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Roadmap Management Roundtable

Your Guide:
Mike Pokorny



Introductions

- Take 5 Minutes
- Turn to a Person Near You
- Introduce Yourself



Here Are a Few of the Questions We've Heard...

- ❓ Are you using Clarity Roadmaps in Production?
 - *If yes*, what are some of the use cases?
 - *If no*, what has held you back? What other tools or methods ARE you using?

- ❓ How are you organizing your Investments for Roadmapping and Planning?
 - Strategic? Product? By Business Unit? Agile Features?

- ❓ Are you planning against financial constraints? Resource constraints? Both?

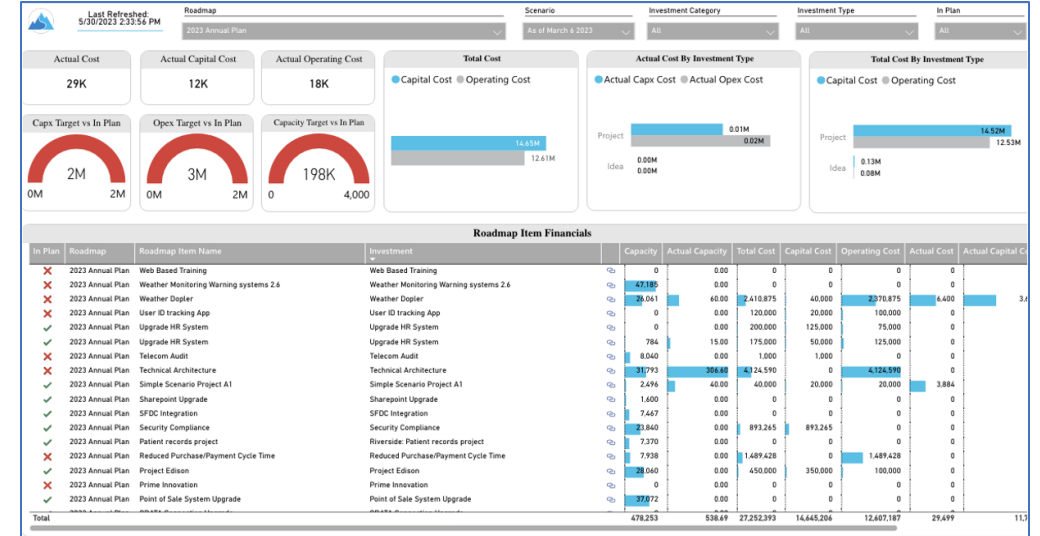
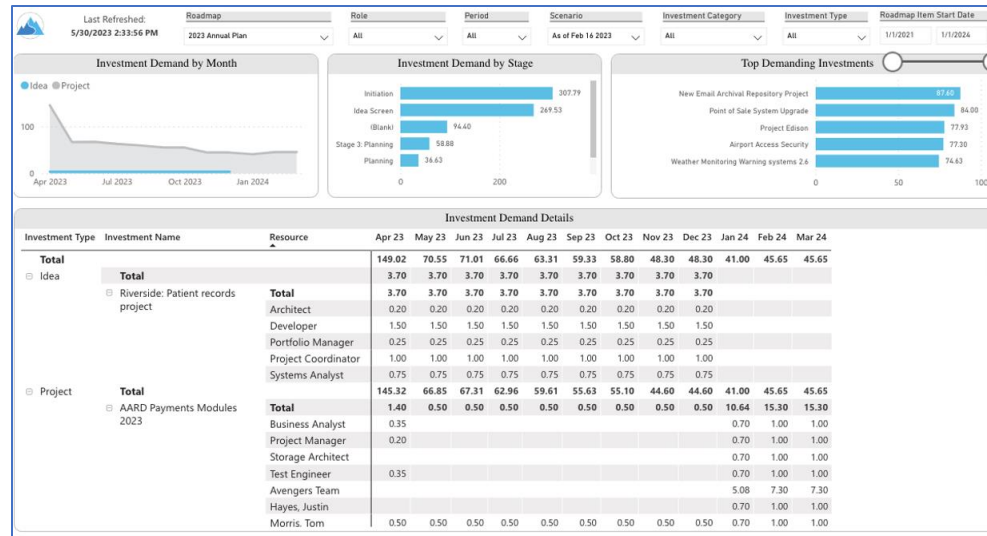
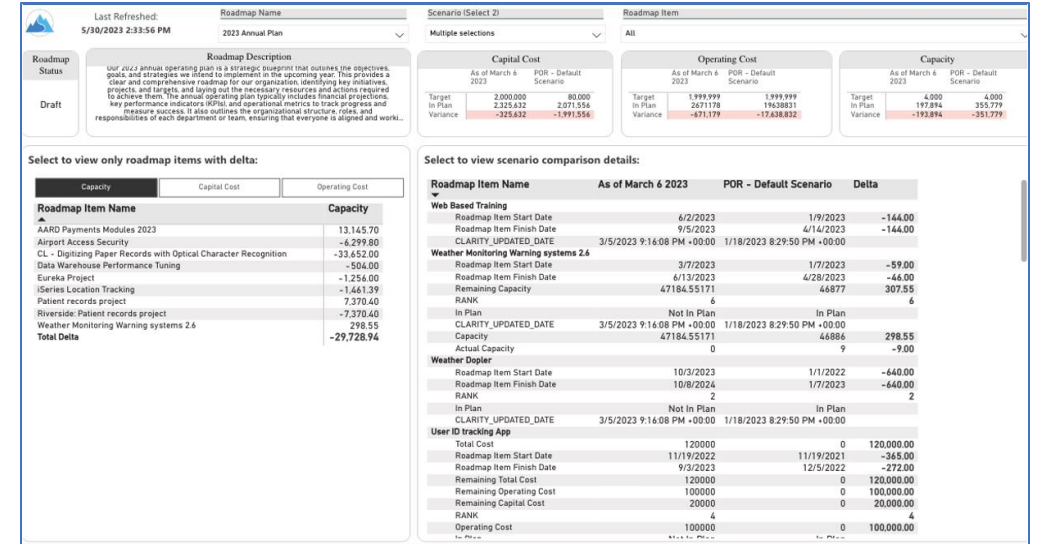
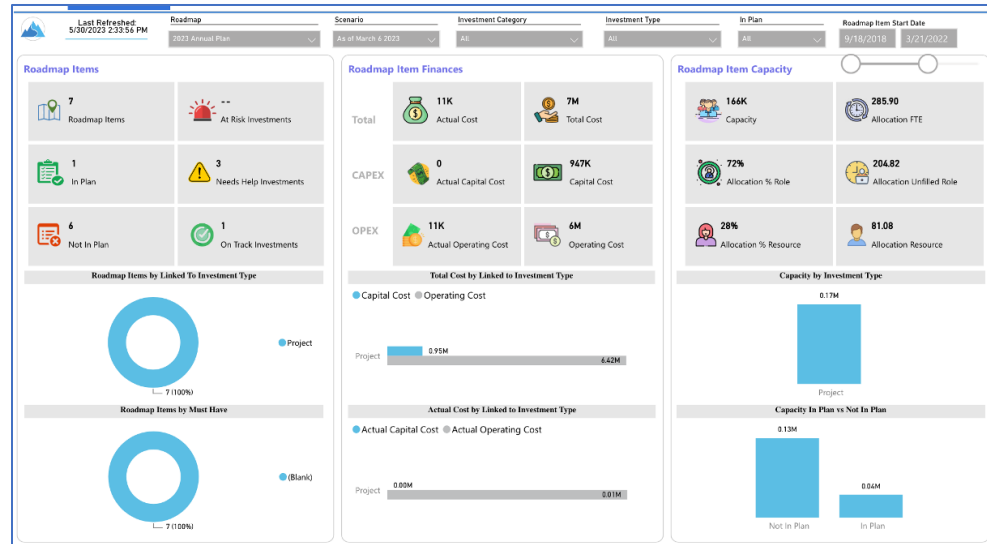


Here Are a Few of the Questions We've Heard...

- ❓ What cadence are you Roadmapping against?
 - Annual planning? Multi-year planning?
- ❓ What type of resources are involved in the Roadmapping process?
 - Roadmap Manager? PMO? Leadership?
- ❓ How do you monitor the ongoing execution of your approved plan?
- ❓ How are you reporting out on your Roadmaps?



RegoXchange – Investment Roadmap Summary Dashboard



Investment Roadmap Summary Dashboard (Power BI) - RegoXchange (regoconsulting.com)

Let Rego be your guide.

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RegoXchange



Roadmap Ranking

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

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



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//>



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/rego-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/rego-roadmap-conversion/>



Roadmap 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/>

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.
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- Access your account at pmi.org
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- 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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