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SAN ANTONIO • 2026

SPM in Action: From Strategy to Work

Your Guides:
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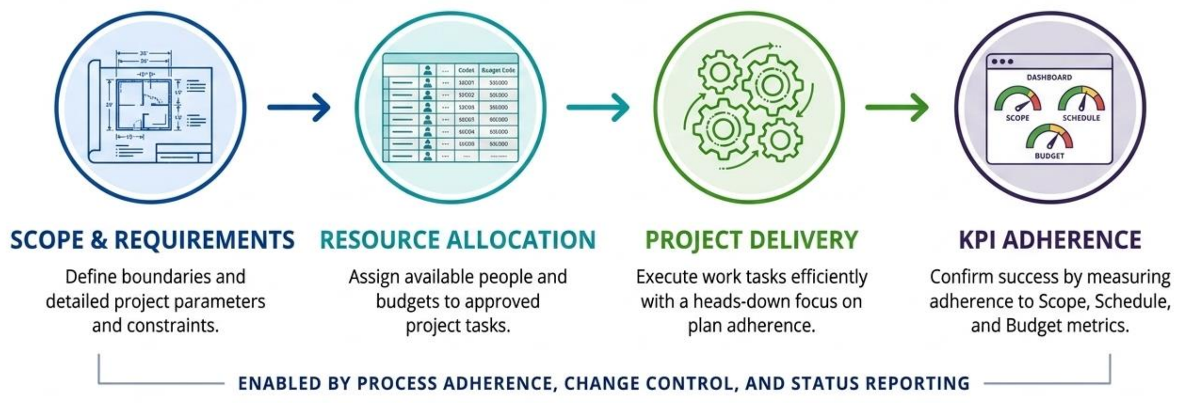
Agenda (This is a 2-part session!)

- Framing the problem and opportunity
- SPM business capabilities and personas
- Interactive group exercise overview and objectives
- Exercise part 1 detailed instructions
- <Session Break / Lunch>
- 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

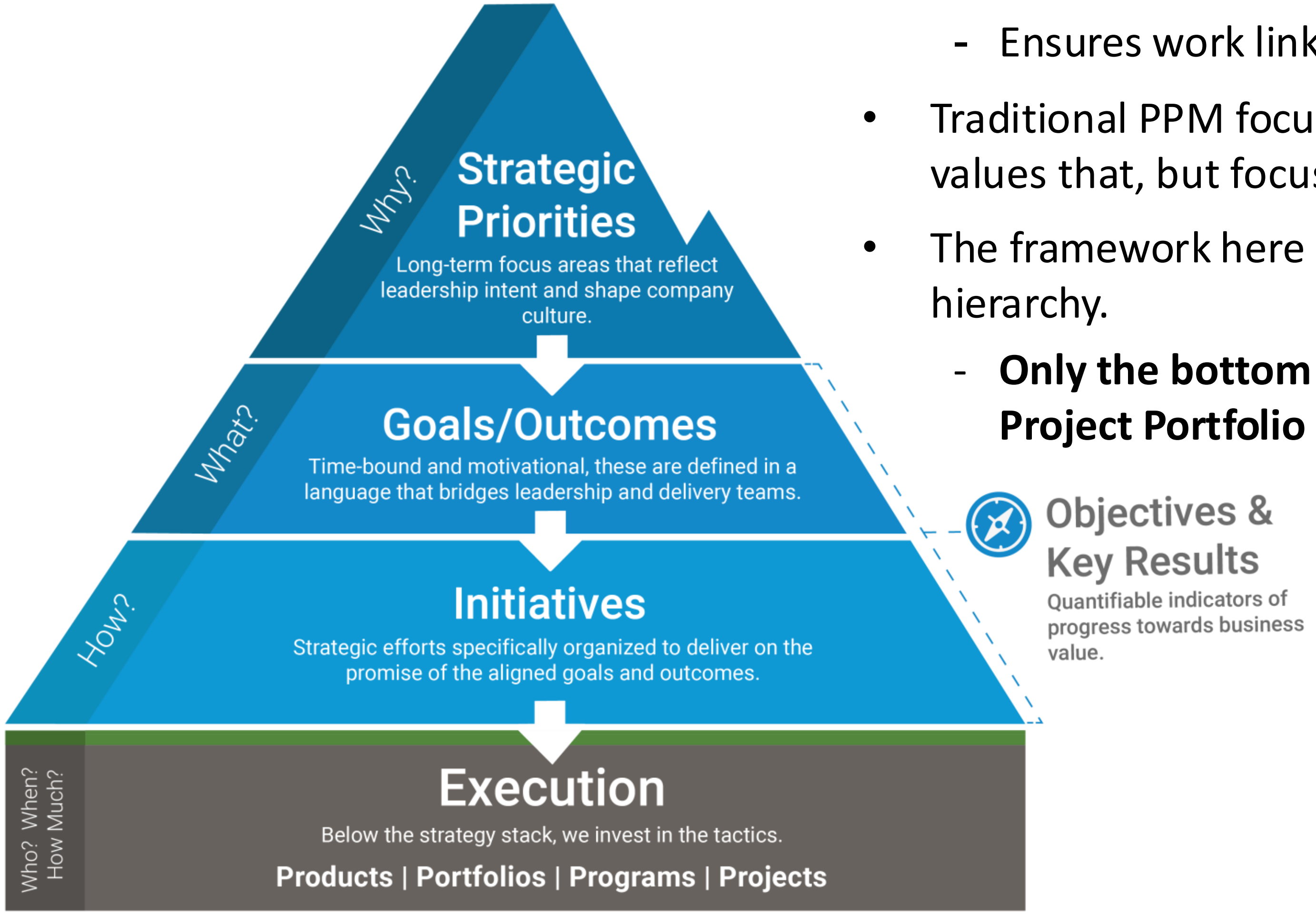
- Data siloes and lack of consistent, trusted portfolio insights
- Inconsistent or misaligned prioritization practices
- Difficulty to provide senior leaders with a “single lens” into portfolio of investments
- Limited ability to adapt to unplanned changes, “What-if” scenarios
- Difficult to anticipate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



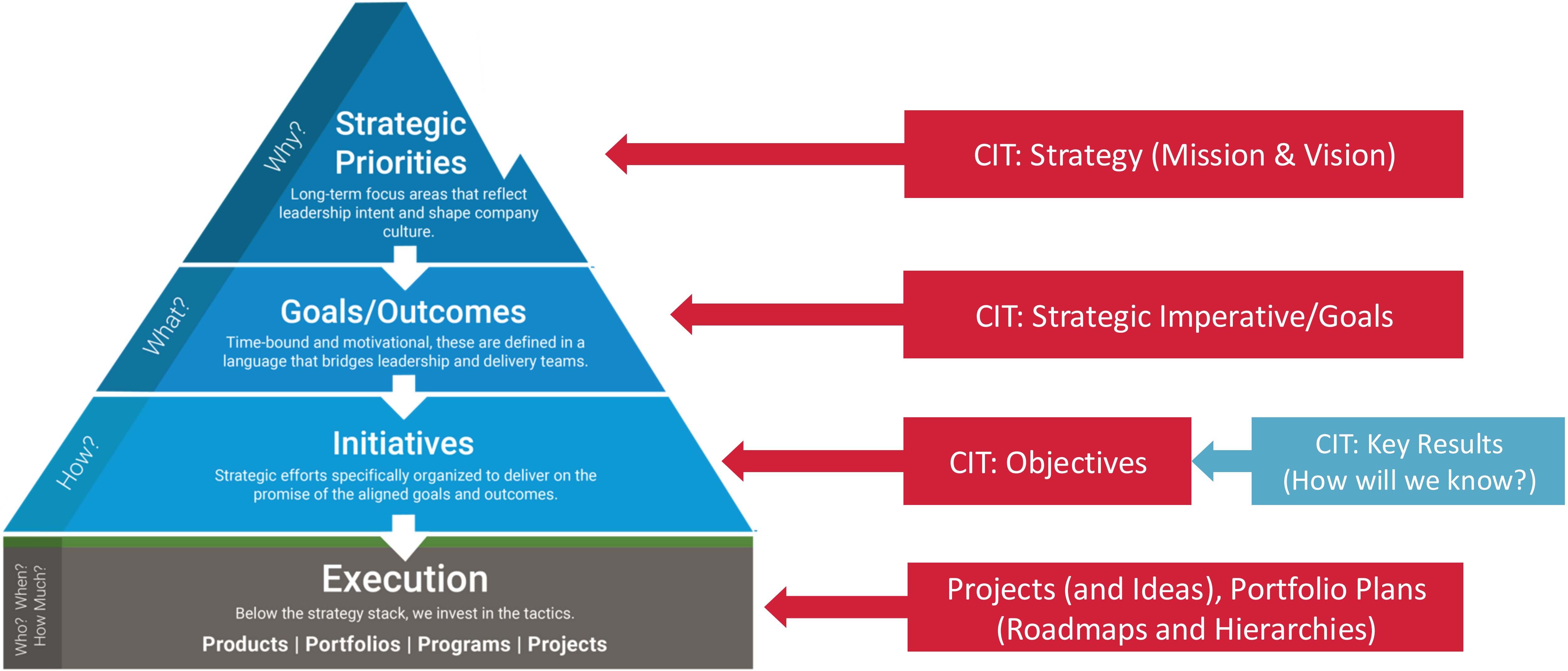
SPM Business Capabilities and Personas

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

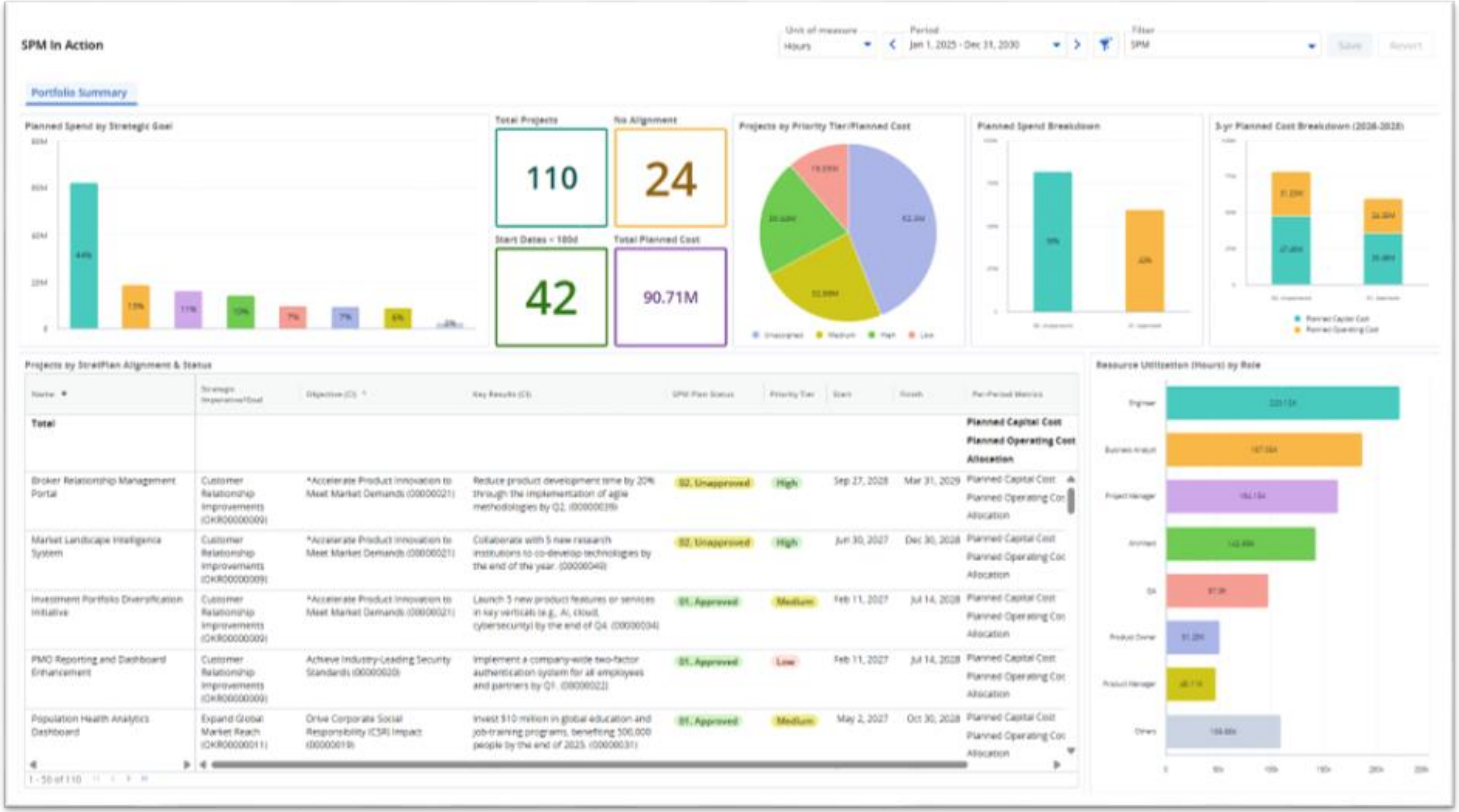
The Personas that Show Up in Our Exercise

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

Group Exercise

Overview and Objectives

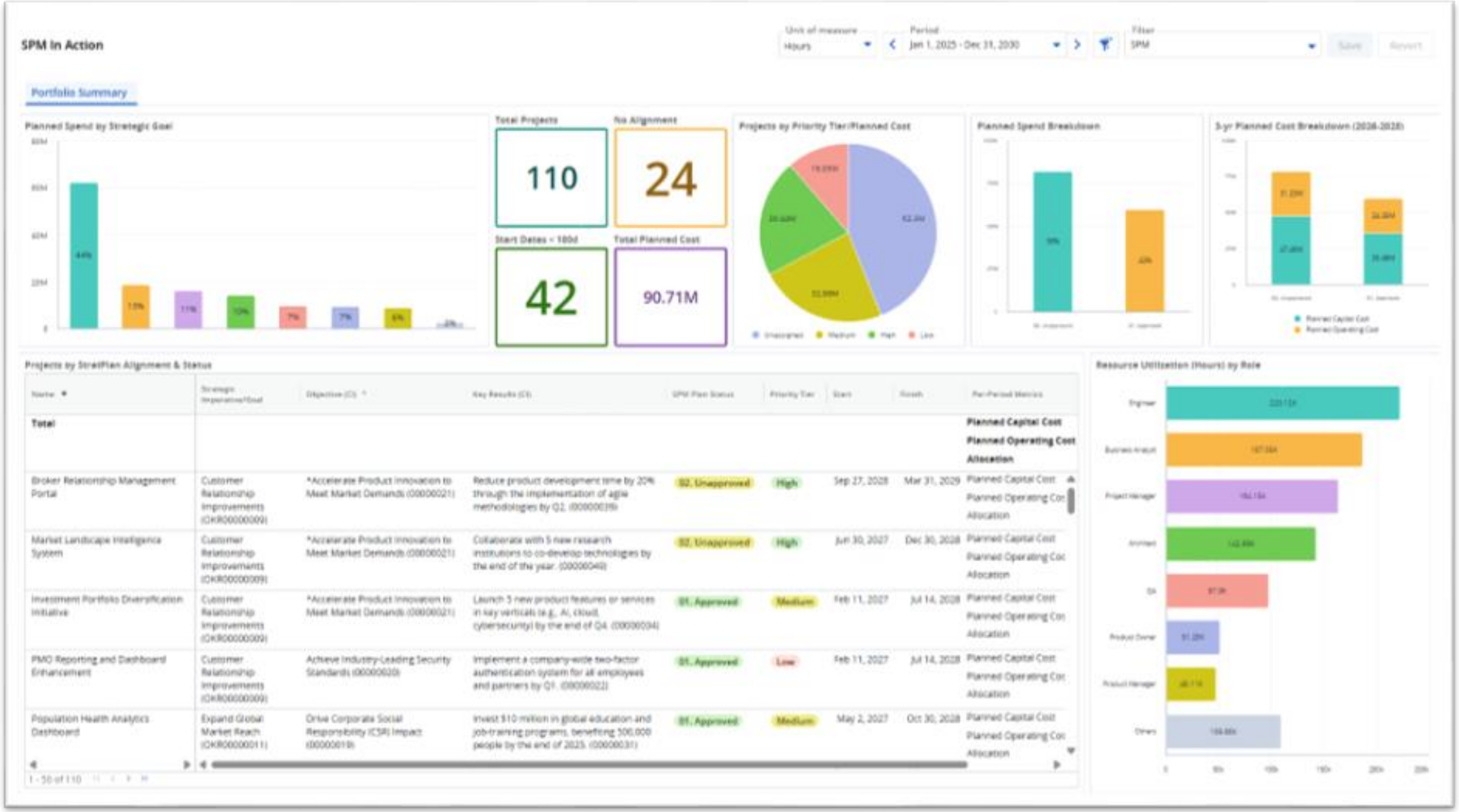
Group Exercise Parameters and Overview



Portfolio Health Standards:

- All Projects should be Strategically aligned; “Objective (CI)” and “Key Results (CI)” values should NOT be empty.
- All Projects should have a Priority Tier assigned
- No more than ten percent of the total Planned Costs for the portfolio of Projects should be sitting on unapproved demand (“SPM Plan Status” = “02. Unapproved”)
- The greatest proportion of Planned Costs for the portfolio of Projects should be allocated to HIGH priority work (“Priority Tier” = “High”)

Group Exercise Parameters and Overview



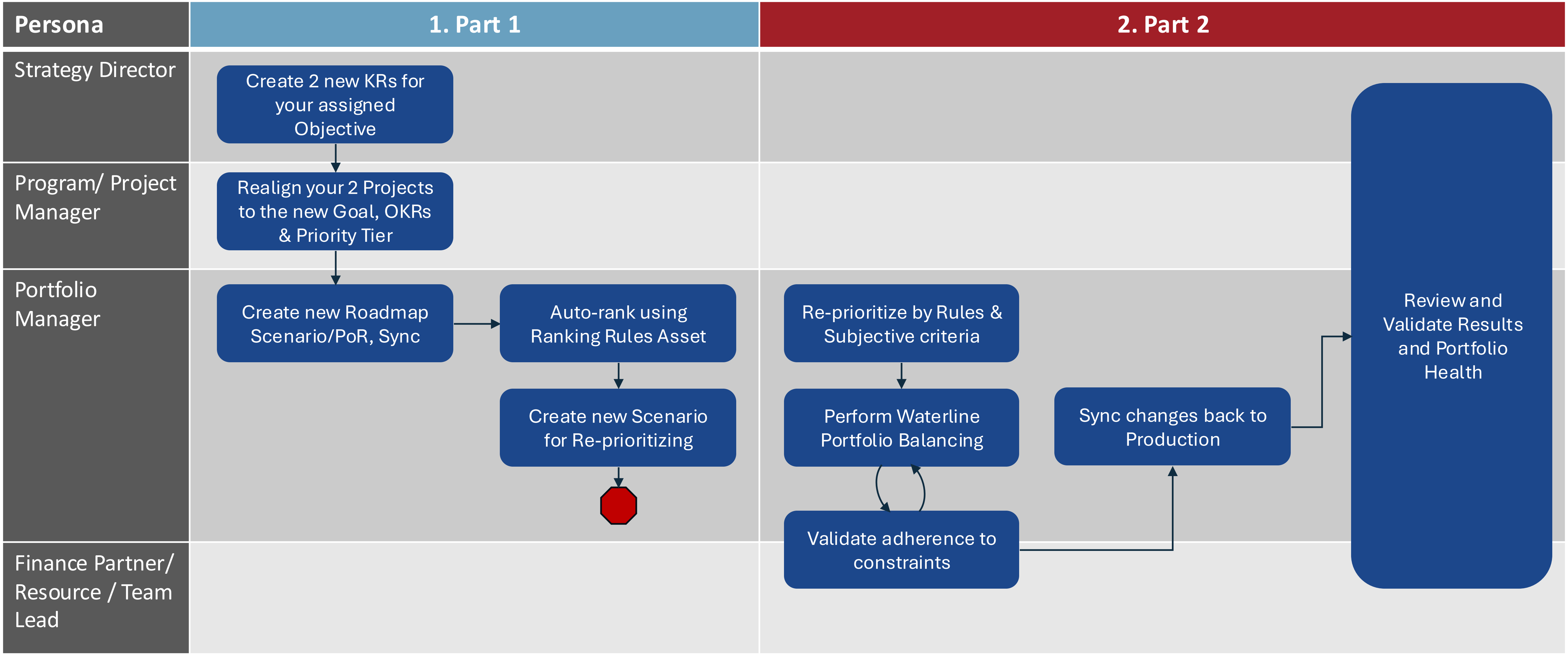
Portfolio Health Standards:

- Total 3 year budget (2026-2028) for APPROVED Projects should not exceed $26M Capital Cost or $20M Operating Costs
- Any Projects with a Start Date within the next 180 days must be “Approved” (SPM Plan Status)
- No single Strategic Imperative/Goal should account for more than 30% of the Total Planned Costs for the Portfolio of Projects

Group Exercise Parameters and Ground Rules

- Each table will work together as a group, alternating tasks
- The goal is for each person in the group to have the opportunity to participate (but no one is forced 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 follow the instructions carefully and do not try to work ahead. If you get stuck, raise a hand and a facilitator will come assist you
- 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
- This will get chaotic! Please keep side conversations to a minimum

Overall Exercise Flow of Activities



Group Exercise (LUNCH BREAK: 12:20-1:20)

Part 1 Detailed Instructions (Handout)

Group Exercise

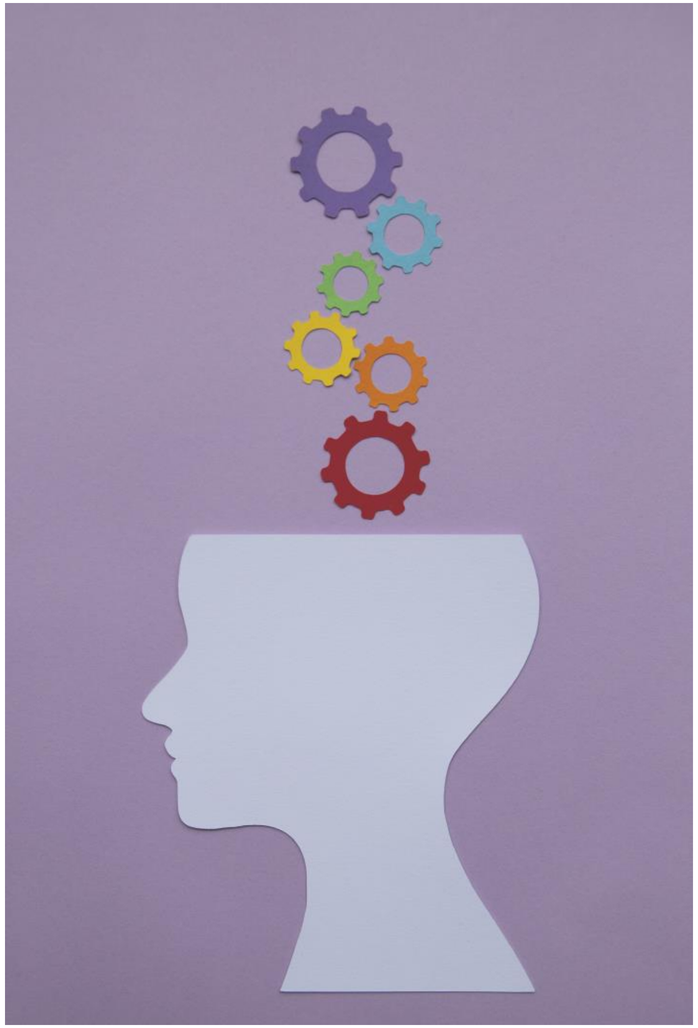
Part 2 Detailed Instructions (Handout)

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?



Questions?

Survey

Please take a few moments to fill out the class survey.

Your feedback is extremely important for future events.

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