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Balance Your Ecosystem of Tools

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 – Framing the Challenge

- ❓ 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 organizational changes or organic growth created a need to bring more users into your PPM/SPM environment?
- ❓ Are work management or other point solution tooling creating siloed data and processes, that makes it difficult for leadership to have a single lens into trusted insights?

Why Should You Assess Your PPM Implementation

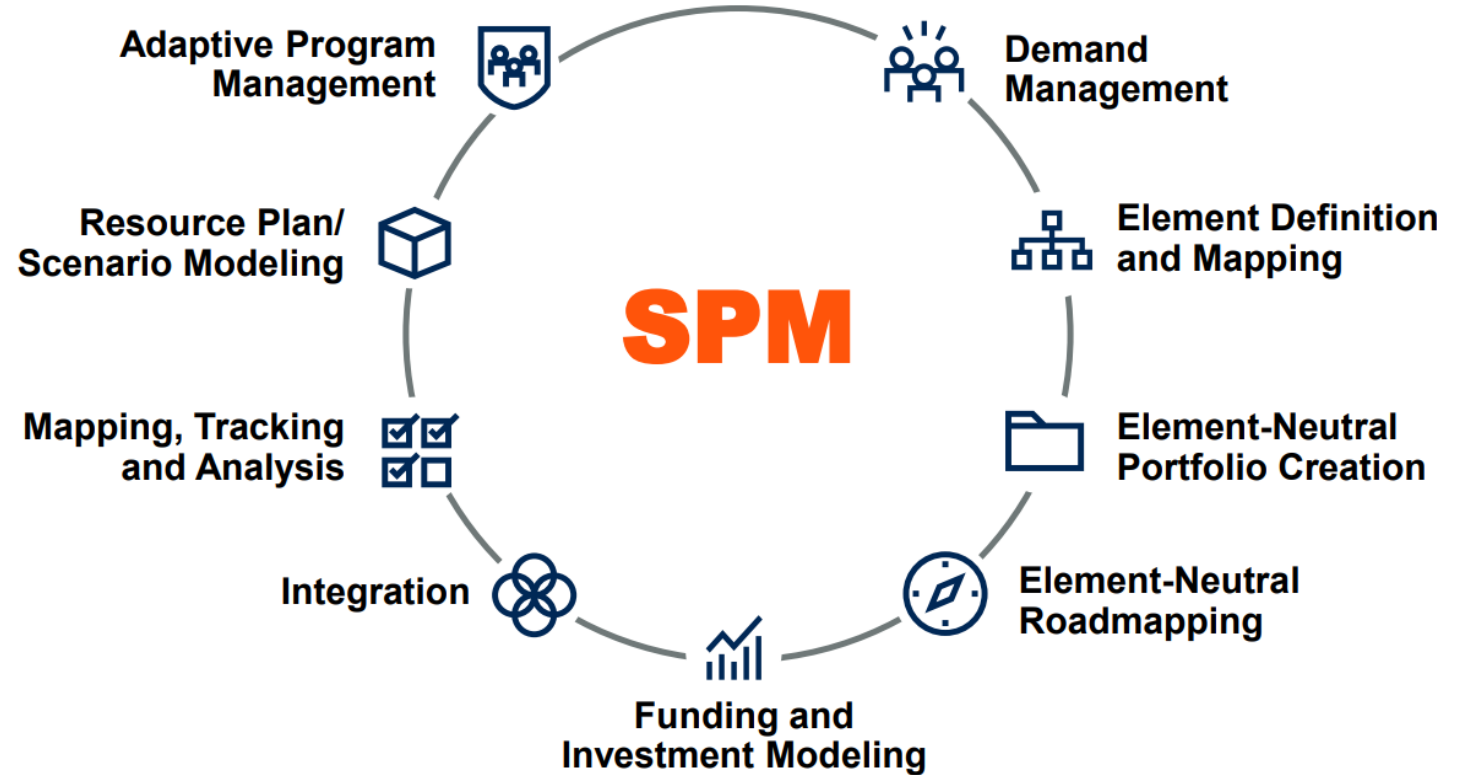
- 1 PPM is not connected to other key data, processes or systems
 - HR
 - Finance
 - Work Management/Agile
- 2 Questioning value, low adoption, lost momentum
- 3 Changes in roles or process and tool ownership
- 4 Leadership struggles to make strategic decisions from trusted insights
- 5 Stakeholders sense a lack of transparency and visibility
- 6 Redundant tooling and data repositories create friction and confusion



SPM: A Connected Strategy to Achieve Business Value

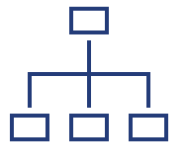
Strategic Portfolio Management (SPM) is a set of business capabilities, processes and supporting technologies that can focus an organization's finite resources to execute enterprise-wide business strategy.

Gartner



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



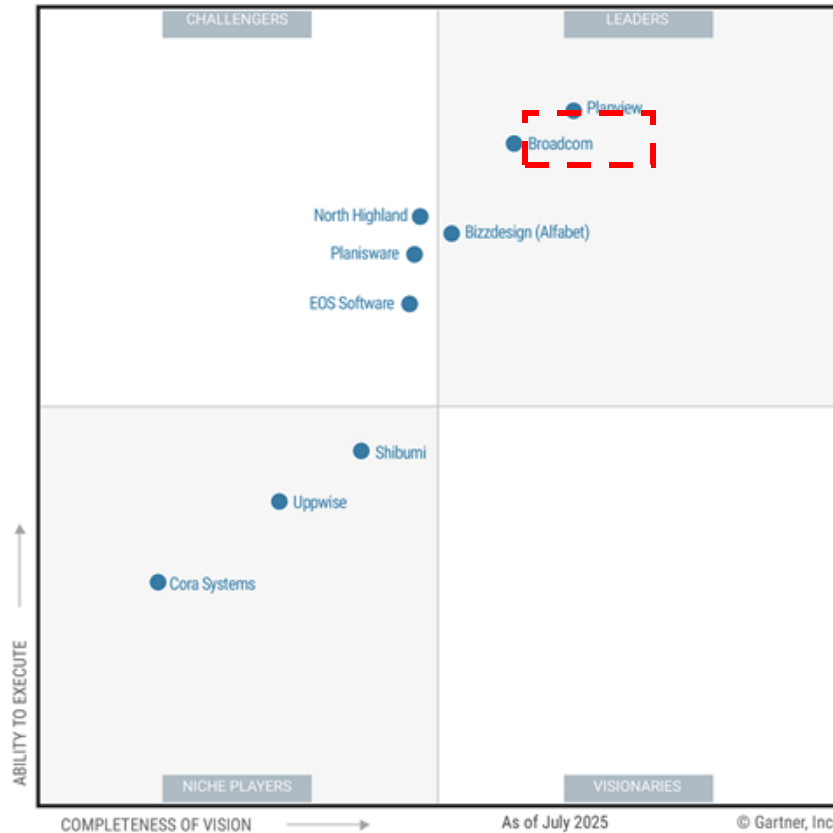
Leverage Leading and Existing Toolsets

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

Figure 1: Magic Quadrant for Strategic Portfolio Management



According to Gartner, "By 2028, 80% of portfolio management offices (PMOs) will principally provide outcome-driven portfolio management and will not be directly involved in delivery orchestration. By 2027, 75% of organizations will enrich business architecture by connecting financial benefits to digital investment decisions. By 2027, 80% of portfolio leaders will adopt collaborative capability-based methods for the planning and prioritization of all work needed to support the democratized delivery of digital outcomes."

Broadcom is proud to be acknowledged by Gartner as a Leader in the Magic Quadrant for Strategic Portfolio Management.

* Source: Gartner

<https://www.broadcom.com/company/industry-analyst-report/gartner-magic-quadrant-for-strategic-portfolio-management-2025>

Gartner

How Does SPM Differ from Traditional PPM?



- SPM expands beyond traditional PPM
Manages all types of work (projects, programs, products, services, etc.)
- Ensures work links back to organizational value and strategy
- Traditional PPM focuses on “Are we doing things RIGHT?” whereas SPM still values that, but focuses more on “Are we doing the right THINGS?”
- The framework here shows an illustrative Strategic Portfolio Management hierarchy
- Only the bottom two tiers of the pyramid are typically a part of traditional Project Portfolio Management

What Is a Digital Ecosystem Assessment?

Stop, Collaborate, and Listen

- Reflect on current state
- Listen to large coverage of stakeholders
 - Up as high as the C level
 - Talk to team members
 - Every persona in between



Core SPM Business Capabilities

Right-Sized Governance, Data Strategy, Visualizations and Insights, AI Enablement, Process Efficiency & Optimization

Strategy	Portfolio	Program	Work
Strategy Definition	Investment Intake Management	Planning and Coordination	Task and Workflow Management
Strategic Hierarchy	Strategic Planning	Execution and Delivery	Development
OKR Definition	Investment Prioritization	Quality Management	Deployment
Value Tracking	Workforce Optimization	Risk and Issue Management	Knowledge Management
	Investment Funding	Resource Utilization	Metrics and Performance
	Governance and Oversight	Stakeholder Management	Quality Assurance
	Continuous Planning	Continuous Improvement	Collaboration
		Financial Forecasting	Actuals Tracking
			Workload Management

These are some of the L1 and L2 business capabilities; L3 drills down into specific activities.

To bring this to life, however, we prefer to discuss and evaluate these capabilities through the lens of *role-based personas*.

Persona-Based Data Insights



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	

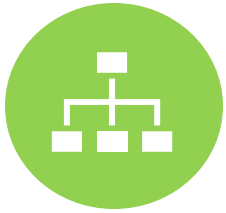
Looking Across Tools/Technology

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

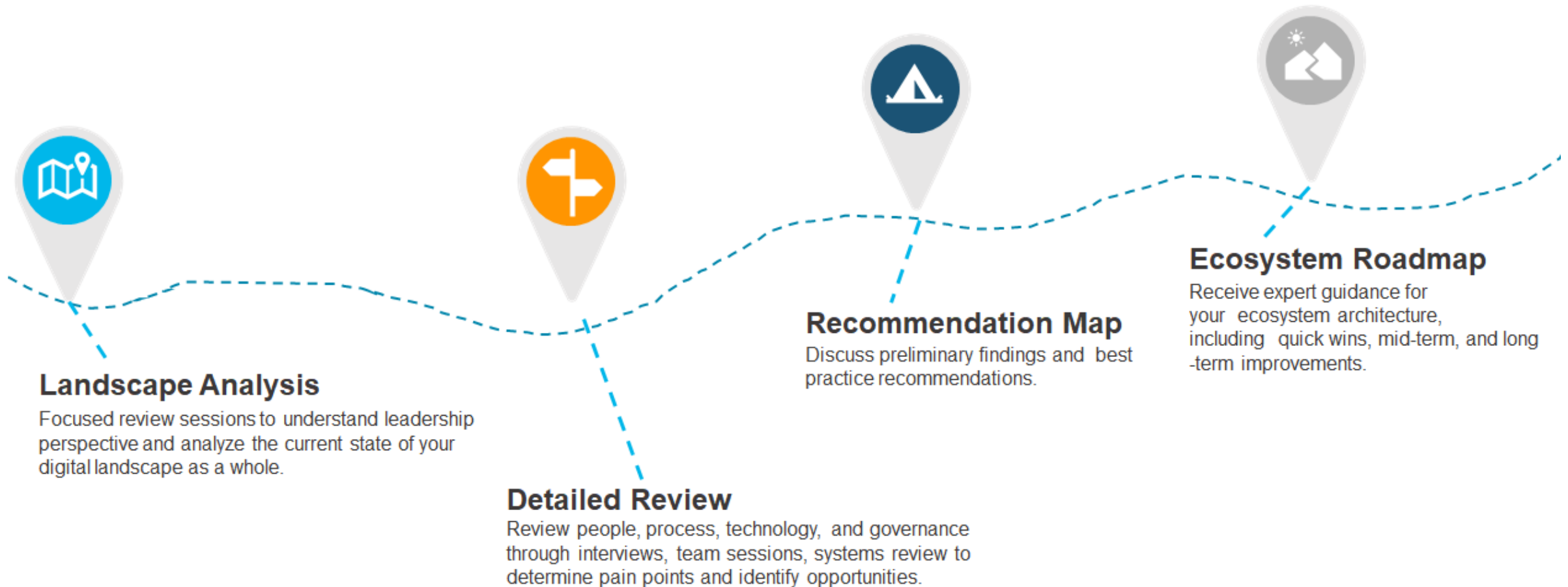


Governance

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

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?
- Aligning work to Strategic Plans / Goals / OKRs
- Agile Journey, moving forward or stepping back
- Capability Alignment, use the correct tool for the job – Eliminate process & data siloes
- 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?

- ✓ Roadmap of recommendations
- ✓ Architecture of your key systems
- ✓ Value stream map
- ✓ Conceptual integration diagram



Executive Summary (Details in Subsequent Slides)



People & Process Change

Current State Challenges	Recommended Transition Steps	Enabling Principles, Behaviors & Tools	Future State
End user community has limited understanding of Clarity's capabilities and how its features are best intended to be utilized to support common business processes.	Conduct Clarity "Roadshows" to demonstrate the Art of The Possible; Demand Intake, Top-Down Strategic Planning & Prioritization, end to end Resource & Financial Management, Project Planning/Scheduling, and visualizations and dashboards.	Demonstrate and communicate a commitment and understanding that Clarity has immense untapped strategic value for that can readily be attained.	users will begin to see Clarity differently and begin to challenge pre-existing beliefs that it is too complicated and too technical-focused and be more open to change.
End user community wants more empowerment, less friction and less complicated procedures. They want to maintain consistency while benefiting from configuration and processes specifically designed to address their needs and use cases.	Formalize a long-standing Community of Practice (CoP) to act as champions who empower users and support consistent business processes across the sectors (Power User Network, Train the Trainer, Office Hours, PM Coaching, Change Agency Board)	Aligning with Mission and Vision, we need to begin with a mindset that relentlessly puts people first, helping them to be better, faster, and stronger.	Users will experience more trust and collaborative efforts. They will learn from each other, feel more empowered and better equipped, and begin to demonstrate more consistent processes and ways of working. Friction and siloes will be reduced.



Governance & Technology Change

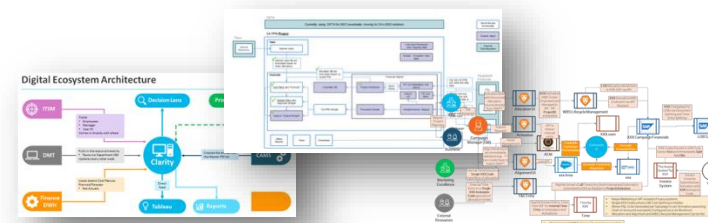
Existing config was primarily built for governance within legacy IT. The new S&T has new needs and processes being developed. This is an opportune time to reimagine Clarity, leveraging the lessons learned to support the future state vision.	Pilot a "Fresh Start" build. Include foundational end-to-end Financial and Resource Management and Top-Down planning.	"Crawl-Walk-Run" Approach; Quick Wins. Leverage Power Users across the sectors. Follow guiding principles that focus on usability and value, rather than governance and rigor.	No more "Tail wagging the dog" – Clarity will be viewed as purpose-designed to meet the needs of stakeholders and critical business processes, and not as merely administrative rigor.
Stakeholders want Clarity to provide more transparency, traceability, consistency, and optimization. However existing configuration and controls are too complex and not suited to the various archetypes and ways of working.	Design processes and configurations in the "Fresh Start" build around personas and archetypes. Design an "MVP" for each archetype. Deploy only what can be delivered in the MUX. Ruthlessly resist customization where possible. Invest in View Only licenses to increase access. Investigate Rego PowerBi packs (Jaspersoft plan)	Base Blueprint containing fundamental non-negotiables, additional Blueprints driven by personas and archetypes. Leverage Business Rules and OOTB controls. Minimize custom "Controls", instead leverage Checklists (only as needed), and SharePoint (integrated) for artifacts (eliminate duplication).	Consistency can still be maintained through agreed upon fundamentals, upheld by the CoP. And the inherent flexibility in Clarity will be leveraged to provide a better user experience which promotes more engagement and focuses on delivery of value and providing insights to address key business questions and decisions.
As users sought a path of least resistance, data and processes have become siloed across many different tools, creating a disparate ecosystem.	Redesign ADO integration for more optimal use. Create Monday.com integration. Research integration with Financial system. Pilot Clarity Mobile app	Integrations should fill gaps without disrupting what is working well. Focus on achieving holistic visibility and optimization without duplications.	Strategic tools will be leveraged according to their strengths, while reducing friction and duplicated data and efforts, allowing higher confidence and more rapid decision making based on trusted data.

Examples of Deliverables



Roadmaps

- Product roadmaps
- Portfolio roadmaps
- Epic and Feature roadmaps
- Architectural enablement roadmaps



Architecture

- System architectures
- Application architectures
- Governance models



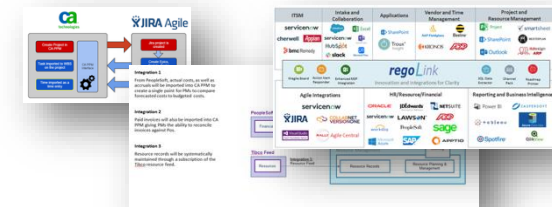
Metrics

- SMART – Specific, Measurable, Achievable, Relevant, Time-bound
- OKR and KPI metrics
- Behavior metrics
- Sentiment metrics (CSAT, NPS)
- Cost-of-delay
- Direct feedback
- Product usage tracking
- Customer health metrics



Journey and Value Mapping

- Identify product steps
- Identify and Eliminate Waste
- Visualize Flow of Work
- Blueprint for Improvement



Integration Maps

- Detailed integration maps of impacted systems

Backlog/Roadmap of Recommendations



Short Term (0-6 months)

Foundational or Quick Wins

P1 Implement Clarity Iteratively, Implementation Roadmap
P2 Standard Processes and Taxonomy
P8 Publish an Enterprise Data Architecture
P9 Use one Instance of Clarity
O1: Create a Global Cross Regional Enterprise Project Management Office (EPMO)
O4: Document Personas
O5: Deploy Change Champions
O6: Pace Change
O7: Develop Strategic Themes
I1: HR SuccessFactors
I3: SharePoint/Teams



Mid Term (within the next year)

Sooner than Later

P5 Develop Training Videos
P6 Consider Federate Clarity Support and Configuration
O2: Consider Creating a Manager of Resource Management Role
O3: Drive a Culture of Creativity and Continuous improvement
A1: Form and Agile Center of Excellence
A2: JIRA Integration with Clarity
I2: SAP FICO



Long Term Goals (beyond next year)

Vision for the Future

P3 Invest in PowerBI Embedded within Clarity UI
P4 Survey End Users of Clarity
P7 Track Lessons Learned
C1 Project Management Best Practices
C2 Resource Management Best Practices
C3 Financial Management Best Practices
C4 Portfolio Management Best Practices
I4: Apptio

6-Month Work Plan

Sep 23-Feb 24

Core Activities	1	2	3	4	5	6	Outcomes
1. IT Financial Management <ul style="list-style-type: none"> Build Salary and Benefits Planning into IT Planning Transition Management of Run Costs to IT Planning Pilot Agile Funding with one Agile Team 							<ul style="list-style-type: none"> Makes focus on Sal and Ben part of forecast Focuses investment planning on new work Demonstrates how future project funding can be simplified with Agile
2. Resource Management <ul style="list-style-type: none"> Create Resource plan by PD based on salary and benefits Define and Create a Pilot Agile Release Train Begin throughput measurements based on outcomes for pilot Pilot time capture through agile team metrics 							<ul style="list-style-type: none"> Continues focus on cost of FTEs vs project spend Train teams to work toward common vision Provides experience for how capacity/demand planning can work Develops framework for alternate cost and value calculation
3. Agile Transformation <ul style="list-style-type: none"> Choose and implement Industry Standard Tool Educate Teams and Specialty Roles Identify Epics/Features and create initial backlog for pilot team Create 18-month Product Roadmap with pilot team Conduct Value Stream Mapping Define OKRs and KPIs for pilot team 							<ul style="list-style-type: none"> Provides portfolio level management Creates framework for agile transformation Demonstrates possibilities with rolling wave forecasting Allows for higher level reporting Aligns work with business outcomes and metrics to track value
4. Technology Business Management <ul style="list-style-type: none"> Align FTEs and Run Costs to Towers, solutions and Portfolios Map approved projects to towers, solutions and Portfolios Prepare portfolio TCO Views for Business leaders 							<ul style="list-style-type: none"> Provides business with portfolio TCO without project structure Recreates holistic Portfolio Cost for Business Leaders
5. ITSM <ul style="list-style-type: none"> Provide access and training to CMDB Reps/support on BI Dashboards Schedule remaining known apps for monitoring, discover any unknown apps. 							<ul style="list-style-type: none"> Continue training for CMDB CI population/maintenance. Instruction for use of BI Dashboards and increased adoption of ITSM best practices across all portfolios.

Details for Each Recommendation

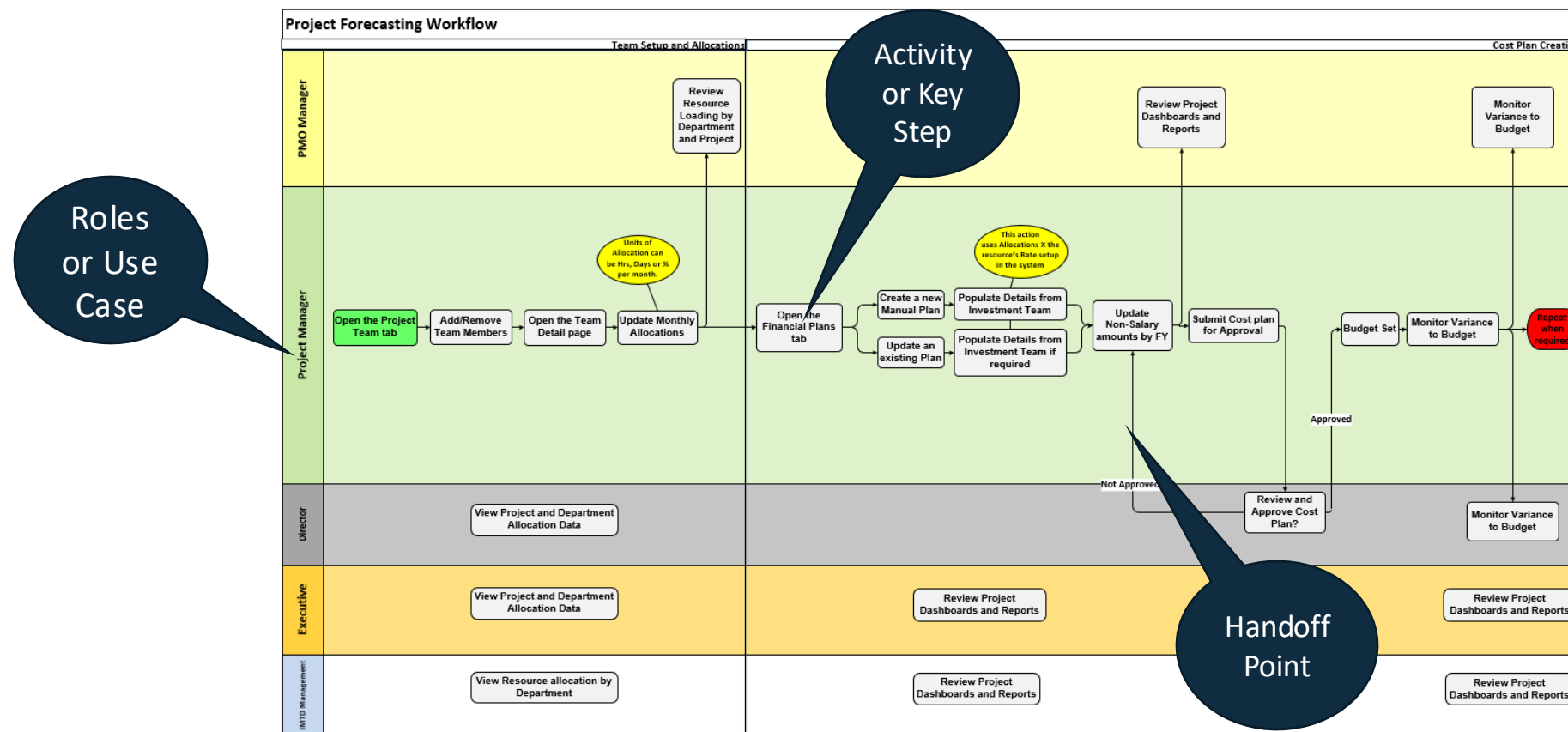
Overview	Key Challenges Addressed	Value and Key Results
Today, run costs are entered in value planning each year with a zero-based approach. This requires portfolio directors to keep track of recurring spend offline or potentially omit it from the next year's plan. Keeping the ongoing run costs detail in IT Planning and tracking actuals against it will make planning easier and more accurate.	<ul style="list-style-type: none"> Simplified Annual planning process for Run Forecast Accuracy Continues tracking of Run/Run spike 	<ul style="list-style-type: none"> Gives Budget Owners a repository for run costs Continued Run Cost Visibility Supports move to fewer planning tools

Recommended Actions	Overview	Key Challenges Addressed	Value and Key Results
<ul style="list-style-type: none"> Load 2023 Contracts and other run budget items into IT Planning Configure Actuals comparisons in IT Planning Create monthly forecast process for run costs 	Today, run costs are entered in value planning each year with a zero-based approach. This requires portfolio directors to keep track of recurring spend offline or potentially omit it from the next year's plan. Keeping the ongoing run costs detail in IT Planning and tracking actuals against it will make planning easier and more accurate.	<ul style="list-style-type: none"> Simplified Annual planning process for Run Forecast Accuracy Continues tracking of Run/Run spike 	<ul style="list-style-type: none"> Gives Budget Owners a repository for run costs Continued Run Cost Visibility Supports move to fewer planning tools














































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Recommended Actions		Dependencies / Related Recommendations
<ul style="list-style-type: none"> Load 2023 Contracts and other run budget items into IT Planning Configure Actuals comparisons in IT Planning Create monthly forecast process for run costs 		Potentially consider amortization of large (>500k) contracts

Process Mapping

Mapping key steps inside each phase of work will identify current state slow and possible gaps.



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, & canvases. 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 

* Total solution capabilities go beyond what is displayed here

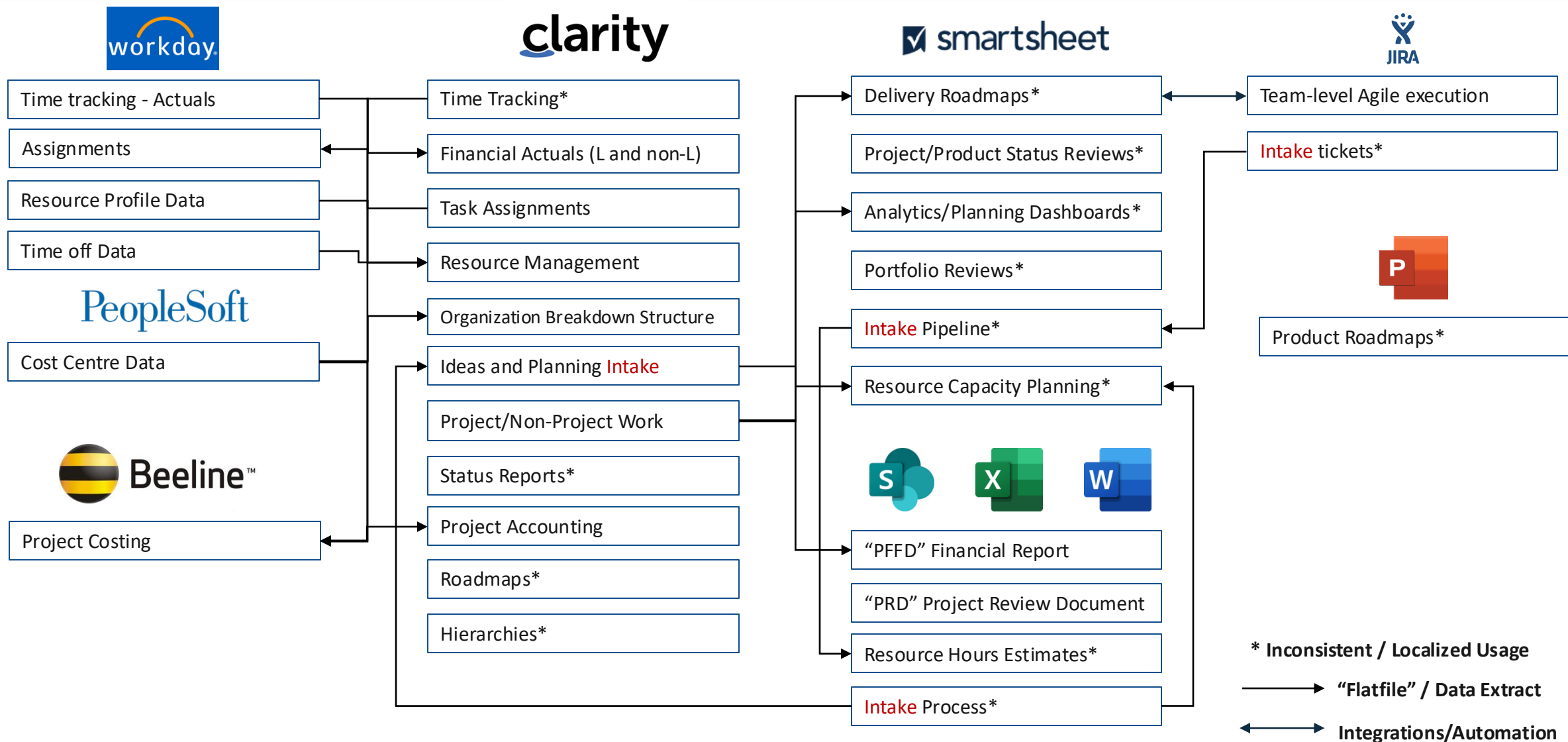
 Not Inherent
  Poor Fit / Manual
  Some/Limited Ability
  Ideal Fit
  Current Use Case

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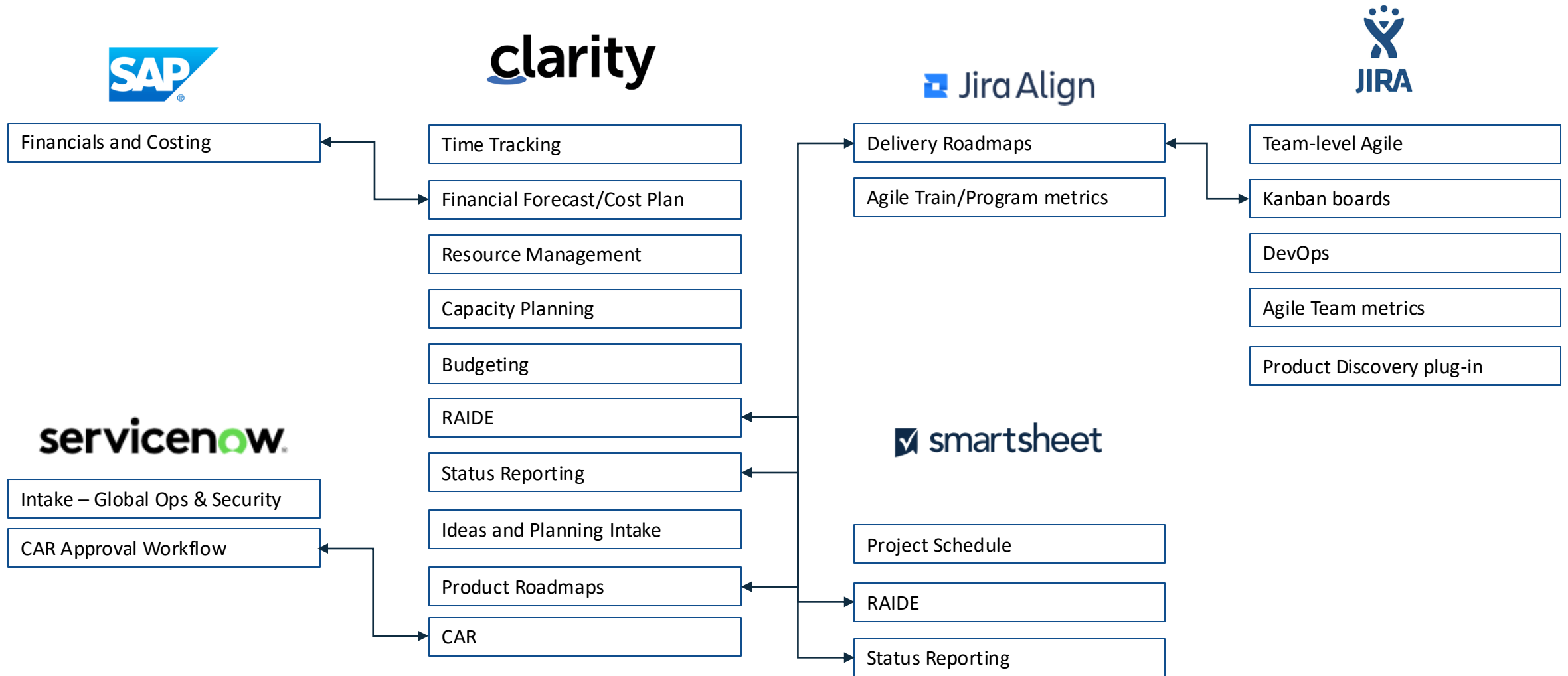
Let Rego be your guide.

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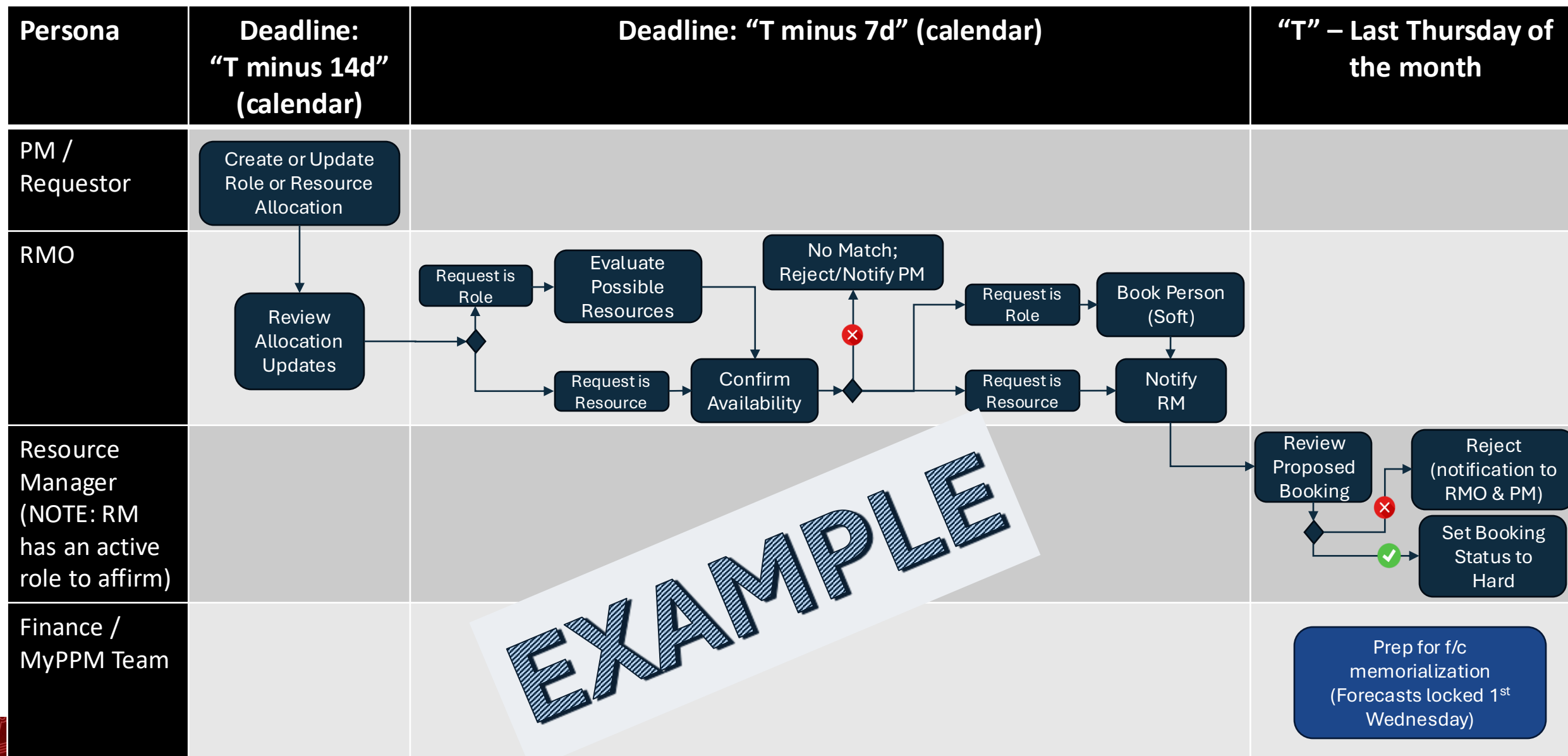
Capability Stack Current State



Capability Stack Possible Future State



RMO Illustrative Monthly Procedures






Future State Process RACI

Step Role	Prepare New Submissions	Create/Initialize Roadmap	Prep Waterline Scenario	Perform Waterline / Balancing	Align and Approve Scenario	Publish for Execution	Update Work Items
PPM Team	I	R	R	I C	I	R C I	R C I
Portfolio Managers	I	A C I	A R C	R C I	R C I	A R C I	R C I
Project Managers	R			C	C	I	A R C I
Team / Delivery Leaders	C		I	I C	R C I	I	I C
Executive Leaders				A C I	A R C	I	I
Finance Partners	C			C	R C I	I	I
BUs/Requestors	A R C I			C	C	I	R C I

R	RESPONSIBLE – Performs the action step	C	CONSULTED – Assists with or provides input to the action step
A	ACCOUNTABLE – Ensures the step is performed (There can only be one ACCOUNTABLE for each step)	I	INFORMED – Notified after the action step is complete



Change Impact Guide

Role Estimated Impact (L/M/H)	START 	CONTINUE 	STOP 
PPM Team (High)	<ol style="list-style-type: none"> Using Roadmaps for Waterline scenario process Maintaining new data elements and taxonomy Make system adjustments as guided by the business Monitor process and iteratively improve 	<ol style="list-style-type: none"> Support and enable stakeholders Utilize legacy data elements required to maintain continuity of process (e.g. Portfolio OBS) Monitor and maintain data integrity 	<ol style="list-style-type: none"> Utilizing Portfolios in PPM Classic Accepting / Prioritizing ad hoc out of cycle requests
Portfolio Managers (High)	<ol style="list-style-type: none"> Using Roadmaps for Waterline scenario process Utilize new data elements and taxonomy Facilitate ongoing monthly review cadence Identify gaps/improvements; report to PPM Team 	<ol style="list-style-type: none"> Prioritize in accordance with strategies and goals Validate and review with business/stakeholders 	<ol style="list-style-type: none"> Utilizing Portfolios in PPM Classic Accepting / Prioritizing ad hoc out of cycle requests
Project Managers (Low)	<ol style="list-style-type: none"> Adjust to new data requirements (if applicable) Adhere to new monthly cadence for submissions 	<ol style="list-style-type: none"> Follow current sizing/estimating procedures Make work item updates as appropriate following approved Waterline scenario 	<ol style="list-style-type: none"> Submitting new requests ad hoc (out of cycle)
Team / Delivery Leaders (Mid)	<ol style="list-style-type: none"> Participate in Waterline scenario alignment and approvals using Roadmaps Utilize Canvasses and other new visualizations provided in ProPM (TBD) 	<ol style="list-style-type: none"> Monitor funding targets / constraints Review requests and waterline scenarios and provide input 	<ol style="list-style-type: none"> Utilizing Portfolios in PPM Classic
Executive Leaders (Mid)	<ol style="list-style-type: none"> Participate in Waterline scenario alignment and approvals using Roadmaps Utilize Canvasses and other new visualizations provided in ProPM (TBD) 	<ol style="list-style-type: none"> Oversee alignment to strategies and goals Review requests and waterline scenarios and make executive decisions to approve/reject items Enforce adherence to financial targets / constraints 	<ol style="list-style-type: none"> Utilizing Portfolios in PPM Classic Approving new requests ad hoc (out of cycle) – unless by Exception process
Finance Partners (Low)		<ol style="list-style-type: none"> Communicate funding targets / constraints Review requests and waterline scenarios and provide input 	
BUs / Requestors (Low)	<ol style="list-style-type: none"> Capture Project proposal detail in PPM (recommended) Adjust to new data requirements (if applicable) Adhere to new monthly cadence for submissions 	<ol style="list-style-type: none"> Submit requests in accordance with strategies, goals, and financial considerations Follow current sizing/estimating procedures 	<ol style="list-style-type: none"> Using Excel or PowerPoint for Project Proposals (recommended) Submitting new requests ad hoc (out of cycle)

What We Heard – Insightful Feedback & Assoc Themes



- There's too many different ways to do the same thing
- People are doing the bare minimum, no standardization
- Takes too much time to complete simple tasks

Theme: Establish consistency through fundamental non-negotiables in Clarity

Benefits

- Reduce confusion and time wasted searching for information
- Promote more self-service, fewer handoffs and delays
- Increase visibility to who is doing what, who is available, with proper time context
- Establish starting point to promote overall value of Clarity



- End users doing too much work outside the system
- Clarity is "The Big Black Hole"
- People don't understand how Clarity works

Theme: Simplify user experience with MUX capabilities and targeted improvements

Benefits

- Increased visibility and awareness of Clarity capabilities
- Make life easier for end users
- Empower users to see and update their own data
- Reduce likelihood of errors/rework/miscategorization



- Its difficult to have a single pane view of things with all these different tools
- Need to consolidate and do less "copy/paste"
- Need a more integrated system

Theme: Synchronize and optimize ways of working

Benefits

- "Single Lens" holistic view of all work, context-rich views specific to stakeholder PoV
- Reduce siloes & duplication of data/processes
- Potential to eliminate custom/one-off tools thereby reducing technical debt and TCO
- Increased visibility to LPM practices and standardized support for Portfolio Reviews

What We Heard – Insightful Quotes

Need for Standardization

"We don't have a clear-cut process, this needs to be addressed before tools"

"We don't want to be making updates in a tool for the sake of updating, tools should talk to each other"

"Need Actionable Dashboards"

"Everyone everywhere starts work, there is no centralized process"

"Functions and teams all have different levels of maturity, struggling to get everyone to that same level"

General Challenges

"Growing so fast by M&A that there has been no capability to get to a 'gold standard', just been focusing on executing and keeping our heads above water"

"We don't want anything to be slowing us down"

"Project outcomes are very different depending on who is responsible, have to many non-PM's masquerading as PM's"

"we do not have clear guidelines"

"We succeed with a tremendous amount of work despite ourselves, but it comes down to working hard not smart"

Illustrative Implementation Roadmap

clarity ← Roadmap

DEA Recommendations
RD00026

CA

Roadmap Items Conversations Properties

Scenario

Search...

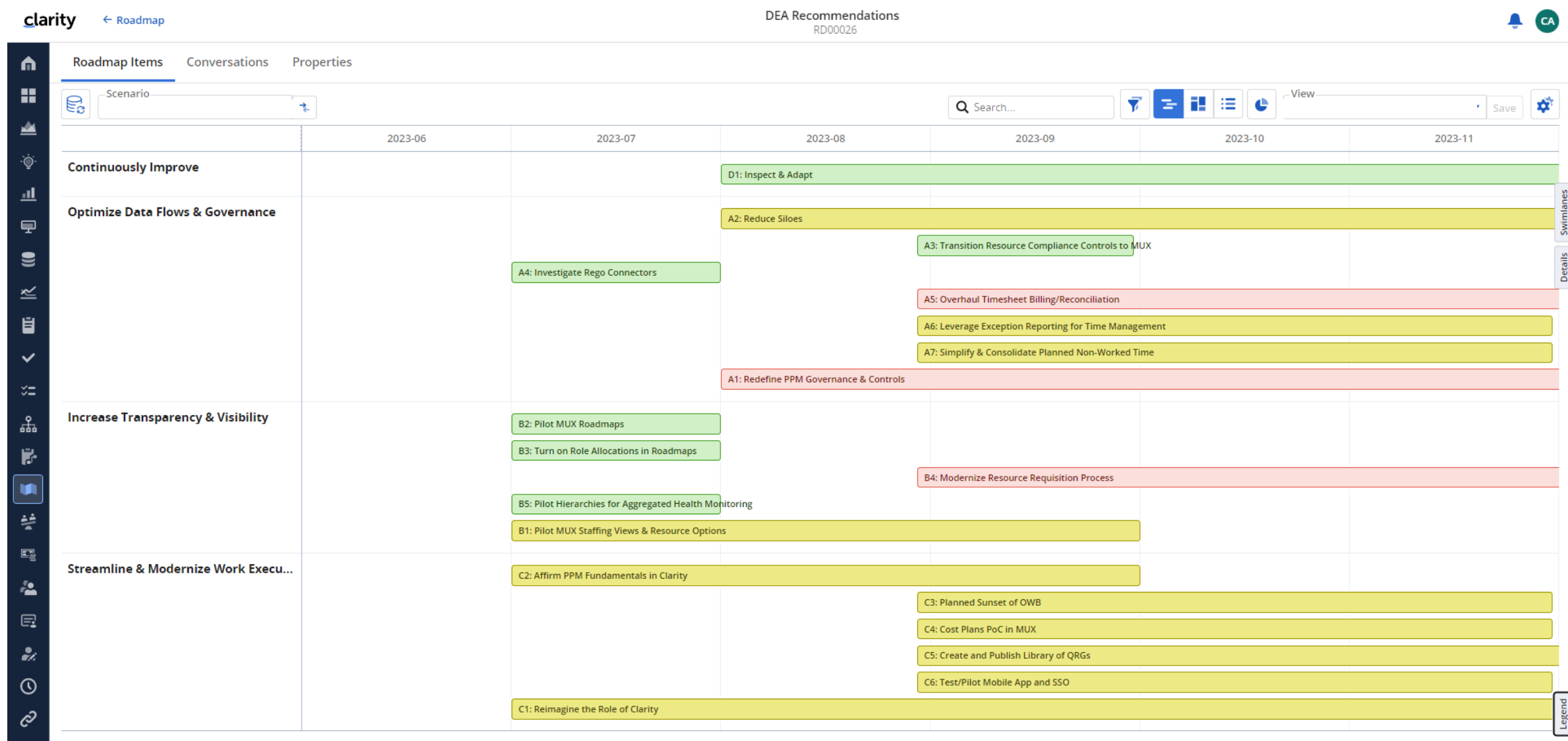
View

Select All Deselect All

Group By

Rank	Roadmap Item ★ 2↑	Theme	Description	Effort (L/M/H)	Impact (L/M/H)	Start 1↑	Finish	Predecessors
<input type="checkbox"/>	A4: Investigate Rego Connectors	Optimize Data Flows & Governance	Assemble the appropriate business, functional, and technical stakeholders to ex...	Low	High	Jul 1, 2023	Aug 1, 2023	
<input type="checkbox"/>	B1: Pilot MUX Staffing Views & Resource Op...	Increase Transparency & Visibility	The MUX has multiple options for views that will enhance the ability for Project ...	Mid	High	Jul 1, 2023	Oct 1, 2023	
<input type="checkbox"/>	B2: Pilot MUX Roadmaps	Increase Transparency & Visibility	Roadmaps are a no-risk, low-effort means of providing an instant improvement t...	Low	High	Jul 1, 2023	Aug 1, 2023	
<input type="checkbox"/>	B3: Turn on Role Allocations in Roadmaps	Increase Transparency & Visibility	Using Rego's free add-on to display Role Allocations in Roadmaps will support sc...	Low	High	Jul 1, 2023	Aug 1, 2023	
<input type="checkbox"/>	B5: Pilot Hierarchies for Aggregated Health ...	Increase Transparency & Visibility	Investment Hierarchies in the Modern UX can not only help stakeholders better ...	Low	High	Jul 1, 2023	Aug 1, 2023	
<input type="checkbox"/>	C1: Reimagine the Role of Clarity	Streamline & Modernize Work Execution	The overall impression of Clarity appears to be that of a "Watchdog" rather than ...	Mid	High	Jul 1, 2023	Dec 31, 2023	
<input type="checkbox"/>	C2: Affirm PPM Fundamentals in Clarity	Streamline & Modernize Work Execution	As a Best-In-Class tool for Enterprise Project Management, Clarity should be leve...	Mid	High	Jul 1, 2023	Oct 1, 2023	
<input type="checkbox"/>	A1: Redefine PPM Governance & Controls	Optimize Data Flows & Governance	Perform an analysis of existing governance processes and controls. Identify any ...	High	High	Aug 1, 2023	Jun 28, 2024	
<input type="checkbox"/>	A2: Reduce Siloes	Optimize Data Flows & Governance	Review sources of siloed/disparate data and plan for intentional, targeted consol...	Mid	High	Aug 1, 2023	Mar 29, 2024	
<input type="checkbox"/>	D1: Inspect & Adapt	Continuously Improve	As a Best Practice, schedule regular reviews (biannually?) to evaluate process eff...	Low	High	Aug 1, 2023	Dec 31, 2023	
<input type="checkbox"/>	A3: Transition Resource Compliance Control...	Optimize Data Flows & Governance	Staffing Views can be built in the MUX to simplify and optimize the governance o...	Low	Mid	Aug 30, 2023	Sep 30, 2023	
<input type="checkbox"/>	A5: Overhaul Timesheet Billing/Reconciliation	Optimize Data Flows & Governance	An extraordinary amount of resource time and manual effort is spent on this crit...	High	High	Aug 30, 2023	Jun 28, 2024	
<input type="checkbox"/>	A6: Leverage Exception Reporting for Time ...	Optimize Data Flows & Governance	There are many OOTB reports which can easily be deployed, or simple custom r...	Mid	Mid	Aug 30, 2023	Nov 30, 2023	
<input type="checkbox"/>	A7: Simplify & Consolidate Planned Non-Wo...	Optimize Data Flows & Governance	Current process for planning and approving staff PTO requires multiples steps a...	Mid	Mid	Aug 30, 2023	Nov 30, 2023	
<input type="checkbox"/>	B4: Modernize Resource Requisition Process	Increase Transparency & Visibility	Enlist a focus group or "Tiger Team" to evaluate options to streamline and mode...	High	High	Aug 30, 2023	Feb 29, 2024	
<input type="checkbox"/>	C3: Planned Sunset of OWB	Streamline & Modernize Work Execution	Open Workbench as a scheduling tool has reached the ceiling of the value it can ...	Mid	High	Aug 30, 2023	Nov 30, 2023	
<input type="checkbox"/>	C4: Cost Plans PoC in MUX	Streamline & Modernize Work Execution	Full utilization of Cost Plans and related views for reviewing and forecasting plan...	Mid	Mid	Aug 30, 2023	Nov 30, 2023	
<input type="checkbox"/>	C5: Create and Publish Library of QRGs	Streamline & Modernize Work Execution	Brief but clear Job Aids or instructive videos can be a valuable resource to help e...	Mid	Mid	Aug 30, 2023	Mar 29, 2024	
<input type="checkbox"/>	C6: Test/Pilot Mobile App and SSO	Streamline & Modernize Work Execution	(Combining due to technical dependencies) Providing users with Single Sign-On ...	Mid	Mid	Aug 30, 2023	Nov 30, 2023	

Illustrative Implementation Roadmap



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.

The Project Management Office

- The Project Management Office (PMO) focuses on implementing projects properly and efficiently, supporting project managers in sharing resources, as well as best practices, coaching, and monitoring compliance with project and process standards.

The PMO is responsible for executing the strategies that are assigned by the SRO.

The Strategic Realization Office

- The Strategic Realization Office (SRO) emphasizes implementing the right projects and evaluating whether they serve the organization's strategic alignment needs.

Executive leadership implements the SRO to better understand the enterprise strategy.



billy

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How to Get Started with SPM?



Understand Strategy, Value & Risk

- Accept that risk is inherent in any investment, understand the trade-off between risk, value and cost.



Get Executive Buy-in

- Acknowledge SPM is a framework, to adopt it successfully requires a top-down shift in an organisations decision making approach.
- Consider the creation of a Strategy Realization Office (SRO) or SMO*



Invest in the SPM technologies designed to complete the strategy-to-execution connection



Partner with Rego - Get Help with Strategic Portfolio Management (SPM)

- Take our FREE PPM/SPM Maturity Self-Assessment (QR Code at left)
- Expert assistance to implement best practices for strategic alignment
- Tailored demonstration of how Clarity functionality can unlock value for your organisation
- Free SPM Content = white paper, webinars and articles to gain insights into Strategic Portfolio Management - [Clarity – Your Key to Strategic Portfolio Management \(SPM\) Success](#)

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?





Master Clarity with Rego University

Earn Certifications in
Administration, Leadership,
and Technical Proficiency

Let Rego be your guide.



Elevate Your Professional Expertise with Rego University Certifications

Rego is excited to continue our **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.





Jacob Cancelliere, PMP

VP of Account Enablement
Rego Consulting



Let's Connect on LinkedIn



Matthew Palicki

Helping Enterprises Bridge Strategy & Execution
| Supporting SPM & Transformation Initiatives



Thank you!

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



Thank You for Attending Rego University

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- Click on **Course or Training**
- Class Provider = **Rego Consulting**
- Class Name = **Rego University**
- 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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