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Hierarchy and Roadmaps: Complementary Use Cases

Your Guides:
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Agenda

- Introduction to Roadmaps
- Introduction to Hierarchies
- Roadmaps and Hierarchies – Better Together
- Demo
- Best Practices Discussion

Introduction to Roadmaps

Introduction to Roadmaps

Roadmaps allow organizations to maximize the value of initiatives and minimize risks by prioritizing and selecting investments that most closely align with corporate goals and realize estimated cost and ROI



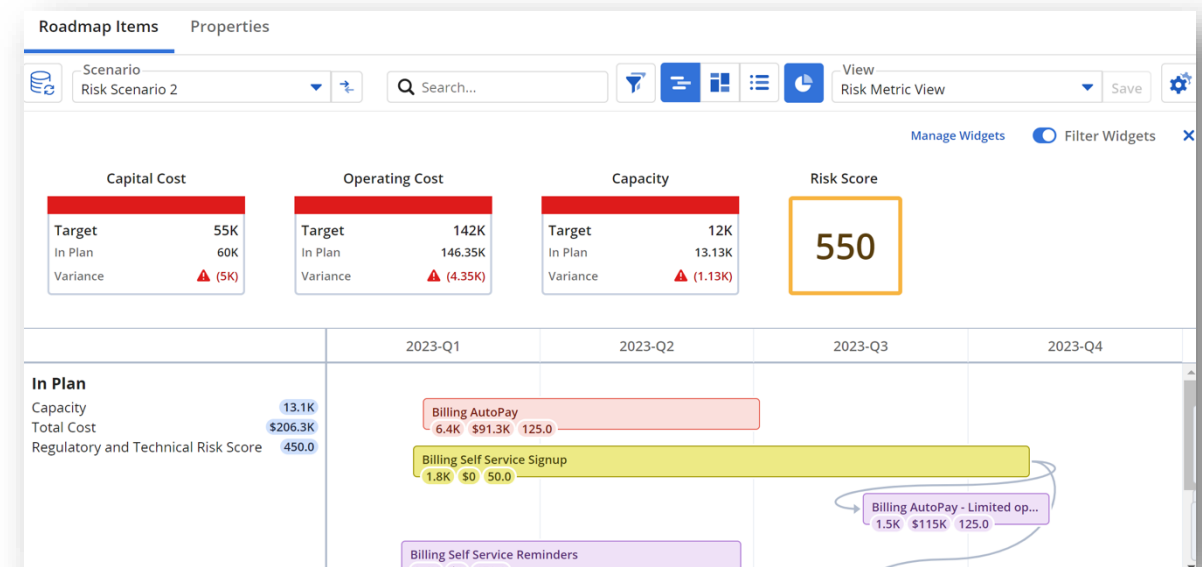
Import and sync Projects, Ideas, Custom Investments, or add ad-hoc placeholders directly in the Roadmap



Visualize timelines, metrics, and evaluate plans against constraints and targets



Manipulate Roadmap data to create one or more planning scenarios without impacting underlying data



Why Use Roadmaps?

Investment Planning and Visualization

- Create high-level plans for a portfolio of investments
- Create and compare scenarios to determine the right mix and timing to meet targets and constraints
- Create and modify investments directly within the plan**
- Use Roadmaps to communicate with stakeholders and adjust plans
- Use Roadmaps for long-range planning, or to assess the impacts of proposed changes
- Use Roadmaps to help draw the funding or capacity waterline for AOP
- Use Roadmaps to assist during PI planning
- Use Roadmaps to build out Product Roadmaps (new features, sunseting modules, etc.)
- Ongoing – sync the Roadmap with underlying investments to monitor data changes during execution (create snapshots)

Open Mic



For those that are utilizing Roadmaps:

- How are you structuring the Investments that are included? Product, Strategic, or BU focused?



What type of Planning Periods are you defining?

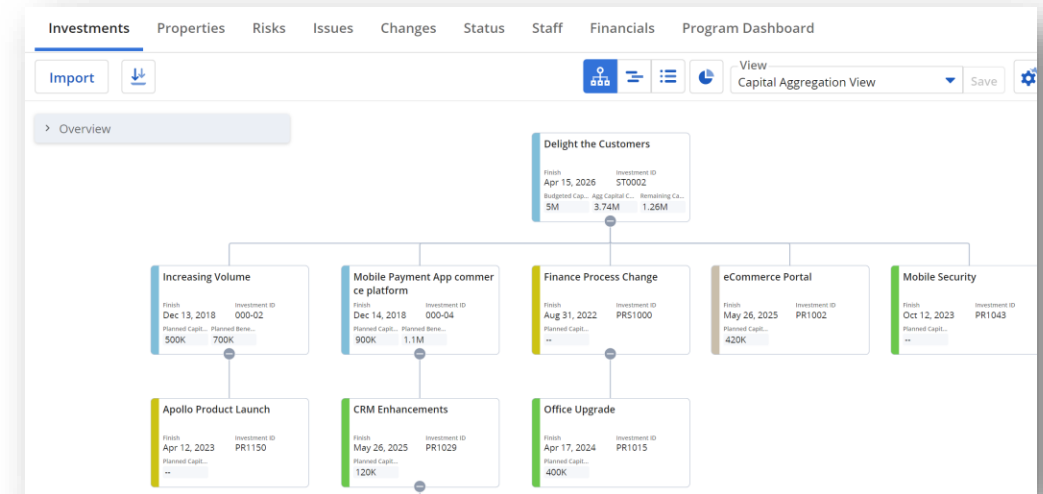
- Annual Planning? Long-term Roadmaps?

Introduction to Hierarchies

Introduction to Hierarchies

Hierarchies allow organizations to examine current investment data aligned to the hierarchical structure of their choosing

- ✓ Import Projects, Ideas, or Custom Investments
- ✓ Hierarchies show real-time data
- ✓ Leaders can view Status, Financials, Teams, Risks, Issues, Changes and other underlying data across all investments in the hierarchy
- ✓ Review rollup metrics at various levels of the hierarchy
- ✓ Utilize the Parent field to help auto-build hierarchies
- ✓ You can get value from using hierarchies WITHOUT organizing investments into a hierarchical structure. There is still value in reviewing Financials, Risks, etc. across a flat list of investments
- ✓ API enabled as of 16.2.3



Why Use Hierarchies?

One Stop Shop for Reporting without Reports

Use Hierarchies for:

- Line of Business discussions
- Strategic alignment review
- Defined portfolio monitoring and actions

How?

- Visualize current and planned work with rollup metrics
- Visualize investment timelines
- Understand Status
- Analyze Financials
- Monitor and act on portfolio Risks, Issues, Changes, Financials

ty < Hierarchies Delight the Customer Strategy FY24 Alignment 2

Investments Properties Risks Issues Changes **Status** Staff Financials Program Dashboard

View Red and Yellow Project Monitoring Save

Select All Deselect All

Group By

Report Date	Overall St...	Name *	Cost And Effort S...	Schedule Status
<input type="checkbox"/> Dec 9, 2021	Needs Help	Finance Process Change	On Track	Needs Help
<input type="checkbox"/> Oct 26, 2021	Needs Help	CRM Enhancements	At Risk	At Risk
<input type="checkbox"/> Feb 23, 2023	Needs Help	eCommerce Portal	On Track	On Track

Columns

Status Report_2020-0... (SR_2020-06-10)

Details

Investment Name
Finance Process Change

Report Date
Dec 9, 2021

Overall Status
Needs Help 40

Attachment
PRS1000...

Investment Manager
Thomas, Brian

Open Mic



For those that are utilizing Hierarchies:

- How are you structuring the Investments within your hierarchy?



How often are you reviewing your Hierarchy to track the health of the body of work?



Do you structure the Hierarchy the same way as your Roadmap?

Roadmaps and Hierarchies

Better Together



Roadmaps and Hierarchies – Better Together



Best Practices for Roadmaps and Hierarchies

- How many and what kind? You can create as many Roadmaps or Hierarchies as you need.
- A single investment can be added to multiple Roadmaps, so for coordinated long-range planning, it is best to select one “type” of Roadmap. Avoid approving the same work in different roadmaps.
- Be thoughtful about types of roadmaps used for plan approval
- Create smaller more manageable Roadmaps and then roll them up using a Roadmap Group
- Automated import in Hierarchies is limited to one structure based on the Parent attribute. Consider how you leverage that attribute; additional types of Hierarchies can be created but relationships must be created manually. Recall that a flat list of investments in a Hierarchy is still valuable.

Best Practices for Roadmaps and Hierarchies

Roadmaps

- Thoughtfully plan your roadmaps to match investments (i.e., is this a strategic roadmap or a product one)?
- What metrics and constraints will be used (costs, benefits, points, resources)?
- What drives scenarios and options (people, timing, planning cycles)?
- How will this information be used?
- Is the granularity appropriate? How many investments are reasonable for planning and monitoring purposes?

Hierarchies

- Consider aligning a Hierarchy with approved Roadmaps
 - Utilize Rego Roadmap and Hierarchy Power Filter Sync
- Use rollup metrics or widgets to track key metrics (costs, benefits, points, resources)

Creating Structure

- 1 What is important to your organization? WHO and WHAT drives decisions?
- 2 Considering max # investments, create roadmaps for top or second level
- 3 Evaluate proposed work along with in-flight investments to approve new work and evaluate in-flight work for continue/cancel decisions
- 4 Create corresponding CITs and Hierarchies to monitor progress and performance

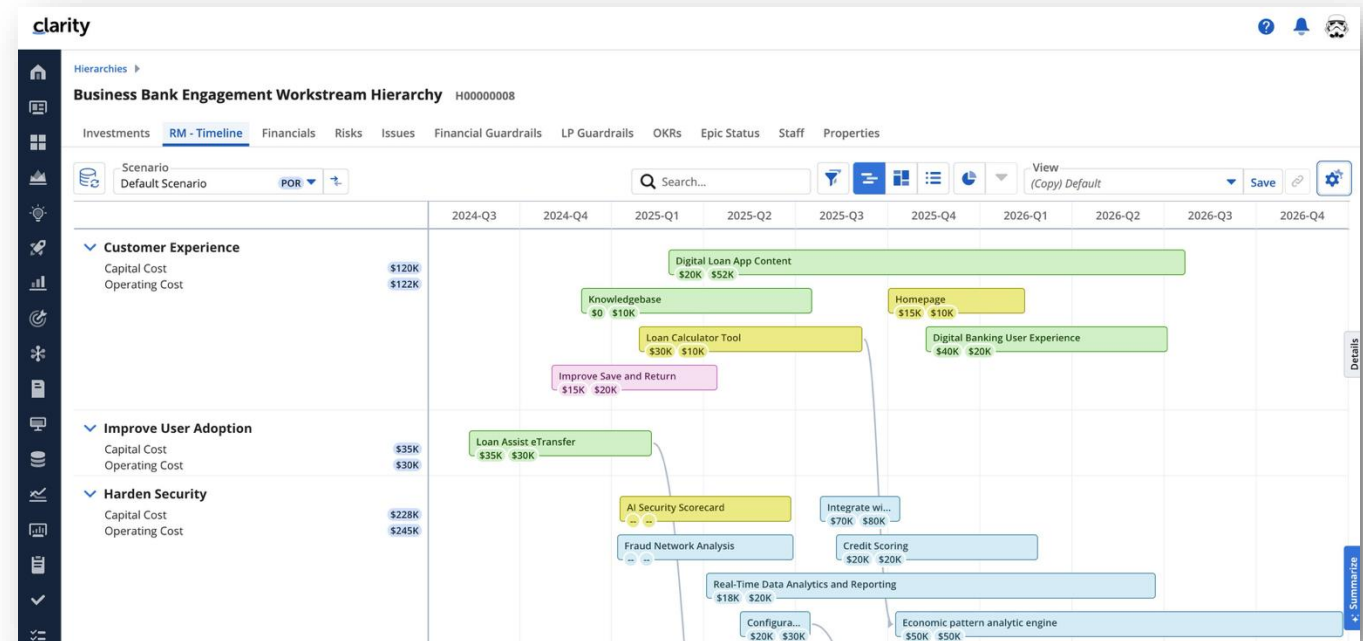
Embed Roadmaps in Hierarchies

Benefit

- Utilize editing and data aggregation capabilities in Hierarchies while also utilizing scenario, timeline, targets, etc. from Roadmaps

Setup

- Create a channel to another Clarity Page/Workspace ([Steps](#) - v16.2)
- Utilize Power Filter Sync ([Download](#))
- Only allow read access to the Roadmap to avoid data sync issues



Creating Structure – Common Approaches

Agile Structure

- Value Stream – Product – Epic/Initiative

Capability or Service Type

- Capability Type – Capabilities

Strategy

- Strategy – Objectives – KPIs

Funding Structure

- Line of Business – Funding Buckets

Management Structure

- Line of Business – Department – Program

What Outcomes Can You Achieve?



Trust

- Transparent Planning
- Alignment to Strategy and Objectives



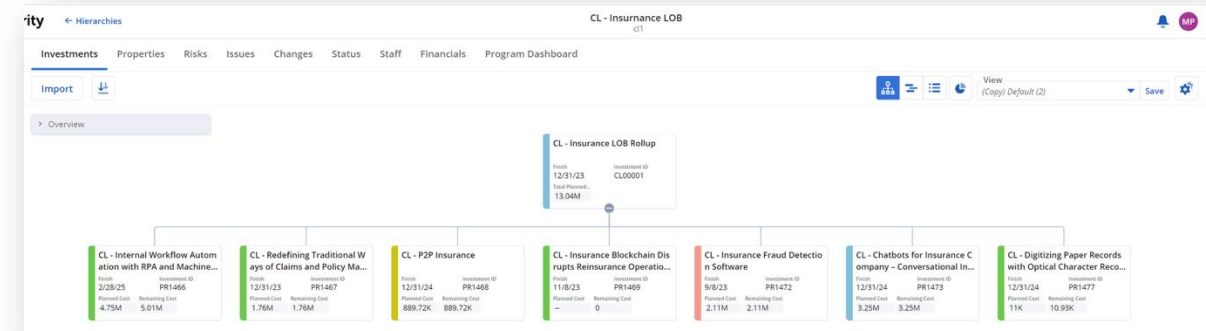
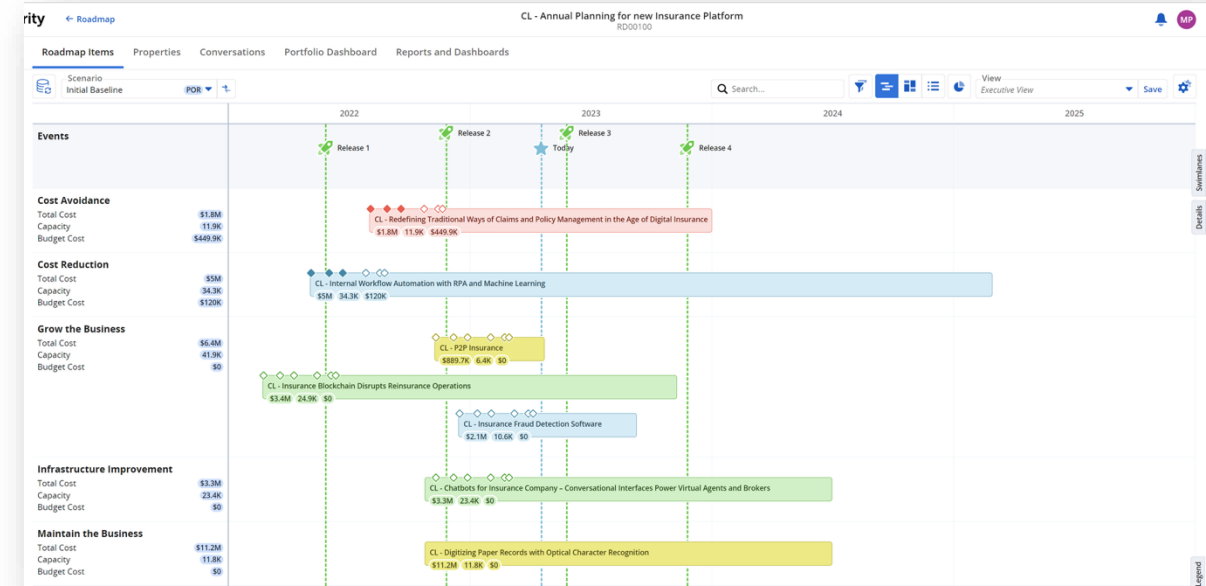
Integrated Data Management

- Less Data Entry
- Less Waste Searching and Consolidating



Leadership Insights

- Leverage data you already have for leadership visibility
- Monitor portfolio health and course correct



Resources: Enhance with RegoXchange

- **Roadmap Ranking**

Provides the ability to rank Roadmap Items within individual Roadmap Scenarios.

<https://xchange.regoconsulting.com/product/roadmap-ranking/>

- **Cost Plan Details in Roadmaps**

This Roadmap add-on provides configurable Financial Category metrics that can be used in the grid view as targets and constraints.

<https://xchange.regoconsulting.com/product/cost-plan-details-in-roadmaps-all-db/>

- **Convert Roadmap Items to Investments**

Create any Investment from a manually created Roadmap Item

<https://xchange.regoconsulting.com/product/reg-roadmap-conversion/>

- **Push/Sync Roadmap Item Data to Investments**

After changes have been made to Investment data within a Scenario, either push the changes to the Live Investments and email the manager of the changes or notify the manager of the changes asking for them to manually make the updates.

<https://xchange.regoconsulting.com/product/reg-roadmap-conversion/>

- **Roadmap/Hierarchy Population**

Utilize views/filters as criteria to automatically populate Roadmaps with Investments and keep them up to date (power filter).

<https://xchange.regoconsulting.com/product/roadmap-hierarchy-power-filter-sync-all-db/>

- **Roles in Roadmaps**

This Roadmap add-on provides configurable Role-based metrics that can be used in the grid view as targets and constraints.

<https://xchange.regoconsulting.com/product/roles-in-the-mux-roadmap/>

Now support for Teams Investments as well!!

<https://xchange.regoconsulting.com/product/teams-allocations-data-in-the-roadmap-oracle-postgres/>

- **PowerBI/Tableau Reports**

- [Roadmaps](#)
- [Hierarchies](#)

- **Training**

- [Hierarchies – Creation](#)
- [Hierarchies – Card View](#)
- [Hierarchies – Grid View](#)
- [Roadmaps – Creation](#)
- [Roadmaps – Saving & Creating View](#)
- [Roadmaps – Updating & Synchronization](#)

Questions?





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✓ **Eligibility:** Open to all Rego University attendees



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Surveys

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- Access your account at pmi.org
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- 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 = **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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