



# Top 7 Project Portfolio Management (PPM) Trends of 2025

Your Guides:  
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# How the Trends Are Chosen

## How We Identify the Trends:



Insights from Rego's 250+ PPM consultants.



Data from hundreds of organizations across industries.



Trends shaped by real-world challenges and opportunities.

# Overview of 2025 Trends

**1** Interconnected and Inclusive Ecosystems

**2** Overlapping PPM and CWM Capabilities

**3** Personas Not Pillars

**4** Aligning With Finance

**5** Dedicated Teams and Resource Management Challenges

**6** Refocusing on People Leadership

**7** AI Fatigue

# Trend 1 – Interconnected and Inclusive Ecosystems



## The Challenge

- Siloed methodologies and disconnected data.
- Conflicting capabilities in multiple tools .



## The Opportunity

- Create a unified ecosystem for better collaboration and insights.
- Use Best practices from multiple methodologies.



## Action Steps

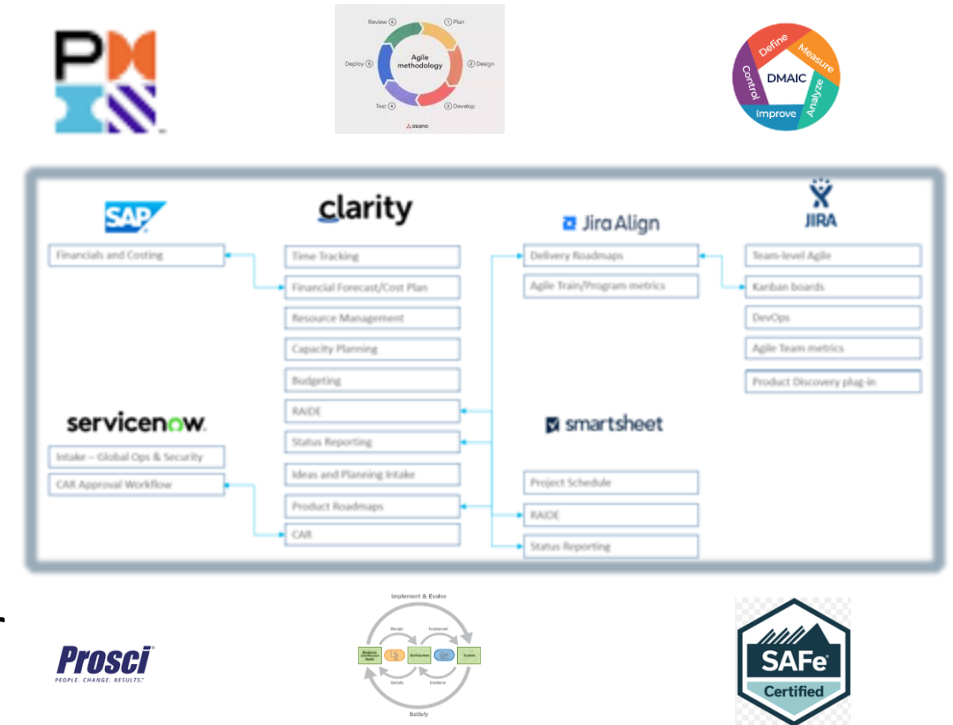
- Map use cases across your organization. Personas.
- Standardize taxonomies and data models. Best Practices.
- Secure executive sponsorship for unified systems.

# Trend 1 – Interconnected and Inclusive Ecosystems



## One Way of Working, NOPE!

- We are seeing success using Best Practices from multiple methodologies.
- Move away from pure SAFe implementations.
- Project to Product is becoming Projects in Product structure.
- Annual Planning still challenging.
- Resource Management a key focus across all methodologies.
- Each vendor will oversell their tool capabilities so you need to determine what will work best for your organization now and with growth.





# Get on Track with This Trend



## Personas

- Document and Map Personas.
- Document and publish Roles and Responsibilities.



## Standardize Using Best Practices for Your Organization

- Create a standard taxonomy.
- Assess current practices to understand what is working well and where gaps may be.
- Be open to multiple methodologies or frameworks working together.



## Baseline all Tool Capabilities

- Document your capability stack across all delivery tools.
- Align your use cases to an optimal Capability Stack – Seek help.

# Trend 2 – Overlapping PPM and CWM Capabilities

PPM: Project Portfolio Management | CWM: Collaborative Work Management



## The Challenge

- CWM solutions continue to expand their capability footprint into the portfolio space.
- At the same time, PPM solutions introduce enhanced team collaboration and simple work management features with each release.
- Silos become increasingly difficult to bridge as teams are emboldened to expand outside traditional use cases.
- There's an increased risk of over-configuration and adoption struggles.



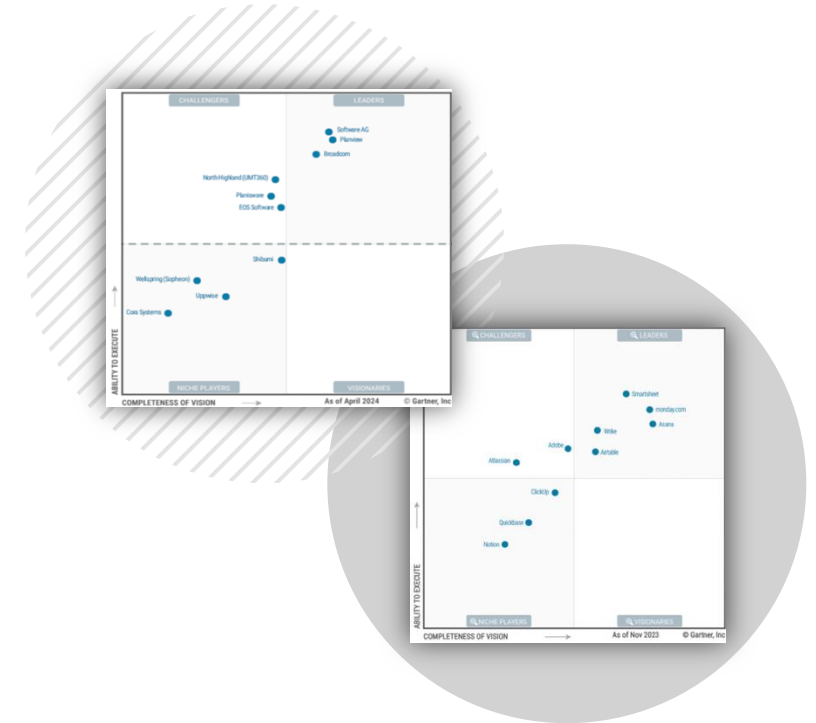
# Trend 2 – Overlapping PPM and CWM Capabilities

PPM: Project Portfolio Management | CWM: Collaborative Work Management






## The Prediction Variables

- Critical capabilities remain a focus of vendors:
  - CWM solutions are highlighted by no-code workflow and industry accelerators.
  - PPM with scenario modeling and strategic value management.
- PPM solutions have an easier technical path to push into CWM but face change management challenges.
- CWM solutions have stickiness but limited technical runway.
- Integrations, for now, provide a means of balancing the ecosystem.





# Get on Track with This Trend

-  **Define Your PPM Journey**
  - Understand your current maturity and articulate a vision for portfolio management.
  - This will help establish the critical tool capabilities needed along the way.
-  **Assess Your Current Toolset**
  - Establish an application inventory.
  - Assess adoption and data quality.
  - Rationalize capabilities and disparate systems of record.
-  **Review Product Roadmaps for Future Capabilities**
  - Work closely with vendors to understand their investment roadmap.
  - Understand timelines and align to your current and future use cases.

# Trend 3 – Personas, Not Pillars



## The Challenge

- Legacy technology solutions focused on general process areas such as Project or Resource Management. Modern organizations and business processes have become more complex and use cases have become more varied and nuanced.



## The Opportunity

- Shift from “One Size Fits None” to “One Size Fits MOST.”
- Adopt persona-based solutions to improve user experiences.
- Tooling can become more intuitive and effective, while end users become more efficient and empowered, delivering better outcomes.

# Trend 3 – Personas, Not Pillars



## Action Steps

- Identify personas across your organization.
- Evaluate how well current tools meet these needs.
- Tailor solutions for greater engagement and success.

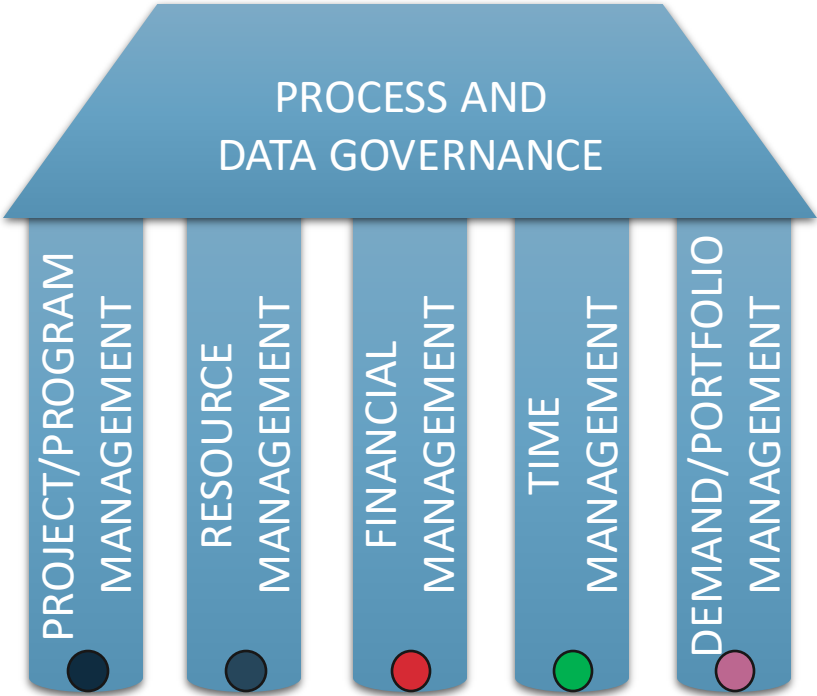




# Personas Not Pillars

## Traditional Mindset

Focused on process areas or general capabilities



## Emerging Mindset

Focused on unique use cases and ways of working

● ● ● ●	Workforce / Headcount Planning, Chargebacks
● ● ● ●	Strategic Planning & Realization
● ● ●	Agile Feature Costing / SW Capitalization
●	Application Portfolio Management
● ●	Agile Team/Train Capacity Planning
● ●	Delivery or Operations Lead
● ●	Risk Management, Audit, Compliance
● ●	Agile/Hybrid Delivery, CWM
● ●	Strategic Programs / Products
● ●	Business Outcomes & Initiatives
● ●	Traditional / Technical Projects

# Get on Track with This Trend



## Do Your Research

- Gain a deeper understanding of the relevant personas in your organization and the unique needs of each.
- Ask questions that help you understand the key responsibilities of each persona role, the primary challenges they face relevant to this technology solution, and how the ideal solution can be best positioned to address their unique needs.



## Assess Your Current Ecosystem and Look For Gaps

- Assess how well your existing technology solutions meet the needs of the intended personas, and identify critical gaps (end user surveys, value stream mapping).



## Collaboratively Visualize an Ideal Future State

- Brainstorm with senior leaders and change agents in your organization to hypothesize what future persona needs will be expected to be met through technology solutions.

# Trend 4 – Aligning with Finance



## The Challenge

- Growing involvement from Finance in PPM processes.
- Product Focused Costing with Project Costing Models.
- Finance driven PPM Practices.



## The Opportunity

- Strengthen ties between PMOs and Finance for better transparency.
- Improved reporting and investment alignment.



## Action Steps

- Build strong relationships with Finance leadership.
- Simplify financial reporting requirements.
- Educated each other on common practices.



# Trend 4 – Aligning with Finance



## Complexity that needs to be challenged

- WBS that is a financial construct instead of work breakdown.
- A CapEx model that needs to be simplified.
- Way too many time tracking line items – Tasks.
- Manually Reporting Efforts - adjusted data after extracting from systems of record.
- How to Pivot to a Product Funding Model.



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# Get on Track with This Trend

## Education

- The PMO should have a strong understanding of Financial Requirements.
  - Reporting
  - Timing
  - Data Used
  - The PMO should have a strong understanding of Financial Requirements.
- Finance should have an understanding of how work is planned and forecasts are created and maintained.

# Get on Track with This Trend



## Build Relationships

- PMO leadership needs to have a strong relationship with Finance leadership.
- Involve Finance early and often.



## Connect Data

- Ensure your systems of record are connected so reporting can move from data administration to data analysis.
- Build standard layout reports that have dynamic filtering and layouts.



# Trend 5 – Dedicated Teams and Resource Management



## The Challenge

- Rigid team models causing inconsistent utilization and often over allocates users
- Shifting priorities disrupting resource management.



## The Opportunity

- Strike a balance between dedicated and flexible resource models.



## Action Steps

- Gain visibility into resource allocation.
- Use trusted insights for better decision-making.



# Resource Management Is Both Art and Science



# Get on Track with This Trend



**Visibility Is Key** – Getting ALL work-related allocations into one system really does help.



**Experiment** – with What If Scenarios and modeling (NEW) - Empower Resource Leads with tools to try things out before applying.



**Communication Is Key** – Agile Product Owners, Product Managers, Scrum Masters all need to be part of the conversation as well. It goes against traditional Agile work – but super effective.



**High Level Is OK** – Don't discount the value of the "buckets" or placeholders when resource planning.



# Trend 6 – Refocusing on People Leadership



## The Challenge

- Over 65% of change initiatives fail without strong people leadership.
- Engagement from senior leaders and effectively empowered and enabled end users are critical success factors to every change initiative.
- The modern workforce is more diverse than ever, and end users are facing unprecedented levels of stress and burnout.<sup>1</sup>
- Faced with economic challenges, companies often sacrifice people leadership as a “luxury” investment.



<sup>2</sup> <https://www.prosci.com/blog/why-change-management>



## The Opportunity

- Improving people leadership has a direct correlation to the likelihood of success.<sup>2</sup>
- Future-proof your organization with change leadership that casts a clear and compelling vision, helps people feel empowered and engaged, and drives successful adoption.

# Trend 6 – Refocusing on People Leadership



## Action Steps

- Learn from past successes and failures.
- Gather employee feedback to shape initiatives.
- Partner with HR to align leadership strategies.



# Get on Track with This Trend



## Learn from the Past

- Survey your workforce to gain an understanding of their levels of acceptance or resistance to past change efforts.
- Go back and evaluate major change initiatives from the past and document the learnings and critical factors that contributed either to successful adoption, or to outcomes and adoption that fell short of the expected results.



## Get Curious

- If recent change initiatives in my organization fell short of expected results, how might the results have been different if we had managed the people side of change differently
- If we implemented even a “Fair” level of people leadership practices as an intrinsic part of our next major change initiative, what might that look like? How might the outcomes be different from past efforts?

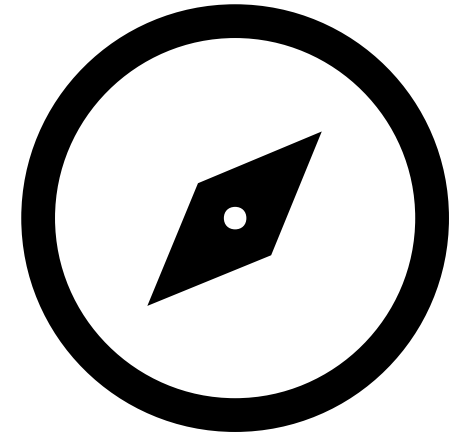


# Get on Track with This Trend



## Prepare For the Future

- Consult with appropriate leaders in your organization to determine your ability to formalize Organizational Change Management roles and processes in your company. If your company is not in a position to do this formally, experiment with how you can begin with a grass roots movement.
- Consider investing in leadership or Organizational Change Management training and certification for yourself, your teams, and other change agents in your company.



# Trend 7 – AI Fatigue



## The Challenge

- AI remains the #1 topic of discussion across industry conferences, research publications, and analysts.
- Technological advancements are omnipresent.
- Executive mandates and funding have followed the hype.
- However, practical PPM use cases are lagging and PMOs are struggling to show progress.

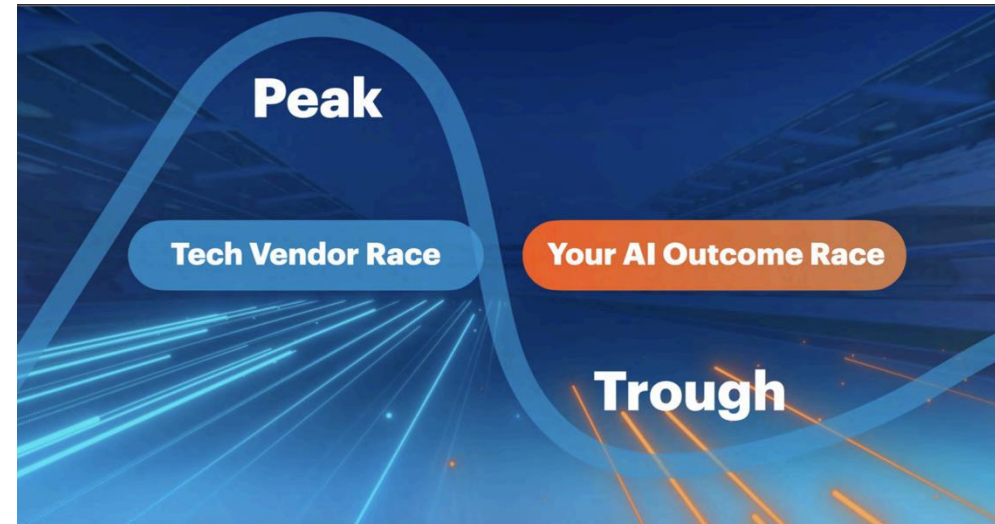


# Trend 7 – AI Fatigue



## The Opportunity

- Data quality initiatives can be pushed to the top of the prioritization list.
- Data security policies take time to define and communicate.
- The AI umbrella is large enough to include LLM, RPA, and Predictive Analytics.
- Automations, expanded reporting, and math-based solutions can provide quick wins.
- Overreactions in either direction can be dangerous.



# Get on Track with This Trend



## Focus on Data Cleansing and Ongoing Quality

- AI will only be as good as your data.
- Identify data gaps and take actions to close.
- Baseline data quality and measure impacts of ongoing change management.
- Look for integration opportunities.



## Continue Defining Use Cases for AI

- Define project success and contributing variables.
- Identify areas of inefficiencies and manual data investigation.
- Work directly with solution vendors on the application of current and future capabilities.



## Look for Quick Wins to Drive Value Now

- Workflow automation
- Status report creation and summarization



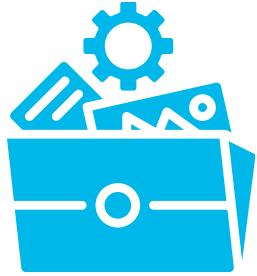
## Consider an AI Readiness Assessment



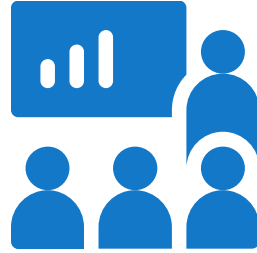
# Rego Consulting's Role

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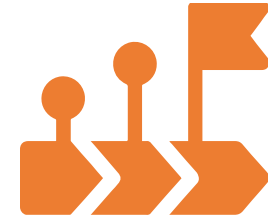
## How Rego Can Help



Toolset evaluations  
and integrations.



Workshops for  
improving alignment  
with trends.



Roadmaps for  
actionable, long-term  
success.

# 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**
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- Class Name = **regoUniversity**
- Course **Description**
- Date Started = **Today's Date**
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- Click on **I agree** and **Submit**



Let us know how we can improve!  
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# Continue to Get Resources and Stay Connected

- 1 Use [RegoXchange.com](https://RegoXchange.com) for instructions and how-tos.
- 2 Talk with your account managers and your Rego consultants.
- 3 Connect with each other and Clarity experts at [RegoGroups.com](https://RegoGroups.com).
- 4 Sign up for webinars and join in-person Rego groups near you through at [RegoConsulting.com](https://RegoConsulting.com)
- 5 Join us for the next [Rego University](#)!

