LAS VEGAS

regoUniversity 2025

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SPM In Action; Maximize Value Delivery and Optimize Portfolio Planning

Your Guides:

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Agenda

- Framing the problem and opportunity
- SPM business capabilities and personas
- Interactive group exercise overview and objectives
- Exercise part 1 detailed instructions
- <Session Break>
- Exercise part 2 detailed instructions
- Wrap-up; insights, call to action, Q&A
- References and concluding material

Framing the Problem and Opportunities

Common Business Challenges with Heads-Down Delivery

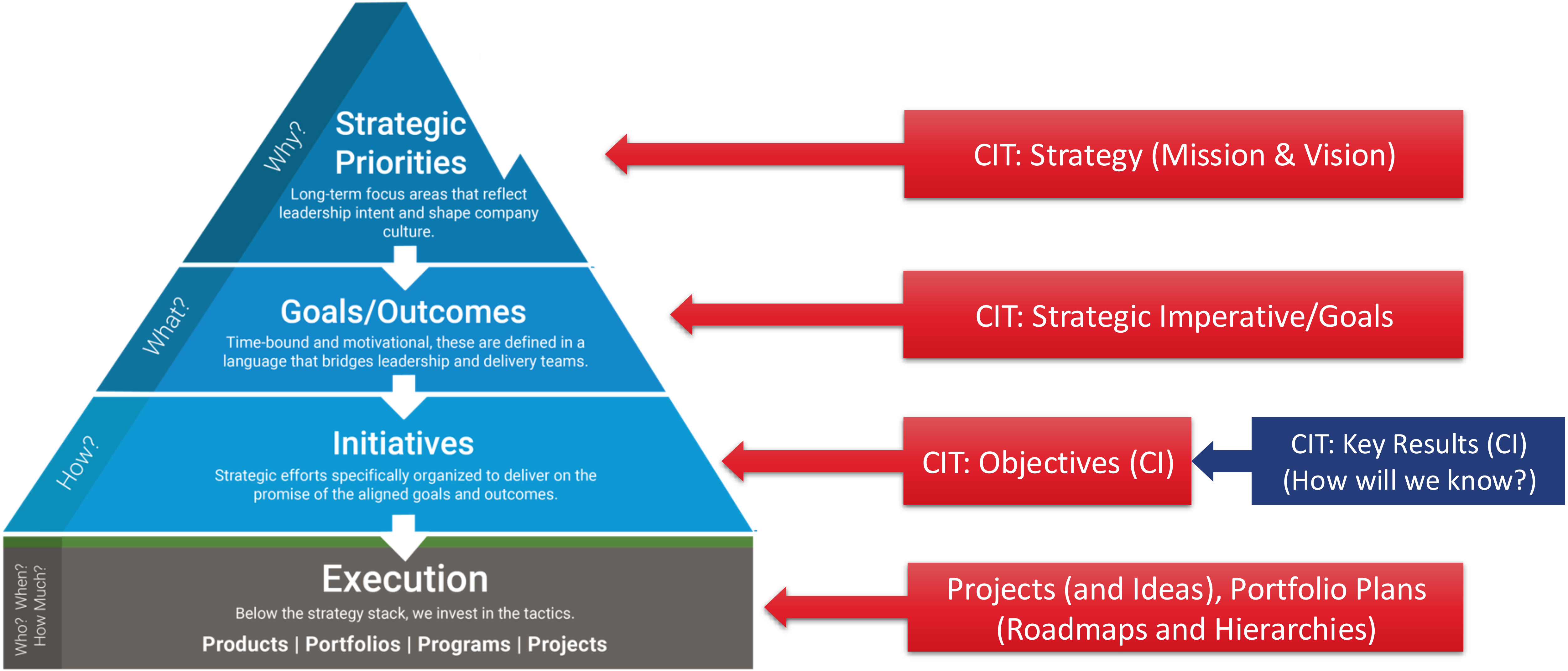
- Data siloes and lack of consistent, trusted portfolio insights
- Inconsistent or misaligned prioritization practices
- Difficulty to provide senior leaders with a “single lens” into portfolio of investments
- Limited ability to adapt to unplanned changes, “What-if” scenarios
- Difficult to articulate if we are investing in the right work
- Difficult to anticipate if we have the necessary resources to deliver on business commitments

SPM Business Capabilities and Personas

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**

Relating This to Our Exercise Dataset



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 persona activities will be involved in our group exercises today.

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

Business

What am I getting for my investments, and when?

C-Suite
Operational Executives
Product/Service Executives

Strategy ▶ Initiatives ▶ Funding — Data Required →

- Cost of Service/Product
- Investment Roadmap Summaries
- Direct/Indirect Labor Cost
- Agile Delivery Costs
- Benefits Realization Metrics

Financial Planning

Do our plans align with our commitments?

CFOs
FP&A
TBM
Project Accounting

Budgets ▶ Forecasts ▶ Financial Performance — Data Required →

- Budgets & Forecasts
- Variances Analyses
- Product/Service Tagging
- Resource Utilization / Capacity
- Benefits Realization Metrics

Portfolio Planning

Are the right people Working on the right things?

Portfolio Managers
Product Line Leaders
Operational Leaders
Finance Partners

Capacity, Intake, Prioritization ▶ Portfolio Backlogs ▶ Roadmaps, Guardrails — Data Required →

- Demand Pipeline
- Resource/Team Capacity & Allocations
- Budgets & Forecasts
- Investment Taxonomy

Delivery Teams

Are we building things right and according to plan?

Project Managers
Product Owners
Delivery Leaders
Agile Teams/Developers

Program/Team Backlog ▶ Execution ▶ Measure & Grow — Data Required →

- Committed v. Completed
- Flow Metrics
- Quality & Value Metrics
- Dependencies / Blockers

The Personas that Show Up in Our Exercise

1. **Senior Executive**: Responsible for overall results and success of the portfolio of work and for making data-driven decisions
2. **Director of Strategy**: Owns the enterprise Strategic Goals, Objectives, and Key Results, and responsible for reporting on alignment and progress
3. **Resource/Delivery Manager**: Owns the people executive on the work, and accountable for ensuring the right people are working on the right things, and that people are appropriately utilized
4. **Finance Director**: Accountable for the enterprise Capex and Opex budget, responsible to monitor variances and ensure the plan of record is aligned with budget commitments
5. **Program/Project Manager**: Accountable for PMO process and data quality for the book of work, raising issues, and for updating investments according to strategic alignment and prioritization decisions and approved portfolio plans
6. **Portfolio Manager**: Accountable for prioritization according to business constraints and producing portfolio scenarios and insights that enable business leaders to make data-driven decisions

Continuous Planning and Value Delivery Lifecycle

Intake/Prioritization/Approval | $ Planning | Performance Monitoring | Capacity & Work Planning | Delivery Execution & Actuals

Portfolio Management	Finance	Portfolio Sponsors	Project Management	Delivery Teams
Confidence in Investment and Delivery • Increase confidence that investments are aligned to business objectives • Insight into funding source, risk, strategy • Reporting automation and insights around financials and delivery performance • Governance and continuous planning	**Enhance Strategic Alliance with IT** • Improve financial transparency • Increased credibility through greater IT spend governance • Reporting automation that provides insightful reporting	**Demonstrate Strong Financial Stewardship** • Improve IT spend accountability • Adjust spend as needs dictate • Fund new initiatives with insights into opportunistic funds • Insight into funding source, risk, strategy	**Manage Planning & Forecasting Processes Efficiently** • Improve Finance collaboration and participation • Drive more accurate forecasts / budgets and reduce variances from plan • Forecast reporting automated and provide more time for analysis and insights	**Automation in a Single Source of Record** • Remove reliance on spreadsheets • Automate forecasting and reporting • Practitioner specific tools to manage project and status (i.e., RAID) in a single source of record

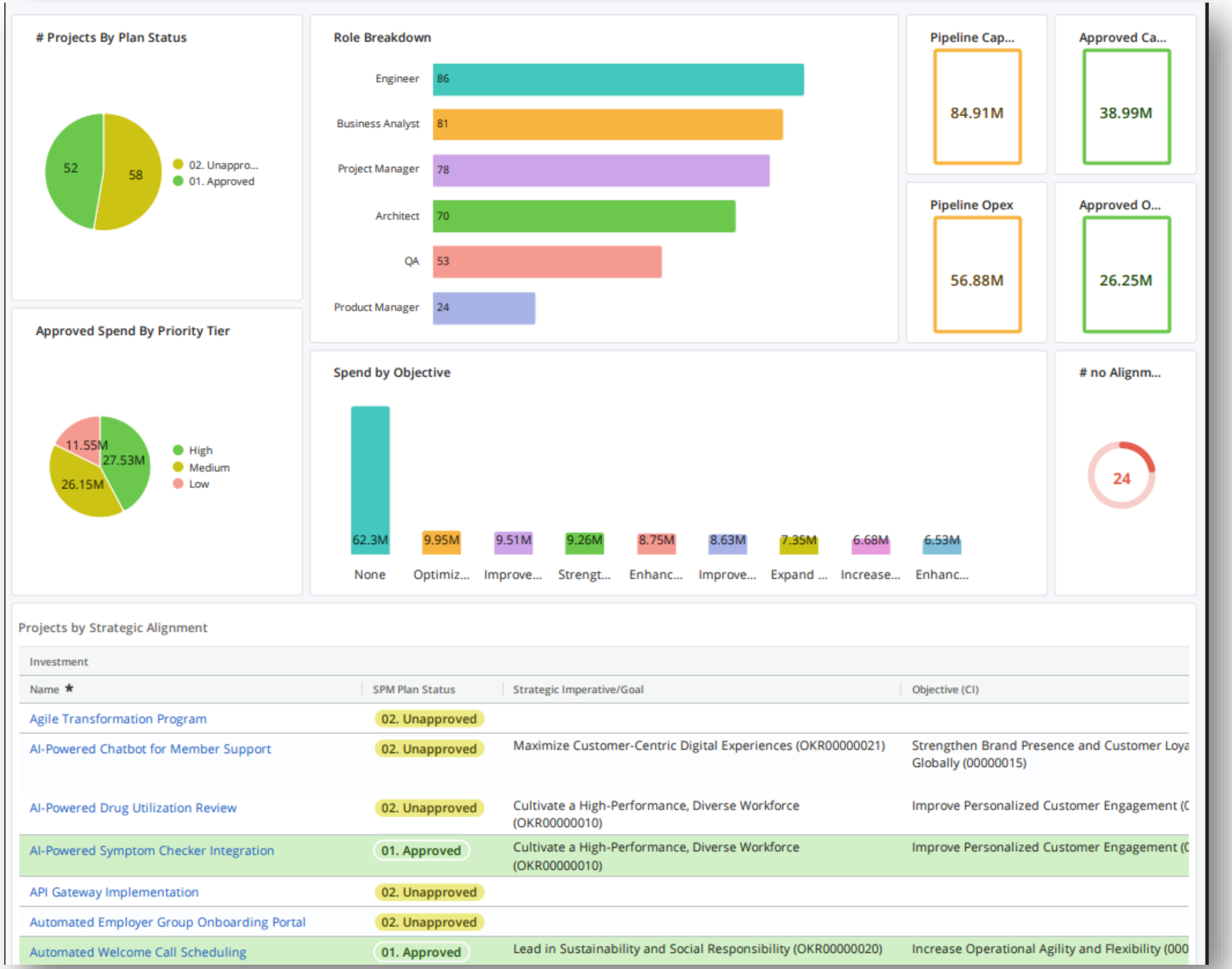
Group Exercise

Overview and Objectives

Group Exercise Parameters and Overview

- Each table will work together as a group, alternating tasks
- Goal is for each person in the group to have the opportunity to participate
- All groups will work from the same server and overall dataset, but with a unique login for each group, and a unique Roadmap instance for each group (details provided on handouts)
- Please only one login per table at a time; either pass around the laptop, or take turns logging in to perform your assigned task
- Facilitators will describe the scenario, exercise objectives, and business rules
- Outcomes will be reviewed and discussed via shared dashboards at the conclusion of the second session

Group Exercise Parameters and Overview



Group Exercise (BREAK: 2:20-2:30)

Part 1 Detailed Instructions (Handout)

Group Exercise

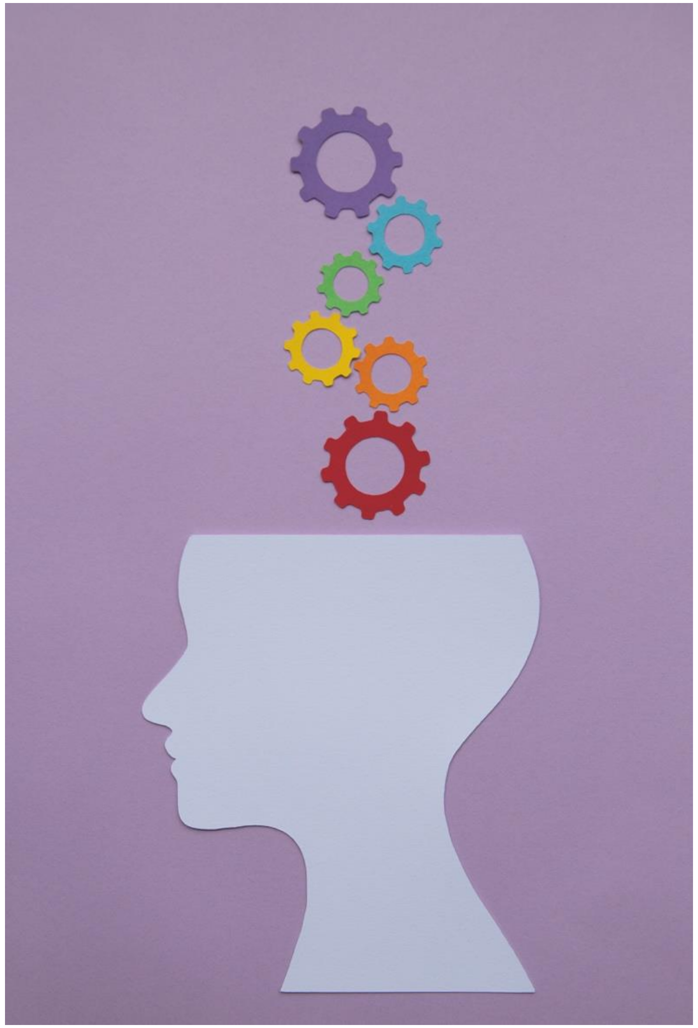
Part 2 Detailed Instructions (Handout)

Wrap-up

Insights, Call to Action, Q&A

Insights and Takeaways

- What was that experience like for your group? Were there any unanticipated challenges or obstacles?
- Did you notice any similarities to the strategic planning processes in your organization?
- What is one key insight or idea that you can take back to your organization?



Conclusion

Additional Resources

Articles/Webinars
https://www.gartner.com/smarterwithgartner/use-zero-based-prioritization-to-reevaluate-your-project-portfolio
https://www.pmi.org/learning/library/proven-project-portfolio-management-process-8503
https://www.mckinsey.com/capabilities/operations/our-insights/matching-the-right-projects-with-the-right-resources
https://www.stonyhill-it.com/post/it-s-not-all-gloom-doom-part-2
https://collaborate.scaledagile.com/template/try?id=52ADBEMQNAG4YPRXZJCA0YSACWAYEFNT
https://info.regoconsulting.com/top-ppm-trends-for-2023-december-2022
https://info.regoconsulting.com/clarity-lean-portfolio-management-nov-2021
https://info.regoconsulting.com/the-art-of-annual-planning-july-2023
https://info.regoconsulting.com/the-art-of-annual-planning-tracking-progress-and-performance-part-2-october-2023

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

SAFe
https://scaledagileframework.com/lean-portfolio-management/
https://scaledagileframework.com/portfolio-flow/
https://scaledagileframework.com/roadmap/
https://info.regoconsulting.com/safe-expand-to-the-value-stream-may-2022

Personal Growth
From Strength to Strength, Arthur C. Brooks
The Seven Spiritual Laws of Success, Deepak Chopra
The Last Arrow, Erwin McManus
Atomic Habits, James Clear
The Art of Action, Stephen Bungay

Questions?

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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!
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