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# The Art of Annual Planning: Creating a Prioritized and Balanced Roadmap

Your Guides:

Matthew Palicki, Ben Raper, and Josh Childers

# Agenda

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- Introduction: Portfolio prioritization approaches
- Illustrative demonstration
- Interactive group exercise
- Wrap-up / Q&A / Call to Action

# Part I: Introduction

Traditional prioritization processes – and an alternative approach



# Common Approaches to Portfolio Prioritization

Open the Poll Question in your Cvent App:

Which of the following are a part of your current planning and prioritization processes:

- Scorecard-driven stacked ranking (1-n)
- Subjective stacked ranking (e.g. “squeaky wheel”)
- Financial drivers (e.g. NPV, ROI, IRR)
- Alignment to Value Streams / Strategy / OKRs
- SAFe Lean Budgets / Guardrails
- Other homegrown/internal processes

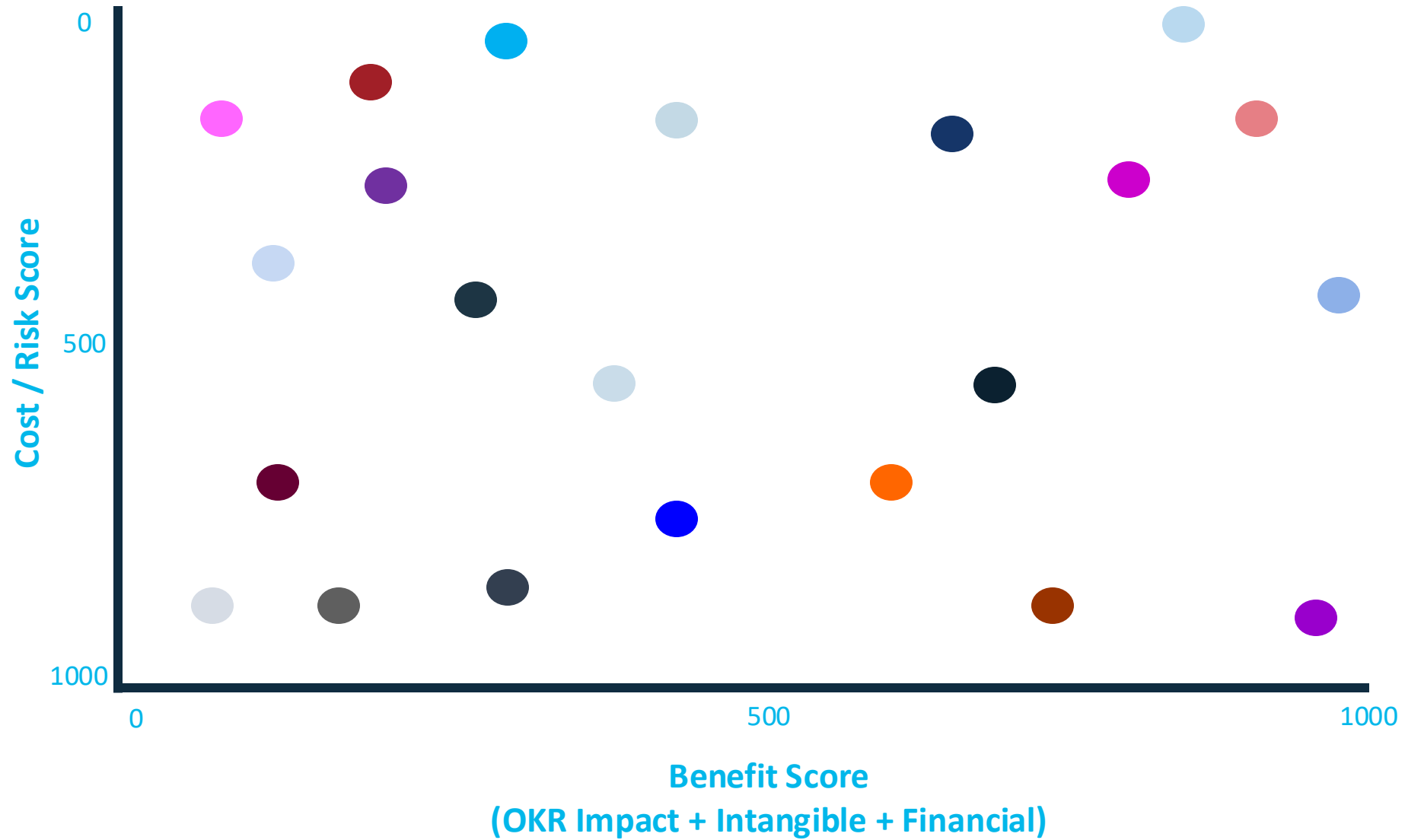
Open mic: What have been some of the challenges or limitations in your current process?

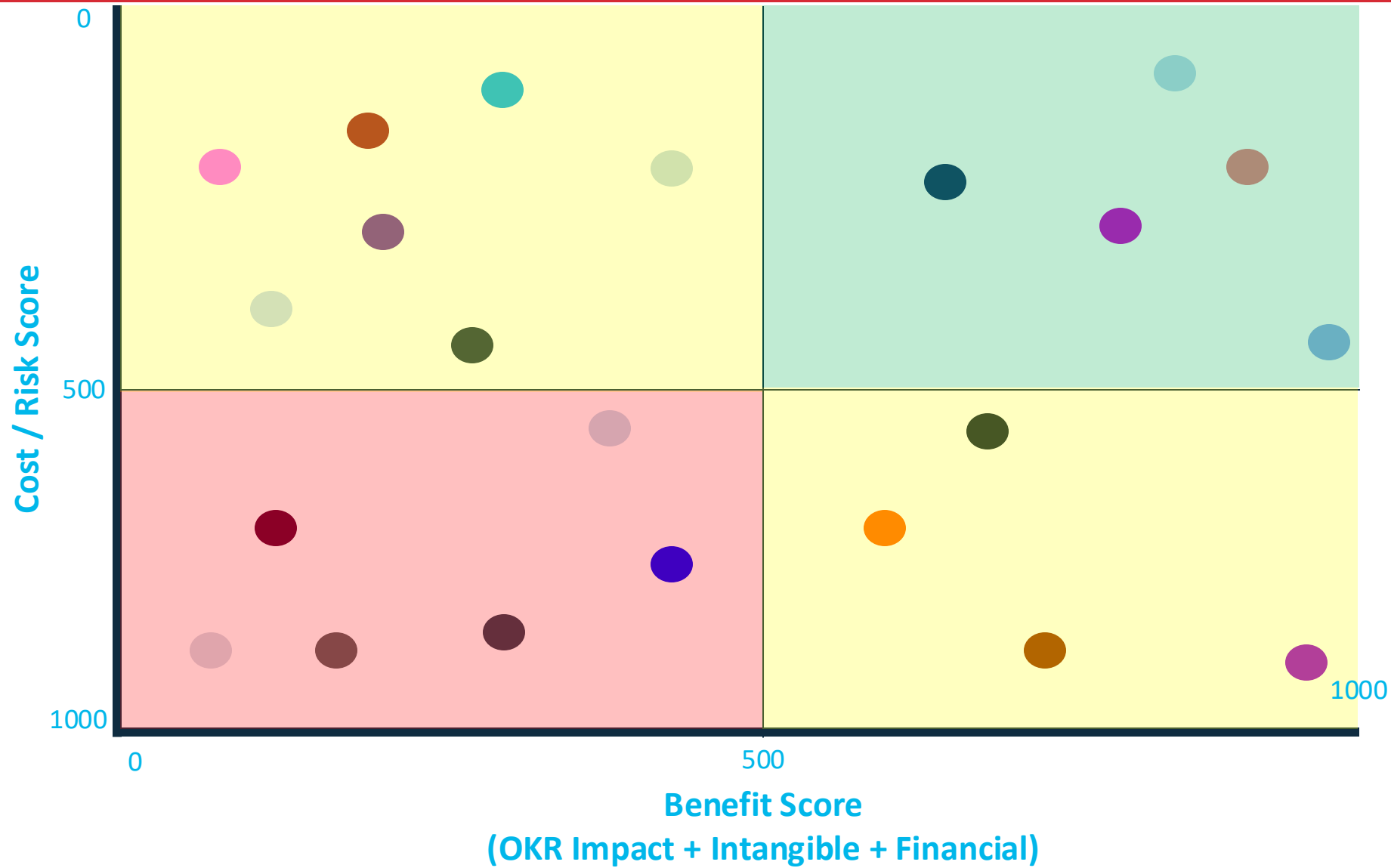


THE  
PRIORITIZATION  
PROBLEM!

Ferdi Rizkiyanto



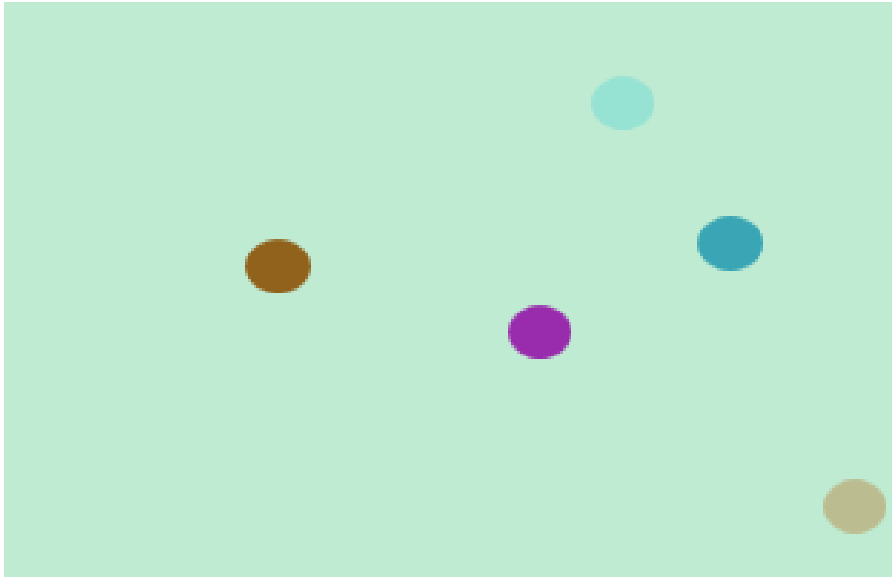




**Overall Score:**  
**(Illustrative)**  
 $\frac{\text{Benefit} * 2}{\text{Cost \& Risk}}$

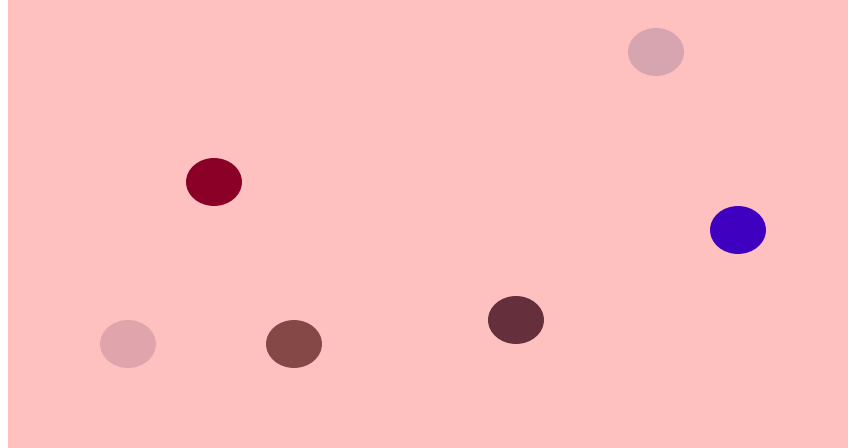


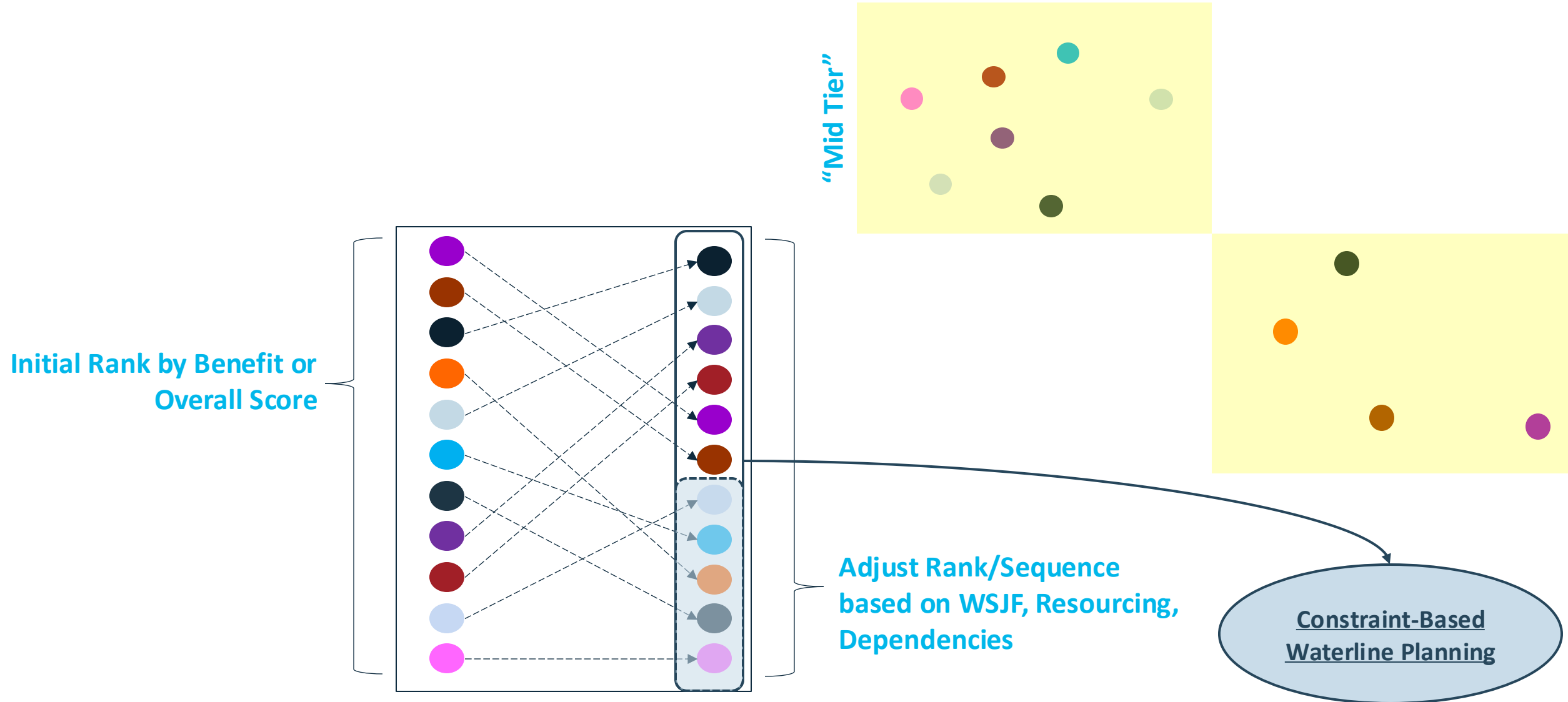
“High Tier”

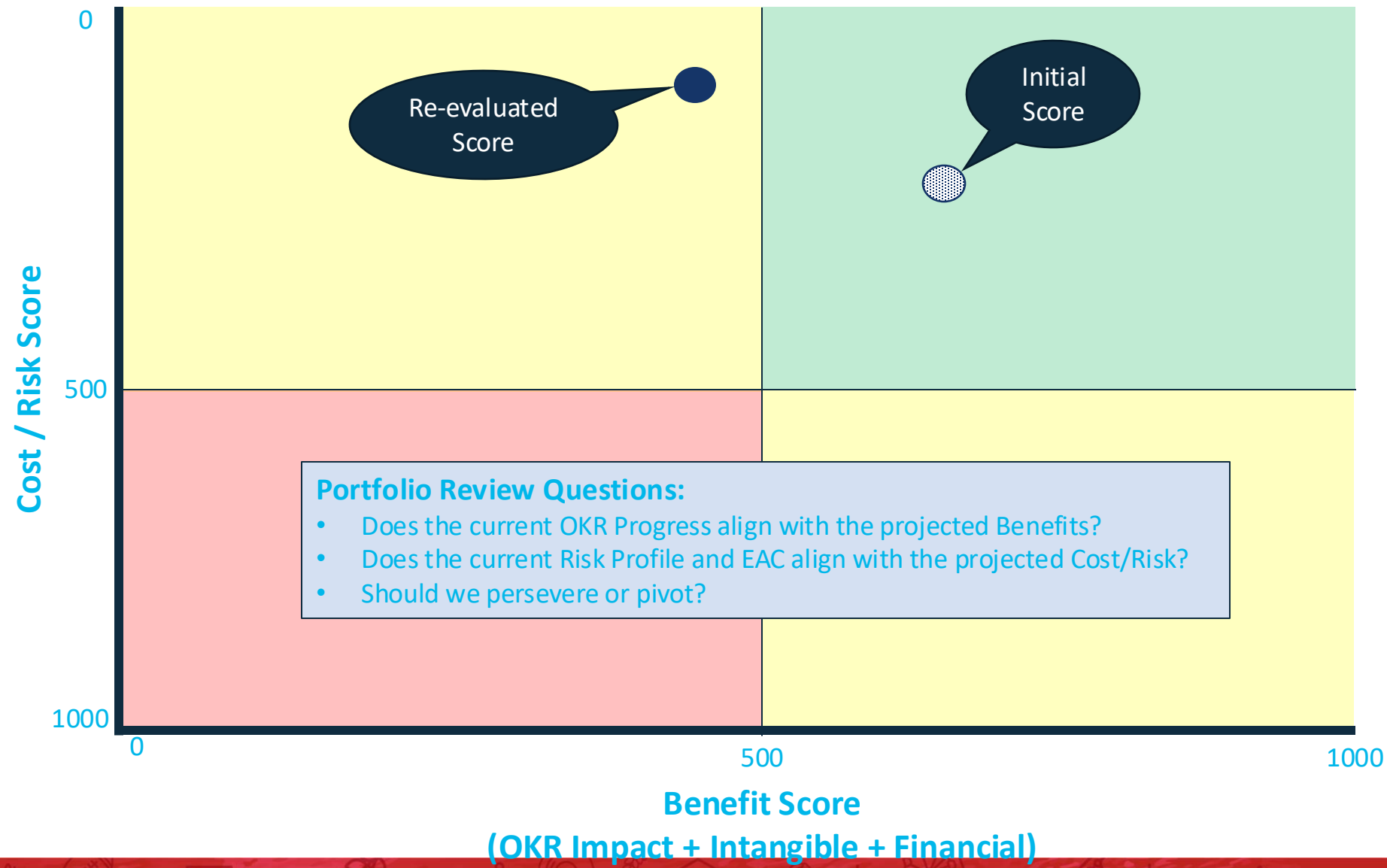




“Low Tier”







# Interactive Prioritization Exercise!



# Building a Prioritized and Achievable Portfolio Roadmap

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## (Illustrative Process Steps)

- Import “Approved” (In Flight) Projects
- Mark these as “Carryover” and “In Plan”
- Re-Affirm any “Required” or “Top Choice”
- Import “Ready” Ideas (Submitted and Approved), Sync
- Identify any “Required” or “Top Choice”
- Prioritize “Not In Plan” Roadmap Items (Tiers, Incumbents)
- Manage to Constraints (Roles and Financials)
- Mark Approved Plan as PoR and create a new Scenario to facilitate future planning

# Interactive Prioritization Exercise!



# Team Exercise – 45 minutes

- The room will be divided into groups of 8-10 people, then each group will subdivide into two smaller groups (each group will require 3 laptops connected to the internet and the Clarity server found in the QR code below)
- Each group will create an “Optimized Ranking” of one subset of the portfolio, managing to constraints and the provided business rules
- One person will act in an “EPMO Process Governance” role, monitoring the Roadmap Group to ensure you adhere to the business rules
- The individual Portfolio teams will make adjustments to the Plan of Record as needed, and negotiate a finalized plan which adheres to the business rules and constraints
- Detailed instructions will be handed out by the presenters
- [https://bit.ly/RegoU\\_Art2024](https://bit.ly/RegoU_Art2024) (CASE SENSITIVE)



# (Tuesday) Team Exercise – 45 minutes

Group	Logins	Passwords	Portfolios	Portfolio Group	Group	Logins	Passwords	Portfolios	Portfolio Group
A	ben01 ben02	Paris01! Paris02!	Paris P01 Paris P02	Paris Group 1&2	E	ben09 ben10	Paris09! Paris10!	Paris P09 Paris P10	Paris Group 9&10
B	ben03 ben04	Paris03! Paris04!	Paris P03 Paris P04	Paris Group 3&4	F	ben11 ben12	Paris11! Paris12!	Paris P11 Paris P12	Paris Group 11&12
C	ben05 ben06	Paris05! Paris06!	Paris P05 Paris P06	Paris Group 5&6	G	ben13 ben14	Paris13! Paris14!	Paris P13 Paris P14	Paris Group 13&14
D	ben07 ben08	Paris07! Paris08!	Paris P07 Paris P08	Paris Group 7&8	H	ben15 ben16	Paris15! Paris16!	Paris P15 Paris P16	Paris Group 15&16

- [https://bit.ly/RegoU\\_Art2024](https://bit.ly/RegoU_Art2024) (CASE SENSITIVE)
- **NOTE:** After logging in, you may have to select Roadmaps from the Home menu





# (Thursday) Team Exercise – 45 minutes

Group	Username	Password	Portfolio	Portfolio Group
A	art01	London01!	London P01	London Group 1&2
	art02	London02!	London P02	
B	art03	London03!	London P03	London Group 3&4
	art04	London04!	London P04	
C	art05	London05!	London P05	London Group 5&6
	art06	London06!	London P06	
D	art07	London07!	London P07	London Group 7&8
	art08	London08!	London P08	
E	art09	London09!	London P09	London Group 9&10
	art10	London10!	London P10	



- [https://bit.ly/RegoU\\_Art2024](https://bit.ly/RegoU_Art2024) (CASE SENSITIVE)
- **NOTE:** After logging in, you may have to select Roadmaps from the Home menu

# Business Rules for Constraint Planning

- High Tier items must be In Plan if they are “Required” or “Top Choice” Incumbents
- Final Plan must be within +/- 10% of Capex and Opex Targets
- Must not exceed Target Allocations for key constrained Resource Roles
- May offset constrained Resource Role Allocations with External Resources which will correspond with +\$100k Opex for every 500hrs of Allocation to External Resources
- CANNOT offset constrained Resource Roles with External Resources for the High Tier
- In-Flight items may be cancelled or delayed (moved out of Plan), UNLESS they are “Required” or “Top Choice” (i.e., Mid Tier Only)
- Portfolio Balance/Mix must meet overall (**SHARED**) Targets set by Leadership Team:
  - At least 10% of total spend allocated to Cost Reduction / Cost Avoidance
  - At least \$28MM of total spend allocated toward Business Growth
  - No one person should be Manager for more than 5 “In Plan” Investments

# Illustrative Results

clarity [← Roadmap](#)
RegoU - The Art of Annual Planning  
RD00035
🔔 CA

Roadmap Items   Conversations   Properties

Scenario: Art\_RegoU Group 11
🔍 Search...
Per-Period Metrics - 1 Period
View: Art\_RegoU - Group Exercise

Manage Widgets
Filter Widgets

### Capital Cost

Target	40M
In Plan	39.95M
Variance	46.32K

### Operating Cost

Target	30M
In Plan	27.36M
Variance	2.64M

### Architect FTEs

Target	27K
Demand	22.86K
Variance	4.14K

### Engineering FTEs

Target	30K
Demand	29.89K
Variance	105.92

### Project Manager FTEs

Target	18K
Demand	17.65K
Variance	349.06

### QA Team FTEs

Target	12K
Demand	11.95K
Variance	52.89

### Goal: Infrastructure

Goal	5M
Total In Plan	5.86M
Variance	✓ (859.92K)

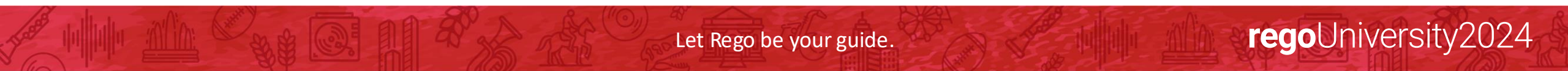
### Spend by Goal

### In Plan

Select All   Deselect All

In Plan   Tier

Group	Order	Rank	Roadmap Item *	Linked To Type	In Plan	Tier	Incumbents	Goal	2023						
									Capital Cost	Operating Cost	Architect Allocation	Engineer Allocation	Project Manager Allocation	QA Allocation	External Contractor Allocation
<b>Total</b>		1,485							11,155,969	27,090,468	22,425	23,780	15,753	10,863	0
<b>In Plan</b> (47)									10,679,809	21,724,452	18,803	21,849	12,960	9,162	0
> <b>1. High</b> (20)									10,375,651	9,821,674	16,248	9,042	9,179	6,765	0
> <b>2. Medium</b> (19)									299,458	3,533,027	1,637	11,383	3,244	1,861	0
> <b>3. Low</b> (8)									4,699	8,369,751	919	1,424	536	536	0
<b>Not In Plan</b> (7)									476,161	5,366,016	3,621	1,930	2,793	1,701	0
> <b>1. High</b> (3)									118,320	4,623,920	3,302	1,607	2,060	1,644	0
> <b>2. Medium</b> (2)									232,718	277,718	211	188	527	9	0
> <b>3. Low</b> (2)									125,122	464,377	108	136	206	48	0



Let Rego be your guide.

regoUniversity2024

# Illustrative Results

clarity [← Roadmap](#) RegoU - The Art of Annual Planning  
RD00035 🔔 CA

Roadmap Items Conversations Properties

Scenario: Art\_RegoU Group 11 Search... Per-Period Metrics - 1 Period

Category	Target	In Plan	Variance
Capital Cost	40M	39.95M	46.32K
Operating Cost	30M	27.36M	2.64M
Architect FTEs	27K	22.86K	4.14K
Engineering FTEs	30K	29.89K	105.92
Project Manager FTEs	18K	17.65K	349.06
QA Team FTEs	12K	11.95K	52.89
Goal: Infrastructure	5M	5.86M	859.92K

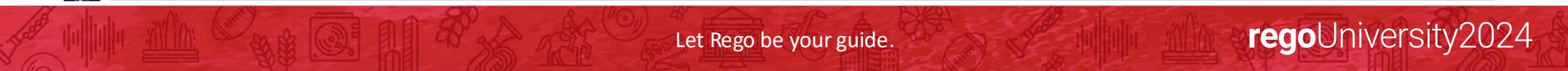
Spend by Goal

In Plan: 87%

Select All Deselect All

									2023						
Group	Order	Rank	Roadmap Item *	Linked To Type	In Plan	Tier	Incumbents	Goal	Capital Cost	Operating Cost	Architect Allocation	Engineer Allocation	Project Manager Allocation	QA Allocation	External Contractor Allocation
<b>Total</b>	<b>1,485</b>								11,155,969	27,090,468	22,425	23,780	15,753	10,863	0
<b>In Plan (47)</b>									10,679,809	21,724,452	18,803	21,849	12,960	9,162	0
<input type="checkbox"/>		38	Security Enhancements	Idea	In Plan	1. High	01. Required	Maintain the Business	75,000	125,000	14	28	85	14	0
<input type="checkbox"/>		1	GDPR Compliance - Loan Application	Project	In Plan	1. High	01. Required	Cost Avoidance	107,196	14,400	0	1,112	222	1,112	0
<input type="checkbox"/>		2	EMEA GDPR Certifications	Project	In Plan	1. High	01. Required	Cost Avoidance	125,680	41,200	528	528	528	528	0
<input type="checkbox"/>		3	GDPR Certification - Monetary App	Project	In Plan	1. High	01. Required	Cost Avoidance	0	77,390	0	0	0	0	0
<input type="checkbox"/>		4	Integration M&A Workstream	Project	In Plan	1. High	01. Required	Grow the Business	0	51,913	0	0	0	0	0
<input type="checkbox"/>		39	GlobalX Acquisition	Project	In Plan	1. High	01. Required	Grow the Business	0	178,725	1,688	0	0	0	0
<input type="checkbox"/>		40	Green IT Initiative	Idea	In Plan	1. High	02. Top Choice	Cost Avoidance	200,000	1,200,000	37	37	55	37	0
<input type="checkbox"/>		41	Mobile Initiative for EMEA	Idea	In Plan	1. High	02. Top Choice	Infrastructure Improvement	96,429	128,571	42	0	83	167	0
<input type="checkbox"/>		5	Migrate CRM Services to SaaS	Project	In Plan	1. High	02. Top Choice	Infrastructure Improvement	0	120,560	616	616	616	0	0
<input type="checkbox"/>		42	Migrate HR Services to SaaS	Project	In Plan	1. High	02. Top Choice	Infrastructure Improvement	0	1,322,400	1,160	1,160	1,160	1,160	0

1 - 49 of 49



# Group Results and Debrief

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- In one word, what was this experience like for you?
- What was the most challenging thing about this exercise?
- What was an “a-ha moment” or ingenious idea in your group?
- How realistic was this compared to your personal experiences?
- What would you do differently in the real world?

## **Call to Action**

- What is one takeaway from this session you can attempt to bring into your next planning and prioritization cycle?

# Additional Considerations

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- Zero-Base (Gartner Article)
- Big Rocks/Small Rocks/Pebbles
- SWOT / TOWS
- Participatory Budgeting (SAFe)
- +/- 10% Scenarios
- Fast-Track Exceptions

# Additional Resources

## Articles/Webinars

<https://www.gartner.com/smarterwithgartner/use-zero-based-prioritization-to-reevaluate-your-project-portfolio>

<https://www.pmi.org/learning/library/proven-project-portfolio-management-process-8503>

<https://www.mckinsey.com/capabilities/operations/our-insights/matching-the-right-projects-with-the-right-resources>

<https://collaborate.scaledagile.com/template/try?id=52ADBEMQNAG4YPRXZJCA0YSACWAYEFNT>

<https://info.regoconsulting.com/clarity-lean-portfolio-management-nov-2021>

<https://info.regoconsulting.com/the-art-of-annual-planning-july-2023>

<https://info.regoconsulting.com/the-art-of-annual-planning-tracking-progress-and-performance-part-2-october-2023>

## 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](#)

# Rego has an exciting new asset for our clients!

- Are you curious about Roadmaps in Clarity and want to learn more?
- Could your organization benefit from Strategic Portfolio Management (SPM) planning capabilities?
- Are you struggling with how to utilize Clarity Roadmaps to empower your planning and prioritization processes?

Based on one of our most popular Webinars and RegoU sessions, “The Art of Annual Planning”, we are thrilled to be able to provide our clients with their own exclusive Roadmap instance and pre-built dataset, along with step-by-step instructions to facilitate an illustrative prioritization and constraint-planning process. Contact your Rego Account Team for more information or use the link or QR code on this page to request access.

<https://forms.office.com/r/DmuXLPUQaE>

Rego Consulting: "The Art of  
Annual Planning" Client Access  
Request Form





# Questions?





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# Elevate Your Professional Expertise with Rego University Certifications

Rego is excited to introduce our **new certification programs**, designed to enhance your expertise in Clarity administration, leadership, and technical skills. These certifications provide hands-on experience and knowledge to excel in your career.



## Certification Requirements:

- ✓ **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.



# Thank You For Attending Rego University

## Instructions for PMI credits

- Access your account at [pmi.org](https://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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