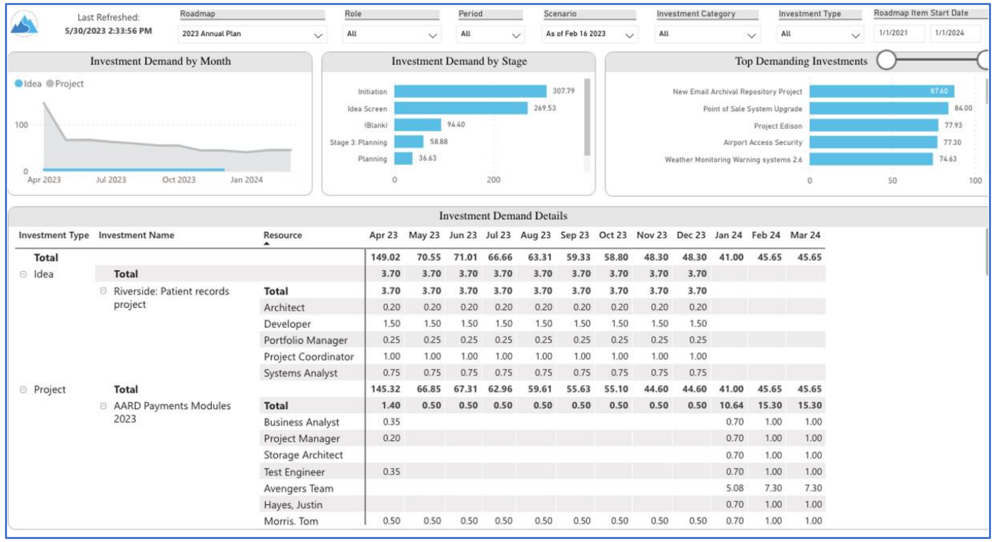
  https://xchange.regoconsulting.com/product/rego-roadmap-conversion/
- Roadmap Population
  - Utilize views/filters as criteria to automatically populate Roadmaps with Investments and keep them up to date (power filter)

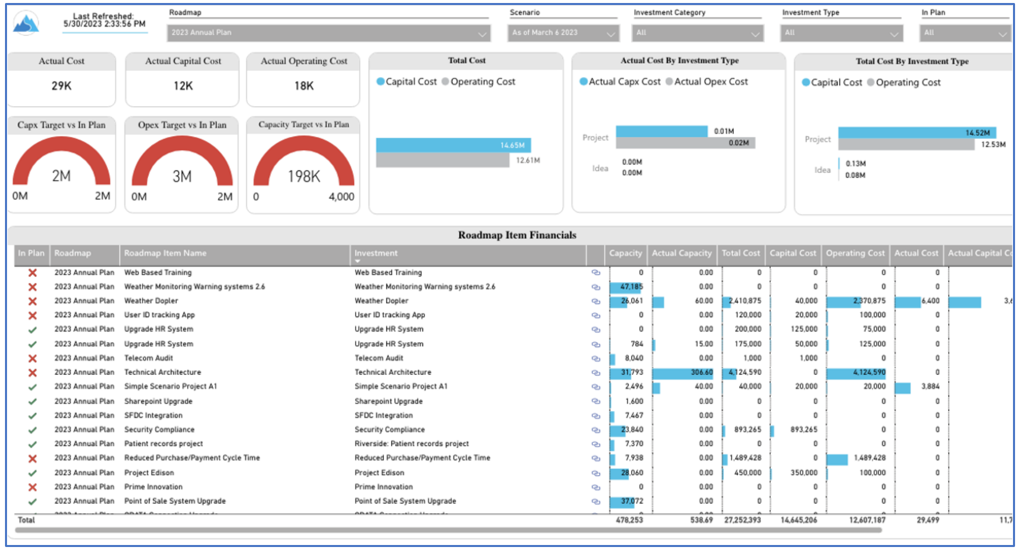
  https://xchange.regoconsulting.com/product/roadmap-hieirarchy-power-filter-sync-all-db/

RegoXchange – Investment Roadmap Summary Dashboard









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

RegoXchange

- Under Consideration (Standard Safe Harbor disclaimer)

1. **Roadmap Enhancements (P2&P3)**
    1. **Overall Goals**
        1. Develop additional features within the OOTB roadmaps that meet current and future customer needs
        2. Develop additional features within the OOTB roadmaps that are needed to mimic competitor functions
    2. **Key Features**
        1. **Optimize the portfolio (P2)**
            1. First phase = use dependencies (project, task, roadmap) only – when you optimize, it will create a new scenario using these constraints
            2. Second phase = pick up to 5 key roles and % tolerance – when you optimize, it will create a new scenario using these constraints
            3. For all optimization, a Report or log with details on what has changed and why
            4. Have the option to give the details for what will change before the portfolio is optimized and put in a new scenario. Then easily actionable one by one – allow the user to selectively select which ones to do. – This is FUTURE – maybe phase 3
        2. **Ranking rules / value (P2)**
            1. Work like OOTB portfolios does
            2. A user can select up to 8 levels of prioritization rules – using any LookupNum or Number fields – ROI, priority, etc. then a process runs and updates the OOTB ranking field based on these new rules
        3. **Reporting (P3)**
            1. When can I slot my new project into the roadmap
            2. How can I go faster
        4. **Updated Push Changes with more granular details (P3)**
        5. **Pre-built Templates (P3)**
            1. Pre-built widgets and Layout and fields
            2. Canvas Packs - Migrate between environments, sub-object properties
            3. WIP Limits in the Board View

Live Demo of a Roadmap

What do YOU want to see?

- Open the Poll in your Cvent app to vote now:

1. Managing and comparing Scenarios
2. Managing Events and Dependencies in the Timeline view
3. Creating Roadmap Groups
4. Prioritizing and managing to constraints
5. Widget and Canvas tips and tricks
6. Attribute sync, import/export, and sharing options

Discussion Points:
What has worked with you?

Additional Resources

Additional Sessions
Hierarchy and Roadmaps, Tuesday 1:30p (Liberty)
Broadcom Product Roadmap Session, Wednesday 5:40p
The Art of Strategic Planning, Tuesday 11:20 (Liberty), Thursday 11:20 (Liberty)
Roadmaps Roundtable, Thursday 10:10a (Liberty)

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
Mindset: The New Psychology of Success, Carol S. Dweck, Ph.D.

Questions?

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- **Completion**: 12 units per certification track
- **Eligibility**: Open to all Rego University attendees

Important Reminder:

To have your certification **credits tracked**, ensure you **complete the class surveys in the app** after each session. This step is critical for certification progress.

Surveys

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

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- Access your account at pmi.org
- Click on **Certifications**
- Click on **Maintain My Certification**
- Click on **Visit CCR's** button under the **Report PDU's**
- 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**

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

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