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Envision your SPM Future with Rego's Digital Ecosystem Assessment
Your Guides:
Jacob Cancelliere and Matthew Palicki

Agenda

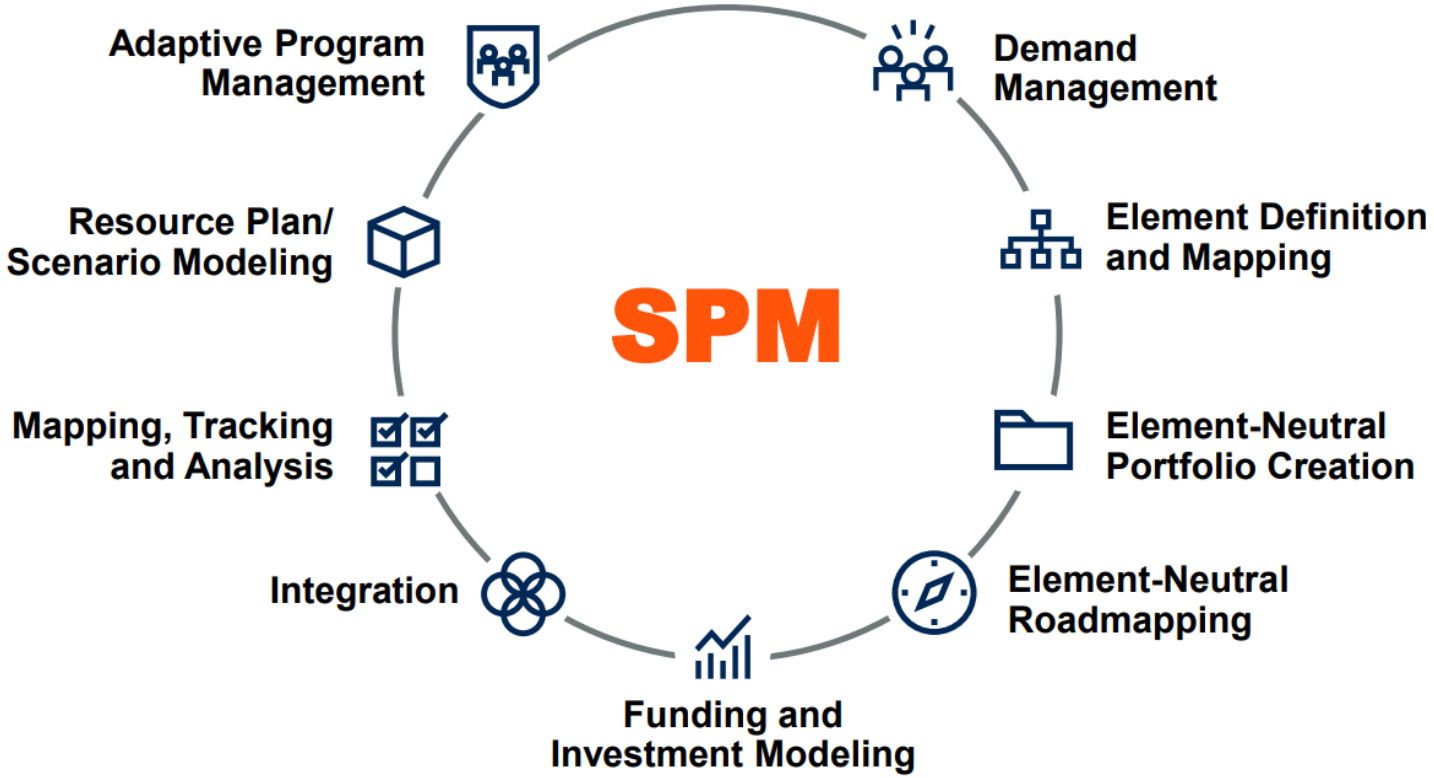
- What is SPM?
- What is a Digital Ecosystem Assessment (DEA)?
- Rego Perspective on Current Themes
- What are the potential deliverables or outcomes?
- Summary
- Q&A / Additional Resources

Open Mic

- Do you have a backlog or roadmap for Clarity features and adoption?
  - If yes, what is included? What horizons does it cover? What's the definition of success/done?
- Does your organization have a common understanding of systems of record vs. systems of reference in your digital ecosystem?
- Have you included People and Process in those Roadmaps/Backlog?

SPM: A Connected Strategy to Achieve Business Value

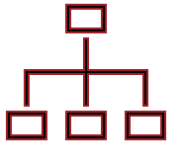
Strategic Portfolio Management (SPM) is a set of business capabilities, processes and supporting technologies that can focus an organization's finite resources to execute enterprise wide business strategy. Gartner



Gartner: Magic Quadrant for Strategic Portfolio Management 2023

SPM Framework Goals

Orchestrate end-to-end investment and work/project management processes to enable transparency, decision-support, and controls.



Work Connected to Strategy

Visibility to how the SPM practices and solutions connect to our business processes and strategy

Leverage Best Practices

Support multiple ways of working with fit for purpose methodologies that are aligned to industry standards

Integrate and Automate

Better together technologies to drive quality, efficiency, scalability and an optimized ecosystem

Leverage Leading and Existing Toolsets

Alignment to industry leading tools without ongoing technical debt by using toolsets already owned

What is SPM? (Strategic Portfolio Management)

Strategic Portfolio Management (SPM) Tools

Clarity mapped as one of the Leaders in Strategic Portfolio Management (SPM), Demand Intake and Investment decisions.*

➢ Strengths

1. Robustness and high scalability.
2. Clarity's user interface and user experience (UI/UX).
3. Broadcom's networking at worldwide scale (PPM industry reference).

* Source: Gartner

What is a Digital Ecosystem Assessment?

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Stop, Collaborate and Listen

- Reflect on current state
- Listen to large coverage of stakeholders
  - Up as high as C level
  - Talk to Team Members
  - Every Persona in between

Illustrative Interview Roster (Example)

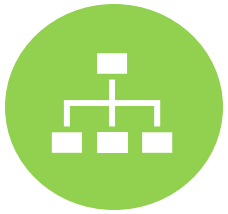
Name	Job Title	Primary PPM Function/Use Case	Interview Date/Time (EST)
	Director, IT Finance	Financial Services & Project Accounting	
	Project Manager	PM/BA user perspective	
	Director, Resource Management Office	Resource Capacity & Allocations Planning	
	Manager, End User Experience	Resource Manager	
	Manager, DBA & Integration	Resource Manager	
	Team Lead, Data Analytics	Resource Manager	
	Director, Business Solutions	Business relationship management	
	Business Success Manager	Business relationship management	
	Director, Business Solutions	Business relationship management	
	Application Support Specialist	Clarity application support	
	Project Manager	Project Management	
	IT Delivery Manager	Project Management	
	Agile Delivery Lead	Agile Delivery / Solution Train Planning	
	VP, Strategy & Transformation	Executive Reporting / Strategic Planning	
	Director, PPM Platform Services	PPM Process & Data Governance	

Looking Across Tools/Technology

The goal of an Ecosystem Assessment is to look across data, technology, and platforms to reveal efficiencies, value, and a more balance Digital Ecosystem.

Assessment Overview

A holistic assessment that evaluates the current state of your project management practices across the following 4 key pillars to compare against industry best practice. Rego will then develop recommendations for a future state.



People

- Well defined roles and responsibilities for optimal execution
- Alignment of location and skills to right roles to execute capabilities

Process

- Streamlined and standardized execution processes
- Standardized key decision points, handoffs, and interdependencies

Technology

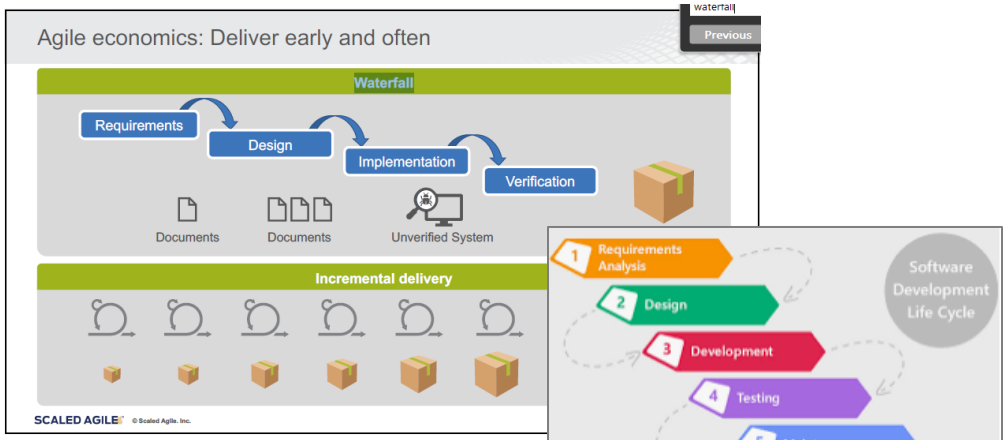
- Aligned technologies that enable planning, execution, and measurement
- Ensure data interoperability across all platforms

Governance

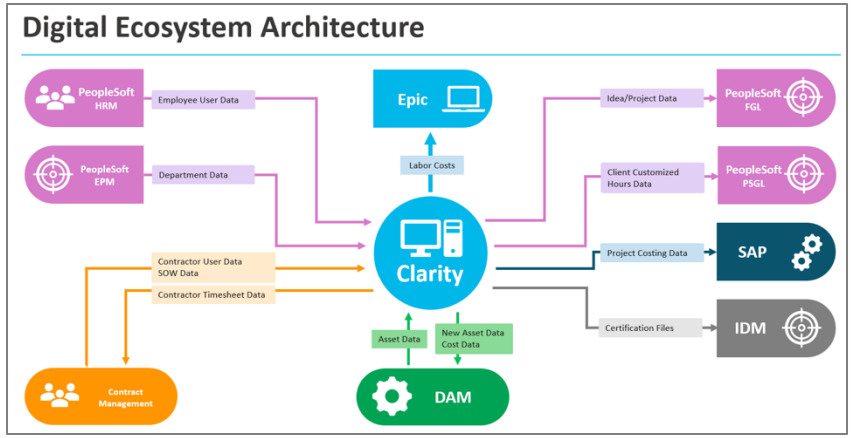
- Clearly defined stewardship over platforms, solution capabilities, performance metrics, and execution
- Definition and compliance oversight of policies and regulatory requirements

Looking outside of the tools!

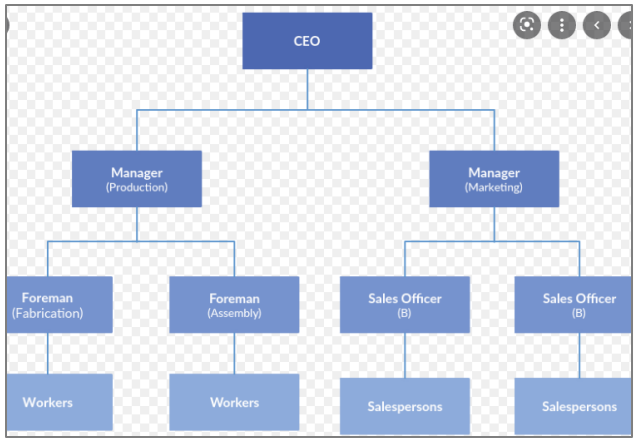
Process and Methodologies



Integrations and data flow



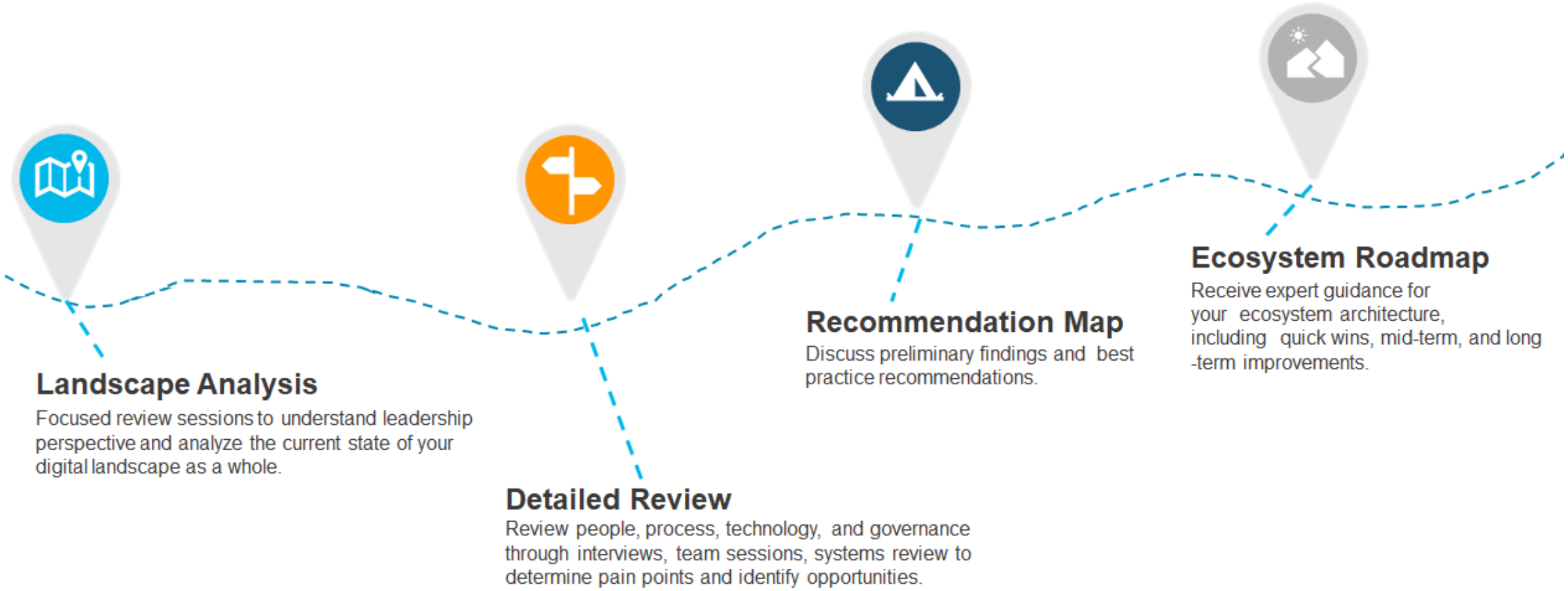
Roles and Org Structure



What are the steps?

The Digital Ecosystem Assessment Process

The assessment work will take 4-6 weeks. The work will include the following activities:



Current Industry Themes

Current Themes in the DEA Program

- Intake/Demand Management and Prioritization Practices
- Resource Management, Agile or not: What are people working on?
- Agile Journey, moving forward or stepping back
- Capability Alignment, use the correct tool for the job
- Reporting Strategy, in UI or External BI?
- Simplify Financials, new ways of capitalization

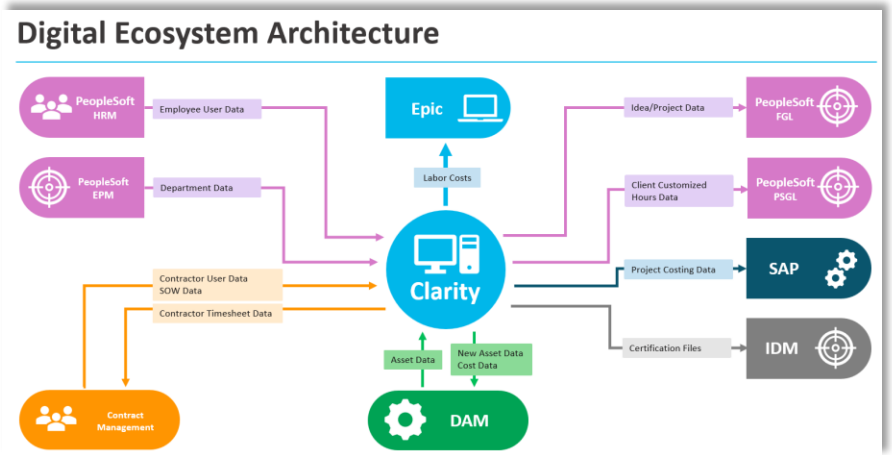
What are the Potential Deliverables or Outcomes?

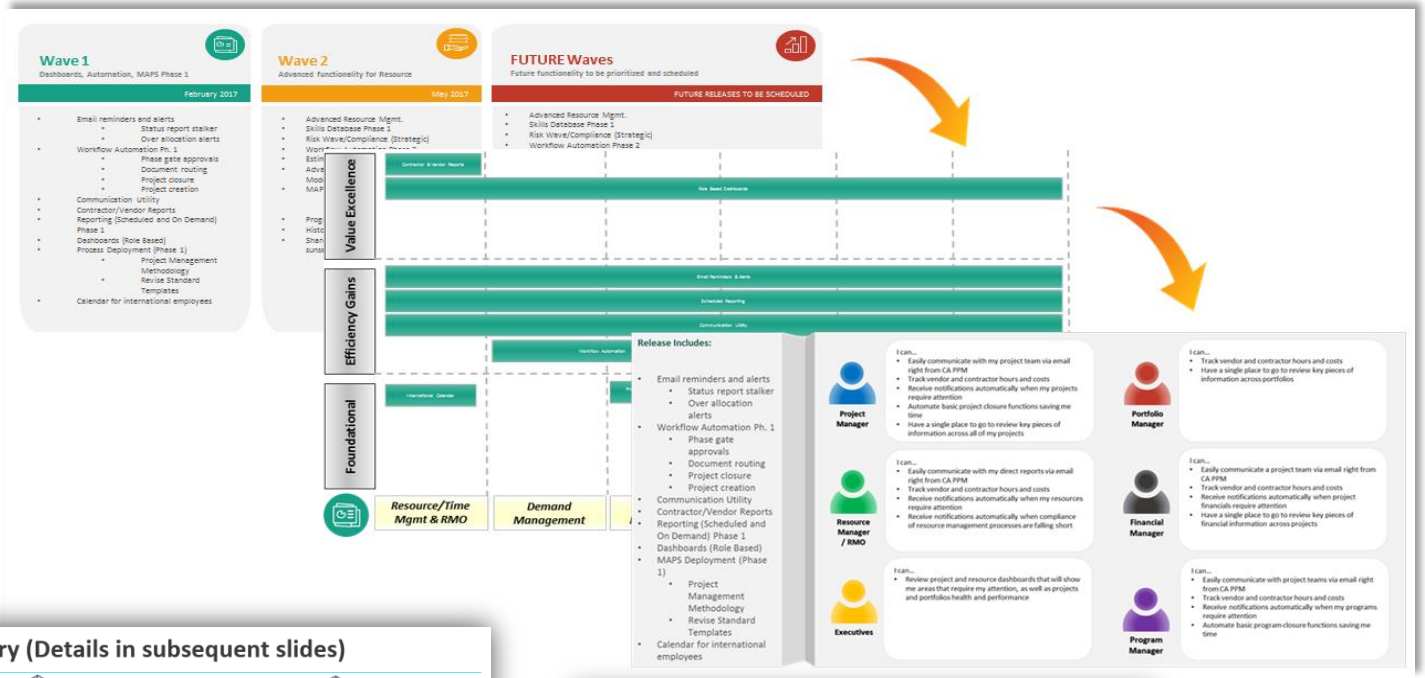
What are the potential outcomes?

- A Roadmap of Recommendations
- An Architecture of your key systems
- A Value Stream Map
- A Conceptual Integration Diagram

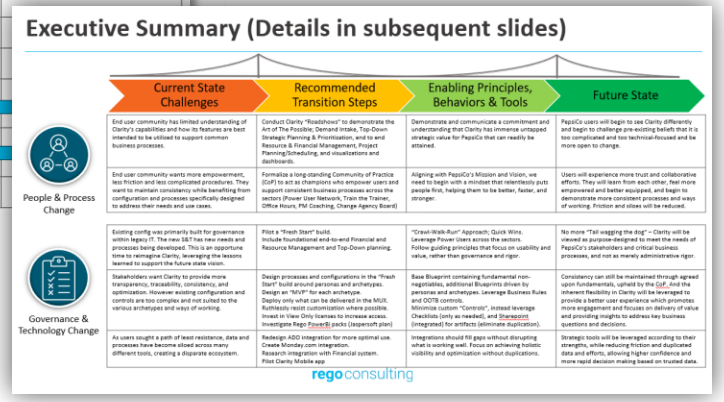
Digital Ecosystem Assessment Results

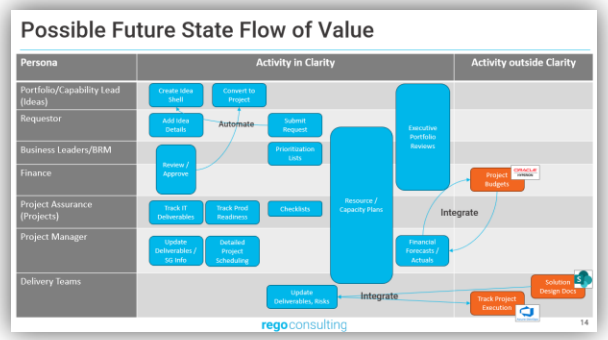
Architecture, Maturity Levels, Process Changes, Collaboration Roadmaps, and more….





Projects	Impact	Effort	Near-Term 3-6 mo	Mid-Term 6-18 mo	Long-Term 18+ mo
Portfolio Baselines	M	M			
Fresh Start Clarity Financials	M	M			
Complete View of Time Tracked	H	H			
Use Project Level Baselines	M	L			
Model Product Funding in Clarity, VSM later	M	M			
Use Clarity as the Source of Project Financial Truth	H	H			





DEA PPM Focus Areas and Guiding Principles

	Assessment Area	Guiding Principles Summary
	Image of Success	▪ Providing greater transparency and visibility increases collaboration and trust ▪ Optimizing data, process, & administration activities reduces friction and results in an empowered and efficient modern workforce ▪ Reducing siloes, exceptions, and manual processes ensures a sustainable and scalable digital ecosystem
	Change Leadership & Culture	▪ Any successful change effort must begin with a clearly articulated, pervasive vision (Start with Why) ▪ While all voices should be heard and respected, resistance to change should not be an acceptable barrier to progress ▪ Change efforts should follow a pace that minimizes disruption and carries a high likelihood of success (Crawl/Walk/Run)
	Taxonomy / Portfolio Structure	▪ Data schemes and terminologies should either align to a widely-accepted framework, or be obvious and intuitive ▪ Taxonomies should be derived in a way that is logical and valuable from the Customer's viewpoint (no "tail wagging the dog") ▪ Build what is required to support the realities of today, with inherent flexibility to support future growth and change
	Data and Reporting Strategy	▪ Trusted, defensible outputs demand that good data hygiene is a nonnegotiable throughout the organization ▪ Multiple Sanctioned Sources of Truth *may* exist, as long as there is a common understanding of what is the "Gold Standard" ▪ Siloes are the enemy of collaboration and consistency
	Roles, Responsibilities, & Skills	▪ Roles & Responsibilities should be clearly defined, documented, and understood (e.g., Process RACI matrices) ▪ Improve the flow of value and empower people by decentralizing decision-making and shifting away from "Command & Control" ▪ Seek to reduce dependence on "Tribal Knowledge" and success derived through superhuman heroics
	Scalability and Sustainability	▪ Perfection is the enemy of Progress; Strive for right-sized governance and oversight, minimize overengineering ▪ Automation, optimization, and customization must not create an undesirable amount of technical debt or failure points ▪ Business processes and methodologies must be able to evolve alongside transformational efforts (e.g., Process before tool)

DEA PPM Guiding Principles Alignment

Image of Success is ***foundational to the effort*** and impacts of each of the Design Principles, below

DISCLAIMER: These assessments are based on our observations and on stakeholder feedback. There may be undisclosed artifacts, information, or other efforts which we did not observe which could temper some of these recommendations.

Principle Alignment

- No evidence of alignment to Guiding Principles
- Some gaps observed but no major concerns or blockers
- Observed to be fully aligned to Guiding Principles

The degree to which the current implementation aligns with our Principles

Trajectory

- Stay the course; Success is likely
- There are some noted risks which can be mitigated
- Current actions are not likely to deliver desired outcomes

The degree to which previous work/direction will support successful results

Image of Success

Alignment to Principles

Change Leadership & Culture

Alignment to Principles

Taxonomy / Portfolio

Alignment to Principles

Data and Reporting Strategy

Alignment to Principles

Roles, Responsibilities, & Skills

Alignment to Principles

Scalability & Sustainability

Alignment to Principles

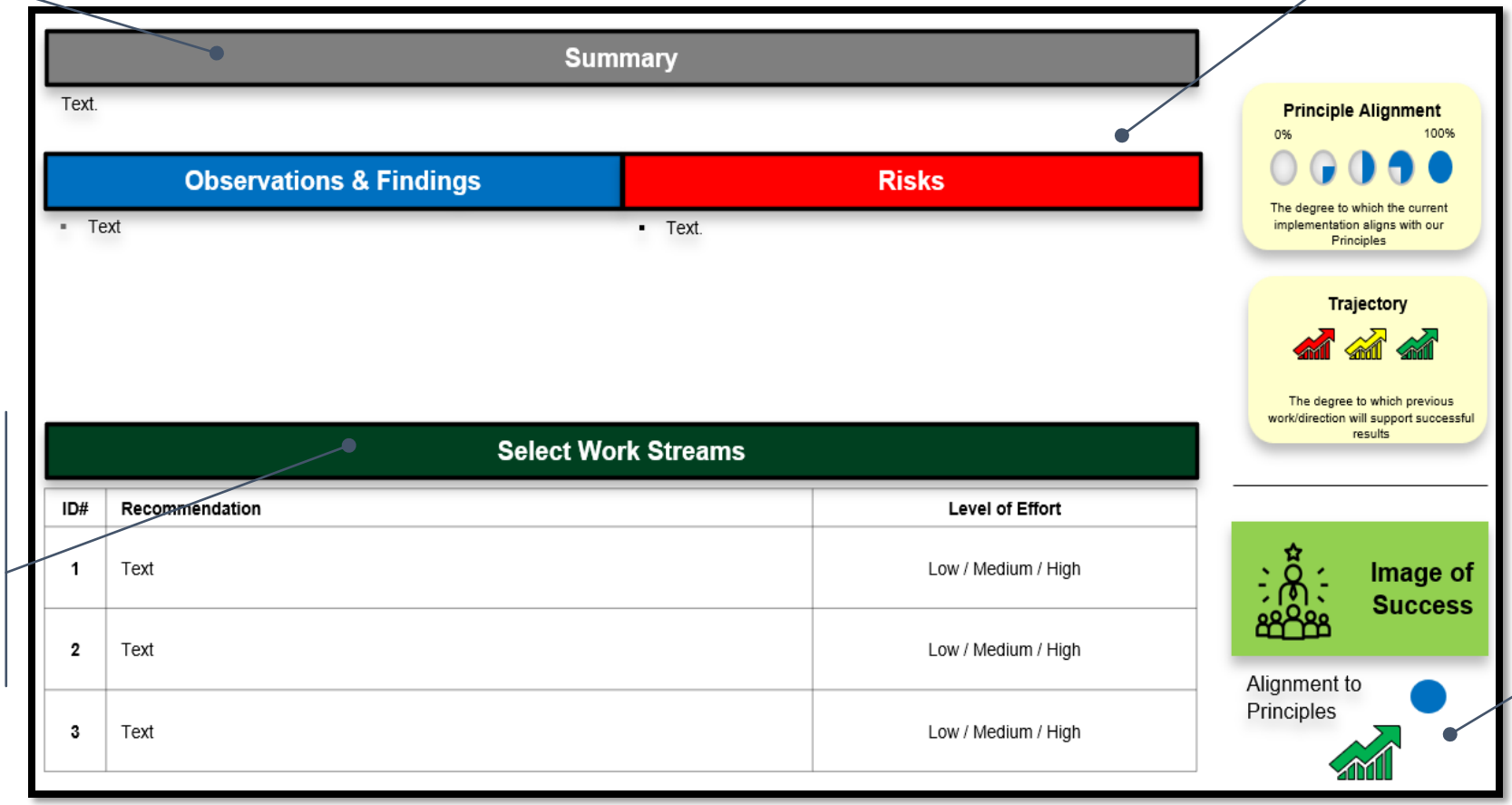
Note that 100% alignment is not the objective. Assessment is structured to enable the identification of key considerations.

Assessment Scorecard

Summary / Findings

A high-level summary of the assessment area along with the main observations/findings is provided. Detailed notes and supporting information can be found in the appendix.

Each assessment scorecard slide is followed by additional content focused on accelerating the accomplishment of the strategy



Select Work Streams

The recommended Select Work Streams are a list of key work activities to consider and do not represent a sequential relationship. We have included a high-level assessment of the potential impact and the anticipated effort required.

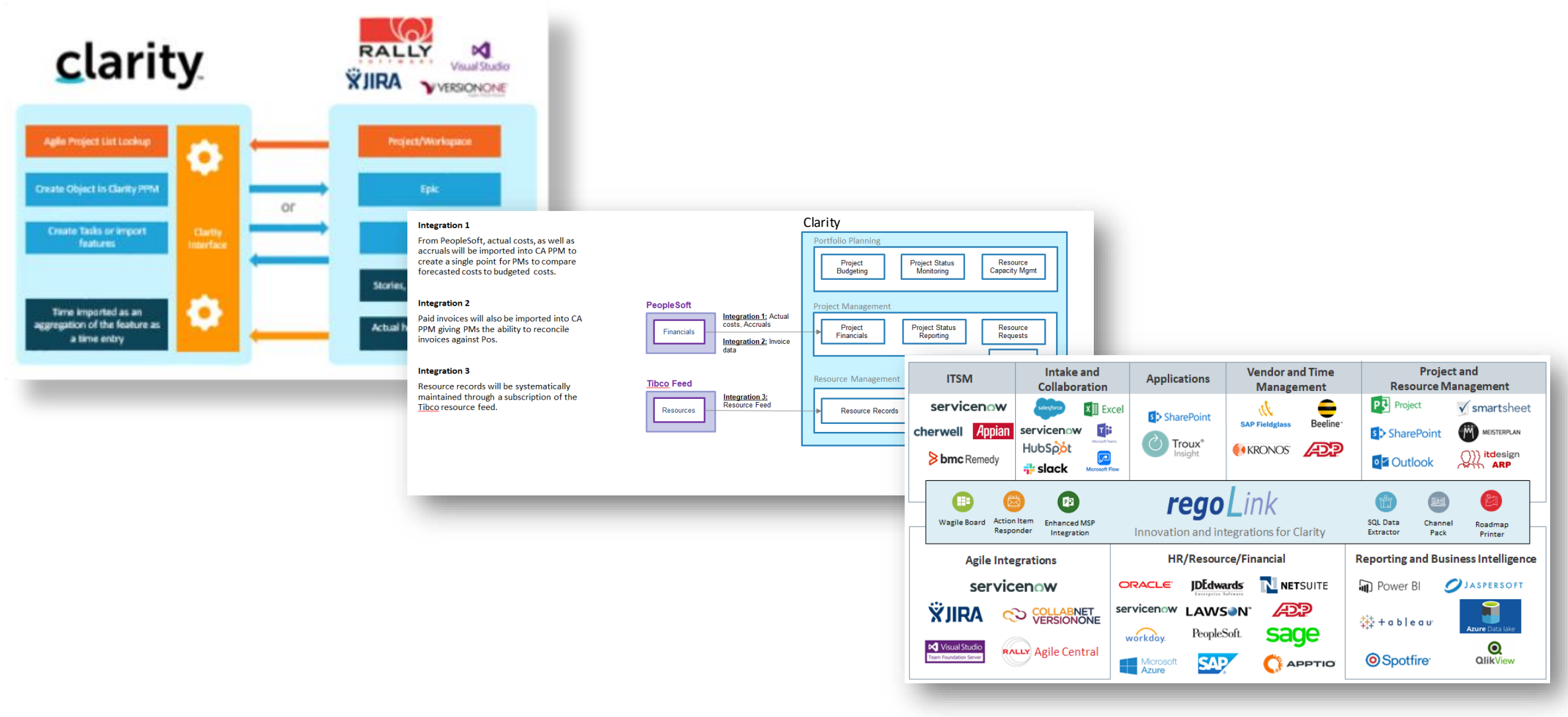
Risks

We have taken an initial cut at identifying the main potential risks for this assessment area. These are not intended to be comprehensive but were the most obvious to our team.

Alignment

Alignment with our PPM reference model and trajectory moving forward.

Integration Diagrams



Best-of-Fit Tools: Rego's Perspective on Alignment

Capability*	Clarity (Best fit for Enterprise SPM)	Azure (Best fit for Agile DevOps)	monday.com (Best fit for isolated work)	ServiceNow (Best fit for automation/ITIL)	Spreadsheets & Custom tools
Demand Intake & Assessment	Ideas (self-service support, View Only licensing)	Manual Configuration	Limited, not enterprise-focused	Manual Configuration	N/A, fully manual
Top-Down Investment Planning & Work Hierarchy	Industry-leading SPM/VSM Investment Planning	Limited	Limited, not enterprise-focused	Extremely limited (PPM Module), manual/custom	N/A
Top-Down or Bottom-Up Financial Planning and Project/Product Financials	Native, robust, built-in functionality	No native ability	Limited, not enterprise-focused	Extremely limited, manual	N/A, fully manual
Traditional Project Management (Schedules, Risk, Issues, Status)	Native, robust, built-in functionality	No native ability	Native, highly configurable, limited native advanced PM capabilities	Native (PPM Module), requires heavy customization	N/A, fully manual
Resource Capacity & Allocation Management	Native, robust, built-in functionality	No native ability	Limited, not enterprise-focused	Native (PPM Module), requires heavy customization	N/A, fully manual
Roadmaps (Portfolio, Product, Solution) & Scenario Planning	Native, robust, built-in functionality	Ability to show timelines for Epics and features	Some native; mainly Gantt focused	Some capabilities (PPM Module), manual	N/A
Collaboratively plan, automate, track, and visualize work tasks and deliverables	Native, traditional schedules, Gantt, Boards, Datasheets, Checklists and To Do items. Native social collaboration.	Native, built-in functionality using Boards	Native, good for high-level collaboration	Native	N/A
Executive level insights and dashboards (Enterprise/Portfolio)	Flexible, user-configurable dashboards, widgets,& canvasses. DWH & BI support	Native, built-in functionality (Agile/Sprint focused)	Native ,built-in functionality	Very limited, manual	N/A, fully manual
PI/Sprint Planning & User Story / Epic Delivery	Possible through custom configuration	Native, built-in functionality	N/A	Custom configuration	N/A

Not Inherent · Poor Fit / Manual · Some/Limited Ability · Ideal Fit · Current Use Case

** Total solution capabilities go beyond what is displayed here*

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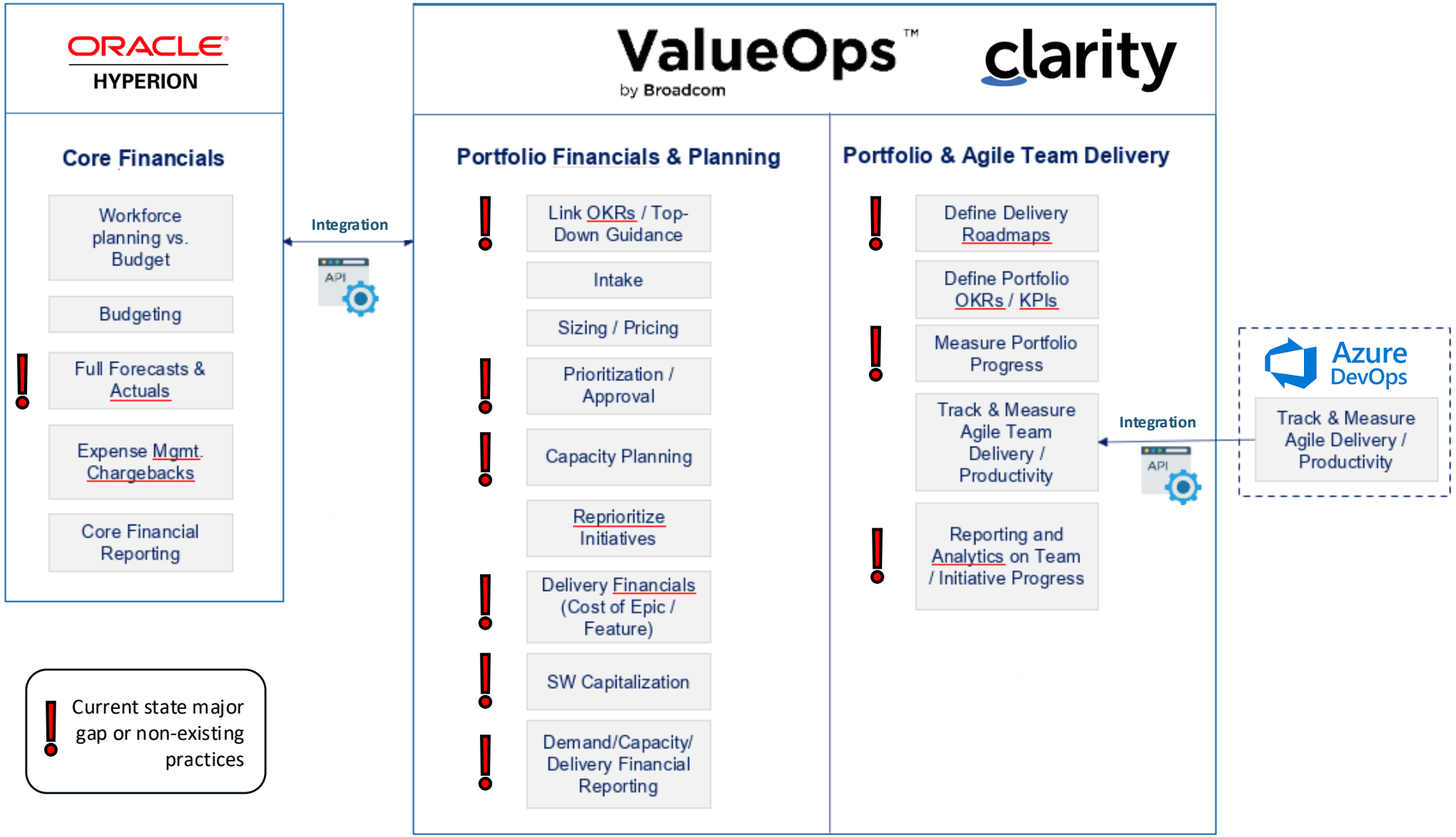
Clarity as a Strategic Bridge in Hybrid/Product Portfolios



Solution Capability Stack (Recommended Approach)

clarity

- Top-Down Investment Planning
- Demand Intake and Approval
- Estimation of Costs & Resources
- Resource Capacity Planning
- Staff Allocations & Utilization
- Project Accounting/Forecasts
- Linked Strategy/OKRs to Work
- Portfolio Strategic Planning
- Product & Solution Roadmaps
- Program/Portfolio Health & KPIs
- Status Reporting, RAID logs
- Executive Dashboards & Insights

monday.com

- Adaptive Work Management
- Unique or One-Time Work Effort

Azure DevOps

- Delivery Roadmaps (Sprint / PI)
- Agile Team Planning
- Dependency management
- Team Backlog sizing
- Team Backlog prioritization
- Team-level Risks & Issues
- Kanban boards
- Agile metrics

servicenow

- ITIL Work Processes
- Workflow Task Automation
- Standardized Work Sequencing
- IT-Centric, Low-Touch Tasks

Sample #1 – Backlog of Clarity Recommendations

Short Term (0-3 months)

Foundational or Quick Wins

T1: Improve the User Experience
T2: Improve System Performance
T5: Shift towards the Modern UX
T6: Integrate with Agile

Mid Term (within the next year)

Sooner than Later

G1: Re-establish Clarity Steering Committee
T4: Investigate a Cloud Migration
T8: Revisit the Clarity Security Model
T9: Leverage BI Tools to Maximize the Value of Clarity Data
T10: Utilize Budgeting within Clarity

Long Term Goals (beyond next year)

Vision for the Future

V1: Create an Enterprise Project Management Office (EPMO)
C1: Pace Change
C2: Develop Strategic Themes
C3: Deploy Change Champions

Assessment Value

- **For the Client,** the DEA will create tactical recommendations and a roadmap to align tools, streamline process and enable people manage project information effectively.

- **For Broadcom and Rego,** the DEA will allow us to gain insight into project practices in detail so we can position offerings for long term engagements. A roadmap of future enhancements, work and growth.

Qualifying Questions?

- Do you have a roadmap for your PPM tool?
- Are you moving toward Agile practices and/or Project to Product?
- Do you have too many tools and/or complex and slow process?
- Would you like an unbiased fresh perspective?
- Would you like an expert to provide tailored best practice guidance for your organization?
- Are you looking for some quick wins and fresh energy to support your PPM ecosystem?
- Does your business need an interconnected roadmap across the entire ecosystem of PPM/Work/Agile tools?
- Do you want to include people and process changes in your roadmap along with tools?

Summary

DEA Summary

- A DEA can show an objective perspective on a Clarity implementation.
- A DEA is a client-first offering that will allow you to discover deep insights into your organization, the users, and use cases.
- A DEA is very partnership focused with the client users and you, the Clarity support/owner team.
- A DEA will unlock additional value in Clarity and improve end user engagement.
- If you want to have your Enterprise SW optimized to work in a balanced ecosystem in support of project delivery, do a DEA!

Questions?

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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.

Additional Resources

Additional RegoU Sessions:
Best Practice Use of Clarity for Intake & Prioritization (Thursday, 0900)
Adoption Roundtable (Thursday, 0900)
Roadmaps Roundtable (Thursday, 1010)
Intake & Prioritization Roundtable (Thursday, 1120)

Articles/Webinars:
https://info.regoconsulting.com/top-ppm-and-work-management-trends-for-2024-december-2023
https://info.regoconsulting.com/improve-your-project-management-practices-with-a-digital-ecosystem-assessment-30-august-2023
https://www.prosci.com/blog/defining-change-impact
https://www.prosci.com/blog/sustainment-in-change-management
https://businessleadershiptoday.com/how-does-leadership-affect-organizational-success/
https://info.regoconsulting.com/what-is-strategic-portfolio-management-linking-strategy-to-execution

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
The Digital Transformation Playbook, David L. Rogers

Personal Growth
From Strength to Strength, Arthur C. Brooks
Designing Your Life, Bill Burnett and Dave Evans
The Six Types of Working Genius, Patrick Lencioni

Surveys

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

Jacob Cancelliere, PMP

VP of Account Enablement

Rego Consulting

Let’s Connect on LinkedIn

Thank you!

Let's continue the conversation! Connect with me on LinkedIn!

Thank You For Attending Rego University

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- Click on **Maintain My Certification**
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- Click on **Course or Training**
- Class Provider = **Rego Consulting**
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Let us know how we can improve!
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