

## Convert Roadmap Items to Investments, Auto-Populate Roadmaps, and Sync Modified Data



Once you create a roadmap, do you want a way to easily convert those roadmap items into investments to begin work?



As you work in a roadmap and update various fields, do you want to “push” those changes to the related ideas, projects, or CITs?



Do you miss the legacy portfolio functionality to automatically populate a roadmap with existing investments?



**The Rego Roadmap Enhancements save you time and keeps your data in sync!**



Roadmap Items can be converted to a Project, Idea, or any Custom Investment Type when you are ready to move the investments forward.



You can build a “power filter” that will look at existing investments and automatically add them into your current roadmap – then keep adding new investments as they are created.



Changes made to Investments within the Roadmap can be pushed out to the live Investment.

**Contact Your Rego Account Manager Today!**

 [www.regoconsulting.com](http://www.regoconsulting.com)

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 888.813.0444



Your organization will receive an easy-to-use interface to commit approved planning changes to Investments



Investment manager will gain simplified insights, via email, into the changes being made to their associated investments



The user can select individual/any combo of associated scenario, investment(s), and attribute(s) that they want to push

- Only want to push changes to ideas and not projects? You can do that.
- Only want to push your changes to Investments that are In Plan? You can do that.
- Only want to push your changes made to the Manager and Architectural Fit fields? You can do that.
- Only want to push your changes to 2 out of 100 projects in your Roadmap? Guess what.....You can do that!

## These Rego Roadmap Enhancements Accelerate Productivity!



Aligns roadmaps with Clarity Investments



Converts plans into actionable initiatives



Enhances visibility between planners and managers



Reduces time to value

The best part?



**Minimal set up time required.**



These features are included at **no additional cost** for those who have **theWorX subscription in RegoXchange**. Contact us to begin set up!



If you don't have theWorX subscription, contact us to see how we can help.

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