LAS VEGAS

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Best Practice Use of Clarity for Intake and Prioritization

Your Guides:

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Agenda

- Strategic Portfolio Management (SPM)
- Intake – Common Ways, Better Ways, Creative Ways, and Integrated Ways of capturing what needs to be done
- Prioritization – Scoring? Voting? Blind Judging? Whoever yells the loudest? Creative ways to prioritize

Part I: Introduction

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Open Mic

- What does Demand Management mean to you?
- What do you think success looks like?
- What prevents success?

Some Rego Thoughts …

What is Success?

- ✓ Full view of pipeline
- ✓ Accurate data
- ✓ Complete data
- ✓ Demands map to strategic objectives
- ✓ Objective scoring
- ✓ No other tools used to evaluate demand (Excel, SharePoint)

Stumbling Blocks

- ❑ Accurate financial and resource data in projects
- ❑ Goldilocks for demand – what is the right amount of data
- ❑ Business users are not in Clarity
- ❑ Over-engineering demand process
- ❑ How do you decrement Idea demand once converted to a Project?

Part II:
SPM

What Is Strategic Portfolio Management (SPM)?

- **Value-driven, continuous planning discipline** that connects enterprise strategy to execution across projects, products, services, and capabilities—not just projects (traditional PPM).
- Emphasizes aligning portfolios to strategic objectives, using OKRs to translate vision into measurable outcomes, and governing through an **SRO (Strategic Realization Office)** that complements the PMO.
- Centers on three drivers: **organizational maturity, agility, and risk**, with SPM providing the guardrails for faster pivots while preserving alignment.

PPM vs SPM

- **What's the difference between Project Portfolio Management (PPM) and Strategic Portfolio Management (SPM)?**

  - **PPM** manages project execution — tracking scope, schedules, and delivery. **SPM**, by contrast, ensures that the *right* work enters the portfolio by aligning selection, funding, and benefits realization directly to strategy. In 2022, Gartner noted that by 2025, **70% of digital investments will fail without SPM practices** to bridge the strategy-execution gap.

Source: Gartner – *Strategic Portfolio Management: Frameworks and Roadmaps* (2024)

Why Is Strategic Planning Important?

- Without a solid plan, organizations risk:

  ❌ **Lack of Direction** – Teams may not know what to focus on.

  ❌ **Inefficient Resource Allocation** – Time and money may be spent on low-impact activities.

  ❌ **Poor Decision-Making** – Leaders may react to challenges instead of proactively addressing them.

  ❌ **Missed Opportunities** – Growth potential may go untapped.

- A well-executed strategic plan **provides clarity, accountability, and a roadmap for achieving organizational goals**.

Impacts

- By 2025, **70% of digital investments will fail** without Strategic Portfolio Management (SPM) practices (Gartner, 2022).
- Organizations using SPM are **2.2× more likely to realize value** and **3.3× more likely to handle disruptions successfully** (Gartner, 2022).
- Strong portfolio governance is linked to **28× less wasted investment** (McKinsey, PMI, 2021).
- **10–11% of investment is wasted** annually due to poor project performance (PMI, 2021).

Part I:
Intake

Why Does Intake Fail?

Intake often fails because there are no **pre-scoring guardrails** to filter out low-value proposals before detailed review. This clogs the funnel with redundant or misaligned initiatives. Best practice in SPM is to set clear **entry criteria** (e.g., must support at least one strategic objective, must have an accountable sponsor) and to manage intake through a **portfolio Kanban** to control flow and apply WIP limits.

Source: Scaled Agile Framework – Portfolio Backlog (2025)

Intake

- Common Practices when using Clarity:
  - Annual and Quarterly Intake (not constantly open)
  - Different forms/intake templates for different divisions and use cases (i.e. small requests fill out a different form that annual projects)
- Additional Options:
  - Integrate from ticketing/service management tool (sounds a lot like ITIL)
    - Do you send back round-trip info to the ticket creator?
  - Anyone leave Clarity ideas open year-round accepting requests at any time?
  - SPM Reprioritization Cadence – Quarterly if not more frequent
- Others?

Intake

Think about who and how many people can submit Ideas.

Are you looking to crowdsource potential investments, or is there a more targeted base of users like Product Managers?

Crowdsourcing

Any user can submit an Idea

Pro

- Transparent disposition of all Ideas
- Gives anyone a 'voice' and opportunity to participate

Con

- Duplicate Ideas
- Frivolous Entries
- Effort to Review/Reject
- May increase license consumption

Moderated Entry

Ideas are filtered through a control point (Production Owner / Portfolio Manager) before being created in Clarity

Pro

- Ideas are Vetted before Entry in System
- Reduced Duplication
- Reduced Effort
- Clear ownership and improved quality

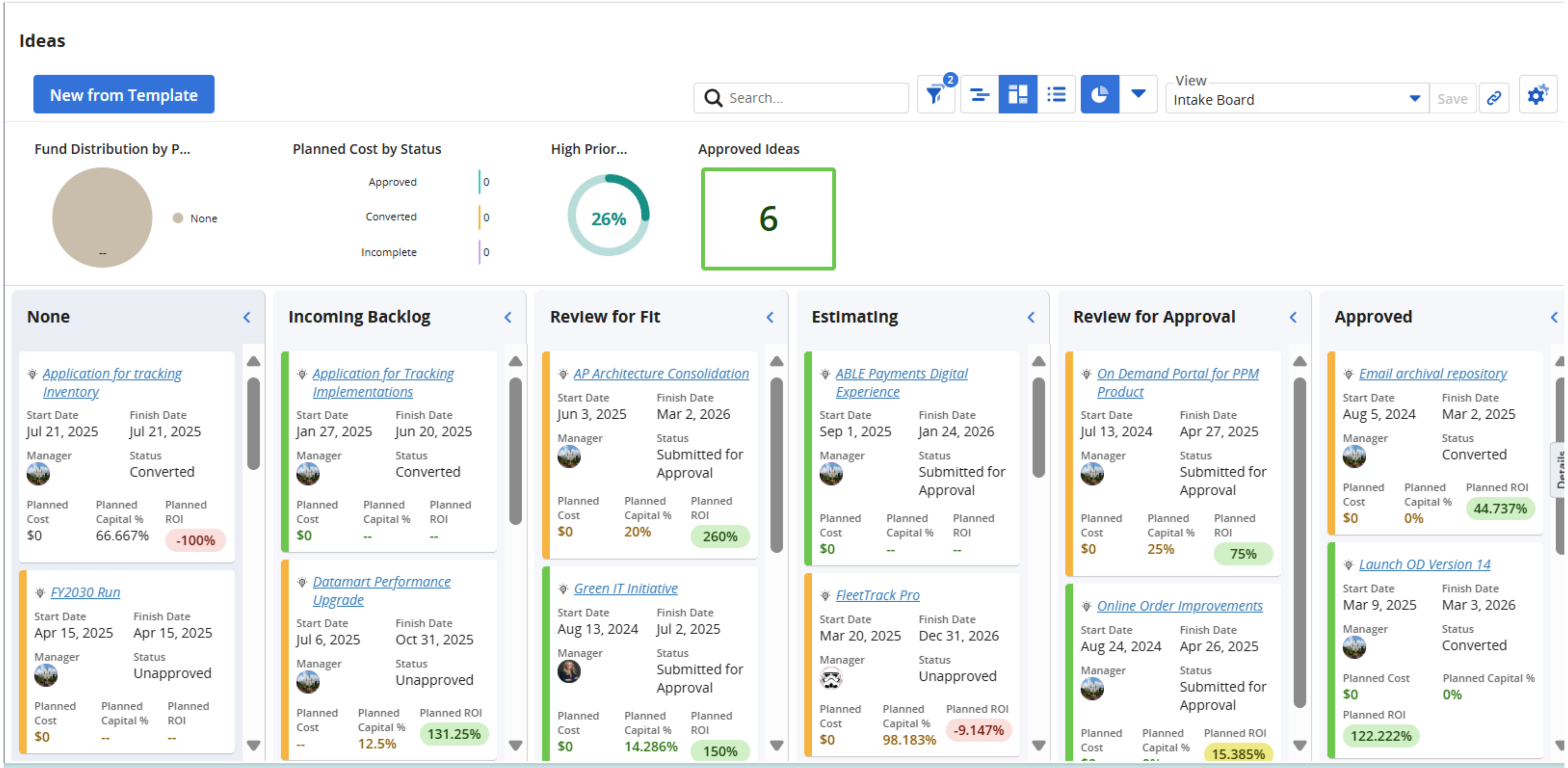
Con

- Delays entry

Idea Data Entry Best Practices

- Keep data entry simple and focused
  - Utilize Simple “Create Screen”
  - Keep the Blueprints uncluttered
  - Define Blueprints by Idea Type (limit fields by type) and leverage Templates
  - Focus on Alignment: How does this support our broader goals?
- Categorize Work to Differentiate Annual Planning from Standard Idea Intake
  - This helps with Metrics and Reporting. For example: Utilize “Type” Fields (Annual Planning, Project, Application, Service, Support Project)
- Consider Project Conversion
  - Create fields that will be leveraged on Projects in the Investment object
- If using Roadmaps:
  - Use the OOTB portfolio categorization fields, goal, strategy, and OBS
  - Capture additional fields that would assist in portfolio planning (e.g., Target Start – Fiscal Year / Quarter)

Intake Dashboard



Idea Financial Estimate Best Practices

- Keep it light
  - you do not have enough information at this stage to have accurate costs
  - the estimate is typically +- 100% at this stage
- Be consistent on the types of costs you plan to forecast (i.e. labor/non labor)
- Be consistent at the level you capture estimates
  - "T-shirt sizing" is commonly used at the Idea stage.
  - Gain agreement on standardized sizes and have them built into the system

Part II: Prioritization

Prioritization Factors to Consider

- Business Value – Soft and hard benefits/ROI
- Urgency - Is it mandatory for compliance or other factors?
- Strategic Alignment – How does it align to goals, objectives, OKRs?
- Impact – On the teams, the customers, the organization
- Bandwidth – Do we have the people? Do we have the money?
- ROI?
- Effort?
- Others?

Prioritization:

- Common Practices:
  - Scoring – Multiple or single score?
  - Ranking – Who determines them?

- Voting:
  - Gaming techniques
  - Anonymous Voting
  - Ranked Voting

- Other?

Financial Alignment – Aligning Budgets to Goals

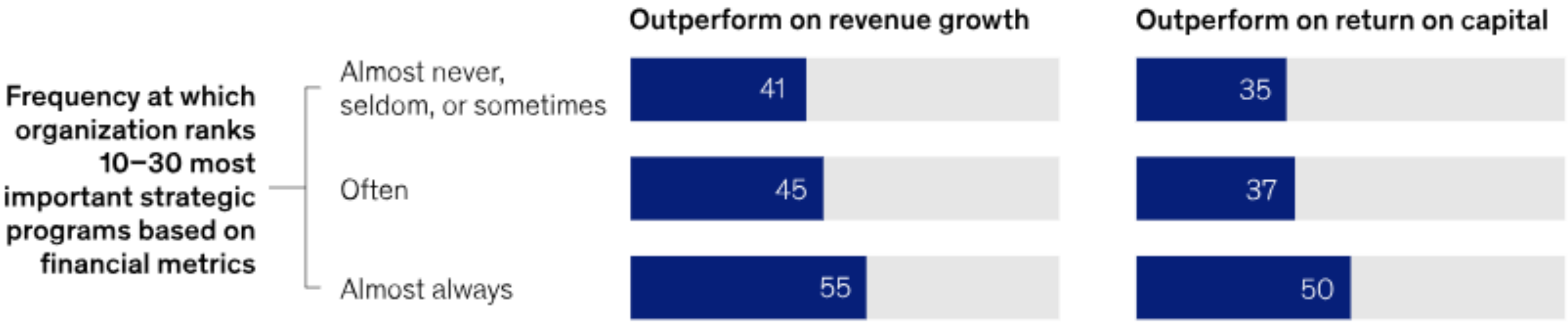
- McKinsey survey, *Resource allocation for long-term value creation | Tying short-term decisions to long-term strategy*, (2024) directly supports the principle of **active, value-driven resource reallocation** in a modern context.

- Key Insights:
  - A survey of **617 executives and managers** shows that **only ~50% of organizations effectively align their budgets with corporate strategies**.
  - Just **53%** report that their organizations consistently fully fund the priorities they've identified (e.g., strategic initiatives).
  - Among those companies that **do succeed** in aligning budgets (and taking appropriate risk), **leaders report significantly better performance** on both ***revenue growth* and *return on capital***—highlighting the value of dynamic, strategy-linked allocation.
  - Companies that complete their **long-term financial planning in 3 months or less**, or their **annual budgeting in 2 months or less**, are more likely to outperform in **revenue growth** and **return on capital**. Streamlined planning processes align with SPM's need for adaptable, continuous funding cycles rather than rigid annual budgets.

Financial Alignment – Aligning Investments to Goals

Ranking strategic programs based on financial outcomes can help guide effective resourcing decisions—if companies do it consistently.

Respondents who agree that their organizations outperform competitors,[1] by extent to which organization ranks strategic programs, %

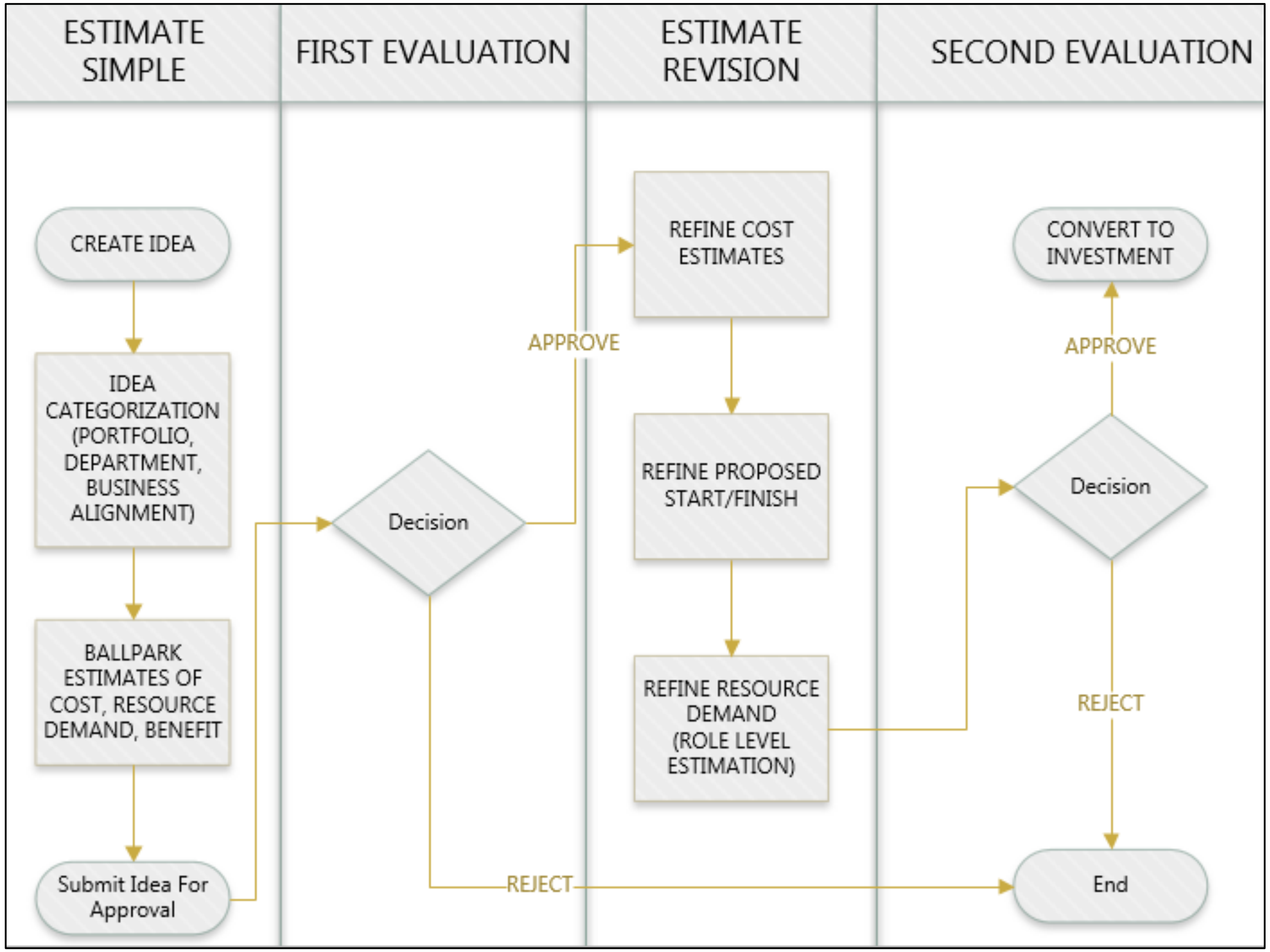


[1]Respondents who answered "disagree," "neutral," or "don't know/not applicable" are not shown.
Source: McKinsey Global Survey on resource allocation; 617 midlevel managers through C-level executives at organizations with $500 million or more in reported annual revenues; Oct 3–13, 2023

McKinsey & Company

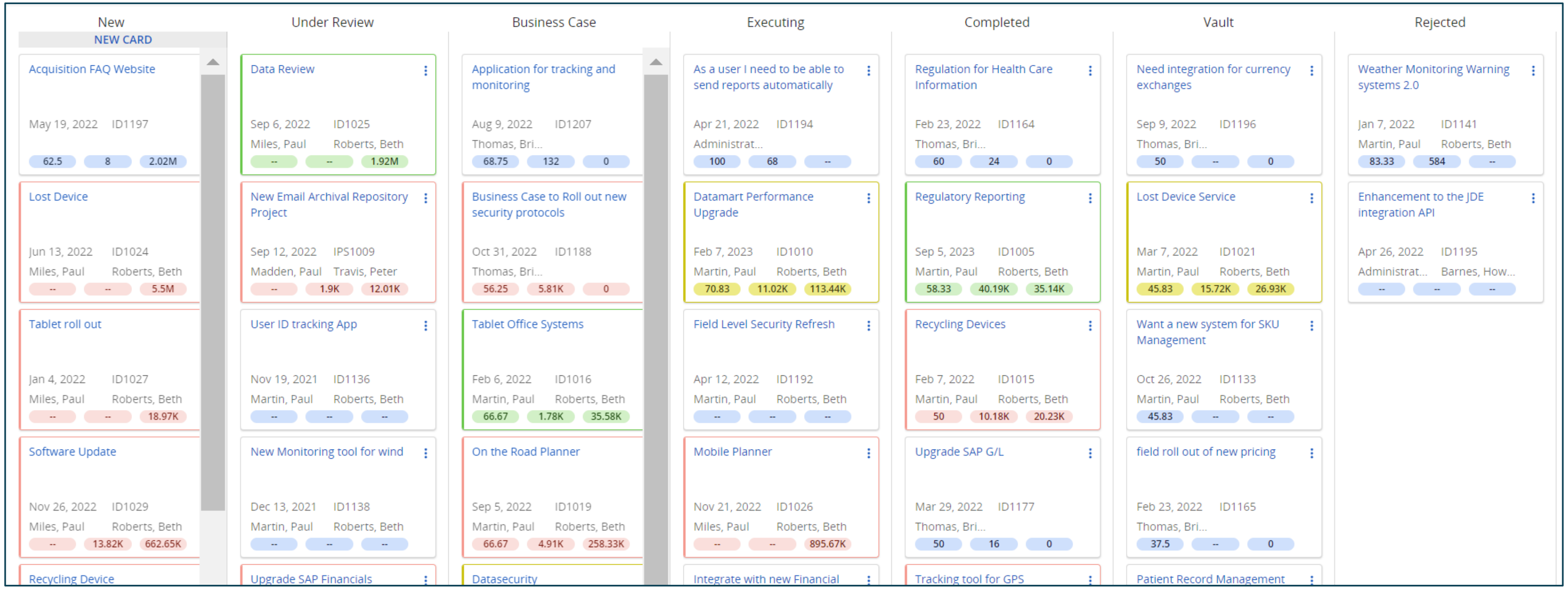
Idea Approval Best Practices

- Build a custom process to align to your organizational needs, but remember, simple approvals work best.
- Try to quickly weed out ideas that should not move forward
- When converting to a project, inactivate the idea – no duplication of financials or allocations in views and Roadmaps
- Use a template when converting to maintain consistent data among projects
- Leverage the Action Item Responder to facilitate quicker, easier workflow decisions



Idea Approval Best Practices

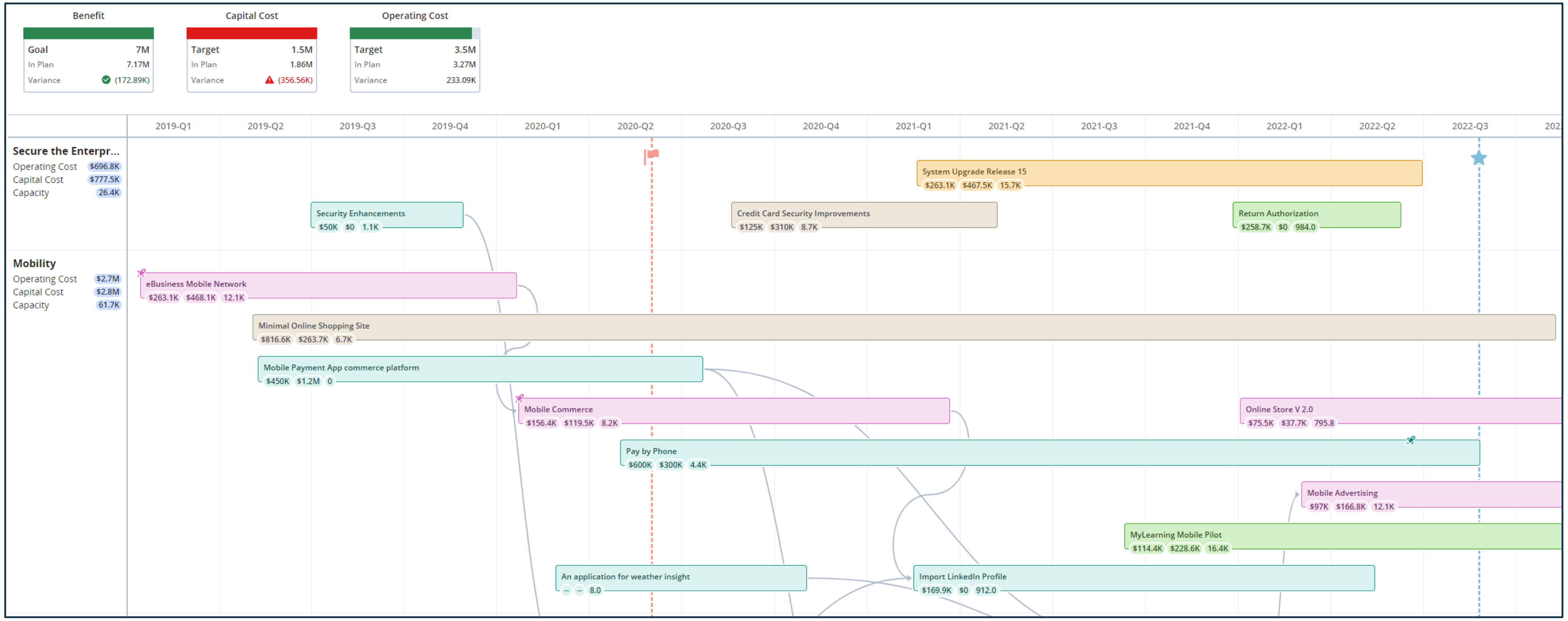
- Leverage Board views to visualize how Ideas are moving through the process



Rejection is Good! Consider reporting on money or time not spent, or conflicts avoided

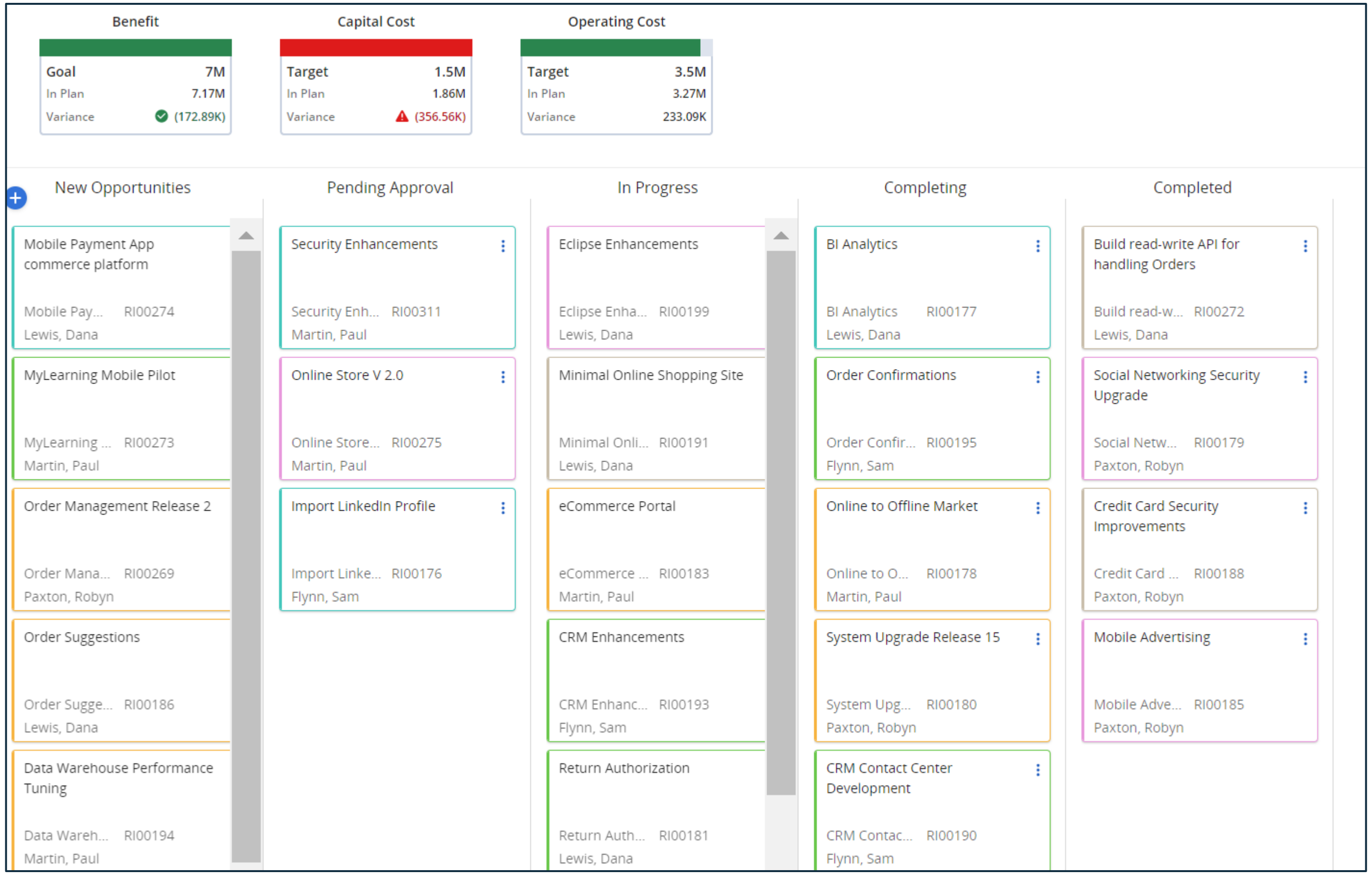
Use Roadmaps for Planning

- Ideas can be vetted against or planned with each other in the New UX Roadmap feature
- Item duration, start, and/or finish may be updated as well.
- Pull in already in-flight projects for complete planning



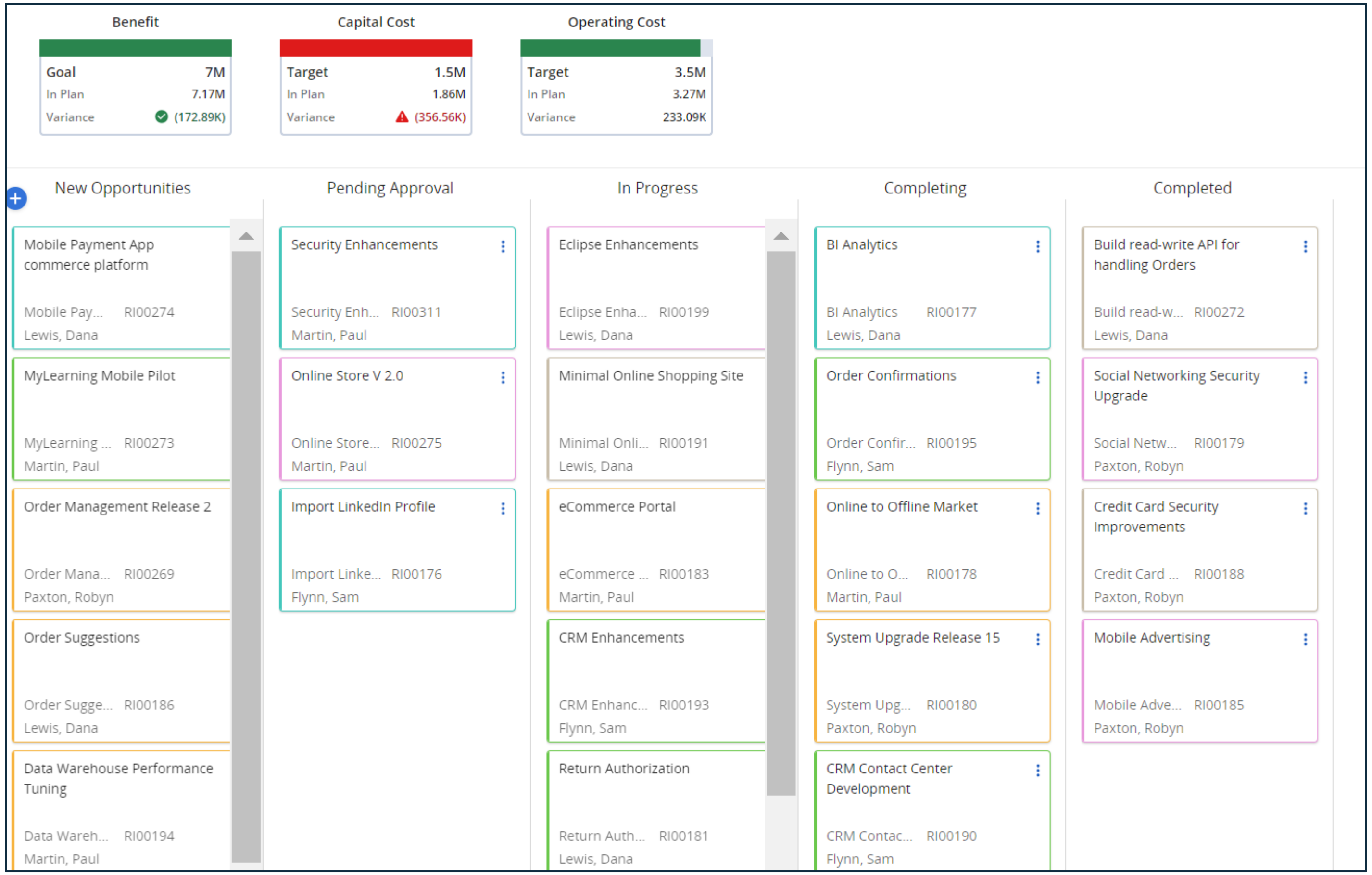
Use Roadmaps for Planning

- Utilize the Kanban board to organize and strategically plan work by dragging and dropping



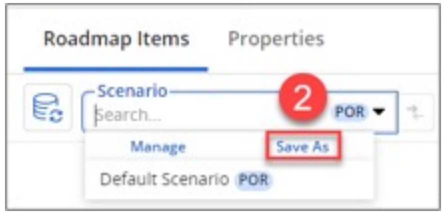
Use Roadmaps for Planning

- Use Grid View to manage work against targets
- Dynamically create and manage targets



Use Scenarios

- Allow for "What-if" analysis on roadmaps
- Scenarios will save roadmap specific information at the item level. For example, adjusting the cost, capacity, or dates of a roadmap item. They will also save target information and what is/isn't included in the plan.
- Unlimited number of scenarios may be created on a roadmap
- All users with access to the roadmap may view the scenarios
- Scenarios may be marked as Baseline and/or Plan of Record (POR)
- All roadmaps will be created with a Default scenario



Custom Investments

- Can be leveraged to capture different types of demand
- Name investments according to your organization's terminology
- Compatible with Roadmaps
- Same as other NPIOs (non-project investment objects)
- Includes *planned* simple budget financial fields on both the grid and the Details page

Questions?

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