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Let Rego Be Your Guide

Strategic Portfolio Management (SPM)

Time to Level Up

Your Guides:



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Strategic Consultant



Jacob Cancelliere
VP of Account Enablement



Who Is Rego?



We are **strategic advisors**, using our deep expertise in SPM and PPM processes and software as the entryway to build **long-term relationships** with our clients.



We are experienced **practitioners** who use our previous SPM and PPM job expertise to **guide** our clients along a maturity-based journey to high-performance.



We bring **industry best-practices** to assist our clients in developing a strategy for deploying SPM and PPM capabilities and **maximizing the value** of their investment.



Rego Solutions



Project & Work Management

SPM, PPM, CWM

Clarity
by Rego

targetprocess

MEISTERPLAN

moventus



IT Financial Management

TBM, ITFM, FinOps

APPTIO

YäRKEN



Agile Methodologies

Ways of Working,
Coaching, Training

Rally Software

Jira Software

targetprocess



Cloud & Infrastructure

SharePoint, AI Services,
Cloud, Services, On-Prem

Microsoft

aws



250+
Experts



800+
Happy
Customers



60%
Fortune 100
Companies



70%
Fortune 20
Companies



1200+
Content
Items



2000+
Attended
Free Training



1000+
Integrations



700K
Received End
User Training



98%
Customer
Retention



18
Years in
Business

What Is SPM?

SPM: Connected Strategy to Achieve Business Value

Strategic Portfolio

Management (SPM) is a set of business capabilities, processes and supporting technologies that can focus an Organization's finite resources to execute enterprise-wide business strategy.

Gartner.



Gartner: Magic Quadrant for Strategic Portfolio Management 2024

How Does SPM Differ from PPM?



SPM expands beyond traditional PPM:

- ✓ Considers all investment types: projects, products, applications, value streams, etc.
- ✓ Ensures investments link to organizational strategy and deliver business value
- ✓ PPM: Doing things right
- ✓ SPM: Doing the right things

Key Benefits of SPM



SPM Supports Value

- Ensures all work is linked to strategy and measured by business value
- Helps organizations make the most of their resources to benefit customers and stakeholders



SPM Empowers Agility

- Enables quick pivots to new opportunities as market needs change
- Supports rapid testing of investment hypothesis to make real-time adjustments
- Allows for scenario modeling to predict impact of changes to resources and cost



SPM Promotes Connection

- Aligns all levels of engagement to common, meaningful goals
- Promotes collective ownership and support for organizational vision



What Are SPM Capabilities?

Core SPM Business Capabilities



These are some of the L1 and L2 business capabilities; L3 drills down into specific activities.

- *To bring this to life, we will discuss and evaluate these capabilities through the lens of **role-based personas**.*

Presentation of Key SPM Capabilities – *by Persona*



*Executive Leadership
and Sponsors*



Portfolio Managers



Resource Managers



Finance



*Program and Project
Managers*



Delivery Team



Key SPM Capabilities by Persona



Executive Leadership and Sponsors

Strategy

Strategy Definition

Strategic Hierarchy

OKR Definition

Value Tracking

Portfolio

Investment Intake Management

Strategic Planning

Investment Prioritization

Workforce Optimization

Investment Funding

Governance and Oversight

Continuous Planning

Program

Planning and Coordination

Execution and Delivery

Quality Management

Risk and Issue Management

Resource Utilization

Stakeholder Management

Continuous Improvement

Financial Forecasting

Work

Task and Workflow Management

Development

Deployment

Knowledge Management

Metrics and Performance

Quality Assurance

Collaboration

Actuals Tracking

Workload Management

What Does This Look Like in Targetprocess?

Unparalleled flexibility to model your work to match your organization – you decide the structure

Strategy Definition

The screenshot displays the Targetprocess interface for a Strategic Objective titled "#188923 Enhance Machine Learning Models". The main view shows a table of Key Results with the following data:

KEY RESULTS	ID	State	Progress	Result Type	Start Value	Target Value	Current Value
Launch 2 New Decision Tree Models	188875	Draft	50%	%	0	2	1
Launch 4 New Linear Regression Models	188876	Draft	25%	Models	0	4	1
Add Decision Trees to 10 Existing Models	188877	Draft	10%	Models	0	10	1

The right sidebar provides a RAG Overview with the following status indicators:

- RAG: Amber
- Financial RAG: Amber
- Risk RAG: Green
- Schedule RAG: Red

Other sidebar details include: State: In Progress (47% progress bar), Assignments: + Teams, + Responsible, Total effort: 0 pt, Info: Planned start 1-Sep-2025, Planned end 29-Nov-2025, Creator: Aden Usborne, Creation date: 24-Aug-2025, Corporate Goal: 188940 Develop AI Solutions, Key Dates: 277421 2025 Q1.



Executive Leadership
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Portfolio Managers



Resource Managers

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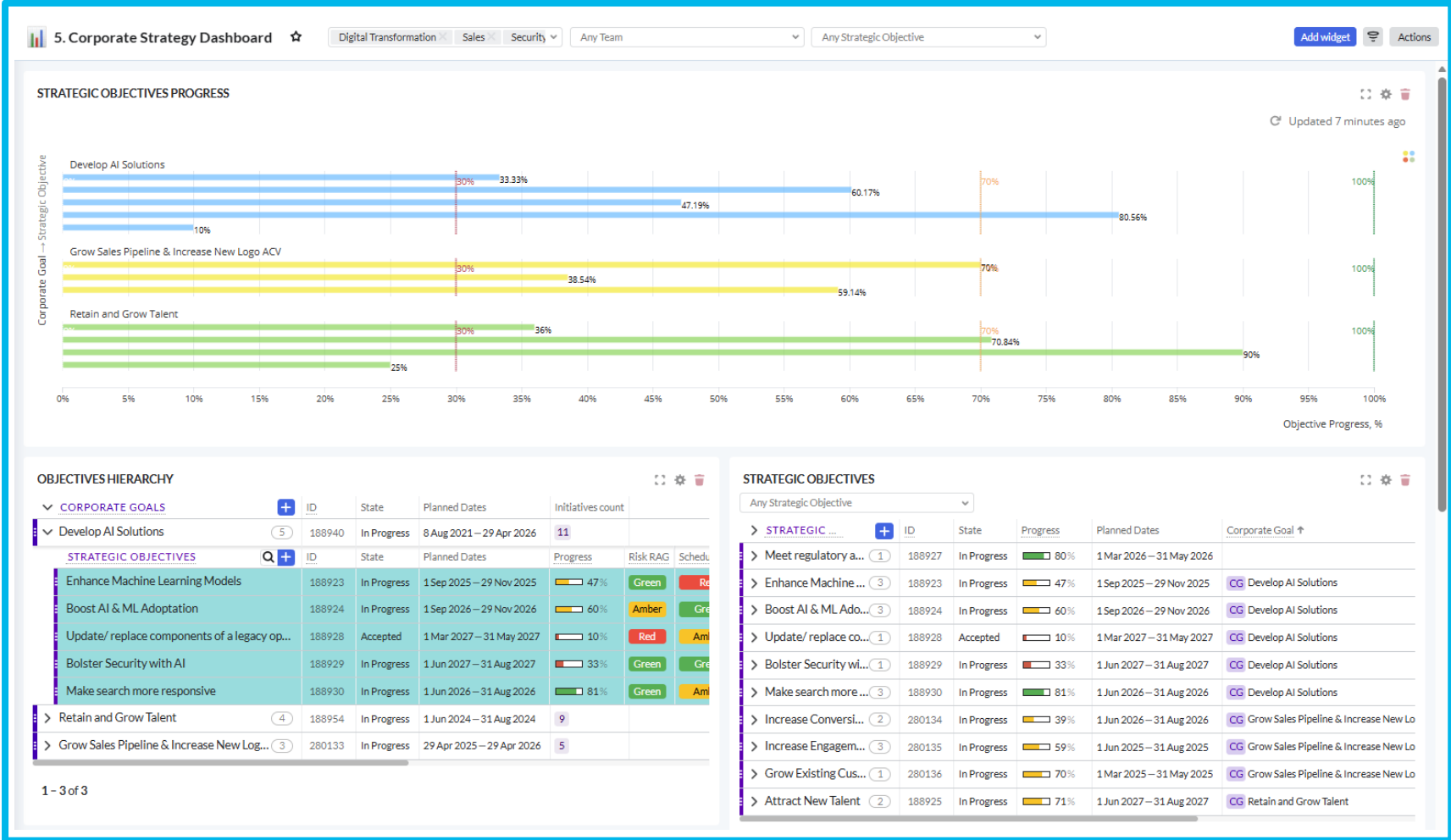


Delivery Team

What Does This Look Like in Targetprocess?

Drill down from corporate vision and mission to strategic goals and imperatives

Strategy Definition



What Does This Look Like in Targetprocess?

Link those to objectives and key results that provide the “bridge” for strategy to execution

Strategy Definition

OKR Definition

The screenshot displays the Targetprocess interface. On the left, a table lists Strategic Objectives and Key Results. The main area shows a detailed view of a request titled 'Phase out SAP On Prem Instance'. This view includes a 'Business Value Score' section with four gauges: Score (480), Strategic Impact (33), Customer Value (100), and Required Resources (56). Below the gauges, there are status indicators for each metric: Score (480), Strategic Impact (Small (\$25k-\$100k)), Customer Value (Major), and Required Resources (Medium (5-10)).

Category	ID	State	Progress	Planned Dates
STRATEGIC OBJECTIVES				
> Meet regulatory and compliance specifications	188927	In Progress	80%	1 Mar 2026 – 31 May 2026
> Enhance Machine Learning Models	188923	In Progress		
> Boost AI & ML Adoption	188924	In Progress		
> Update/ replace components of a legacy operating s...	188928	Accepted		
> Bolster Security with AI	188929	In Progress		
KEY RESULTS				
> Improve Security Classification from L2 to L5 using AI	188896	Draft		
> Make search more responsive	188930	In Progress		
> Increase Conversion & Efficiency	280134	In Progress		
> Increase Engagement	280135	In Progress		
> Grow Existing Customer Accounts	280136	In Progress		
> Attract New Talent	188925	In Progress		
> Retain Existing Talent	188926	In Progress		
> Improve onboarding experience	188931	In Progress		
> Accelerate & Mature COEs	188955	In Progress		

Metric	Value	Status
Score	480	480
Strategic Impact	33	Small (\$25k-\$100k)
Customer Value	100	Major
Required Resources	56	Medium (5-10)



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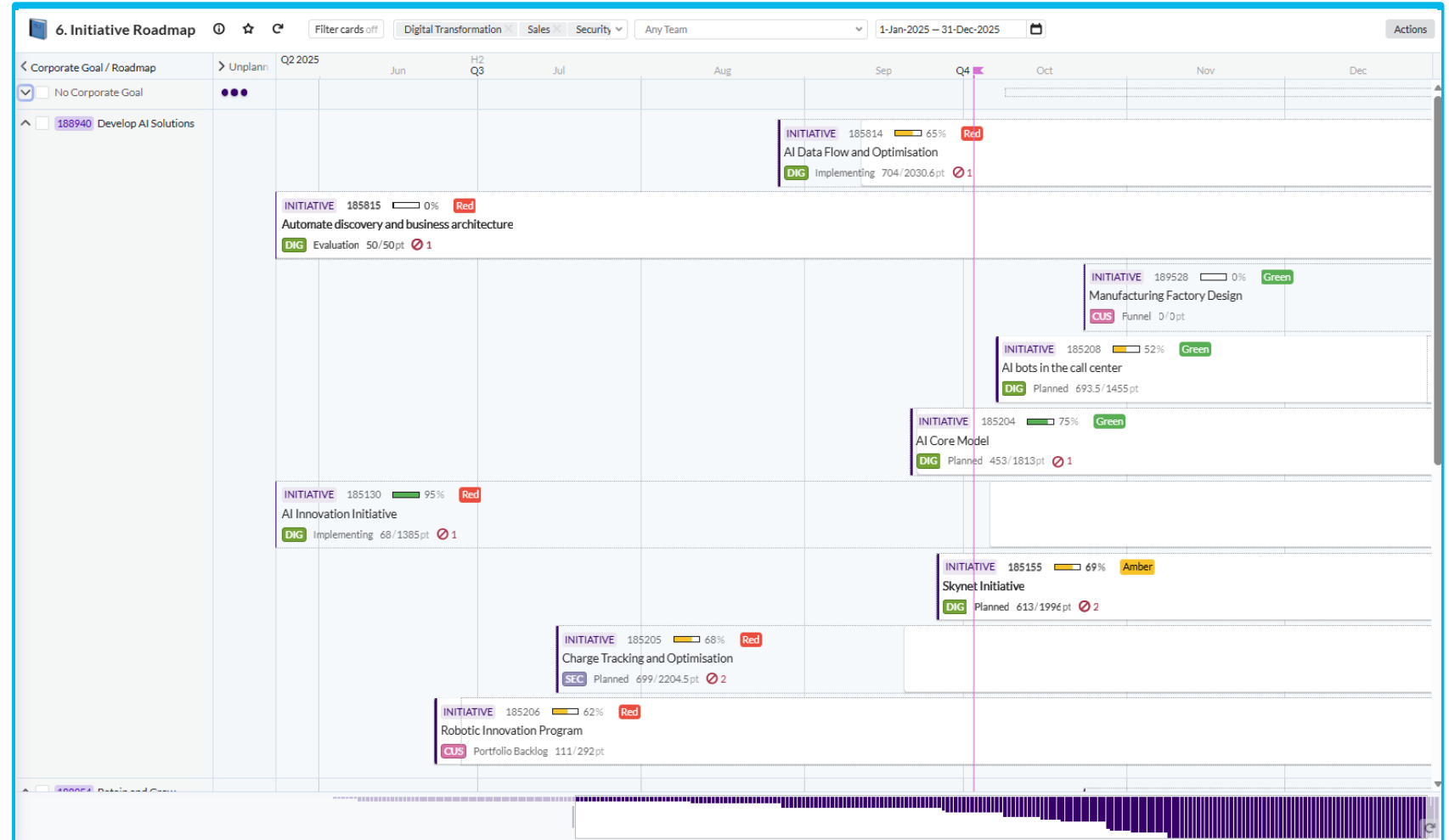
What Does This Look Like in Targetprocess?

Visualize the strategic roadmap from vision → execution in a single view with aggregated target and progress metrics

Strategy Definition

OKR Definition

Strategic Hierarchy



Executive Leadership and Sponsors



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Delivery Team

Key SPM Capabilities by Persona



Portfolio Managers



What Does This Look Like in Targetprocess?

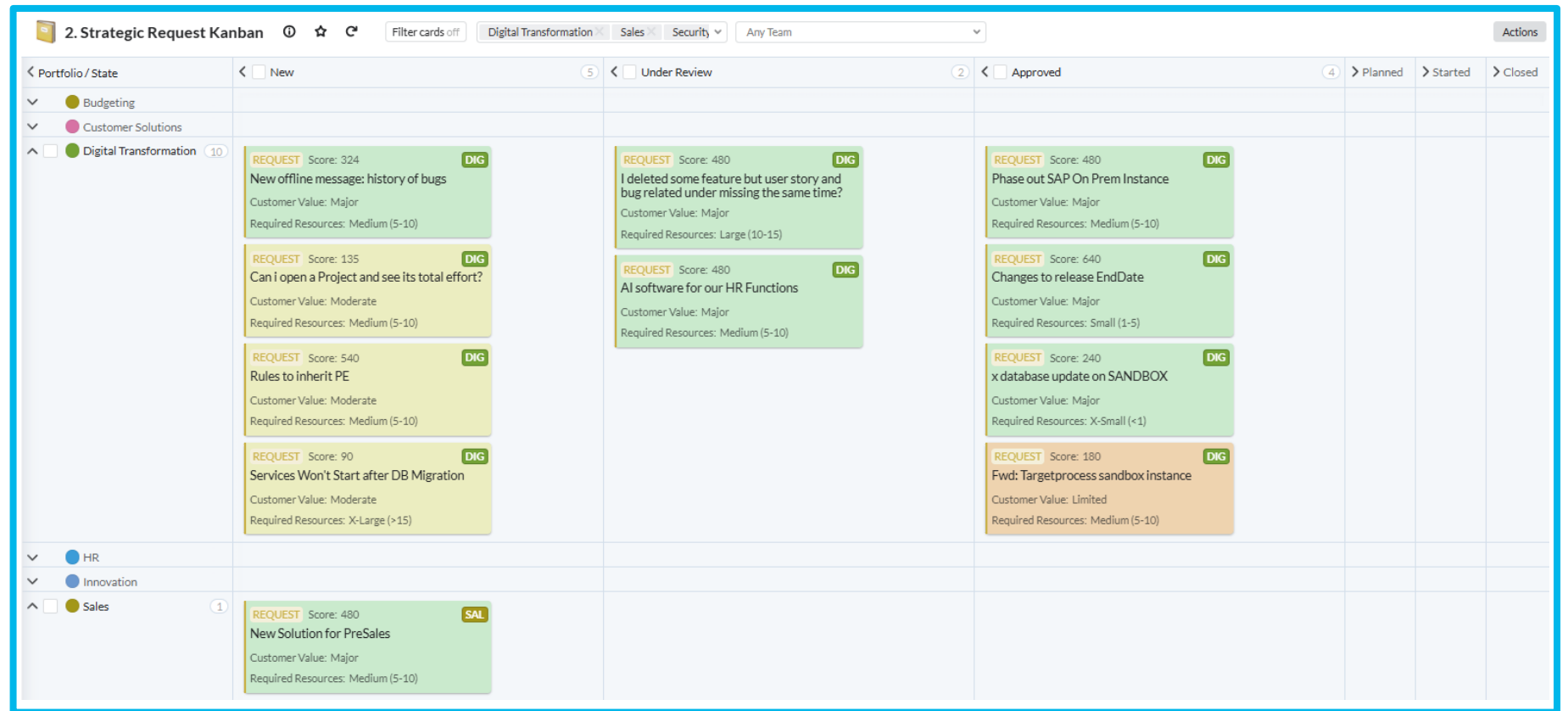
Tap into the expertise of your people. Formalize intake model gating. Right-size business cases.

Strategy Definition

OKR Definition

Strategic Hierarchy

Investment Intake
Management



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What Does This Look Like in Targetprocess?

Integrated decision support, trusted outputs and reports, on-the-fly charts drive unparalleled insights

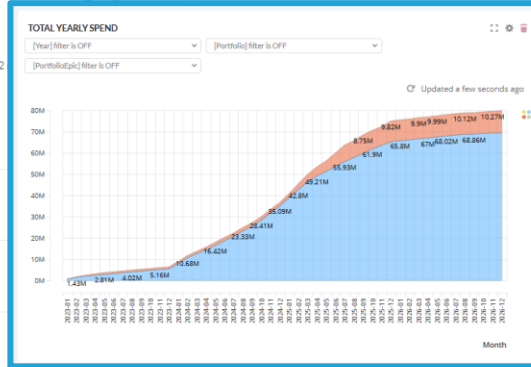
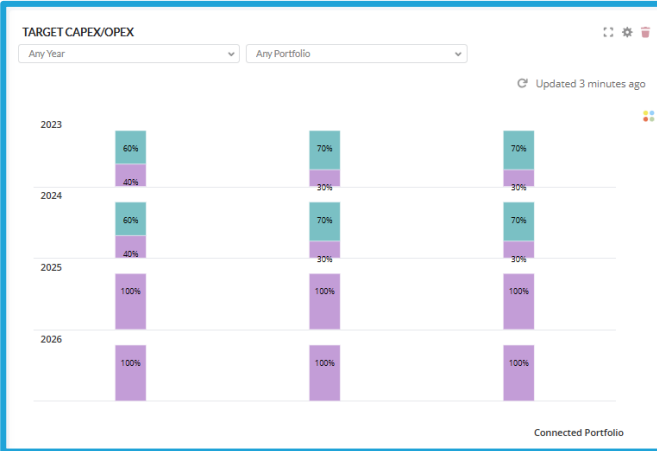
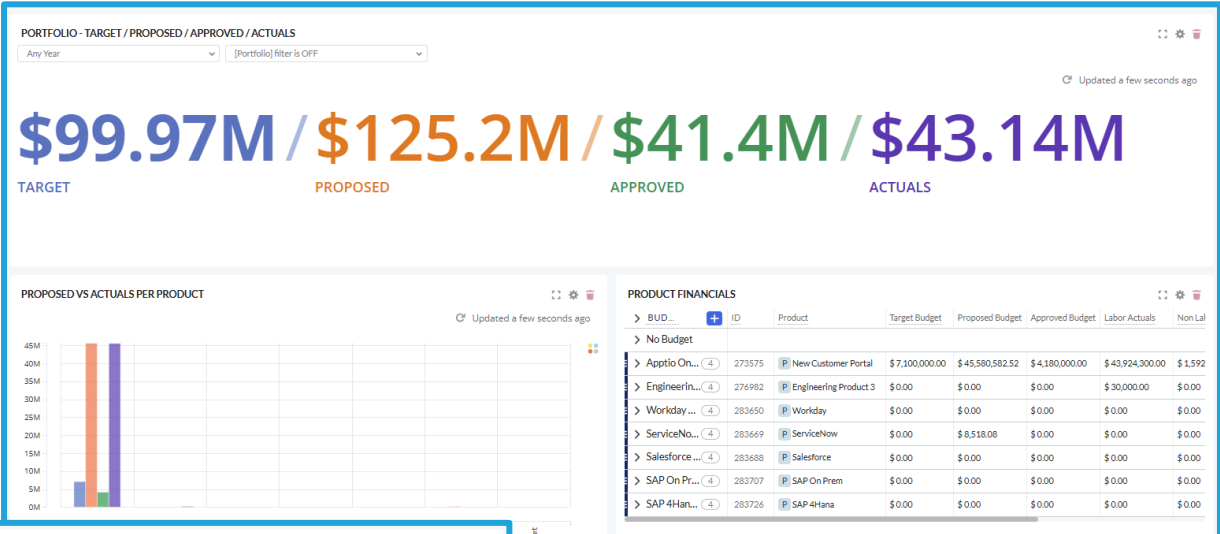
Strategy Definition

OKR Definition

Strategic Hierarchy

Investment Intake Management

Investment Prioritization



What Does This Look Like in Targetprocess?

Real-time, configurable dashboards that give up-to-date insights on portfolio progress and status

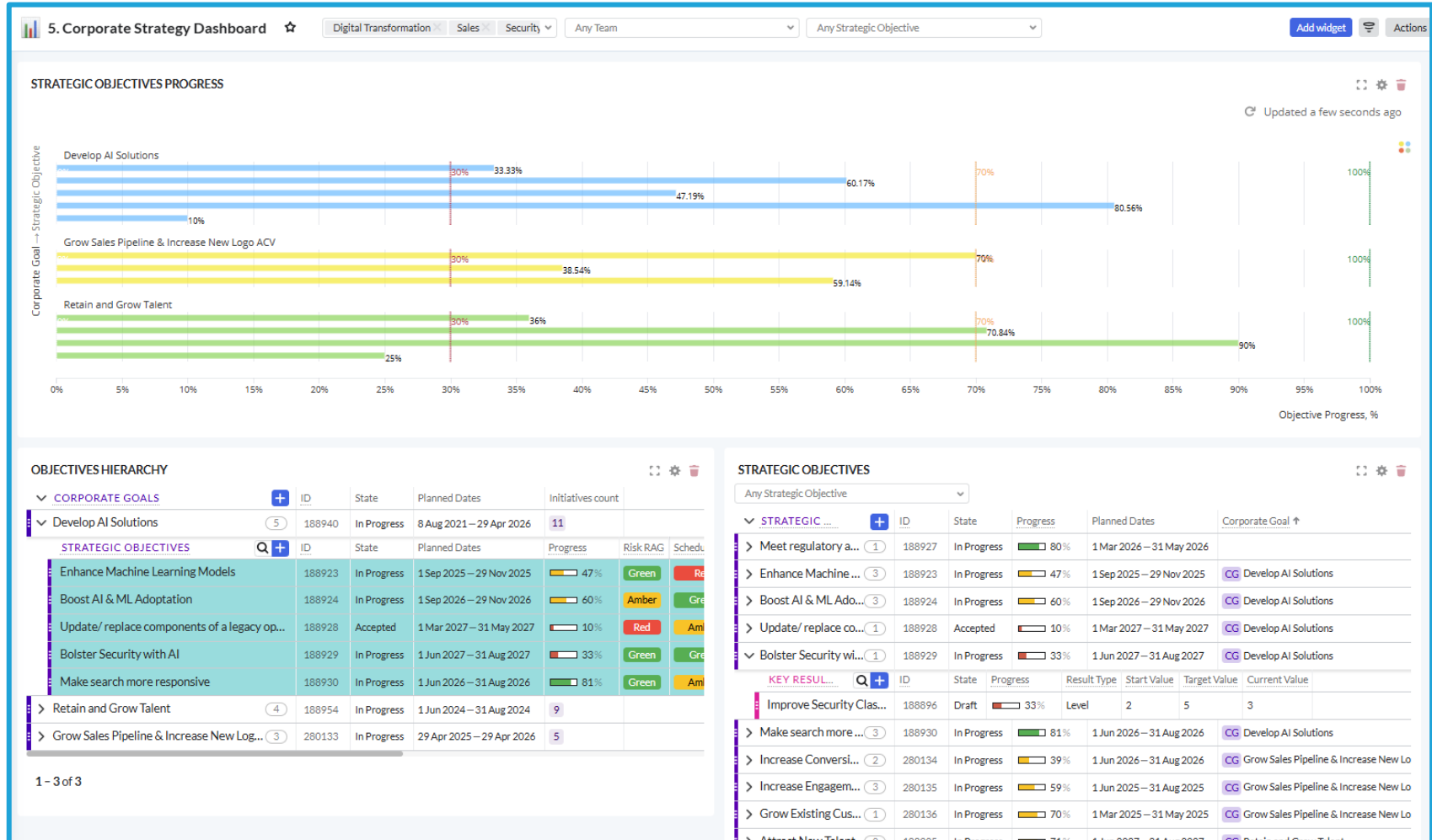
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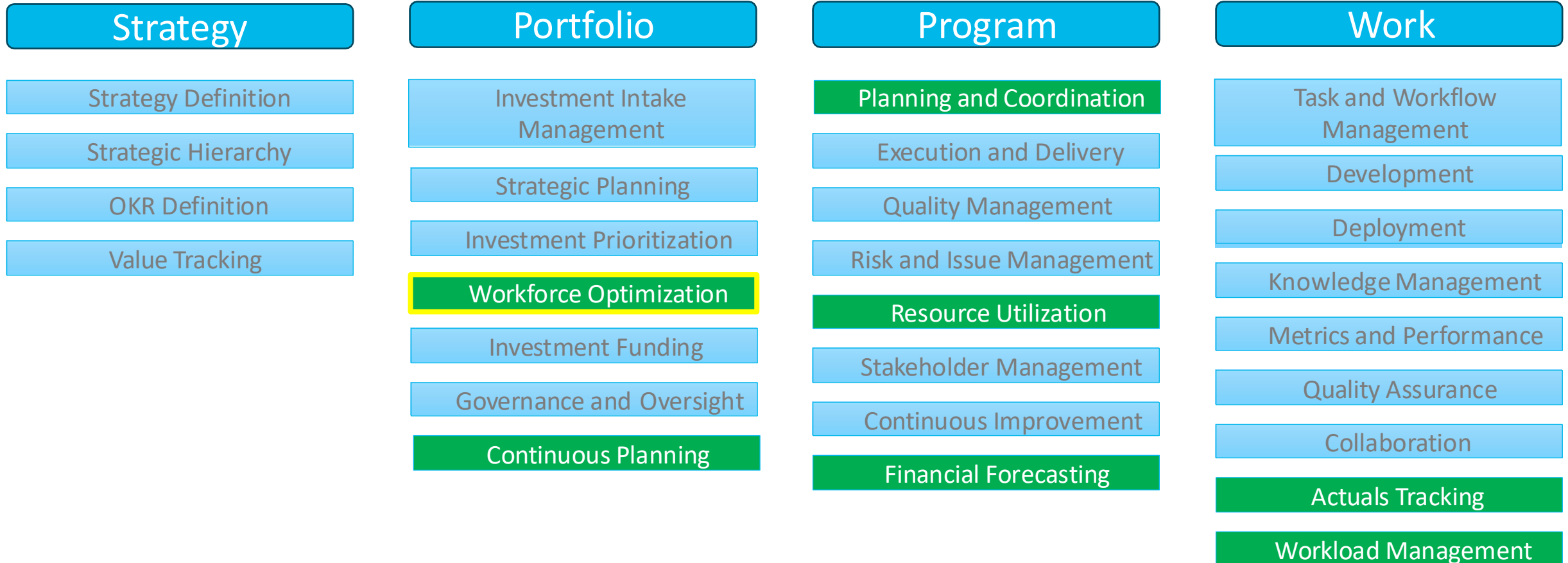


Delivery Team

Key SPM Capabilities by Persona



Resource Managers



What Does This Look Like in Targetprocess?

Workforce Modeling – Plan resource headcount, taking “what-ifs” and plans into account

Strategy Definition

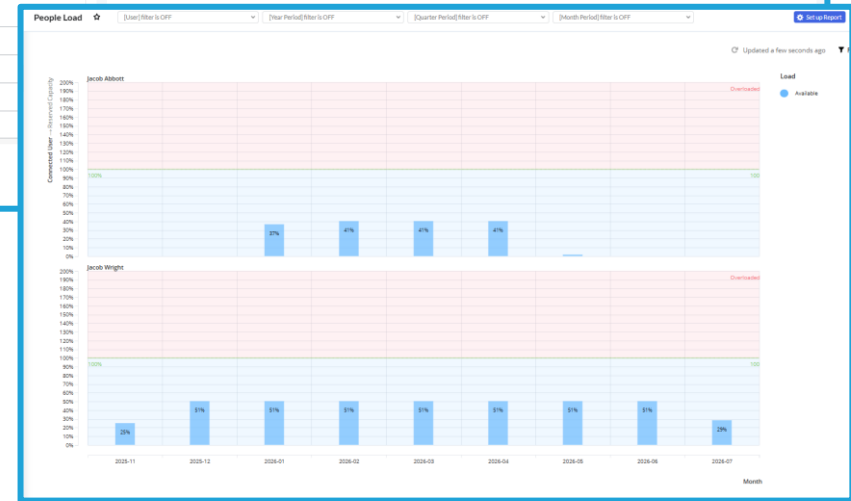
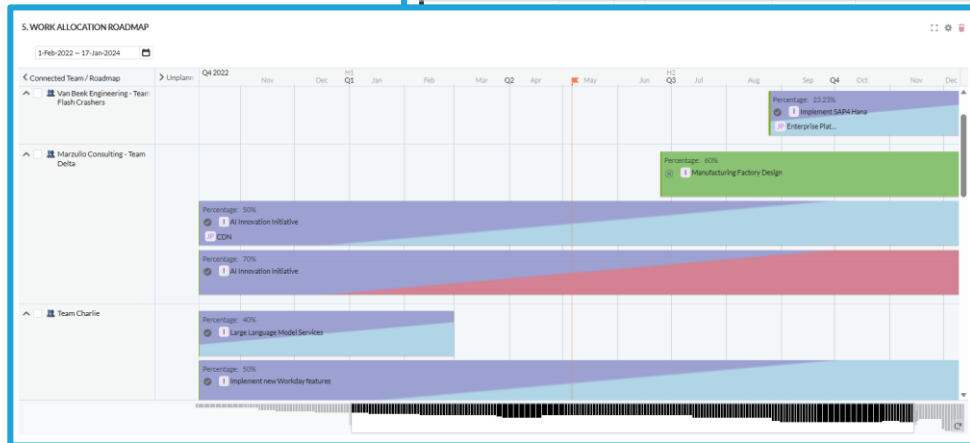
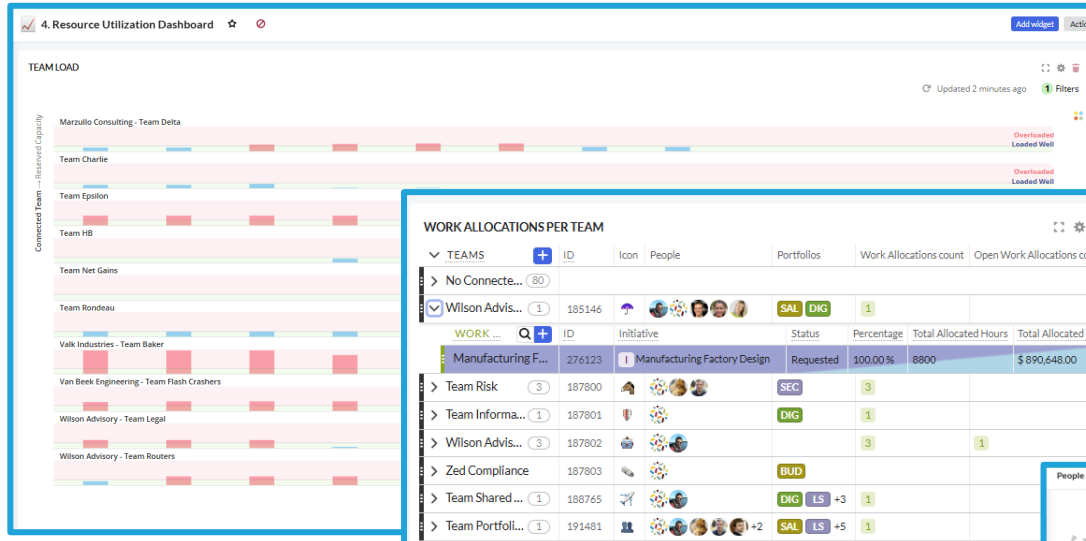
OKR Definition

Strategic Hierarchy

Investment Prioritization

Investment Intake Management

Workforce Optimization



Key SPM Capabilities by Persona



Finance

Strategy

- Strategy Definition
- Strategic Hierarchy
- OKR Definition
- Value Tracking**

Portfolio

- Investment Intake Management
- Strategic Planning
- Investment Prioritization**
- Workforce Optimization
- Investment Funding**
- Governance and Oversight
- Continuous Planning**

Program

- Planning and Coordination
- Execution and Delivery
- Quality Management
- Risk and Issue Management
- Resource Utilization
- Stakeholder Management
- Continuous Improvement
- Financial Forecasting**

Work

- Task and Workflow Management
- Development
- Deployment
- Knowledge Management
- Metrics and Performance
- Quality Assurance
- Collaboration
- Actuals Tracking**
- Workload Management

What Does This Look Like in Targetprocess?

CapEx and OpEx delivered with auditable insights, real-time cost analysis and easy export options

Strategy Definition

OKR Definition

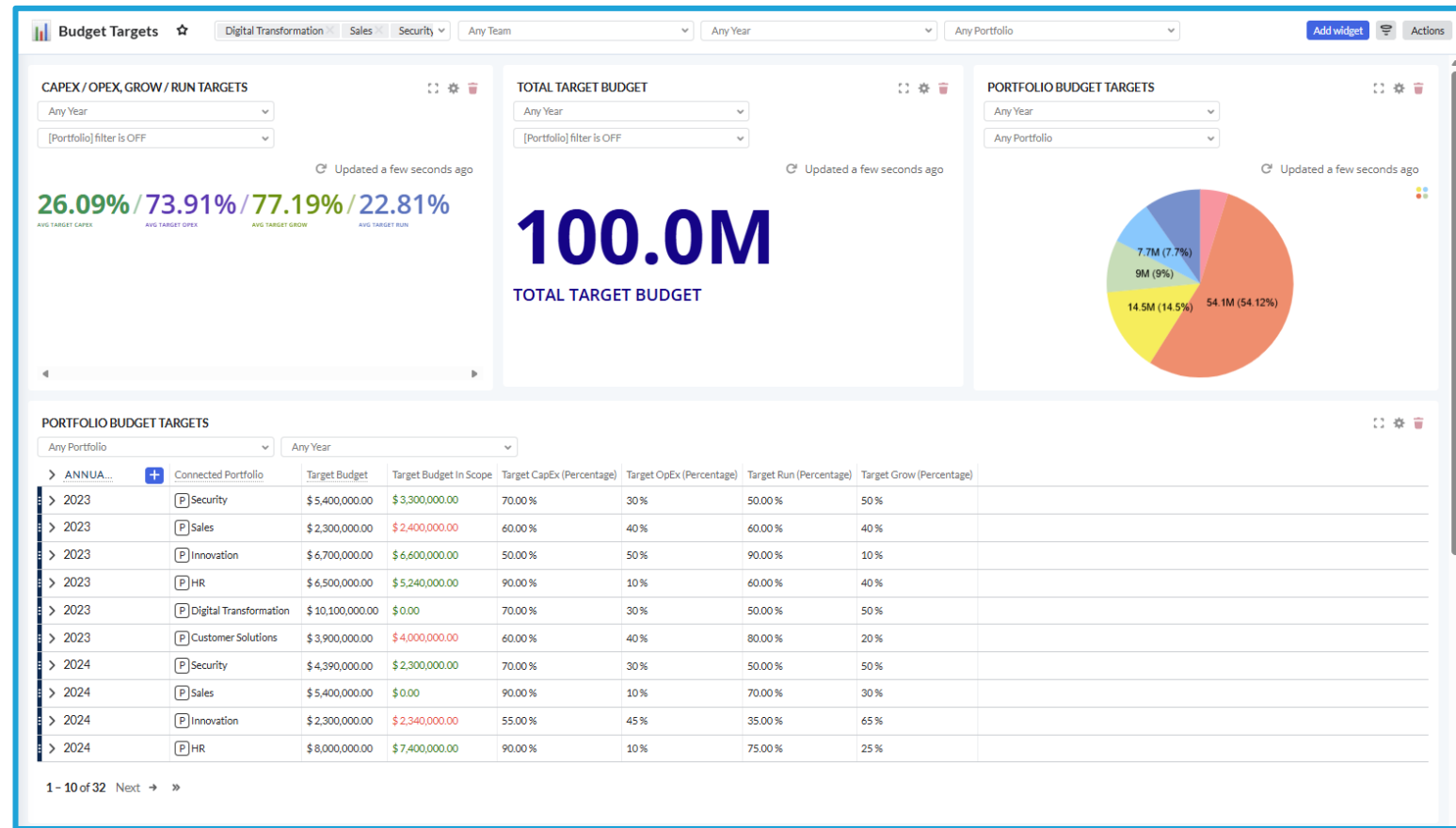
Strategic Hierarchy

Investment Prioritization

Investment Intake
Management

Workforce Optimization

Investment Funding



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What Does This Look Like in Targetprocess?

CapEx and OpEx delivered with auditable insights, real-time cost analysis and easy export options

Strategy Definition

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Investment Prioritization

Investment Intake Management

Workforce Optimization

Investment Funding

The screenshot displays the Targetprocess interface with two main panels: 'TARGET CAPEX/OPEX' and 'TARGET GROW/RUN'. Both panels show a 'Connected Portfolio' view with horizontal bar charts for various categories like Consumer Banking, Customer Solutions, Digital Transformation, HR, Innovation, Project Templates, Sales, and Security. The charts show percentages across different time periods.

Overlaid on this is a 'Team based Financial Overview' table. The table has columns for 'TEAMS', 'ANNUAL BUDGETS', 'Year', 'Proposed Budget In Scope', 'Proposed Non Labor Budget', 'Proposed Labor Budget', 'Labor Actuals', and 'Non Labor Actuals'. The data rows cover the years 2023 to 2026.

TEAMS	ID	Year	Proposed Budget In Scope	Proposed Non Labor Budget	Proposed Labor Budget	Labor Actuals	Non Labor Actuals
2023	274077	2023	\$32,000.00	\$32,000.00	\$0.00	\$284,000.00	\$30,000.00
2024	275315	2024	\$54,000.00	\$54,000.00	\$0.00	\$380,000.00	\$187,000.00
2025	281055	2025	\$0.00	\$0.00	\$260,213.18	\$1,619,000.00	\$0.00
2026	289779	2026	\$0.00	\$0.00	\$0.00	\$448,000.00	\$0.00

Below the table is a list of teams with columns for ID, Icon, People, Portfolios, and Topology. Teams listed include Wilson Advisory - Team Net Assets, Team Risk, Team Information Security, Wilson Advisory - Team Legal, Zed Compliance, Team Shared Services, Team Portfolio Owners, Team Zed demo101, Team Net Gains, Wilson Advisory - Team Routers, Team HB, Team Gamma, Team Rondeau, Valk Industries - Team Baker, Team Charlie, Marzullo Consulting - Team Delta, Van Beek Engineering - Team Flash Crash..., and Team Epsilon.

A 'Set up view' panel is visible on the right, showing options for 'View type', 'Empty lanes', 'Relations', 'Save as template', 'Clone view', 'Export to CSV', 'Copy link', and 'Remove view'.

Key SPM Capabilities by Persona



Program and Project Managers

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Deployment

Knowledge Management

Metrics and Performance

Quality Assurance

Collaboration

Actuals Tracking

Workload Management

What Does This Look Like in Targetprocess?

Flexibility and versatility gives Project Managers choices for how to best manage their work, while driving organizational reporting and consistency

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Planning and Coordination

The image displays three screenshots of the Targetprocess software interface. The top-left screenshot shows a 'PI Backlog' for '188371 PI1 AI Platform' with a planning interval from 8-Jan to 18-Mar. It lists tasks such as 'Getting started, Legend and Map' (0pt), 'Batch Actions: Research' (15pt), 'Improve filter when link entity' (13pt), 'Kube cluster improvements' (20pt), 'Logs improvements' (20pt), 'Postgres improvements' (20pt), and 'Mongo Improvements' (5pt). The top-right screenshot shows a 'PI Roadmap' for '188216 P1 Cloud Platform' from 8-Jan to 18-Mar, displaying a Gantt chart with tasks like 'Selected Cards' (100% complete), 'Large Language Global Search' (100% complete), and 'Assignment Feature to Iteration' (15% complete). The bottom-left screenshot shows a 'Backlog' for 'Digital Transformation' with a table of user stories and bugs. The bottom-right screenshot shows a detailed view of a task 'Selected Cards' with a progress bar and various sub-tasks.

ID	Effort	State
91176	0 pt	Open
140556	0 pt	Open
60635	0 pt	Open
149153	0 pt	Open
141067	0 pt	Open
84048	5 pt	Open
159284	0 pt	Open
78125	0 pt	Open
67307	0 pt	Open
151533	0 pt	Open
172697	0 pt	Open
92488	0 pt	Planned
136007	0 pt	Open
116378	0 pt	Open



Executive Leadership and Sponsors



Portfolio Managers



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Program & Project Managers



Delivery Team

What Does This Look Like in Targetprocess?

Drive consistency while maintaining flexibility with templates, workflows, business rules, user-defined “canvases,” and personalized views

Strategy Definition

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Investment Prioritization

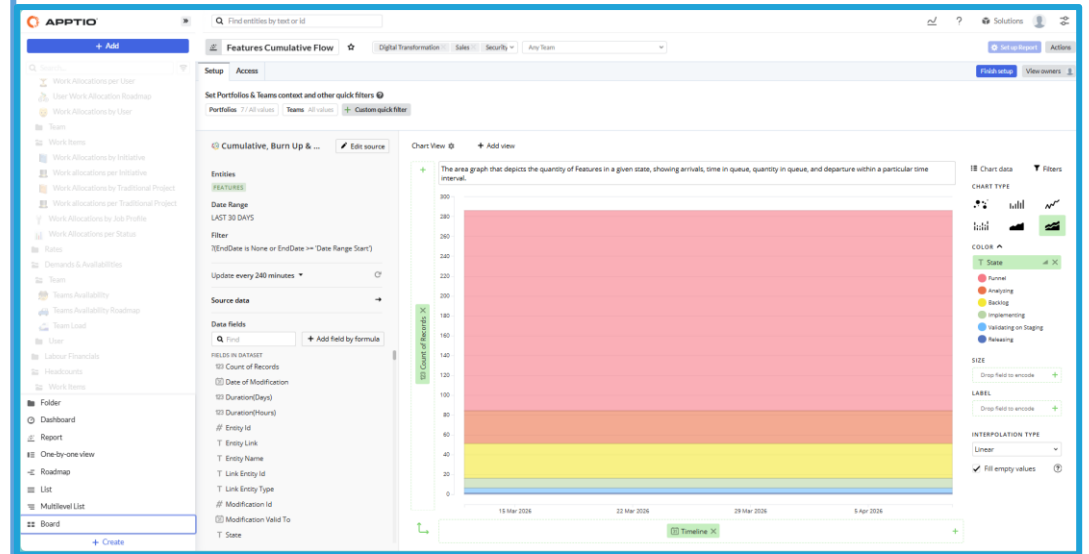
Investment Intake Management

Workforce Optimization

Investment Funding

Planning and Coordination

Task and Workflow Management



Executive Leadership and Sponsors



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Program & Project Managers



Delivery Team

What Does This Look Like in Targetprocess?

Collaborate on risks, issues at all levels of the hierarchy

Strategy Definition

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Investment Intake
Management

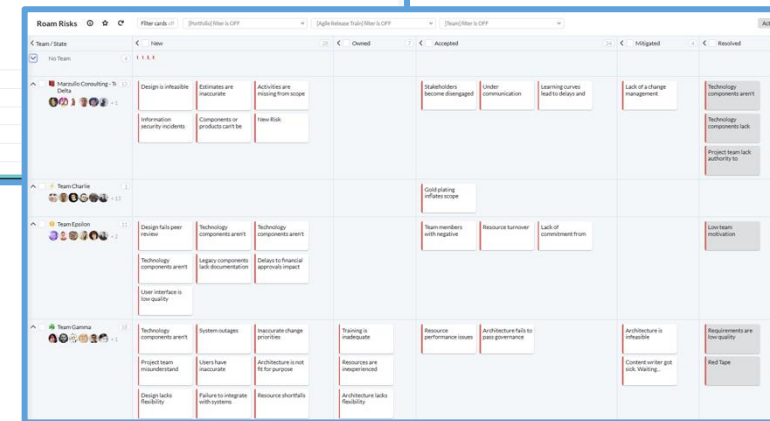
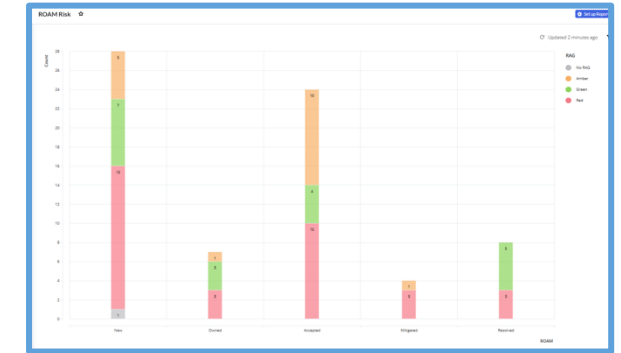
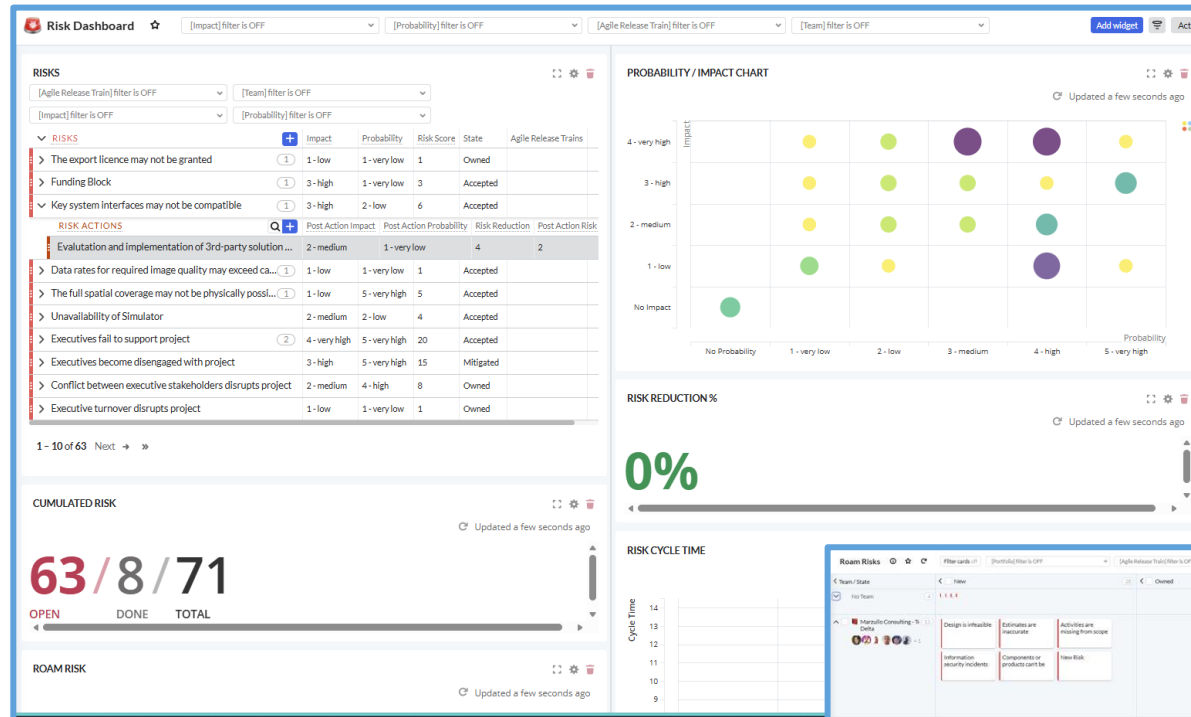
Workforce Optimization

Investment Funding

Planning and Coordination

Task and Workflow
Management

Risk and Issue Management



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Managers



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Key SPM Capabilities by Persona



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What Does This Look Like in Targetprocess?

Lots of reporting options extend insights and surface roadblocks

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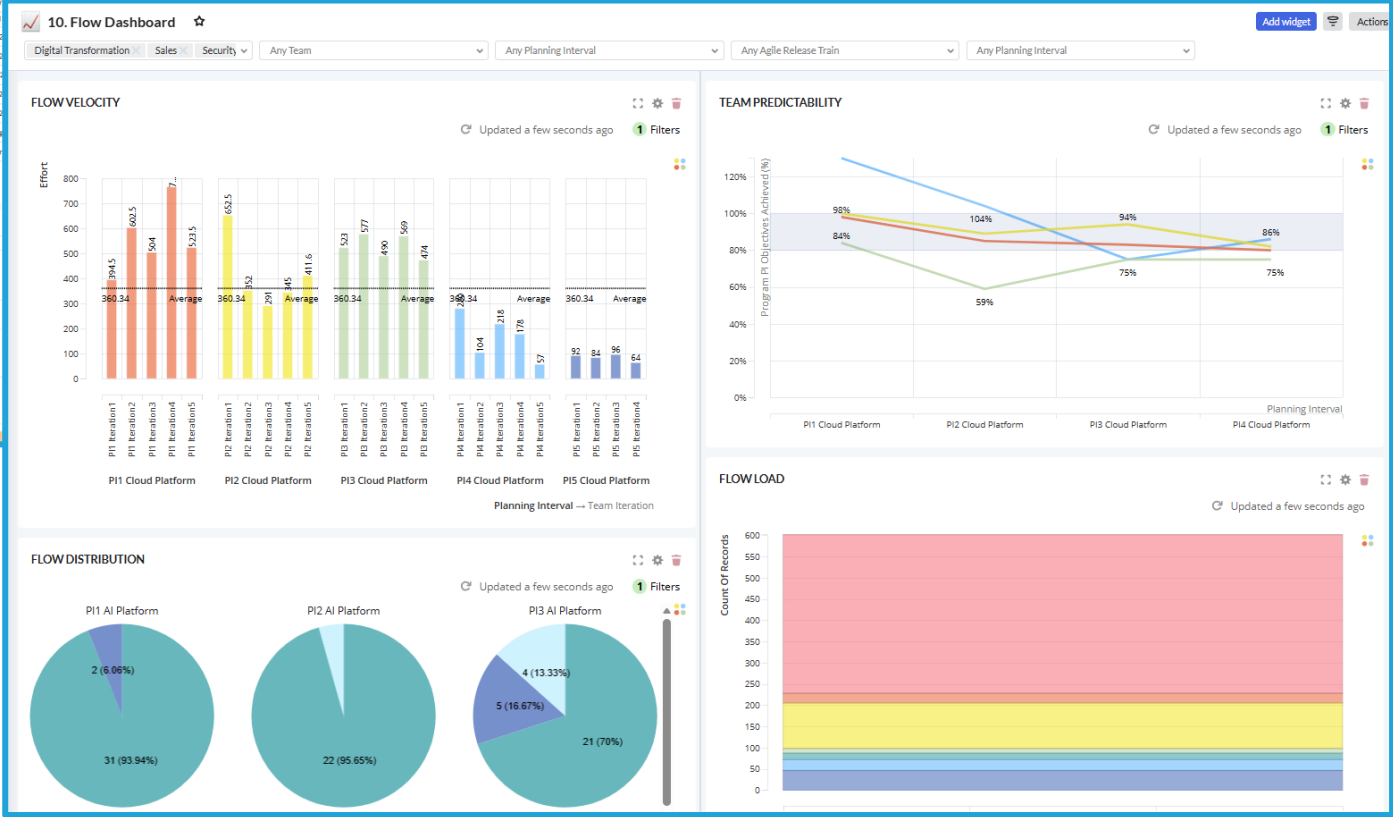
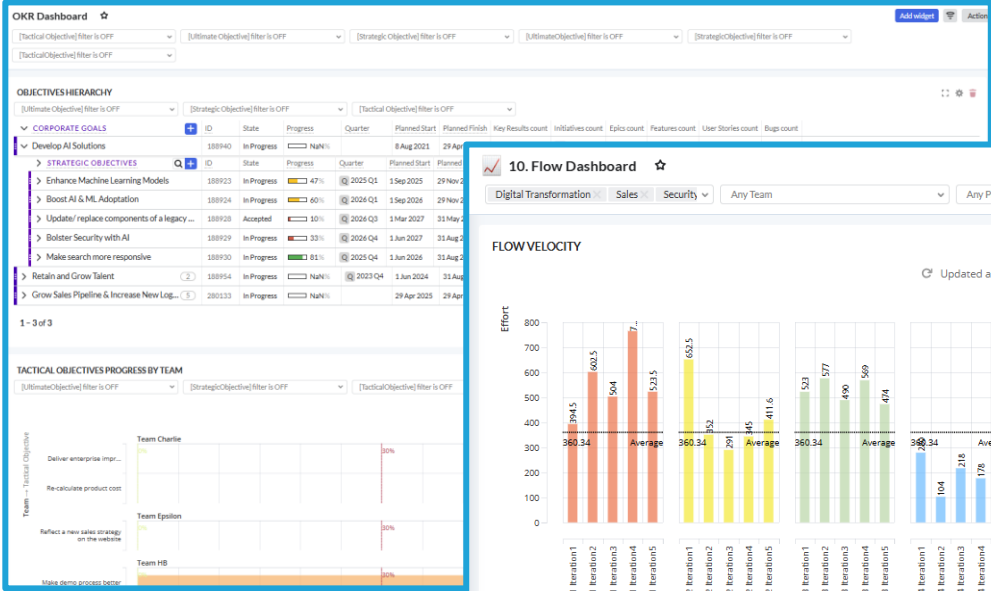
Planning and Coordination

Task and Workflow Management

Risk and Issue Management

Collaboration

Metrics and Performance



Getting Started with SPM



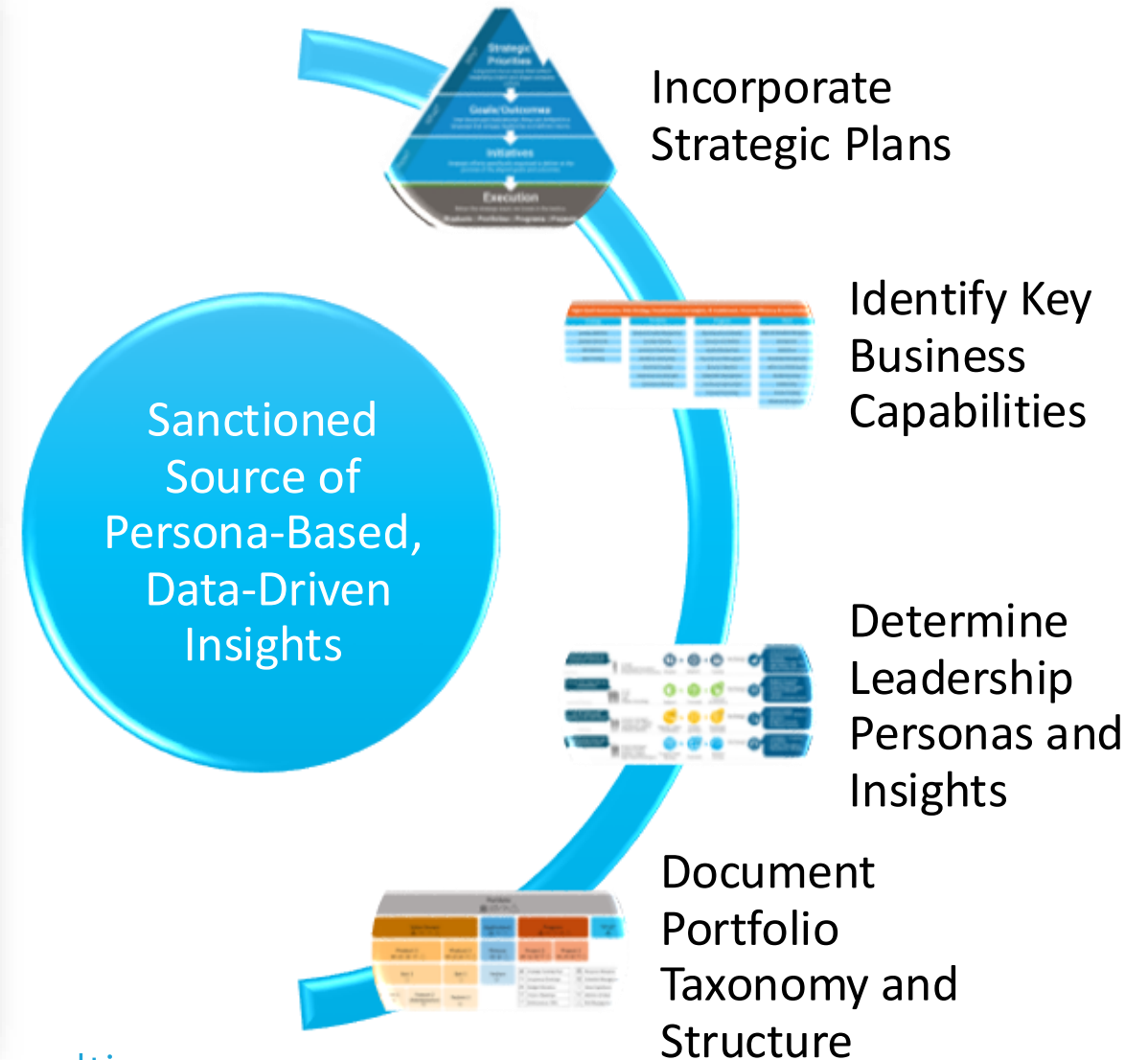
Rego's Proven Playbook for SPM Success

Our proven framework for operationalizing strategy:

- Aligns investments, work, and outcomes across the enterprise
- Integrates people, processes, and data into a single model
- Drives better decisions through clarity and transparency



ENABLED BY GOVERNANCE, DATA, INSIGHTS, AND CONTINUOUS IMPROVEMENT



The Project Management Office

- The Project Management Office (PMO) focuses on implementing projects properly and efficiently, supporting project managers in sharing resources, as well as best practices, coaching, and monitoring compliance with project and process standards.

The PMO is responsible for executing the strategies that are assigned by the SRO.

The Strategic Realization Office

- The Strategic Realization Office (SRO) emphasizes implementing the right projects and evaluating whether they serve the organization's strategic alignment needs.

Executive leadership implements the SRO to better understand the enterprise strategy.

How to Get Started with SPM?

Get Executive Buy-in

- ✓ Acknowledge SPM is a framework; to adopt it successfully requires a top-down shift in an organizations decision making approach.
- ✓ Consider the creation of a Strategy Realization Office (SRO)

Invest in the SPM technologies, do not build from scratch

- ✓ Capability rich tools like Clarity are ready to go

Find a Trusted Partner

- ✓ Take our FREE SPM| PPM Maturity Self-Assessment (QR Code)
- ✓ Expert assistance to implement best practices for strategic alignment
- ✓ Tailored demonstration of how Clarity functionality can unlock value for your organization



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How to Get Started with SPM?



Scan me

Looking for a live demo? We host live demos twice a month. Sign up today.

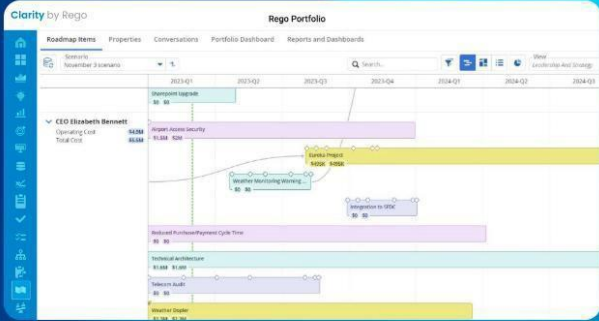
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by Rego


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Your Project Portfolio Management Powerhouse


Enterprise-grade PPM with Consumer-like Ease

[Take the Tour](#) [Live Demo](#) [Free Trial](#)



Now Available In  marketplace

Clarity is designed to manage all your projects



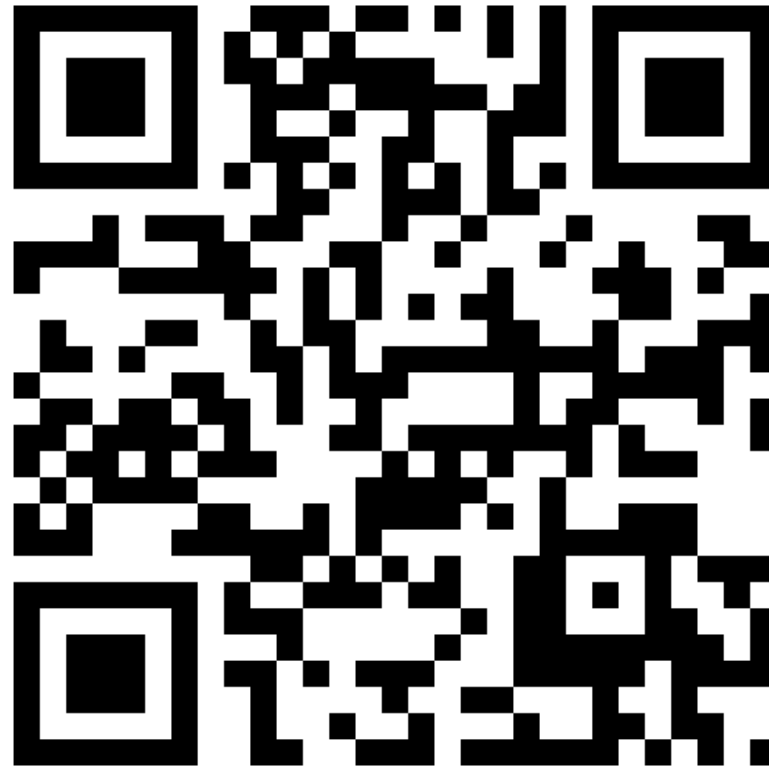
Experience Clarity by Rego

Sign up for live demos or a free trial. Scan the QR code or click here:

[\(https://claritybyrego.com/\)](https://claritybyrego.com/)

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.



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