

Top 7 Project Portfolio Management (PPM) Trends for 2025



Introduction

Project Portfolio Management (PPM) tools have been around for quite some time, but organizational needs are constantly evolving. To keep pace with these changes, we asked our experts at Rego Consulting to share the key trends they are observing firsthand while working with clients.

Each year, the creators of Clarity by Rego help hundreds of organizations across industries – including 60% of Fortune 500 companies – adopt PPM best practices, navigate complex implementations, and manage organizational change. Our 250+ expert PPM guides continuously monitor emerging trends and themes to provide insights that help organizations stay ahead of the curve.

This report outlines the leading PPM trends for 2025 and provides practical steps to help your organization adapt and thrive.

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1 | PPM and CWM Convergence

The gap between Project Portfolio Management (PPM) and Collaborative Work Management (CWM) tools is shrinking. While they each have distinct strengths and are featured in separate Gartner® Magic Quadrants™, the line between them is starting to blur.

Collaborative Work Management tools like Smartsheet, Asana and Monday.com have become popular due to their ease of use and affordability. Organizations have successfully used these tools to increase productivity, enhance collaboration, and manage daily tasks. However, scaling up or implementing advanced PPM practices often highlights their limitations. In response, CWM vendors are adding PPM features.

At the same time, PPM tools continue to differentiate themselves in areas like:

-  Tying work to strategy
-  Prioritizing investments
-  Scenario planning and what-if analysis
-  Optimizing resources

-  Managing detailed financials
-  Improving portfolio and program-level visibility and control
-  Articulating and measuring the realization

While CWM tools are incredibly powerful, organizations face a new challenge: multiple teams across the organization working in separate, disconnected CWM tools. This makes visibility a challenge and increases silos within the organization. PPM solution providers have taken note of CWM's rapid adoption and are starting to offer new features.

The key question is whether CWM tools can develop advanced PPM features or if PPM tools can simplify user experiences to match CWMs. We expect that lines between both types of tools will continue to blur. However, PPM tools may be quicker to meet user needs, because it's generally easier to build collaborative work management features than complex PPM capabilities.



What you can do:

- **Evaluate Your Toolset**

Because CWM tools are so accessible and easy to adopt, many organizations have multiple instances of solutions like Asana, Monday.com, and Smartsheet. CWM tools are often introduced outside formal IT processes. Identify what tools are in use, assess their effectiveness, and consider consolidating redundant solutions.

- **Define Your Path**




Reflect on your PPM goals. Do you need advanced portfolio planning capabilities or more advanced resource management features now or in the near future? Are you looking to mature your PPM practices today, in the next 1-3 years, or is it not a priority? If not, a CWM tool might suffice. For more mature PPM needs, start with a PPM tool.

- **Review Product Roadmaps**

Each PPM and CWM tool has a unique product roadmap. Review the product roadmaps for the tools you already have, focusing on how they are evolving and compare features. Take note that not all features will be as robust compared to other solutions. For example, the resource management features in PPM tools may have more capabilities than those in CWM tools. Be sure to check the timelines for features you need now and in the near future.

- **Evaluate the Ecosystem**

Based on your needs and current tools, evaluate the appropriate ecosystem for your organization. Consider where you want to be today and in the future. To help with this process, we have created a tool rationalization matrix below.

Rationalization Matrix	PPM Tool	Integrated Solutions	CWM Tools
 <p>Benefits</p>	<ul style="list-style-type: none"> Ensures scalability and stability for future growth Enhanced visibility for faster decision making Provides a single source of truth Capabilities like portfolio planning, prioritization, and what-if scenario modeling, etc. which are not yet fully available in CWM tools 	<ul style="list-style-type: none"> Employees stay in the tools they are already comfortable with no additional onboarding or training Can create a cohesive ecosystem that leverages the strengths of both types of tools 	<ul style="list-style-type: none"> Easy adoption Low price point Supports collaboration on daily tasks
 <p>Implementation Considerations</p>	<ul style="list-style-type: none"> Greater initial configuration Often requires end user training Potential greater initial investment (note that PPM tools are starting to offer pre-configured packages with work management capabilities at low price points). 	<ul style="list-style-type: none"> Requires a clear vision of what data and processes need to flow between the tools Need to be strategic in how many CWM tools/ instances integrate with your PPM tool 	<ul style="list-style-type: none"> Limited configuration available or required Pre-packaged with templates May not have the functionality to scale as quickly as your organization May need to wait longer to gain needed PPM capabilities
 <p>Best For</p>	<ul style="list-style-type: none"> Organizations who need to ensure scalability and stability for future growth Organizations who need enhanced visibility for better, faster decision making Organizations that need a single source of truth Organizations that need capabilities like portfolio planning, prioritization, what-if scenario modeling, etc. 	<ul style="list-style-type: none"> Organizations that want to keep employees in the CWM and PPM tools they are already comfortable with Organizations that don't want to invest a lot in additional onboarding or training Organizations that have a clear vision of what data and processes need to flow between the tools 	<ul style="list-style-type: none"> Organizations that are young or small and need a simple, easy-to-adopt tool Organizations that are not worried about tying work to overarching strategy, resource management, financial management, etc.



2 | Aligning with Finance

Finance teams are becoming more involved with project management and delivery oversight, influencing investment decisions and the requiring more detailed financial reporting. By gathering comprehensive financial data and developing cost models, Finance teams are aiming to tie investments to value and fund the most valuable work.

This shift is driven by economic uncertainty, product-focused models, and Agile transformations. While Agile teams focus on speed and efficiency, traditional financial metrics such as revenue, OpEx, and CapEx often take a backseat. Leaders have realized they still need that data and are now requiring clearer financial insights into Agile investments.

Today, while many of these leaders support Agile ways of working, they are requiring more detailed investment information including what is being worked on, when it will be done, and how much it is going to cost. And Finance is helping to lead the way by implementing cost models and defining financial reporting requirements.

Greater collaboration between Finance and delivery teams leads to:

- ✓ Cost Transparency
- ✓ Enhanced systems of record
- ✓ Mapping work to value
- ✓ Stronger alignment of investments with strategy

Growing this alignment comes with challenges of its own. Managing and reporting on project financials doesn't help project teams get work done faster or improve quality. It can be difficult for project leads to strike a balance between their daily activities of managing scope, mitigating risks, leading people, and meeting deadlines, and the added responsibility of financial reporting.

In the end, both Finance and project teams share a common goal: linking investments to value, delivering value to customers, and aligning work with strategic objectives. By understanding each other's goals, these groups can simplify reporting, ensuring data supports investment decisions without overburdening delivery teams.



What you can do:

- **Strengthen the Relationship with Your CFO:**

If the CFO is leading your costing model and is aligned with how work is being delivered, you will be set up for success. Spend time communicating with your CFO on a regular basis, so they understand how projects get delivered, and that you understand financial requirements. Together, look for where you can provide financial transparency in ways that help the organization but won't overwhelm project teams.

- **Educate Finance Teams:**

As you grow your relationship with the Finance department, look for opportunities to help them understand how work is planned, forecasted, and executed. This can include how you define projects, what the difference is between operational work and project work, how stage gates work, how status is reported, and more.

- **Educate Project Teams:**

Conversely, actively seek to understand the Finance team's requirements. Don't just take their financial reporting requirements at face value – look to understand the underlying *why* Finance is asking for what they want. That way, if Finance comes to you with complex reporting requirements, you can present an alternative that still serves their needs, and answers their *why*, without sacrificing your agility.

- **Explore Advanced Costing Models:**

Investigate using team-based costing models, Agile-based costing models, and the Technology Business Management (TBM) Framework's costing model. These frameworks can simplify your data model around product, service, and business unit costing – bringing a clear line of sight into the Total Cost of Ownership (TCO) for investments. Adopting a structured model can reduce Finance's reporting requests.



3 | Improving People Leadership

Organizations are undertaking more large-scale change initiatives than ever before, aiming to boost productivity, adopt new work methods, increase strategic alignment, respond to market shifts, and more. However, a majority of these initiatives fail, with less than 35% being considered a success.¹

Many companies invest in the tools and processes to support their transformations, but they neglect to include the people aspect of the equation. Effective leadership plays a critical role in ensuring new methodologies, processes, and tools are successfully adopted. This means there is an increasing need for improved people leadership, a greater understanding of employee needs, and investment in Organizational Change Management best practices.

According to Prosci, a Rego methodology partner and thought leader, organizational changes are seven times more likely to succeed when the change management practices are rated as “Excellent”. Even moving from “Poor” to “Fair” in your ability to manage the people side of change triples your chances of success.²

Investing in people leadership also offers additional benefits, such as:

- Higher talent retention rates
- Increased collaboration
- Effective and engaged individuals and teams
- Employees feeling aligned with overarching organizational goals
- Increased confidence and independence among employees

Organizations that want to improve their people leadership and succeed in their Organizational Change Management efforts, should start by actively listening and gathering feedback to better understand the voice of their employees (VOE). By understanding what their employees value, they will be able to lead them more effectively.

1. Chiu, M., & Salerno, H. (2019). Organizational Change Management | HR insights | gartner.com. Organizational Change Management: Deliver on Complex Organizational Change Management Initiatives. <https://www.gartner.com/en/human-resources/insights/organizational-change-management>

2. Bush, S. (2024). Rego University 2024. In Integrating Project Management and Change Management. Missouri. Retrieved November 12, 2024, from <https://2652075.fsl.hubspotusercontent-na1.net/hubfs/2652075/2024%20RegoUniversity%20Presentations/Partners/RegoUniversity%20Prosci%20Session%202024.pdf>.



Companies should also evaluate lessons learned from past change management efforts, explore establishing change management roles, partner with HR, and look for new ways to nurture current employees.

But perhaps most importantly, when launching new change initiatives, leaders need to ensure that employees understand the reasons for the upcoming change and the overarching value that it will provide. It all boils down to good communication. By investing more heavily in people, alongside processes and tools, organizations will be positioned to succeed in their change management efforts and gain a competitive edge.



What you can do:

- **Learn from the Past:**

Review your past major change initiatives. Did they succeed or fail? Document lessons learned and factors that contributed to their success or failure, then evaluate what you could change going forward.

- **Gather Feedback:**

Survey employees to gain an understanding of their sentiments about past organizational changes. Were they open to change or resistant? Look for any underlying commonalities across the organization.

- **Partner with HR:**

Tapping into HR's strengths can also enhance your Organizational Change Management change efforts. They can help you identify and develop change champions, improve communications, create plans for employees' personal development, collect employee sentiments, and hire the right resources to support your change efforts.

- **Explore Organizational Change Management Roles and Training:**

Connect with leaders in your organization and evaluate if you can formalize Organizational Change Management roles and processes. If your organization is not ready to take this step, start by investing in Organizational Change Management training and certifications for key leaders and change agents.







4 | Interconnected and Inclusive Ecosystems

In the past, we saw waterfall and agile methodologies being brought together into integrated ecosystems. But this year, that has dramatically evolved. Organizations are now creating single, interconnected PPM ecosystems that bring together multiple ways of working. This goes beyond agile and waterfall to include collaborative work management, product-focused models, lean methods, operational work, and even hybrid methods like “scrumerfall” or “wagile.”

A recent poll of PMO leaders at Rego University revealed that **90%** of participants now use multiple methodologies in their operating models. This is largely due to organizations’ realization that diverse types of work require different approaches, and a mix of methodologies produces the best results.

When organizations initially adopt multiple ways of working, it is common for groups to implement their own siloed tools. While these tools enable teams to use their preferred methods, they each contain their own siloed data and processes. Eventually, the number of disconnected tools and processes can grow out of control, making it impossible for leaders to have visibility into work, decipher disparate data, and make informed decisions.

This is why we are seeing the move to thoughtfully engineered, unified ecosystems. Organizations are recognizing that they need to support multiple ways of working *and* have:

-  A common structure and taxonomy
-  Visibility across tools and methodologies
-  Trusted data insights for better decision-making
-  Collaboration across methodologies
-  Alignment of work with strategic goals and adaptability
-  Insights into resource allocation

These businesses are looking for ways to rationalize and integrate their toolsets, create unified processes, and bring all their ways of working into a cohesive ecosystem. By supporting multiple ways of working in a flexible and unified way, they can deliver strategic business outcomes faster and more reliably.



Those that embrace interconnected ecosystems will see increased collaboration, the use of a common language, a unified focus on strategic goals, and a reduction in siloed people, processes, and data.

Once your shift to an interconnected ecosystem is under way, remember to approach employees with curiosity and empathy. Be sure to also communicate with employees about why the shift to a unified ecosystem is taking place. They will be more open to change if they understand the value of having an interconnected ecosystem.



What you can do:

- **Explore Use Cases:**

Get curious about what problems different employees are trying to solve, what tools and processes they are currently using to solve them, their preferred ways of working, and what gaps exist. As you conduct your research, map out your business processes and value streams to understand the flow of value across your organization.

- **Recruit an Executive Sponsorship:**

Creating a unified ecosystem is a shift that will require Organizational Change Management and executive buy-in. Before you begin, ensure that you have an executive sponsor who understands the value of creating an integrated ecosystem and will support your efforts.

- **Evaluate Data Models and Taxonomies:**

Examine your organization's data model(s) and taxonomies. Identify how to collect data in ways that empower leaders with the insights they need to make strategic decisions.

- **Focus of What Matters:**

Don't focus on minor use cases and processes that are isolated in small, niche groups and do not have a large reach. Use the 80/20 rule and prioritize use cases that will have the greatest impact.

5 | Dedicated Teams and Resource Management Challenges

There is a changing dynamic of resources and dedicated teams as people managers struggle to find balance and direction. The tension that people managers face is fueled by limited visibility and difficulties effectively staffing projects and initiatives due to the adoption of dedicated teams.

In theory, dedicated teams are meant to increase velocity and reduce the need for resource management oversight. However, unforeseen challenges have emerged when this model is rigidly adopted and, many teams work in disconnected, siloed tools, making it nearly impossible for resource managers to know who is working on what and when.



Life Changes: Employee events like vacations, parental leave, or sickness can disrupt the team's stability and momentum.



Specialized Roles: Some roles need to float between teams due to their highly specialized skillsets. But with dedicated teams, they are locked into one group.



Shifting Priorities: Organizational priorities can shift rapidly. These new priorities require the help of employees already assigned to dedicated teams. As a result, employees can become overallocated, giving 100% to their team, plus the new priority.



Limited Visibility: Working from a pure product-based model with dedicated teams does not provide resource managers with visibility into which team members are being underutilized or overallocated.



Underutilized Resources: Some roles, like QA, are often left sitting on dedicated teams, doing a lot of work certain weeks and barely anything during others.



Conflict: Teammates can have interpersonal conflict, and if it goes unresolved over a long period of time, velocity, morale, and productivity decline.

As resource managers adapt to all of these issues, they are also trying to align with strategic goals. Leadership often changes organizational goals and priorities, which resource managers must navigate to ensure that the right employees are aligned to the most value-driven work. It's like trying to solve Rubix cube. But with everyone assigned to dedicated teams, it's like the Rubix cube is locked on one side — making it even more difficult for resource managers to assemble the right mix of employees.

Almost all of these challenges stem from inflexibility. While product-based models offer many benefits, including decreased time-to-value and increased customer satisfaction, being inflexible in your adoption causes issues to flare up.



The good news is organizations are learning from their resource management woes. While product-focused models and agile ways of working will continue to grow in popularity, their rigid adoption is expected to soften. Businesses will start to take a more balanced approach. This will involve choosing agile principles and mixing them with helpful, traditional ways of working to find the perfect blend for their organizations. This new outlook is a less rigid approach to dedicated teams that will give resource managers the flexibility needed to ensure value-driven work is staffed appropriately.



What you can do:

- **Gain Visibility:**

To staff projects and products more effectively, you need a clear picture of who is working on what. Project leaders should look to strategically integrate tools and create an interconnected ecosystem that brings visibility into resources regardless of their preferred ways of working.

- **Leverage Trusted Insights:**

As you develop your integrated ecosystem, it's important to ensure data quality is good and leverage a single tool for aggregation. Trusted data and insights support better resource management decisions.

- **Align with Leadership:**

Project leaders should look to connect with executive leadership early and often as strategic objectives shift. By understanding the staffing needs associated with changing priorities and communicating limitations, you will be better prepared to align resources with organizational goals.

- **Explore New Technology:**

You can leverage insights and visibility with both integrations and PPM tools. With a robust PPM tool, you should be able to do "what if" scenarios and model your resource management decisions to understand impact.



6 | Personas, Not Pillars

In the past, businesses designed their internal technology solutions around specific functions or processes – like “project management” or “resource management.” However, the ways that people are using technology are becoming more nuanced and complex. At the same time, different roles and the processes that support them are also becoming more interconnected than ever before.

Organizations are now shifting toward designing solutions tailored to individual personas. This involves understanding end users – including their roles, challenges, and needs – and then crafting solutions to meet those needs.

Though some organizations have been moving toward this persona-based approach for some time, it has been quickly growing in popularity. This is likely due to a number of factors, including some of the topics we covered in our other trends.



More Ways of Working: Supporting multiple methodologies like waterfall, Agile, and hybrid models requires a deep understanding of each persona.



Increased Complexity: As processes and roles grow more complex, businesses can no longer rely on a one-size-fits-all approach.



Unified Ecosystem: Organizations are moving away from siloed solutions and adopting more integrated and holistic ecosystems. This requires a deeper understanding of how all the different roles will fit together and interact within the unified system.

As organizations adopt persona-based approaches, user engagement skyrockets and outcomes improve. Think of it like the difference between wearing inexpensive flip-flops and a pair of custom running shoes tailored to you. When users have technology that intuitively understands their needs and optimizes their experiences, they can reach their goals faster. They also feel empowered, more engaged, and can deliver better outcomes for their organizations.



In the coming years, we anticipate more businesses adopting this approach. It will likely become the gold standard as organizations continue to create single ecosystems that account for traditional PPM roles alongside newer agile or hybrid-model roles. Those that focus on creating better end-user experiences via personas will see efficiency, engagement, and productivity gains, and their businesses will reach their goals faster.



What you can do:

- **Identify Personas:**

As you develop solutions, look to identify the relevant personas in your organization. Ask questions to understand their responsibilities, challenges, needs, and goals, and the struggles they have had with past solutions. This will help you meet their unique needs.

- **Assess Your Current Technology:**

Evaluate how well your existing solutions serve their intended personas. You can identify gaps and challenges by leveraging user surveys and value stream mapping.

- **Align with Leadership:**

Project leaders should look to connect with executive leadership early and often as strategic objectives shift. By understanding the staffing needs associated with changing priorities and communicating limitations, you will be better prepared to align resources with organizational goals.

- **Plan for the Future:**

Hypothesize with senior leaders and stakeholders to try and anticipate the future needs of the personas.



7 | AI Fatigue

AI is the buzzword everyone keeps talking about. No matter where you turn – conferences, articles, podcasts – this topic always seems to come up. But have you started to feel tired of all the hype? If so, you are not alone.

There's a growing exhaustion with AI stemming from project management leaders who are watching AI develop at lightspeed but have not seen any game-changing benefits for PMOs or project management in general.

Gartner validated this sentiment at their recent Gartner IT Symposium/Xpo™. Analysts Mary Mesaglio and Hung LeHong demonstrated the explosive rate at which Large Language Models (LLMs) are developing. But conversely, they also showed that there is a huge disparity for PMOs and EPMOs, because of the limited value they have been able to extract from AI in this space.³

The truth of the matter is that AI isn't going away. While it seems more beneficial at this stage to ignore the hype and stay the course without it, our experts recommend preparing today, as evidence points to AI's continued growth and the gap between technology and organizational needs closing in the coming years.

Those that want to reap the coming benefits of AI should shift their focus to data quality. After all, AI is only as powerful as the data you feed it. Look for opportunities to ensure that you are capturing the right data, that it is connected, uses a clear taxonomy, and is structured appropriately. That way, when practical use cases emerge, your organization will gain the competitive edge.

3. Mesaglio, M., & LeHong, H. (2024, October). Pacing Yourself in the AI Races. Gartner IT Symposium/Xpo 2024. Orlando; Florida.



What you can do:

- **Improve Visibility and Analyze Data Quality:**

Begin by using dashboards and reports to get a baseline of what data is missing or inaccurate. After you have identified missing and needed data, clean up the data to ensure:



You have a clear process for data collection



The taxonomy is consistent



Your data is structured correctly



Needed integrations are put into place

- **Prioritize High-Value Data:**

Is the data you are collecting providing business value? If you are asking stakeholders to submit excessive data or they do not understand why the data is being collected, they will struggle with adoption. Make sure you rationalize and prioritize the most valuable data and then communicate the value of that data regularly.

- **Leverage Predictive Analytics and Automations:**

Explore predictive analytics and automations to start making gains today. Predictive analytics can be applied to your data to help you make better, data-backed decisions while automation can help you save time, streamline processes, and gain efficiencies.

- **Start to Define AI Use Cases:**

Think creatively and use the knowledge you already have about AI to start developing use cases. This can also help guide your data collection and cleanup efforts.



Conclusion: Embracing the Future of PPM

As organizations navigate the evolving landscape of project and portfolio management, the trends outlined in this report reflect a shift towards greater collaboration, financial alignment, and people-centric leadership. The convergence of PPM and CWM tools, deeper integration with finance, and the rise of unified ecosystems highlight the importance of adaptability and strategic foresight.

The future of PPM lies in the ability to balance technological advancements with human insight, leveraging data-driven decision-making while fostering a culture of innovation and resilience. By addressing the challenges of dedicated teams, refining resource management, and prioritizing personas over rigid structures, organizations can unlock new levels of efficiency and success.

As you look ahead, consider these trends as a roadmap to not only optimize your current processes but also future-proof your portfolio management strategies. Embrace the changes, invest in the right tools, and lead with empathy – because the organizations that thrive in the coming years will be those that prioritize both people and performance.



About Clarity by Rego

Clarity by Rego is a SaaS project portfolio management (PPM) solution that helps businesses and teams gain better visibility, control and improved productivity for their most important initiatives. Built on a top-ranked PPM platform and backed by Rego Consulting, the leader in PPM services and strategic advisors to more than 700 companies— Clarity is the most flexible, powerful and simple to use PPM solution on the market. No matter what your organization looks like, our experts can customize Clarity to your needs and help you develop a strategy to deploy PPM and maximize value.



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