



Assess Your TBM Maturity and Build a Winning Roadmap

Your Guides:



Stephanie Roe
TBM Strategic Advisor



Angie Head
Strategic change leader

Why are we doing TBM?

We cannot measure maturity
if we don't have defined goals and objectives

What Are You Measuring Maturity Against?



Identify the Value Drivers that Matter



We need to implement 10% cuts across all budgets

We need our resources to do more with less

We need to fund new projects like AI

We need to minimize risks and increase compliance

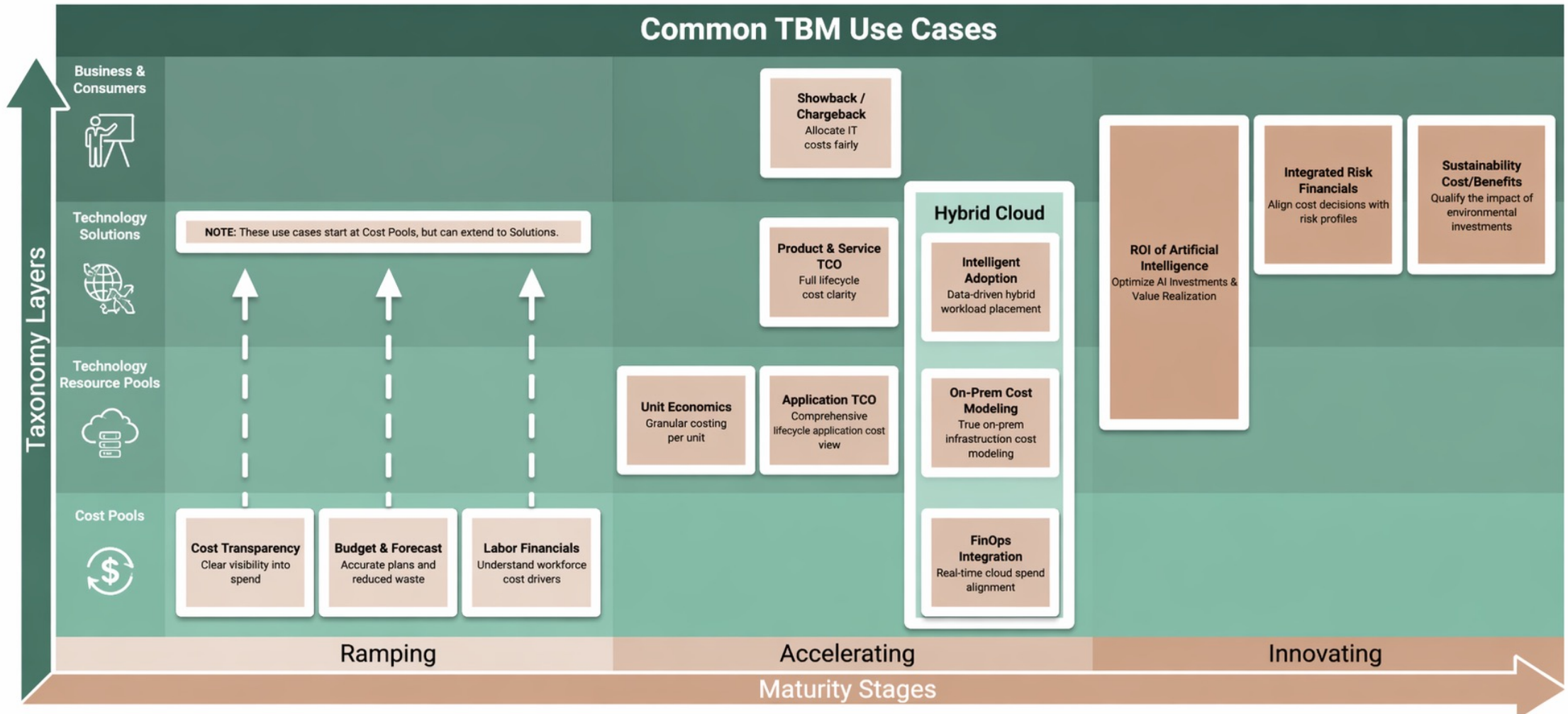
We need to improve the experience for our staff and external customers

We need to reduce our environment impact



Key Takeaway: It is imperative for a TBM practice to solve a relevant problem. Leadership and users don't care about "cool data," they care about "what's in it for them."

Connect Use Cases to Value Drivers



 **Key takeaway:** Select a use-case that supports your organization goals and objectives.

Where are we today?

How to identify key gaps and
prioritize improvement opportunities
for your TBM Practice

TBM Maturity Toolbox

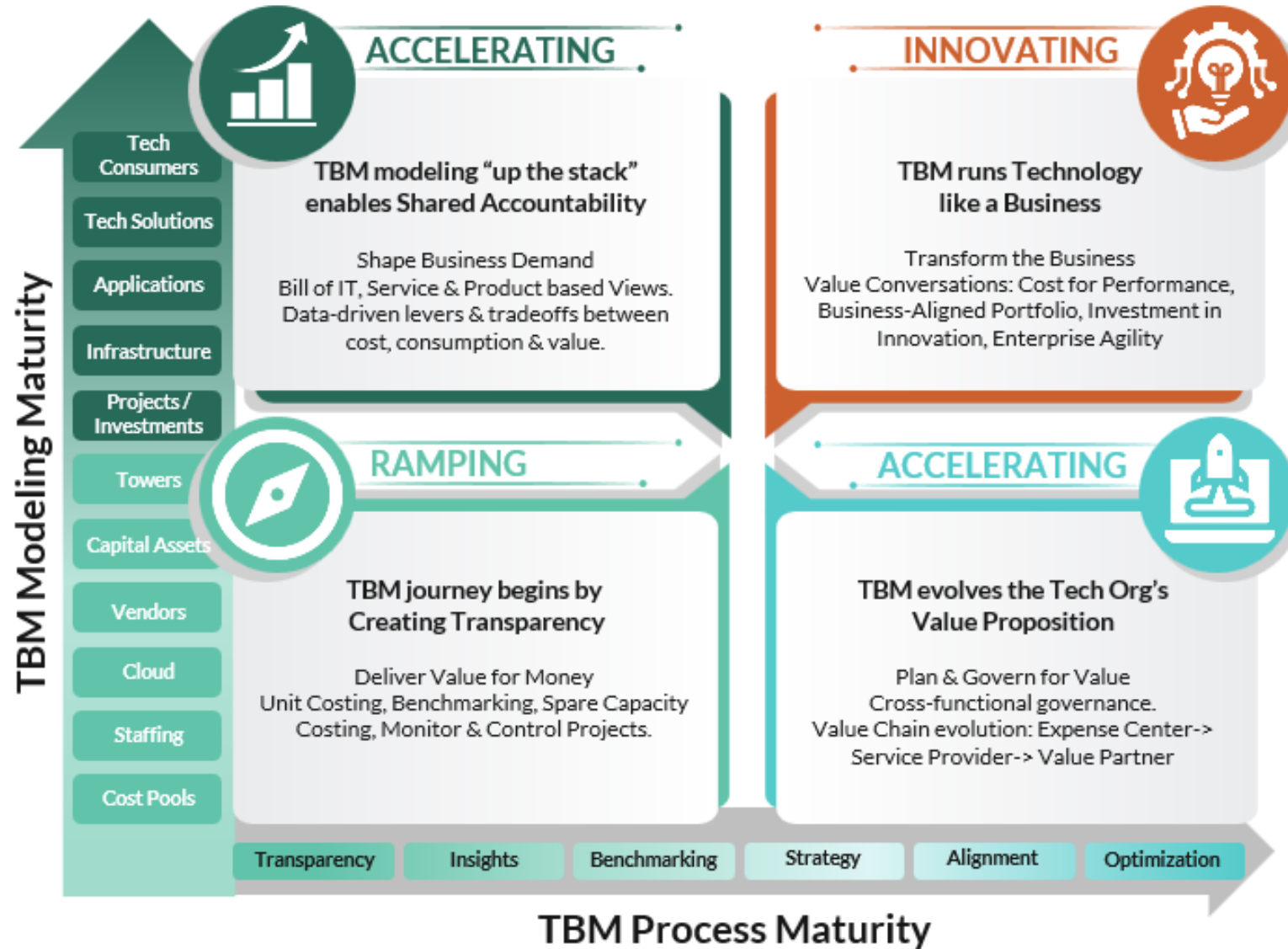
Objective Feedback – Measured Value

- TBM Council Maturity Assessment 2.0
- Apptio ITFM Maturity Model
- [TBM Council KPIs and Metrics](#)

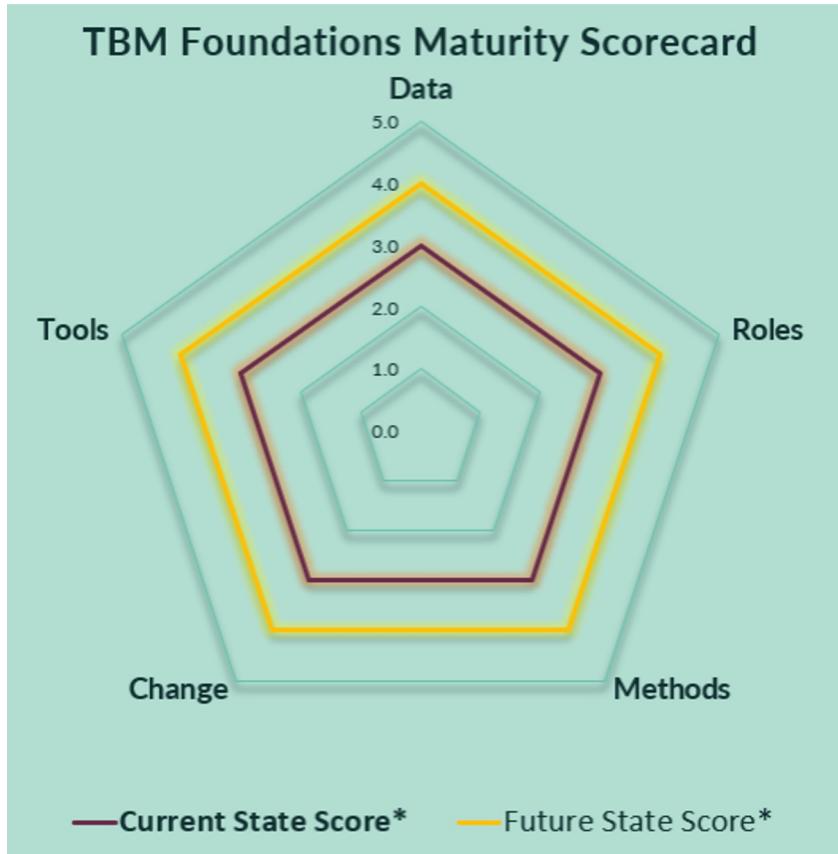
Subjective Feedback - Perceived Value

- TBM Advisory Board
- TBM Sponsor and Leadership

TBM Council – TBM Maturity Model



TBM Council – Maturity Assessment 2.0



TBM Modeling Maturity	Current State Assessment			
	Transparency	Insights & Benchmarking	Strategy & Alignment	Optimization
Tech Consumers	3.3	2.3	1.5	1.0
Tech Solutions	2.2	2.0	1.5	1.3
Applications	3.1	2.6	2.0	1.5
Infrastructure	3.5	2.8	2.2	1.8
Projects/Investments	4.2	3.8	3.0	2.5
Towers	4.0	3.5	3.0	2.5
Capital Assets	4.0	3.5	3.0	2.5
Vendors	3.0	1.5	1.5	1.0
Cloud	3.0	2.5	2.0	1.5
Staffing	5.0	4.0	3.0	2.0
Cost Pools	5.0	4.0	3.0	2.0

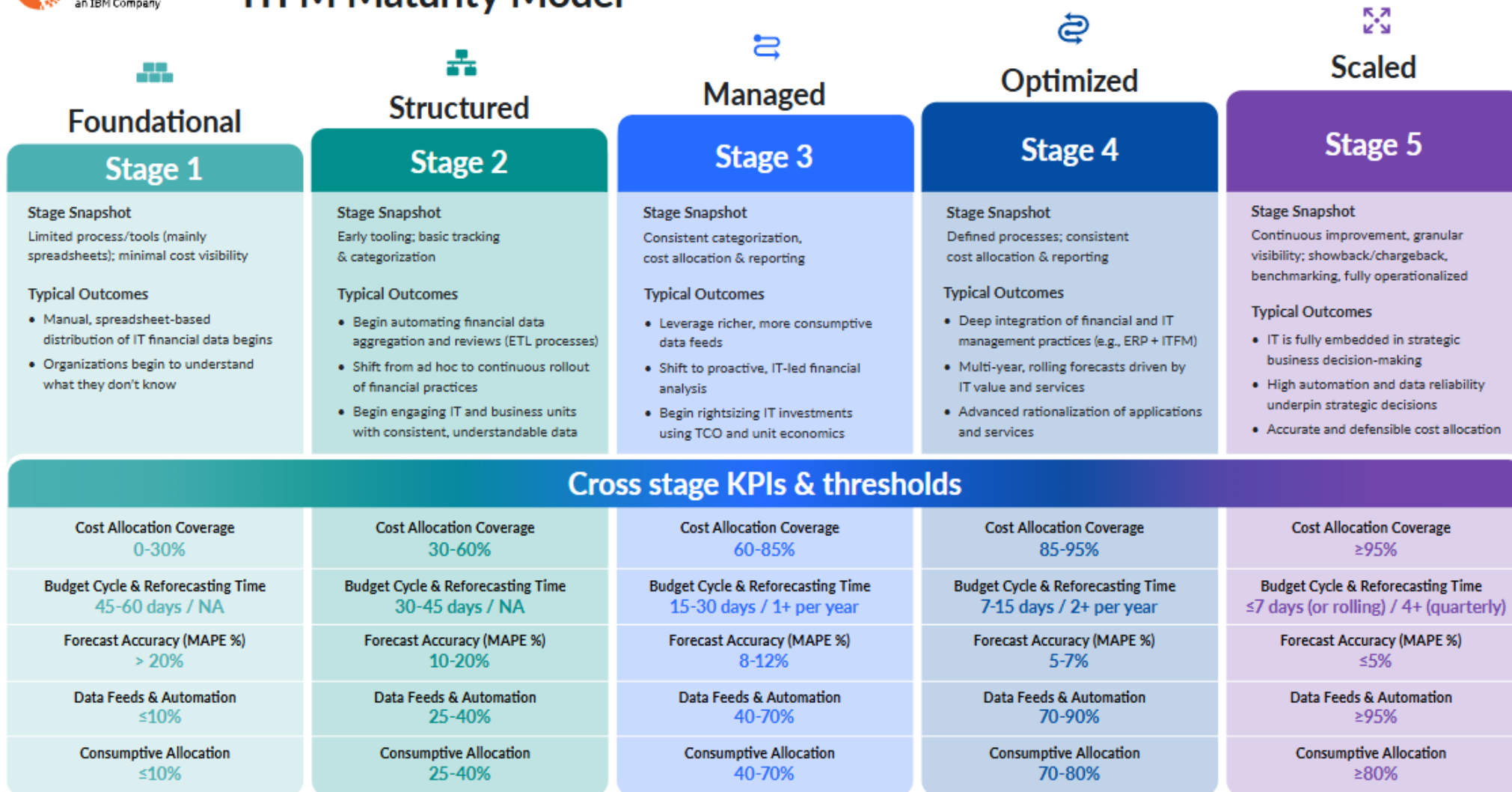
TBM Process Maturity

Sample results across TBM Foundations, Modeling, and Processes

Apptio – ITFM Maturity Model



ITFM Maturity Model



Change Network

Purpose of the SteerCo: An advisory committee focused on fast decision-making



The SteerCo

- Owner: Program Leader
- Members: Sponsor, Leadership

Purpose of the Leader and People Manager Change Networks: A forum which provides information and support to the Leaders and People Managers so they can own and actively drive the changes in the organization contributing to successful change outcomes through adoption and usage by performing the roles of **Communicator, Liaison, Advocate, Resistance Manager and Coach**



The Leader Change Network

- Owner: Program Leader & Change Management Lead
- Members: Sponsor, Sponsor Coalition, Direct leaders of the impacted teams



The People Managers Change Network

- Owner: Change Management Lead
- Members: Direct line managers of the impacted group



Purpose of the Key User/SME Readiness & Sustainment Network: To provide the selected SMEs with the proper education and support from the workstream leads to increase their knowledge and ability to be able to effectively coach and support the Key Users and End Users in the new ways of working by performing the roles of **Trainer, Communicator, Advocate and Coach**

The SME / Key User Readiness & Sustainment Network

- Owner: PM or delegate (business manager)
- Members: Identified Subject Matter Experts per capability



Embrace the changes

Raise any concerns

Share any best practices and breakthroughs you have had

adopt the new ways of working

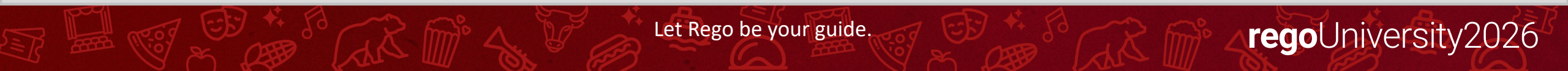
Identify where help is needed

Leverage your SMEs

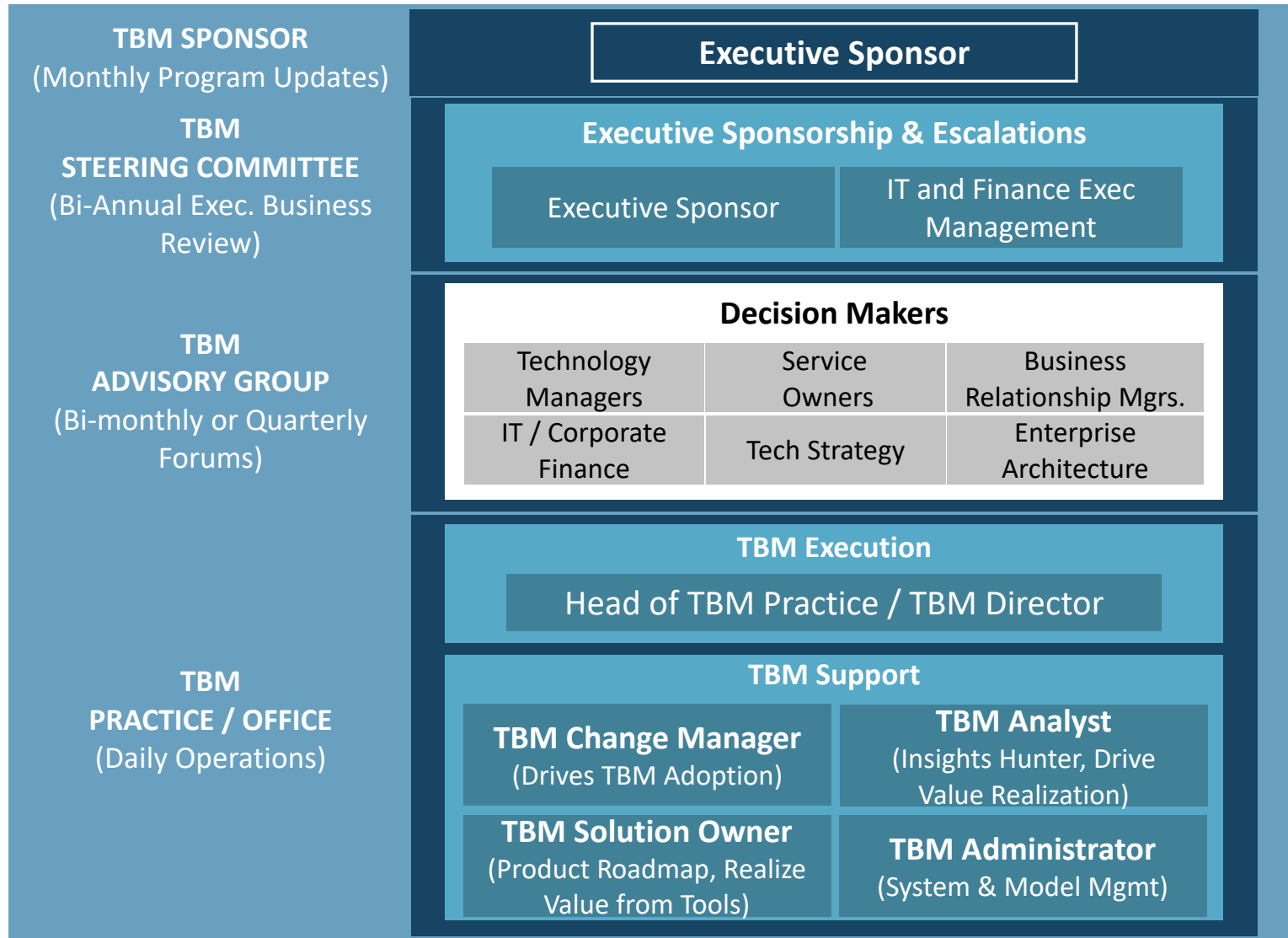
“a Change Network is the key to a successful transformation”

Let Rego be your guide.

regoUniversity2026



TBM Organizational Model



Stakeholders across the organization help set strategic direction, provide accountability and governance



The TBM office underpins and supports the success of TBM across the organization

TBM Advisory Group

The TBM Advisory Group members' primary responsibility is to provide ongoing operational direction and decisions, while also acting as an advocate for, and driving the adoption of, Technology Business Management across an organization.

Responsibilities

- Prioritization and alignment of roadmap to IT strategic objectives
- Ongoing change management - communications and training
- Driving user adoption
- Continuous improvement of data quality across source systems
- Progress on value realization and success metrics
- Policy, standards and guidelines
- Progress and escalations to the executive sponsor

Membership

- TBM Practice Personnel
- IT Finance Manager
- Technology Managers
- Service Owners
- Tech Strategy
- Enterprise Architecture
- Business Relationship Managers
- Vendor Relationship Managers
- TBM Champion Representative
- Data Owners

The TBM Advisory Group is a critical piece of our change network

What do we need to achieve our goals and objectives?

How to translate assessment results
into a practical, phased roadmap

What to Do With Assessments and Feedback?

Objective Feedback – Measured Value

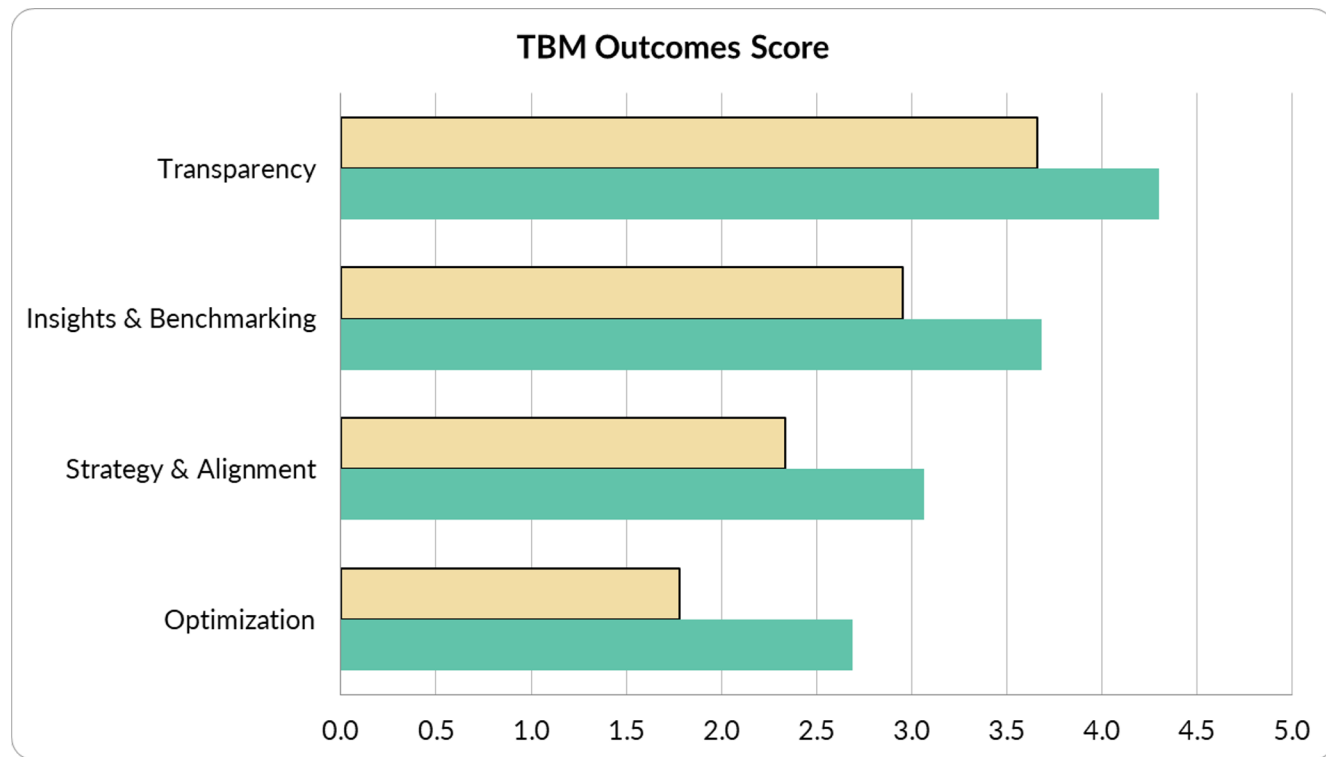
- TBM Council Maturity Assessment 2.0 ➤ Strategic Roadmap
- Apptio ITFM Maturity Model ➤ Technical Product Roadmap(s)
- [TBM Council KPIs and Metrics](#) ➤ Scorecards and Progress Updates

Subjective Feedback - Perceived Value

- TBM Advisory Board ➤ Feedback Loop → Backlog → Governance
- TBM Sponsors and leadership ➤ Executive Briefings

TBM Maturity Assessment Results

Maturity Category	Current State	Future State	Gap Analysis	Level of Effort
Tech Consumers	2.0	3.5	1.5	High
Tech Solutions	1.8	2.8	1.0	Medium
Applications	2.3	2.9	0.6	Medium
Infrastructure	2.6	3.2	0.6	Medium
Projects/Investments	3.4	4.0	0.6	Medium
Towers	3.3	3.9	0.6	Medium
Capital Assets	3.3	4.3	1.0	Medium
Vendors	1.8	2.8	1.0	Medium
Cloud	2.3	2.8	0.5	Medium
Staffing	3.5	3.9	0.4	Low
Cost Pools	3.5	3.9	0.4	Low
Overall Score	2.7	3.4	0.8	Medium



How do we turn this into a practical, phased Roadmap?

Tips for Creating a Roadmap

Be **GOAL-ORIENTED**

- Select items that contribute to leadership's desired goals
- Set hard targets and work towards them
- Include Advisory Board and leadership briefings

Be **REALISTIC**

- What is the size of your team?
- Do you have ecosystem partners?
- What is your track record deploying technical changes and managing change?

Be **FOCUSED**

- Put quick wins early to gain momentum
- Consider what working style fits your team and organization's culture (2-week agile sprints, doing no more than 3 items at a time, etc.)

Be **MINDFUL**

- What other priorities and initiatives are happening within the Tech org?
- What change is happening outside of the Tech org such as re-orgs, budget season, holidays

Sample High-Level Roadmap



	2026			
	Q1	Q2	Q3	Q4
Cost Transparency Phase 1 (IT Financial Mgmt.)				
Cost Pool Transparency				
Labor Financial Management				
Vendor Management Insights				
Cloud Cost Transparency				
Capital Asset Reporting				
Projects: Financial Insights				
Technology Resource Towers				
Change Management				
Communication and Training				
Cost Transparency Phase 2 (Technical Portfolios)				
Infrastructure Portfolio (TCO / Fully Burdened Costing)				
Application Portfolio (TCO / Fully Burdened Costing)				
Service Catalog / Product Portfolio Integration				
Showback to Business Units				

Assumptions:

Recommendations based on maturity assessment interviews, data quality, and objectives

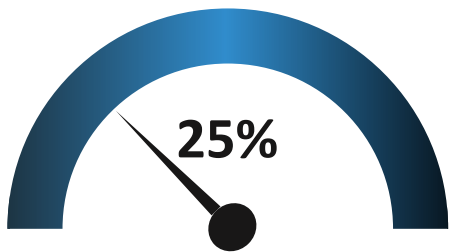


Sample TBM Scorecard

\$ of Cost Allocated



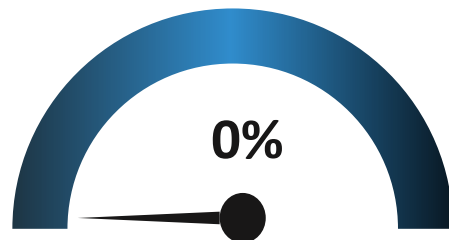
Ex: \$25M of \$100M
allocated to Business Units



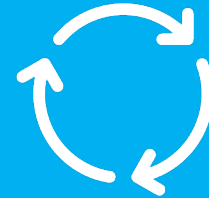
**# of Towers with
Unit Costing**



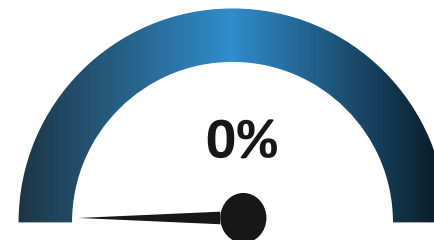
0 of X Infrastructure sub-
towers with Unit Costing



**# of Modeled
Applications**



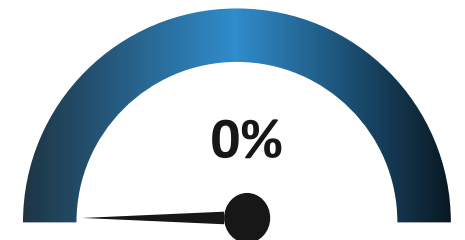
0 of 300 Applications with
Fully Burdened Costs



**# of Solutions with
Consumptive
Allocations**



0 of 75 Solutions with
consumptive allocations to
Business Units



What Action Can I Take Away?

If this is where you are today...

My organization has a TBM program and we provide data to many stakeholders. However, we **don't have a clear understanding of "why" TBM matters.**

My organization has a fully built model, but we **can't seem to get people interested or to use the data.**

My organization **seems to be doing pretty well** with TBM. We use the data and have **clearly defined goals** from our leadership team.

Work on this tomorrow...

Ask leadership for their **definition of success** and **specific targets**. Take the TBM maturity assessment with their goals in mind. Create a strategic roadmap to close identified gaps.

Focus on socialization with your TBM advisory group. Get them excited about use cases. Turn stakeholders and leadership into **champions**, not just **sponsors**.

Continuously improve by ensuring you have **sustainable processes**. Formally track and show progress to the advisory group, steering committee, and executive sponsor. Proactively gather feedback and new use cases.

Questions?



Surveys

Please take a few moments to fill out the class survey.
Your feedback is extremely important for future events.



Thank You For Attending Rego University

Instructions for PMI credits

- 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 = **regoUniversity**
- 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

www.regouniversity.com