Advancing the SPM journey: end-to-end lifecycle transformation

A partnership with Rego Consulting

Danielle Beyer & Sandra Pfeiffer | Rego University 2026

Agenda

- Cambia Health Solutions at a glance
- Our SPM journey and why we engaged Rego
- Assessment to transformation
- Delivering value users can feel
- Change enablement & adoption
- Lessons learned

Who we are: Cambia Health Solutions

Family of Regional Health Plans and Services

Our Cause: To serve as a catalyst to transform healthcare, creating a person-focused and economically sustainable healthcare system.

Regence BlueShield — Washington (since 1917) and Idaho (since 1946). Not-for-profit coverage close to home.

Regence BlueCross BlueShield — Oregon (since 1941) and Utah (since 1944), the state's first health insurer and a not-for-profit.

Blue Cross Blue Shield of North Dakota — Fargo-based mutual insurer serving North Dakotans since 1940 as a not-for-profit.

Asuris Northwest Health — a community-based plan and coverage pioneer that helps people first.

Healthcare Management Administrators — 35+ years administering customized health plans for self-funded employers.

Commencement Bay Risk Management — 30+ years of stop-loss protection for self-funded groups.

Our size and scale

Person-focused since 1917 — a catalyst to transform healthcare

Over a century of neighbor helping neighbor, now serving five states.

Nearly 4M
PEOPLE SERVED

Built on mutual support
Founded in 1917 by Pacific Northwest timber workers pooling wages to care for one another. Headquartered in Portland, Oregon.

5
STATES SERVED

Close to home
Regence health plans serve Idaho, North Dakota, Oregon, Utah and Washington — North Dakota joined us in February, 2026.

4,500+
EMPLOYEES

Clarity powers delivery
Data & Technology Solutions (DTS) runs Clarity as our SPM/PPM platform — the backbone for intake, planning, and delivery.

Awards and recognition

Recognized year-after-year as a great place to work

A consistent record across management excellence, employee wellbeing, technology, and service to veterans.

US Best Managed Company

Sixth consecutive year, sponsored by Deloitte Private and The Wall Street Journal.

Forbes America’s Best Large Employers

Seventh consecutive year on the Forbes list, with a top-three spot in the insurance industry category. Rankings drew on an independent survey of more than 217,000 U.S. employees at companies with 1,000+ workers, weighing over 6.5 million employer evaluations.

Healthiest Employers of Oregon

14th year recognized; placed third among companies with 1,500–4,999 employees.

Computerworld Best Places to Work in IT

Third year in a row; 11th overall among companies with 1,000–4,999 employees.

Military Friendly® Employer

Ninth designation since 2017 for recruiting, retaining, and advancing veterans.

Oregon’s Most Admired Companies

Fifth in health care — a top-10 finish every year since 2014.

Our Portfolio Management Team

End-to-End delivery workflow for **all work** that our Data and Technology Solutions (DTS) team support

OUR TEAM · 6 direct team members + 2 Jira partners in our end-to-end process

Danielle Beyer

Strategy & Governance lead

Sandra Pfeiffer

Clarity Product Owner

+4

Team members

Intake, delivery & adoption

+2

2 Jira partners

Part of our end-to-end process

WHAT THIS LEAN TEAM OWNS

STRATEGY & GOVERNANCE

Operating model · standards · decision rights

PRODUCT & PLATFORM

Clarity roadmap · configuration · platform health

DELIVERY & ADOPTION of INTAKE PROCESSES & TOOLS

Intake · readiness · reporting · training · support

Our focus: scalable processes let lean support keep pace as demand grows.

What this session will cover

A practical story of moving from person-dependent work to governed, scalable portfolio management.

1

WHY CHANGE

Fragmented tools, manual work, and heroics limited visibility and scale.

2

WHAT CHANGED

Cambia and Rego modernized Clarity, structured intake, and strengthened governance.

3

HOW IT SCALES

Focused roles, repeatable processes, and adoption sustain progress with lean support.

Takeaway: Transformation succeeds when process, platform, people, and adoption move together.

Our SPM journey and why we engaged Rego

Moving from "committing to everything" to Strategic Portfolio Management

Clarity evolved solving one problem at a time

The choices that brought us here solved real needs—but they did not create one enterprise view.

ESTABLISHED → **ADOPTED** → **READY TO SCALE**

Time tracking first

Clarity had been in place for more than two decades but was used mainly for time entry—not its broader portfolio capabilities.

Local problems solved

Classic UX hurt adoption and reputation. Customizations supported individual processes but fragmented the big picture.

Enterprise decisions

The next step was one view of demand and capacity—so leaders could make strategic choices across DTS about where to spend our limited resources.

Those decisions were not wrong—they solved the problems in front of us.

Scaling required us to connect those solutions into an enterprise operating model.

Different work, different rules

Project types, delivery methods, and portfolios followed separate processes, standards, and artifacts.

Every work type had its own way

Each project type and work type carried its own processes, gates, templates, and artifacts.

Teams optimized locally rather than working from one DTS standard.

Strategic Portfolio stood apart

The Strategic Portfolio* represented only a small share of DTS work.

It required standards distinct from DTS project standards — another operating model to maintain.

One view had to span every mode

Waterfall projects, agile delivery, and operational support each ran differently.

All three still needed to be visible in one portfolio view.

The result: three operating models to maintain, and no single view of the portfolio.

**Strategic Portfolio represents projects funded out of a designated fund and managed by the PMO.*

Our target future state

We knew what we needed. We didn't know how to get there.

One workflow

- Intake through delivery, end-to-end — not a stack of disconnected tools.

Tools with defined purpose

- Clarity for planning and record, Jira for execution, with clear boundaries.

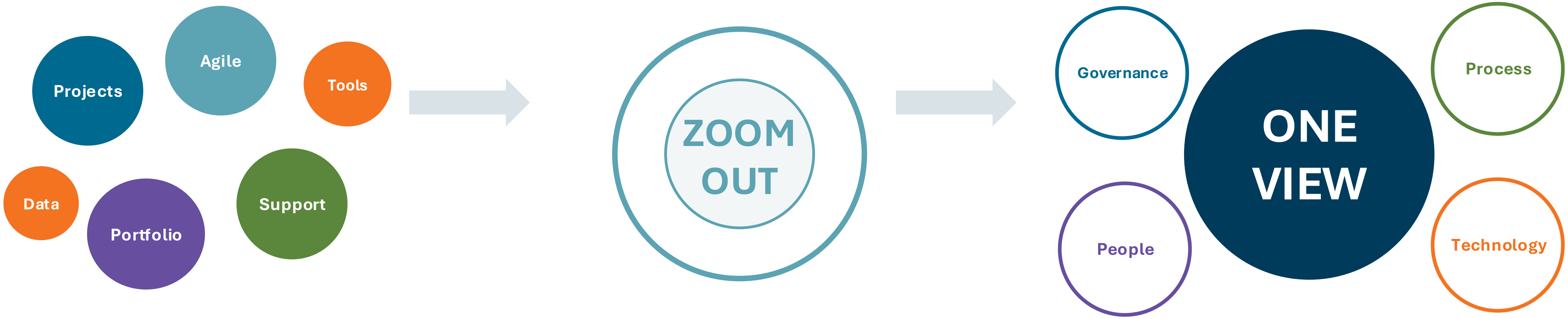
A real governance model

- Decision rights and stewardship instead of informal habits.

Why we engaged Rego

We needed to step back from the details and see how the entire delivery system worked; and ***if*** it worked; and ***how*** it could work ***better***.

BURIED IN THE DETAILS | **FRESH PERSPECTIVE** | **ONE ECOSYSTEM VIEW**



Many valid local solutions—
but no single big picture.

Identify what still worked—
and what no longer served us.

One view of all work—
clear enough to scale.

Not a tool audit. A full assessment of the delivery ecosystem.

The ask: four-dimension assessment

Governance

Clear standards and decision rights across platforms and architecture.

Technology

Aligned tools and data integrity across planning and execution.

Process

Standardized decision points, handoffs, and interdependencies.

People

Well-defined roles with skills aligned to the right responsibilities.

Delivery Ecosystem Assessment (DEA) with Rego

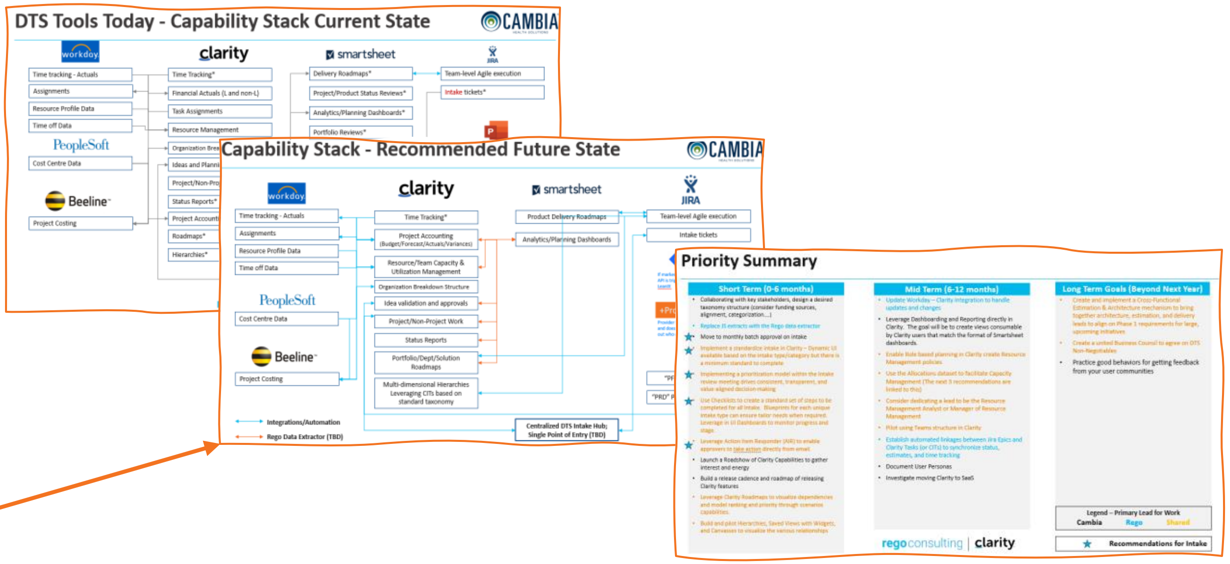
MAR–MAY 2025
MAP THE CURRENT STATE
Document processes, tools, pain points

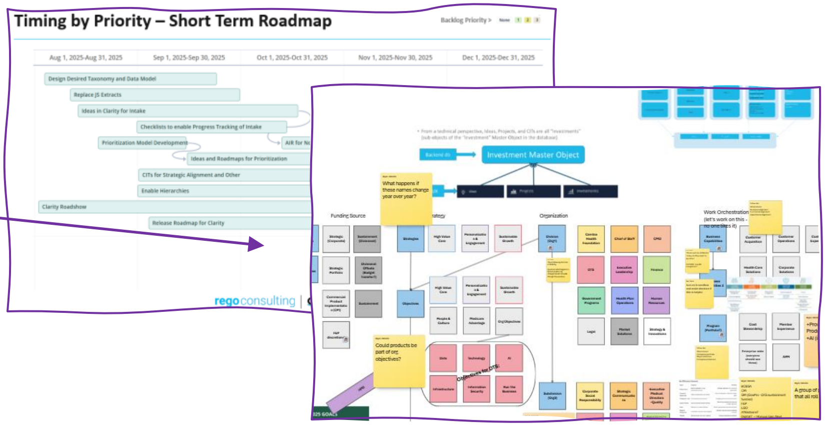
JUN 2025
LAUNCH THE FULL DEA
Onsite interviews of key stakeholders, tool and process owners

JUL 2025
SHAPE RECOMMENDATIONS
Follow ups, deep dives, check-ins

AUG 2025
DELIVER THE READOUT
Current state, future state, prioritization & order

SEP 2025
BUILD THE ROADMAP
Onsite data architecture workshop, implementation roadmap





What the assessment revealed

“We knew what our ecosystem was, but we didn’t have it mapped. Everyone didn’t understand what it was.”
— What we heard from users

What we heard from users

- Perception challenges around Clarity
- Reporting concerns and trust in the data
- Manual upkeep draining the same few people
- Tool confusion — which system is the source of truth?

What leadership needed

- Better portfolio visibility across the work
- Demand and capacity understanding
- Strategic alignment of investments
- Improved, defensible prioritization
- One place to look for information

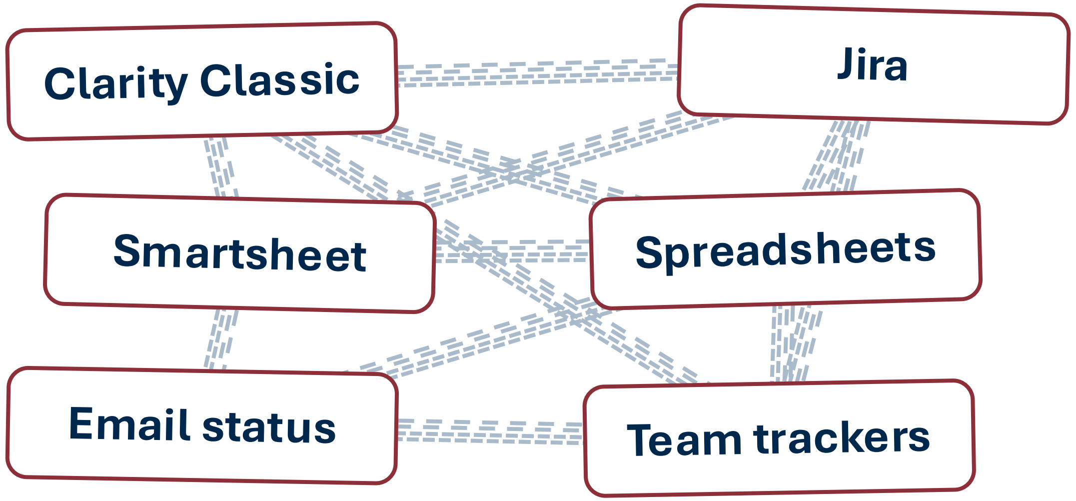
The central question

- “Are the right people working on the right things?”
- Portfolio planning, business leaders, delivery teams, and finance were all asking versions of the same question.

Tools everywhere

Work bounced between tools — and teams built their own fixes

BEFORE | Tools in every direction



Clarity Classic felt clunky and one-purpose, so teams built their own fixes.

AFTER | One end-to-end lifecycle

Ongoing prioritization and planning

- **0 Idea intake**
- **1 Discovery & Ideation**
- **2 Solution Design**
- **3 Execution & Delivery**
- **4 Monitor & Track Performance**

One flow from intake to measurable value — all in Clarity.

Assessment to transformation

The foundation made the visible value possible

Early structural work enabled the capabilities users now see—and the next ones still evolving.

FOUNDATIONAL ENABLERS

CITs and STRUCTURED DATA
CITs, blueprints, glossary and common fields

STANDARD WORKFLOWS
Intake, funding and portfolio processes

CLEAR GOVERNANCE
Product ownership, decision rights and roadmaps

MODERN PLATFORM
Hosted Clarity, upgrades and scalable architecture

FUNCTIONAL VALUE

SELF-SERVICE REPORTING
Role-based widgets, reliable dashboards and Power BI

CONNECTED DELIVERY
Strategic intake, automation and program visibility

SUSTAINABLE CHANGE
Prioritized enhancements and consistent tool direction

NEXT-GEN CAPABILITY
Jira connectivity, capacity pilots and AI readiness

Much of the early work was invisible to users—but it created the structure that makes today's improvements possible.

From foundation to visible value—year by year

2025 established the structure; 2026 turned it into capabilities teams could use and scale.

FOUNDATIONAL WORK · 2025

Q2 2025

REGO PARTNERSHIP Independent assessment and future-state direction

Q3 2025

ECOSYSTEM ASSESSMENT People, process, governance and tools viewed as one system

Q4 2025

DATA REFACTORING + STANDARDS Structured attributes replaced naming conventions and free text

UAT + CIT FOUNDATION Validated Release 1 and introduced reusable data structures

FUNCTIONAL VALUE · 2026

Q1 2026

SINGLE INTAKE One governed path from demand to delivery

CLARITY ENHANCEMENTS Role-based views for easier access

Q2 2026

INTEGRATION + PILOTS Business-unit and Jira pilots

PROGRAMS + ALIGNMENT Rollups to shared outcomes

Q3 2026

HOSTED MIGRATION Modern platform for analytics and AI

BUSINESS UNIT + PMO ONBOARDING More units and PMO artifacts

Q4 2026

REPORTING MODULE + VAIA New module and Vaia delivered

SCALE + STANDARDIZE More units and Jira standardization

Data standardization and structuring

From organizational memory and manual parsing to governed, reportable analytics

Executives — Business Value

- Portfolio intelligence, not data dumping
- No more manual “data tax”
- Investment types roll up spend and capacity
- Status and health mean the same thing everywhere

PMs & Users — Process

- Taxonomy, not folksonomy
- Drop-downs enforce integrity
- Shared glossary and naming conventions for projects and programs
- Blueprints set required fields, so nothing is entered twice

Analytics — Data Impact

- Typed fields, not free text
- BI-ready for automation
- Clean hierarchies link idea to project to program to portfolio
- Dashboards refresh from the source instead of spreadsheets

Stronger data foundation

From parsing exports in Power BI to self-service reporting in Clarity

Custom Investment Types and standardized attributes make the data usable where the work happens.

Before: Manual processes and Power BI carried the load

- Key details lived in free text and naming conventions, so nothing joined cleanly
- Exports from Clarity and other tools were stitched together by hand
- Power BI did the parsing: splitting fields, mapping hierarchies, reconciling IDs
- Every new question meant a new request and a model rebuild

Now: Structured data at the source

- CITs and attributes capture the data as data, not text to be parsed
- One shared taxonomy across investments, roadmaps, and hierarchies
- Standard views and dashboards answer most questions inside Clarity
- Power BI is for executive storytelling, not cleanup

Less reliance on one reporting resource — users self-serve in the tool

Delivering value users can feel

Adoption starts with value users can feel

Users engage when the experience fits their role, reflects their work, and makes the easiest path the governed one.

MY ROLE ❯ **MY WORK** ❯ **ONE PLACE** ❯ **ADOPT**

RELEVANT

The views, actions, and answers I need

PERSONALIZED

Use cases shaped around how I plan, deliver, or lead

SIMPLER

Complete the work without stitching together multiple tools

ADOPTION FOLLOWS

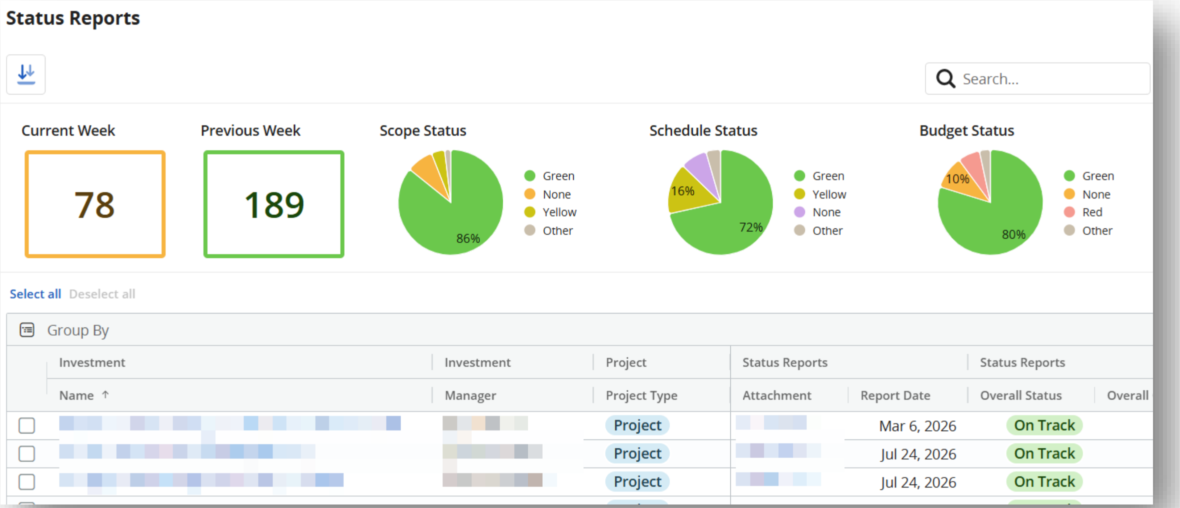
when the tool removes effort—not adds it.

role-based value · personalized experience · one connected place to work

New views & widgets

Making Clarity easier to see and act on

- Rego configured new dashboards, portfolio views, and widgets tailored to how our teams actually work.
- Leaders gained real-time visibility into demand, project status, and resource capacity.
- Teams got cleaner, role-based views — less clicking, more doing.
- Different audiences need different tools: Power BI is where we go for deep, cross-portfolio analysis and historical trends.
- Views and widgets are where the daily work happens — live data, in context, right beside the record being updated.



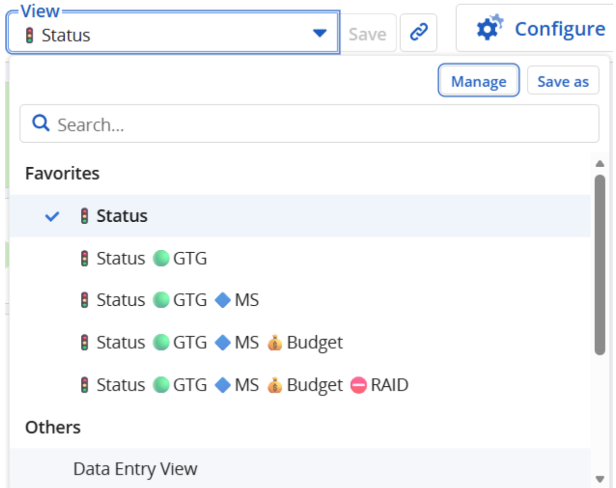
Run the meeting from the widget

We can lead a status review straight from a widget and update it in real time, so decisions land in the system while everyone is still in the room.

One set of data, many views

Everyone works from the same underlying data and picks the view that fits their role

Pick a saved view – Status Reports

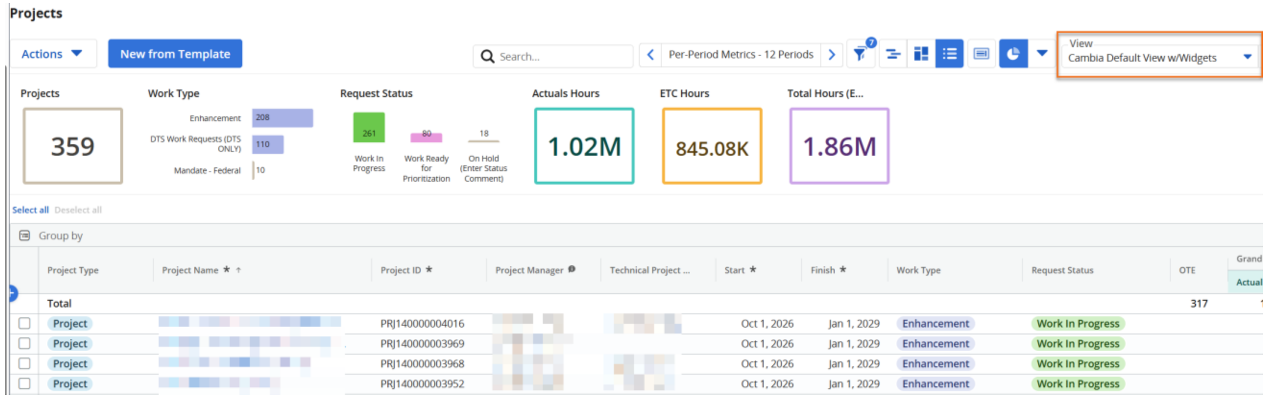


Views we've built

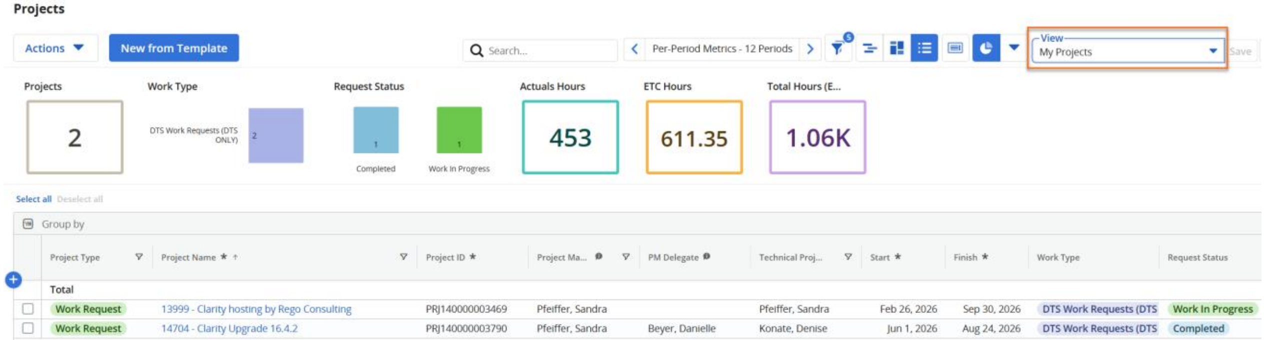
Allows the user to create a status report according to level of detail needed by their project sponsors.

Status, GTG (get-to-green), Milestones, Budget, RAID log

Portfolio view: counts, cost, and status



Same data, filtered to one workstream (My Projects)

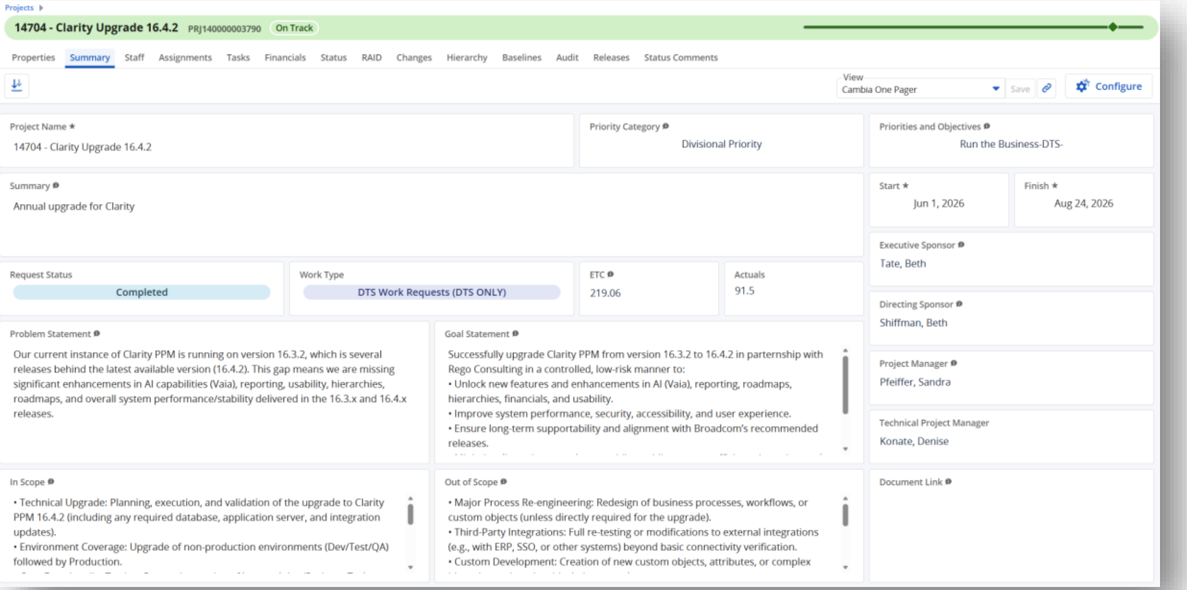


Same underlying data, so no one has to build their own PowerPoint or Power BI to get at it

Example: Project Charter and Status Reports

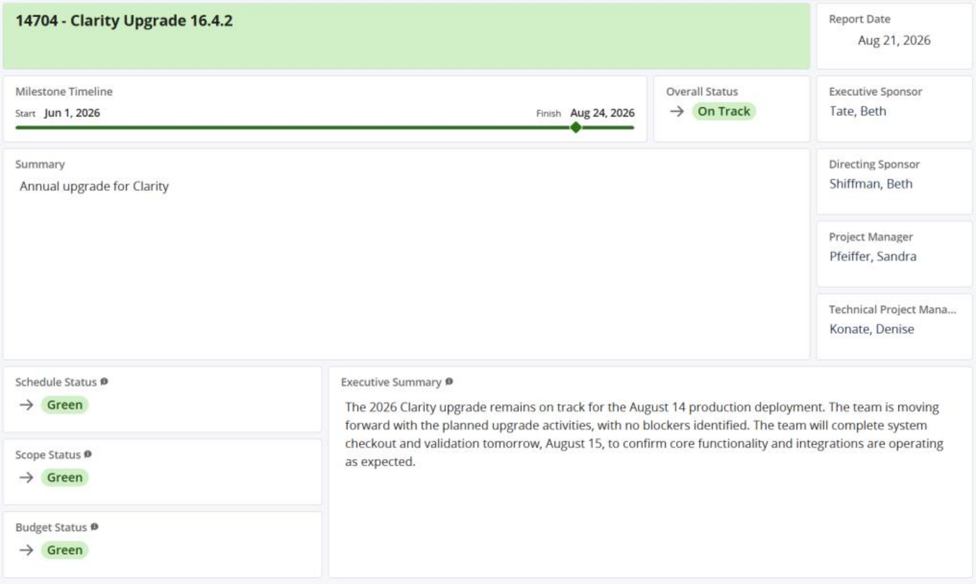
The project charter and status report, captured directly in Clarity

Project Charter (One-Pager)



A quick one-page overview for everyone assigned to the project.
No wading through the full properties screen to get oriented.

Project Status Report



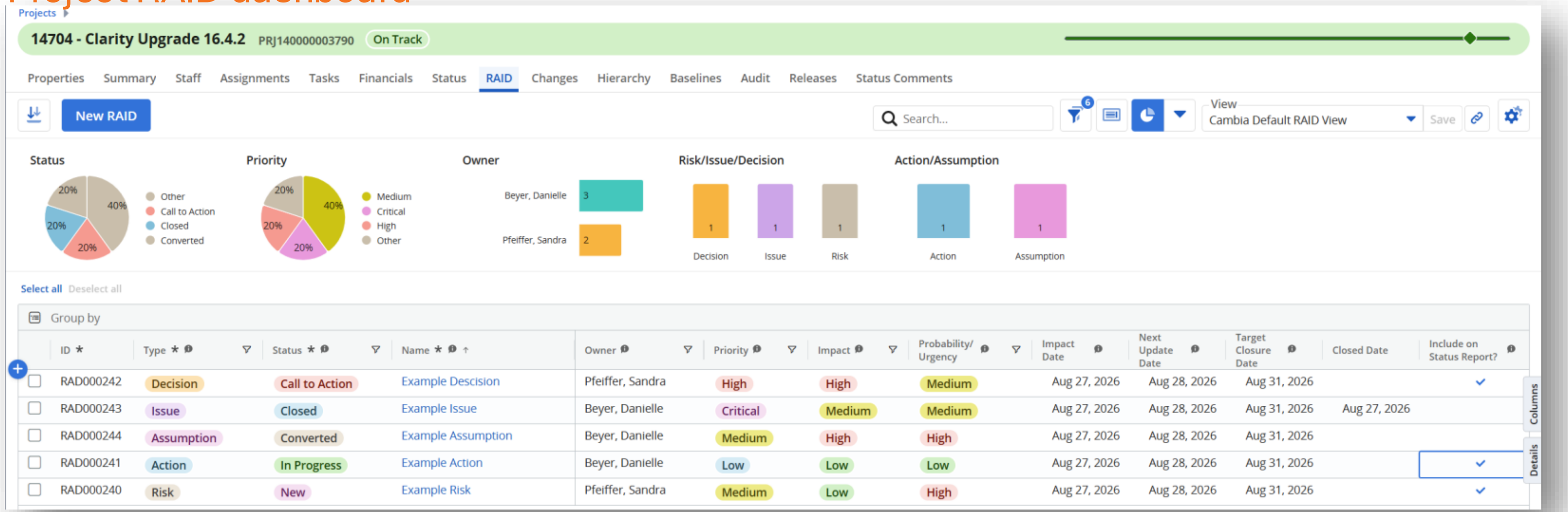
Internal processes previously left us unable to publish status.
The Latest Status Report now drives the process and keeps our PMs compliant.

Charters and status reports now live in Clarity: one place for project context and consistent, compliant reporting

Example: our RAID Log process

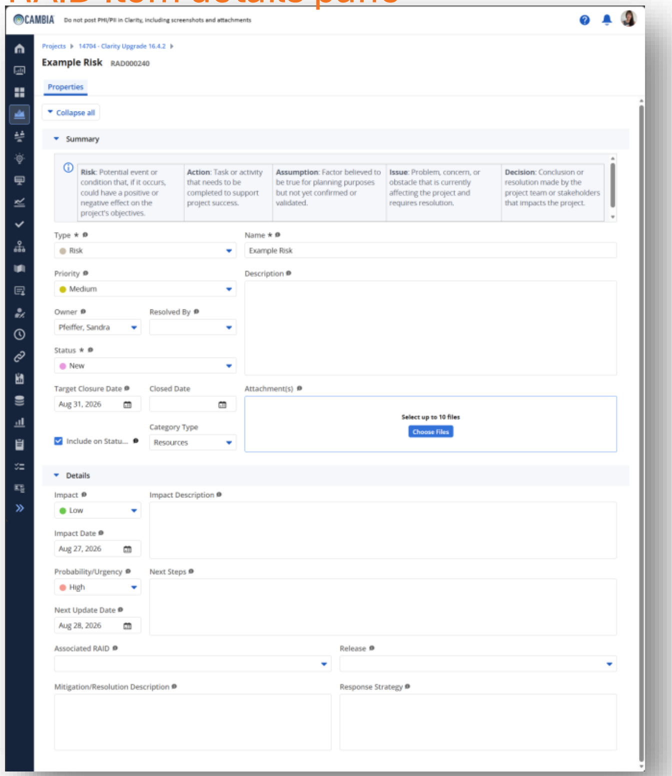
The project RAID dashboard and the item details pane, captured directly in Clarity

Project RAID dashboard



- RAID items are logged against the project and roll up to the dashboard
- Risks, issues, actions, assumptions, and decisions visible at a glance
- The details pane holds the full record: owner, dates, and mitigation
- Executives get one view of all risks across every project in flight

RAID Item details pane



One component of moving off tools like Smartsheet, and a step the PMO needs to migrate fully to Clarity

Why we also use Power BI

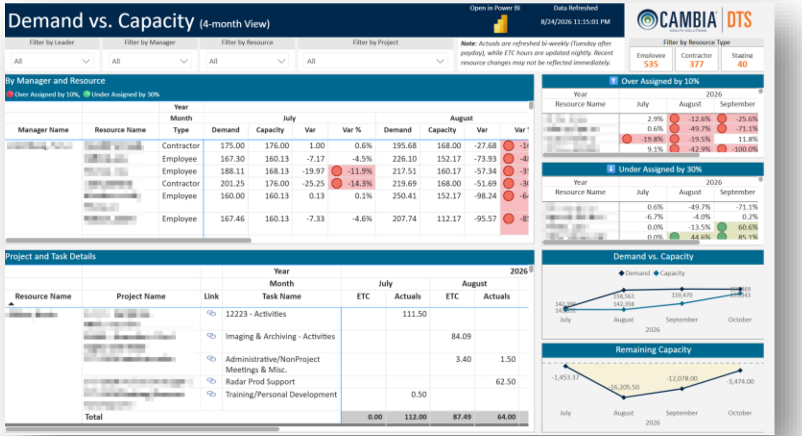
Telling the story to leadership, wherever they work

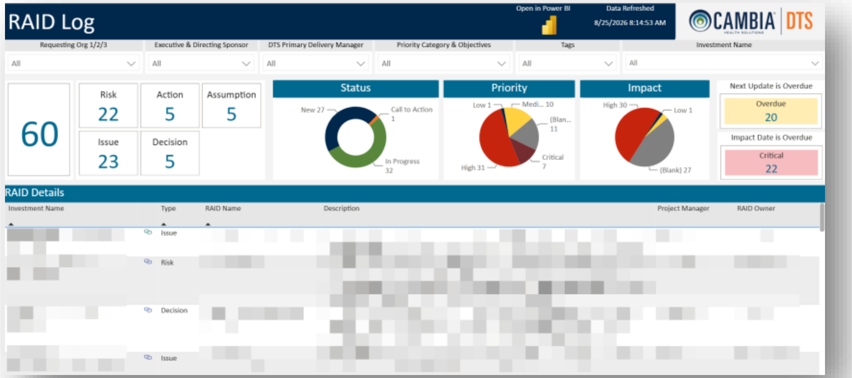
- Power BI is how we tell the story to leadership — including leaders who do not work in Clarity day-to-day.
- Reports are interactive: leaders filter to their own area and quickly see how the information affects them.
- It handles the complex calculations and cross-source roll-ups that go beyond what a view or widget can do.
- Embedded directly in Clarity for users who live there, and available standalone for those who do not.

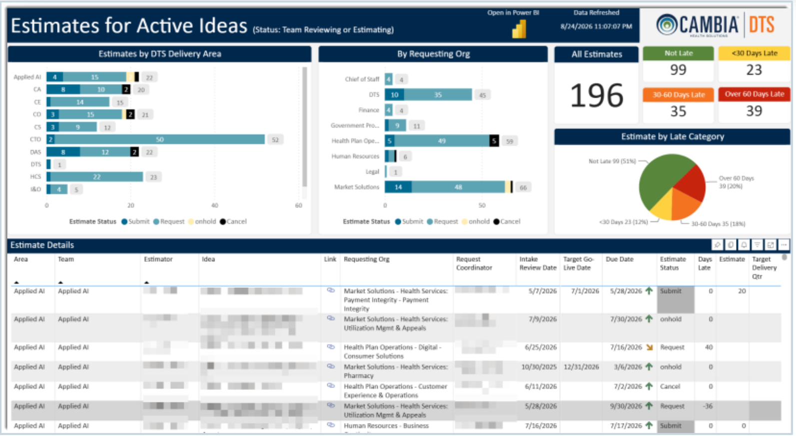
#OneList — one trusted set of data, told the right way for every audience.

Examples of Power BI Reports

Our CITs enabled this level of reporting — filter by lines of business, tags, orgs







Change enablement & adoption

How we communicate change

Clear, consistent communication keeps adoption alive

Communication is what makes adoption stick — we share the why behind every change, early and often.

Ahead of every release

A direct email goes out before new features land, explaining what is changing and why it matters.

Regular newsletters

Newsletters recap recent releases and share practical tips users can apply right away.

Metrics in the open

Leadership shares reports and metrics regularly, so progress stays visible to everyone.

One place for everything

Our End-to-End Delivery Workflow site holds links to other related sites for guidance, templates, and release history.

Visible enthusiasm from leadership drives demand, so we sequence carefully to match capacity.

Training and education

Ways we assist our users: an open door, a weekly look ahead, and guidance that lasts

Responsive today, sustainable tomorrow

Our team answers fast, but one-to-one support does not scale — so we make help routine, visible, and self-service.

Clarity Office Hours

Recurring, bi-weekly drop-in sessions where any user can bring a question and get real-time help with navigating Clarity, modifying views, status reports, upgrade features, and financial and resource management.

Weekly E2E Demos

Every week we walk through new functionality, share what is coming, and gather feedback from a core team of users before anything is rolled out.

PMCOE (Project Management Center of Excellence)

A monthly meeting brings project and technical project manager together, backed by a dedicated SharePoint site with checklists and guidance for managing projects consistently.

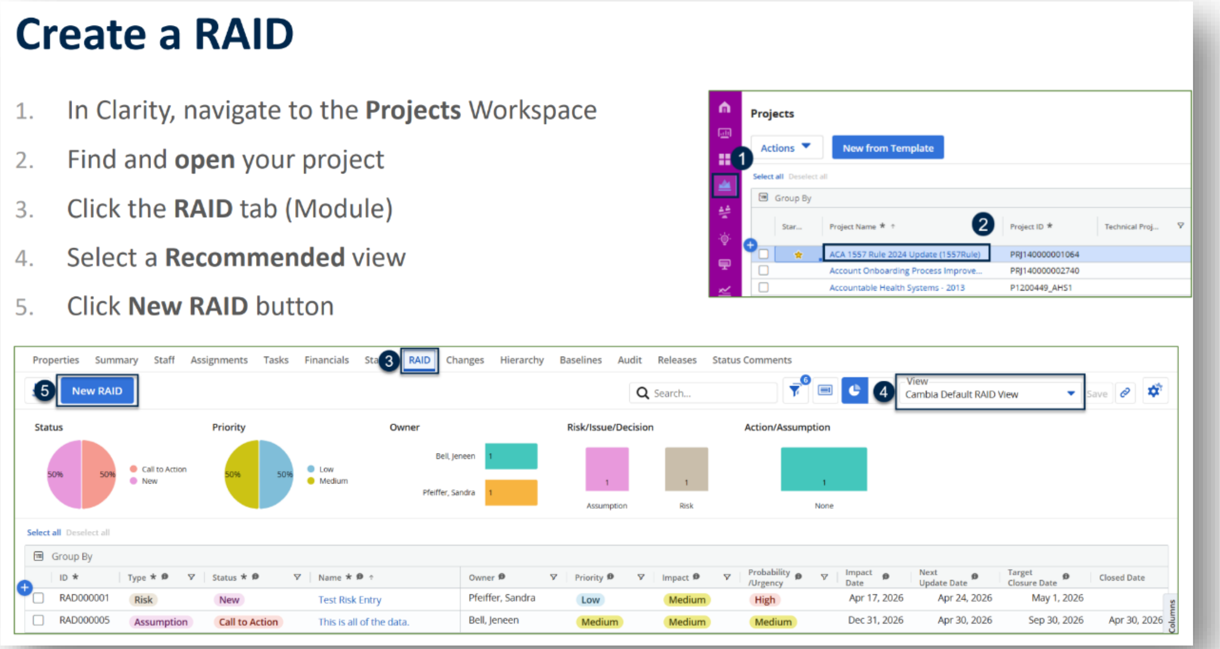
Job aids, quick reference guides, and in-context help

Our processes and job aids live on SharePoint, and Clarity's Custom Help surfaces them right where the work happens — so guidance arrives just in time, not after the fact.

Example: making the new RAID process stick

A template, a job aid, and reinforcement until logging RAID became routine

- Built one standard RAID log template in Clarity so every team logs the same way.
- Wrote a job aid defining when to open each RAID item and who owns it.
- Reinforced the habit in Office Hours and training until logging became routine.
- Migrated open Risks and Issues from the retired modules so nothing was lost.



Result: one consistently classified RAID log that teams keep current and can be rolled up for the enterprise.

Governance & operating model

Clear decision rights route work from intake to enterprise direction

One monthly forum combines Steering + Advisory; only Steering Committee members vote.

1 **STEERING COMMITTEE** — VOTING · MONTHLY

Final authority on priorities, funding, roadmap tradeoffs, and tool purpose; reviews E2E metrics and sets direction.

2 **CROSS-DIVISION ADVISORY** — NON-VOTING · MONTHLY

Provides business context and input on priorities; surfaces risks and dependencies; aligns decisions across divisions.

3 **TECHNICAL STEERING · CLARITY + JIRA** — WEEKLY / BI-WEEKLY

Reviews technical approach, feasibility, dependencies, and sustainability; prioritizes requests with technical context.

4 **TRIAGE TEAMS · CLARITY + JIRA** — DAILY / AS NEEDED

Clarifies incoming requests, estimates effort, and routes work to Technical Steering, Advisory, or Steering Committee.

Formalized process for changes to Clarity, Jira and intake processes

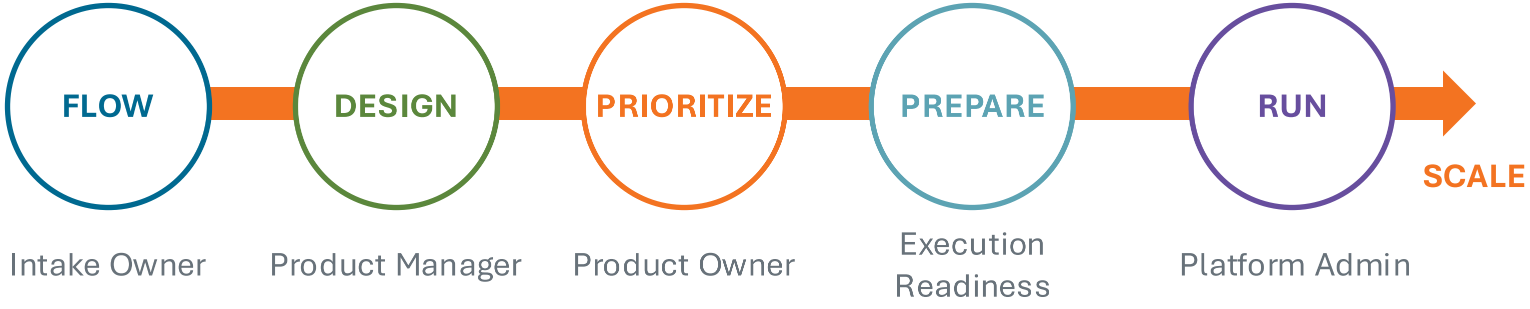
Focused roles to make supporting Clarity scalable

From “all hands-on deck” to clear ownership across intake, product, readiness, and platform support

BEFORE •
EVERYONE TOUCHED EVERYTHING

person-dependent • follow-up driven

NOW •
FOCUSED ROLES MOVE THE WORK



ACCOUNTABILITY • THROUGHPUT • STRATEGIC CAPACITY

Clear ownership keeps collaboration — and removes dependency on heroics.

What we’re already hearing

EXECUTIVE & STAKEHOLDER FEEDBACK

“Thank you for the continued awesome work on our Demand/Capacity/OneList reporting. ***Today’s preview was genuinely exciting!*** *(And it is very, very rarely that I apply the term ‘exciting’ to corporate labor dashboards.)”*

Project Management Leadership

“This is all about ***transparency****.”*

Senior Leadership Sponsor

“The goal of this reporting is to ***surface bottlenecks early****, identify where teams may need more support, and give us* ***data to see where there are opportunities to improve****.”*

Technology Team Lead

“By standardizing our tools and developing scalable processes in Clarity, we’re creating the ***infrastructure needed to achieve key focus areas*** *and ensure* ***effective partnership across the organization.****”*

Technology Leadership

“This represents a shift toward a more ***connected, enterprise view*** *of delivery, improving how we see progress, identify risk, and make* ***decisions across our highest priorities****.”*

Technology Leadership

Lessons learned & what's next

Hard-won lessons

TECHNICAL

- Don't underestimate integrations
- Understand your data model first
- Technical debt always surfaces — plan for it

TRANSFORMATION

- Governance and executive sponsorship both matter
- Process standardization is harder than tools
- Focus on outcomes, not features
- Pace the change — leadership wanted it now, but changing everything at once would have broken things

WHAT'S NEXT

- Walk with guardrails before running self-managed
- Deeper analytics and automation with 16.4.2
- Expand the Clarity–Jira connector
- Templatize onboarding so new teams join Clarity with a repeatable playbook
- Onboard additional business units toward #OneList

We still have work to achieve Strategic Portfolio Management— but we now have a strong foundation to build on.

Thank You

Questions & Discussion

Danielle Beyer — SPM Transformation & Governance Lead

Sandra Pfeiffer — Clarity Product Owner