regoUniversity
SAN ANTONIO • 2026

Visualizing the Future: Mastering Dynamic Roadmaps

Your Guide:
Mike Pokorny & Brian Toplicar

Agenda

- Introduction
- Value Proposition for Roadmaps
- BEFORE the Roadmap – Considerations
- Creating a Roadmap – Do’s and Don’ts
- The Latest “Bells and Whistles”
- Roadmap Demo
- A Sharing of Ideas

Roadmaps

Value Proposition for Roadmaps (WIIFM)

- Long-term Strategic Planning (Solution Roadmaps)
- Value Stream Management
- Complex Program Management
- Constraint-based Prioritization
- Visual depiction of sequencing, dependencies
- Visual depiction of Demand vs Capacity (financial & people)
- “What-If” Scenario-based planning
- SAFe LPM / Lean Budgeting
- Product Management / PI Planning (Broadcom Software, Rego DEA Program)

Before Getting Started with Roadmaps

While you may create as many Roadmaps as you want, you aren't restricted to a number –

- This means to thoughtfully plan your Roadmaps to match investments (i.e., is this a strategic Roadmap or a product Roadmap?)
- What metrics and constraints will be used? (costs, benefits, points, resources?)
- What level(s) of granularity will you include?
- What is the right volume of data to include? Should you use a single Roadmap or consolidate with Roadmap Groups?
- What time period will your Roadmaps entail, and what will be the cadence of review?
- What drives scenarios and options? (people, timing, planning cycles?)
- How will this information be used?

What other questions or considerations have you struggled with when thinking about Roadmaps?

Roadmap Example: Strategic Alignment

- Vision
- Prioritization
- Structure

Key Takeaways

✓ It is important to plan how you want to group your investments

✓ If you are tracking costs, who is holding the wallet? Are your Roadmaps organized to reflect this?

✓ Reporting on investments within a Roadmap is driven by how the Roadmap is organized

✓ Consider where the money and/or resources are coming from, when grouping investments within a Roadmap.

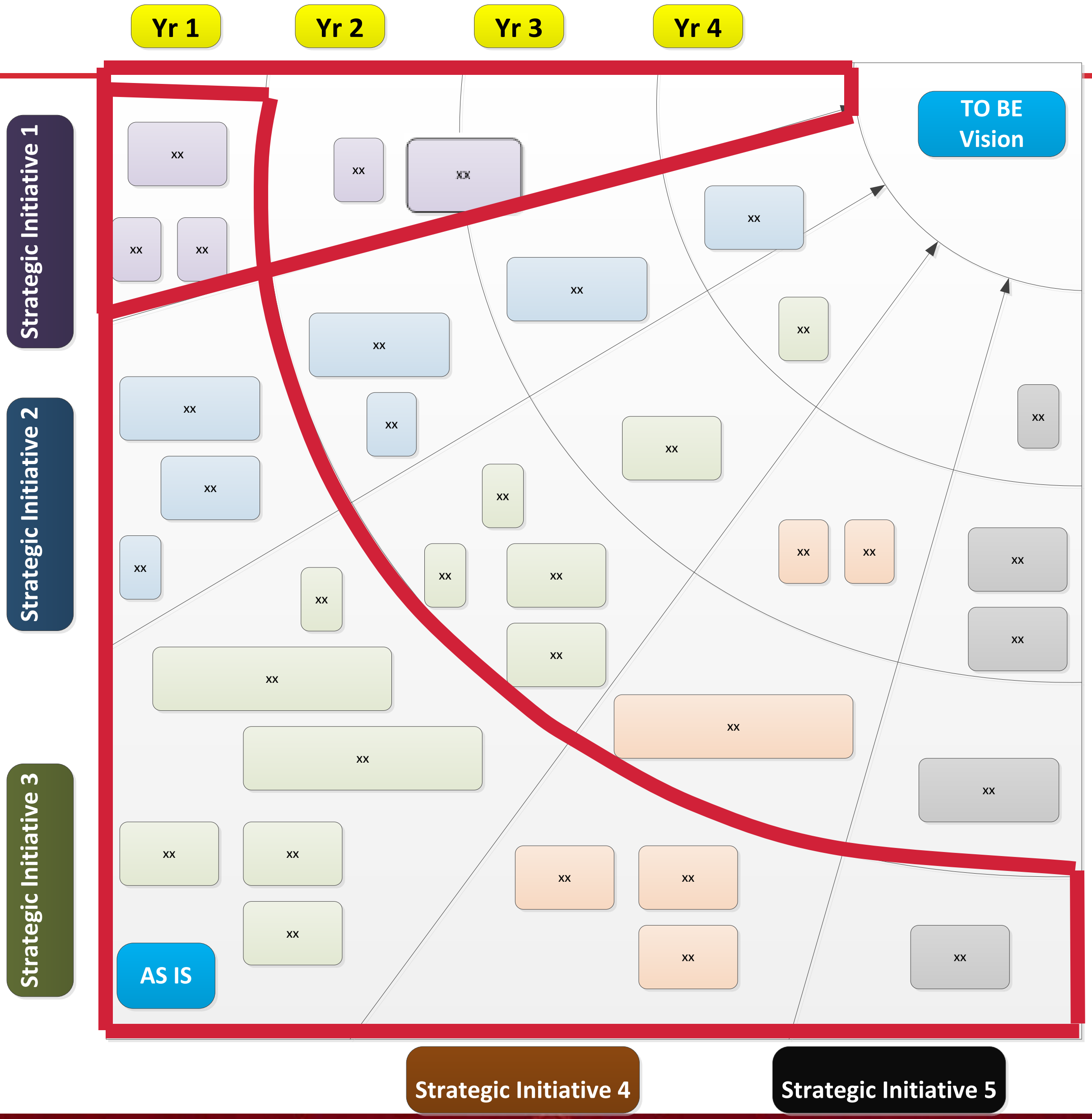
Let's start with the premise that we have a current state and a vision of where we want to be strategically.

And we know that it is going to take us 4 years to achieve our "to be" vision.

Our investments can then be aligned to the strategic initiatives.

We have the ability to organize our Roadmap by strategic initiative across the 4 year horizon. (We could look at just one year at a time as well.)

But we can also look at our investments annually. How we setup our Roadmaps is driven by how we want to see and report on the data.



Dos and Don’ts of the Roadmap

Don’ts

- Don’t try to make one huge Roadmap that includes everything in your FY plan – as it can become unruly.
- Don’t get overwhelmed or concerned if you don’t have all the metrics figured out.
- Don’t hand-out edit access like candy. Since users will be able to sync, modify scenarios, and update data, it’s best to maintain a limited set of edit users for a Roadmap.

Do’s

- Instead, break out the Roadmaps at their corresponding levels
- Give it a try and experiment! The beauty of the Roadmap is it requires far less data capture than a portfolio for good decision planning
- Leverage Views! This will help users of the Roadmap narrow down the information to a specific set of investments, widgets, or grouping.

Experiences of what has and hasn’t worked?

Creating Structure – Common Approaches

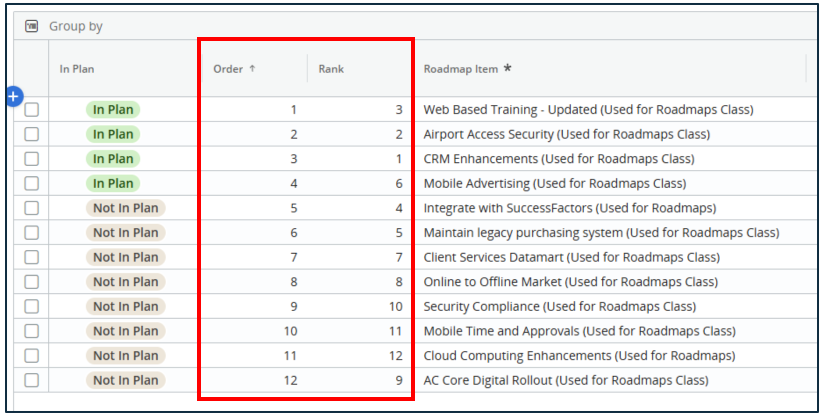
Agile Structure	• Value Stream – Product – Epic/Initiative
Capability or Service Type	• Capability Type – Capabilities
Strategy	• Strategy – Objectives – KPIs
Funding Structure	• Line of Business – Funding Buckets
Management Structure	• Line of Business – Department – Program

How are you structuring the Investments that are included? Product, Strategic, or BU focused?

Get Creative!!

Use the ranking fields to your advantage

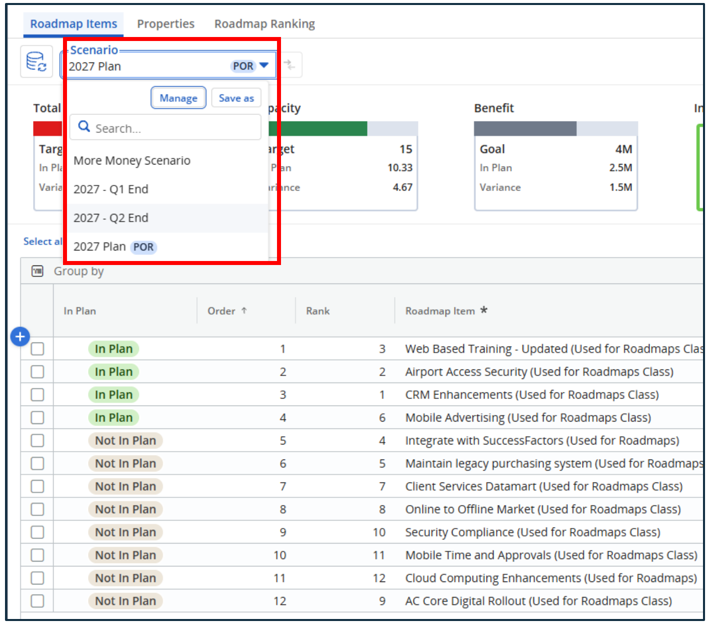
- Order and Rank can be used in parallel with each other
  - Copy the Order into the Rank field if your organization does rounds of ranking
  - Allows you to compare the previous rounds rank with the current round



In Plan	Order	Rank	Roadmap Item
In Plan	1	3	Web Based Training - Updated (Used for Roadmaps Class)
In Plan	2	2	Airport Access Security (Used for Roadmaps Class)
In Plan	3	1	CRM Enhancements (Used for Roadmaps Class)
In Plan	4	6	Mobile Advertising (Used for Roadmaps Class)
Not In Plan	5	4	Integrate with SuccessFactors (Used for Roadmaps)
Not In Plan	6	5	Maintain legacy purchasing system (Used for Roadmaps Class)
Not In Plan	7	7	Client Services Datamart (Used for Roadmaps Class)
Not In Plan	8	8	Online to Offline Market (Used for Roadmaps Class)
Not In Plan	9	10	Security Compliance (Used for Roadmaps Class)
Not In Plan	10	11	Mobile Time and Approvals (Used for Roadmaps Class)
Not In Plan	11	12	Cloud Computing Enhancements (Used for Roadmaps)
Not In Plan	12	9	AC Core Digital Rollout (Used for Roadmaps Class)

Roadmaps analysis doesn't have to stop when planning is over

- Scenarios are not just for what-ifs
  - Create a scenario Quarterly and sync the data to compare how Investments are tracking
  - These can act as snapshots and help you tell a story over time
  - Insights into what Investments might be experiencing problems and allows you to re-evaluate the body of work

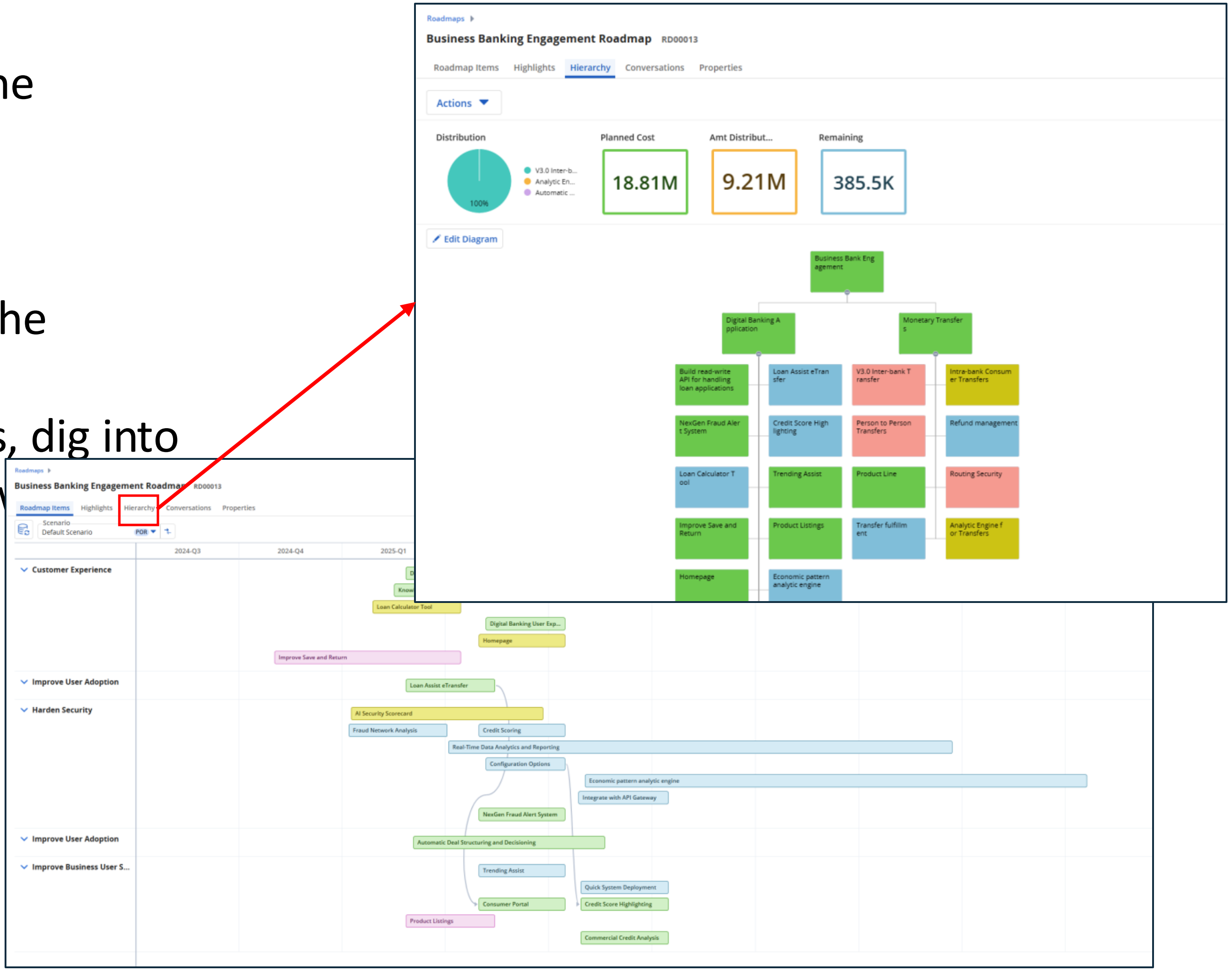


In Plan	Order	Rank	Roadmap Item
In Plan	1	3	Web Based Training - Updated (Used for Roadmaps Clas
In Plan	2	2	Airport Access Security (Used for Roadmaps Class)
In Plan	3	1	CRM Enhancements (Used for Roadmaps Class)
In Plan	4	6	Mobile Advertising (Used for Roadmaps Class)
Not In Plan	5	4	Integrate with SuccessFactors (Used for Roadmaps)
Not In Plan	6	5	Maintain legacy purchasing system (Used for Roadmaps
Not In Plan	7	7	Client Services Datamart (Used for Roadmaps Class)
Not In Plan	8	8	Online to Offline Market (Used for Roadmaps Class)
Not In Plan	9	10	Security Compliance (Used for Roadmaps Class)
Not In Plan	10	11	Mobile Time and Approvals (Used for Roadmaps Class)
Not In Plan	11	12	Cloud Computing Enhancements (Used for Roadmaps)
Not In Plan	12	9	AC Core Digital Rollout (Used for Roadmaps Class)

Get Creative!!

Link your Roadmap to a Hierarchy

- Now that you have planned the work, monitor the execution of that plan
- Create a Hierarchy with the same set of In Plan Investments
- Utilizing Channels, embed the Hierarchy within the Roadmap and vice-versa
- As you are potentially taking quarterly snapshots, dig into the underlying data to help explain the story of w… were then to where we are today

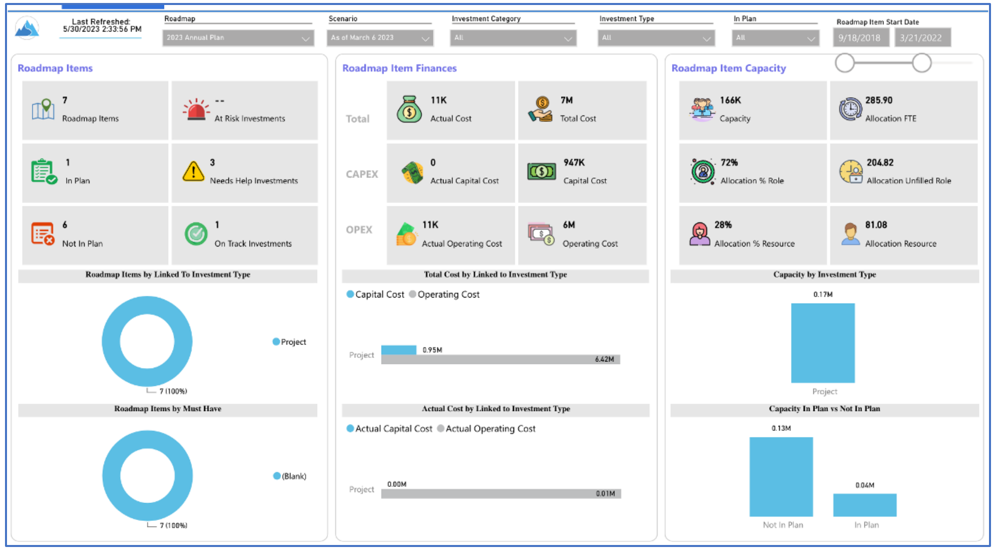


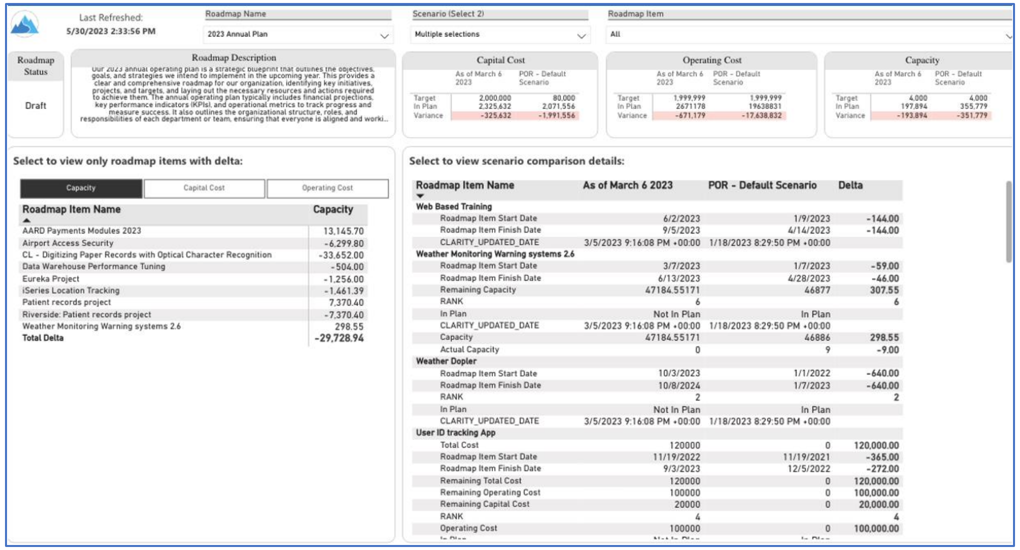
AI

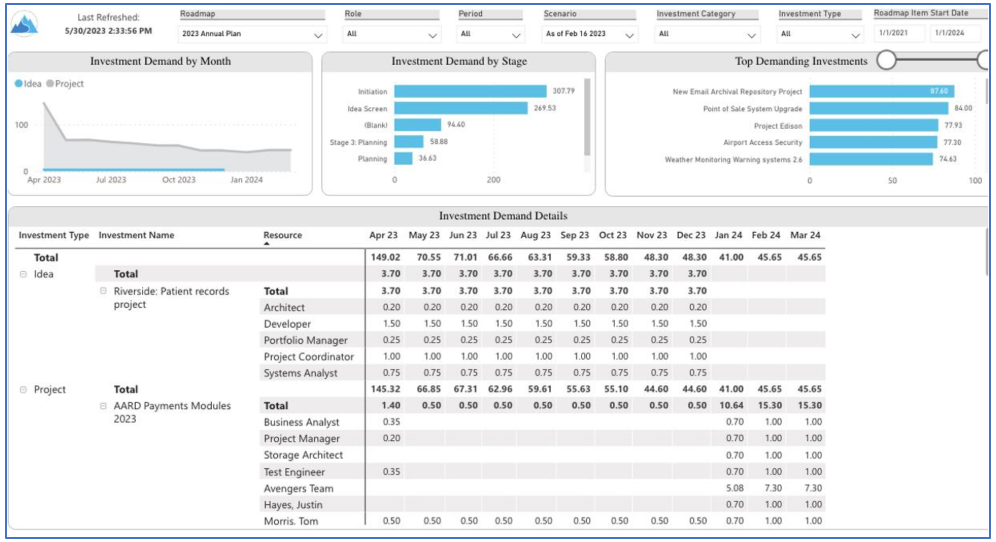
- Make my Roadmap PERFECT!
- Identify Gaps, Analyze Plan, Where Can I Work On Stuff?

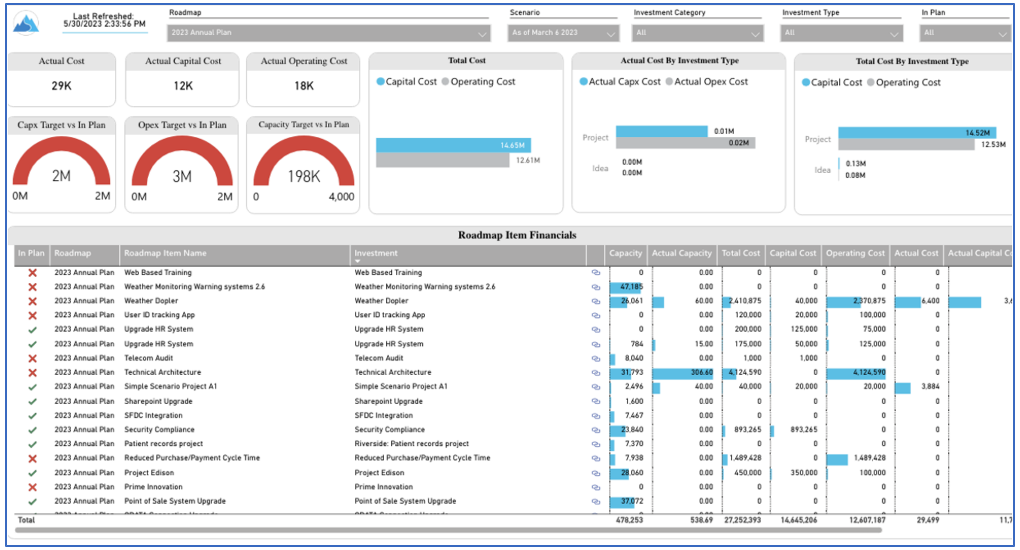
Any creative superpowers?

RegoXchange – Investment Roadmap Summary Dashboard









[Investment Roadmap Summary Dashboard (Power BI) - RegoXchange (regoconsulting.com)](https://regoconsulting.com)

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/

RegoXchange

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-hieirarchy-power-filter-sync-all-db/

Live Demo of a Roadmap

What Do YOU Want to See?

- Open the Poll in your Cvent app to vote now:

1. Managing and comparing Scenarios
2. Managing Events and Dependencies in the Timeline view
3. Creating Roadmap Groups
4. Prioritizing and managing to constraints
5. Widget and Canvas tips and tricks
6. Attribute sync, import/export, and sharing options
7. Rego Xchange add-ons
    - Ranking Rules (with waterlines)
    - Convert Roadmap Item to Investment
    - Roles in Roadmaps
    - Cost Plan Details in Roadmaps

Discussion Points: What Has Worked for You?

Additional Resources

Product Articles / E-Books / Webinars
https://www.broadcom.com/products/software/value-stream-management/clarity
https://academy.broadcom.com/valueops/clarity
https://info.regoconsulting.com/clarity-roadmaps-fastest-route-to-success
https://info.regoconsulting.com/portfolio-v-roadmaps-white-paper-2020
https://info.regoconsulting.com/portfolio-and-roadmaps-clarity-october-2020

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
Mindset: The New Psychology of Success, Carol S. Dweck, Ph.D.

Questions?

Survey

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

Your feedback is extremely important for future events.

Earn Rego University Certifications and Professional Specializations

Your participation in this class may count toward Rego University certification progress.

Certifications

Build recognized Clarity expertise.

Complete 10 eligible learning units within a certification track.

Best Practice Clarity Administrator

Best Practice Clarity Lead

Professional Specializations

Deepen your skills in focused topic areas.

Complete 4 eligible learning units within a selected specialization, with the option to earn multiple specializations.

Artificial Intelligence (AI)

Reporting & Analytics

Technical

***Important:* Complete the class survey in the app after each session so your credits can be tracked.**

More info: https://regouniversity.com/certificates

Earn PMI credit

Eligible Rego University sessions qualify for Professional Development Units (PDUs)

- Access your account at pmi.org
- Click on **Certifications**
- Click on **Maintain My Certification**
- Click on **Visit CCR's** button under the **Report PDU's**
- Click on **Report PDU's**
- 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!
Don't forget to fill out the class survey.

Phone
888.813.0444

Email
info@regoconsulting.com

Website
https://regouniversity.com/pmi-credits/

Continue to Get Resources and Stay Connected

1. Use RegoXchange.com for instructions and how-to guides.
2. Talk with your account managers and your Rego consultants.
3. Sign up for webinars and join in-person Rego groups near you at RegoConsulting.com
4. Join us for the next Rego University!