

# Portfolios are dead

Long live the Roadmap

# Introductions

Help strengthen the PPM Community

**DIRECTOR**

# **PETER HUGHES**

Pemari

2007 - TODAY

## **About Me**

I've been working with Clarity PPM since 2001. My PPM experience comes from working across a number of different sectors but mainly Telcos & Financial Services. My passion is creating elegant solutions for complex business problems. This is what gets me out of bed in the morning. Married, 2 children and an avid Aston Villa supporter (for my sins).



# Agenda

Portfolios are dead, long live the Roadmap



# Session Agenda

Portfolios are dead, long live the roadmap

What is a Roadmap?

Why/when would I use a Roadmap?

How does Clarity PPM support me?

Questions

# Topic 1

What is a Roadmap?

A Roadmap is a graphical representation of a series of events focused on delivering an outcome.

# Roadmaps are growing

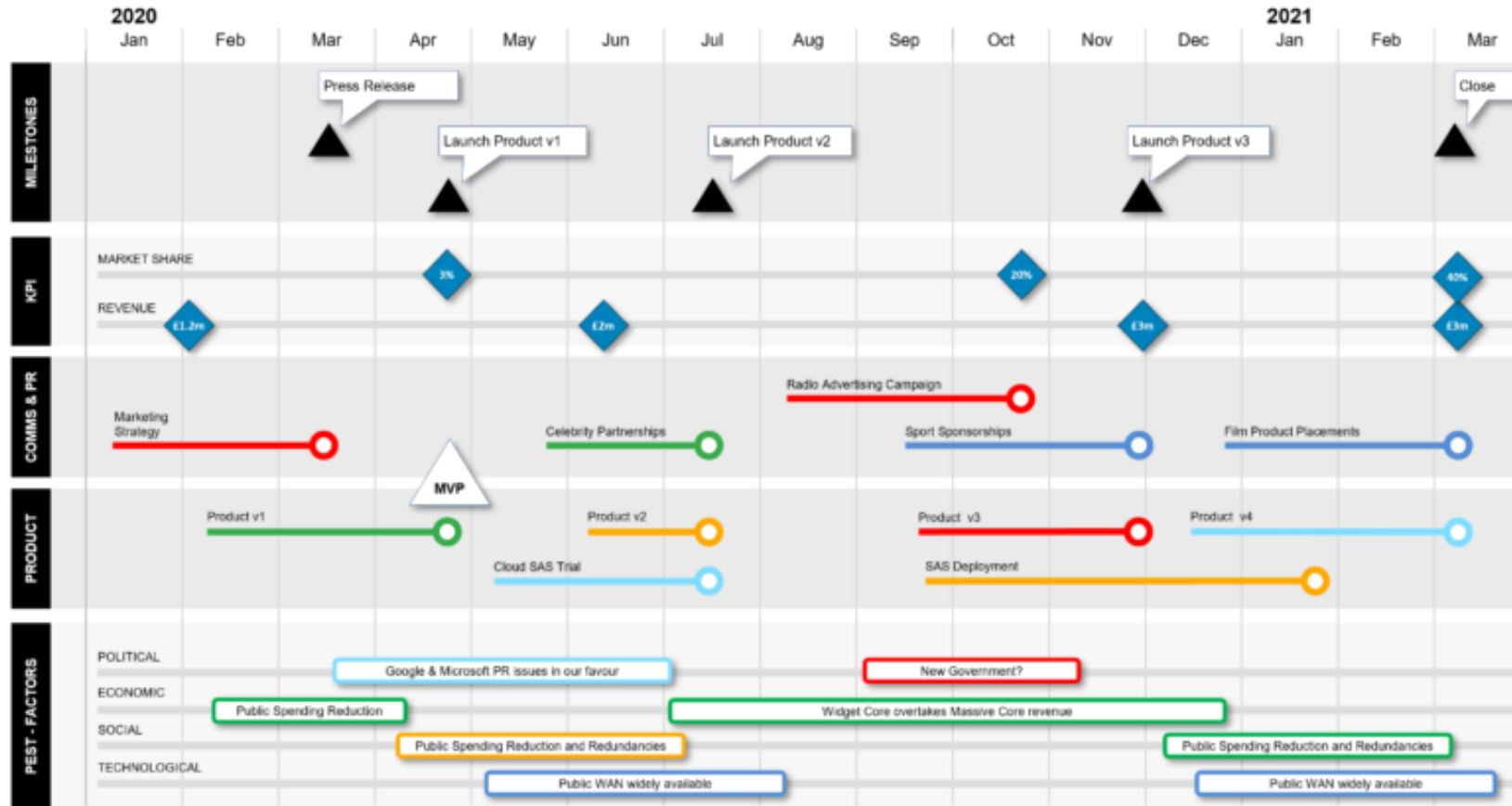


# Still the most common

PowerPoint/Visio

VERSION 3

## Roadmap Template with PEST – 3



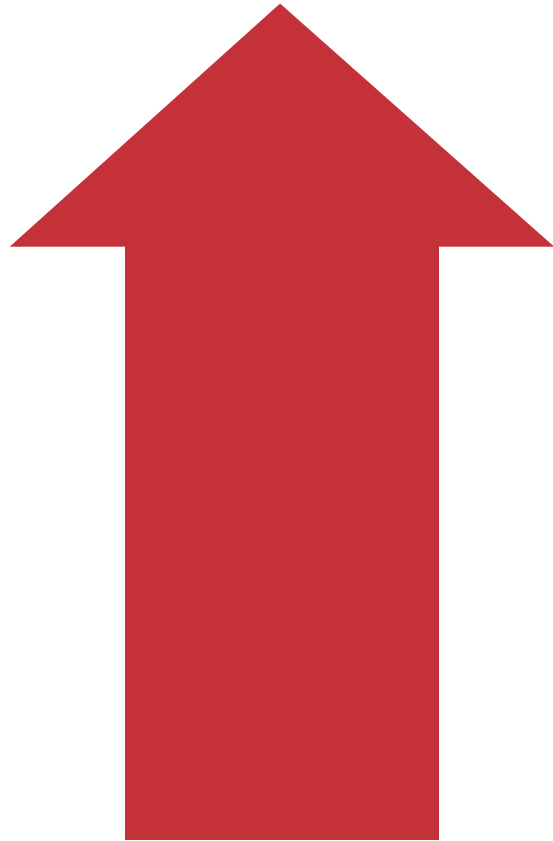
# Topic 2

Why/when should I use a Roadmap?

# Business Agility

# Bottom Up vs Top Down

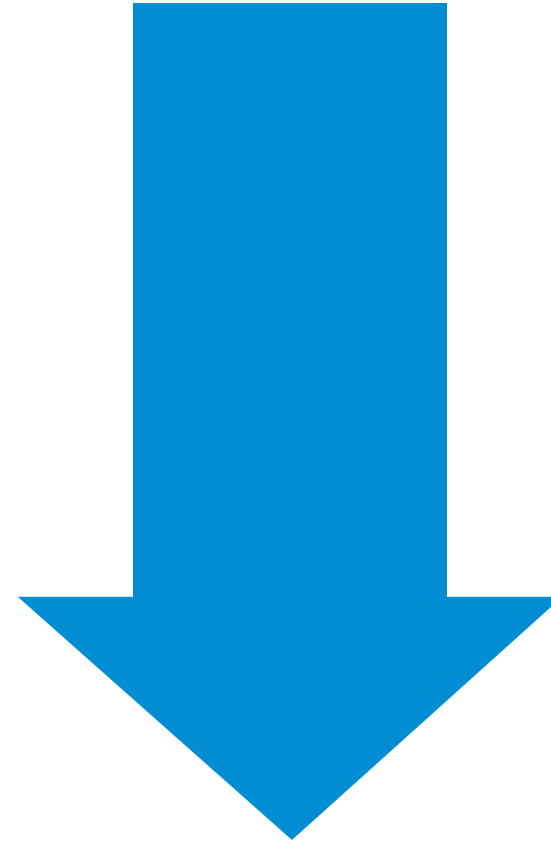
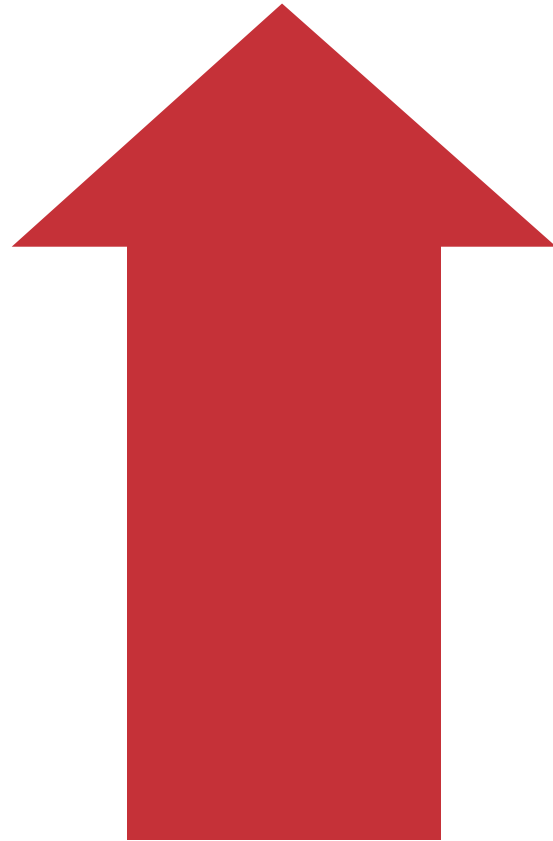
Traditional approaches to portfolio management are time consuming





# Bottom Up vs Top Down

To increase business agility we need to look at this from a different angle



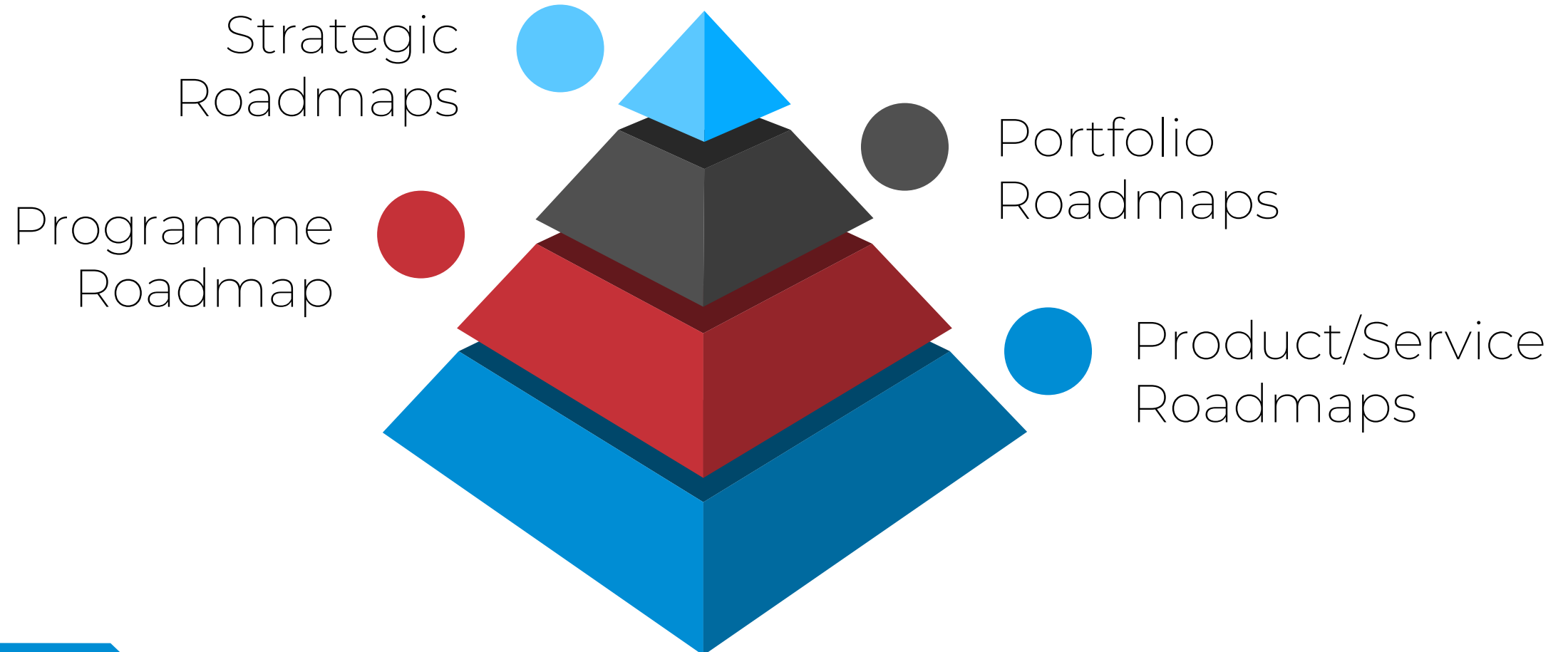
# Bottom Up vs Top Down

What reality will probably look like



# Roadmaps Layers

Roadmaps can be used to reflect many different outcomes



# The Benefits

So much more than just a timeline

## Communication

To Staff  
To Customers  
To Prospects  
To Competitors

## Planning

Strategic investments  
Executive decisions  
Operational impact



## Comprehension

We understand our market  
We understand our customers  
We know where the market is  
going

## Alignment

All our offerings work together  
Our products are evolving

# The Benefits

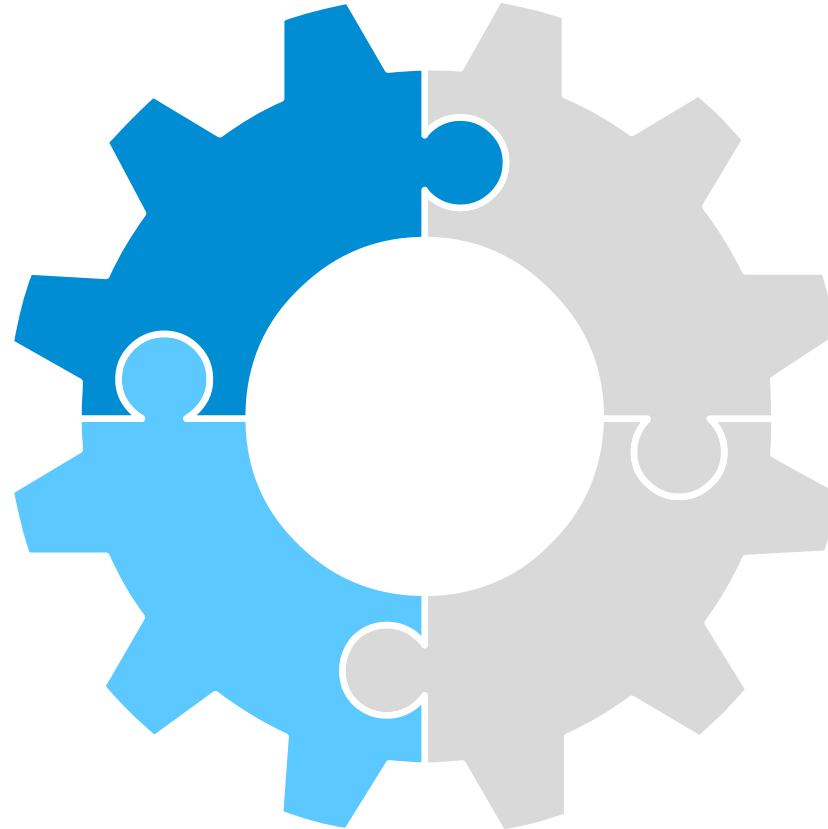
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## Comprehension

We understand our market  
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going

## Alignment

All our offerings work together  
Our products and services are  
evolving

# Topic 3

How does Clarity PPM Support Roadmaps?



**\*\*Product Demo\*\***

SCENARIO **POR**  
Default Scenario

Search or filter...

VIEW **UNSAVED**  
Search...

2019-Q1

2019-Q2

2019-Q3

2019-Q4

Key Dates

v15.6 Release

v15.6.1 Release

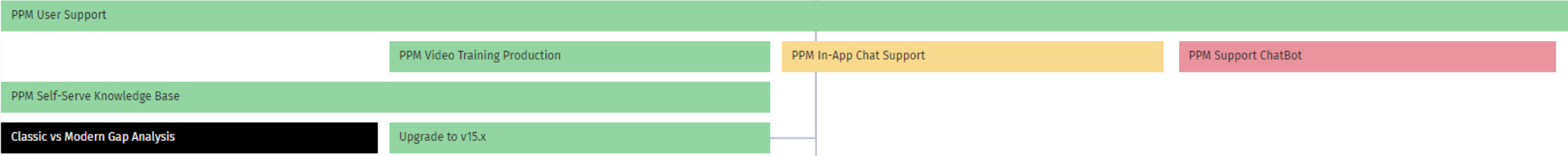
v15.7 Release

v15.7.1 Release

PMO Delivery Framework

Change Freeze

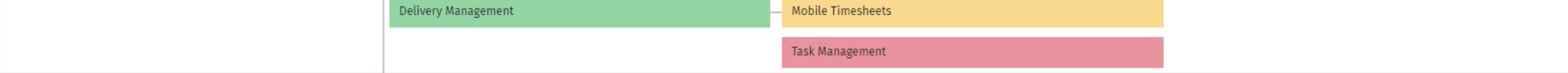
Support and Adoption



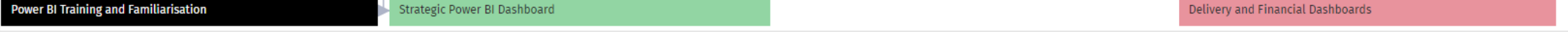
Solution Integration



Delivery Excellence



Advanced Analytics



COLORS None Unapproved Pending Approval Approved Completed On Hold Cancelled

- None
- Change Freeze (JAN 15)
- PMO Delivery Framework (JUL 20)
- v15.6 Release
- v15.6.1 Release
- v15.7 Release
- v15.7.1 Release
- Database Upgrade (MAR 2)

**Q1-2019**

- Classic vs Modern Gap Analysis (MAR 29)
- Power BI Training and Familiarisation (MAR 29)
- PPM Integration to Corp Warehouse (MAR 29)

**Q2-2019**

- Upgrade to v15.x (JUN 28) TA
- Strategic Power BI Dashboard (JUN 28)
- PPM Video Training Production (JUN 28) TA
- PPM Self-Serve Knowledge Base (JUN 28) TA
- Delivery Management (JUN 28)

**Q3-2019**

- Mobile Timesheets (SEP 27)
- PPM In-App Chat Support (SEP 27) TA
- PPM Vendor Time Integration (SEP 27)
- Task Management (SEP 27)

**Q4-2019**

- PPM User Support (DEC 31) CA
- Delivery and Financial Dashboards (DEC 27)
- PPM Support ChatBot (DEC 27) TA
- Vendor Invoices (DEC 27) TA

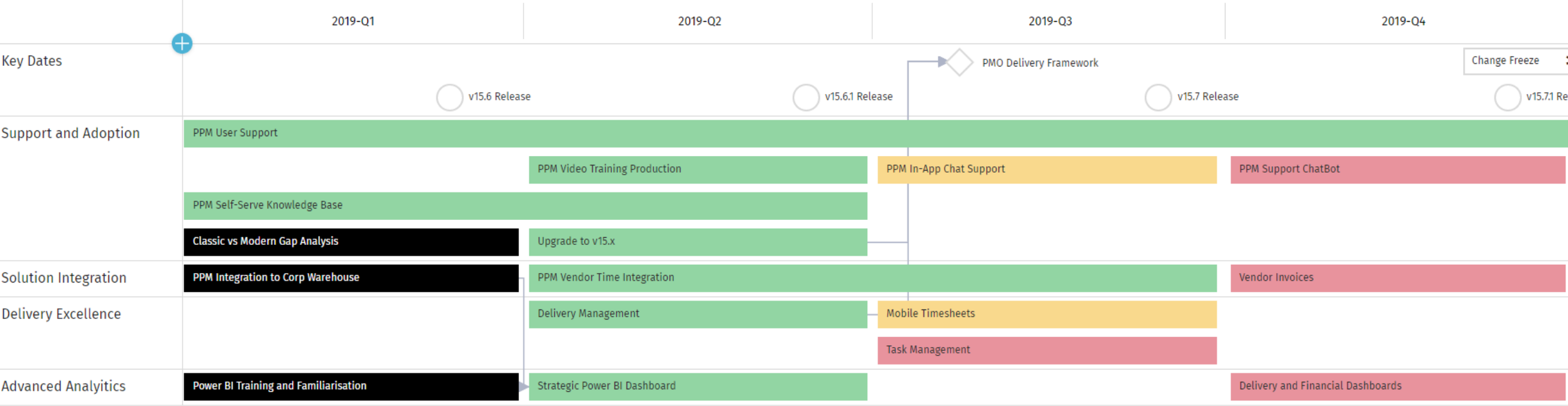
SCENARIO **POR**  
 Default Scenario

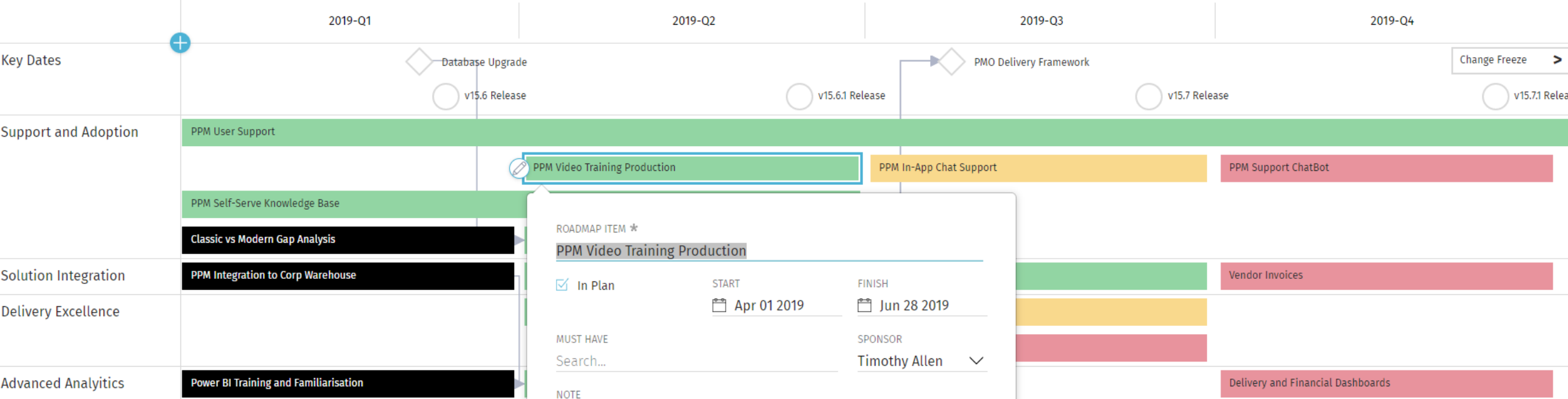
Search or filter...

VIEW **UNSAVED**  
 Search...

Total Cost		Capacity	
TARGET	3,500,000	TARGET	25,000
IN PLAN	2,075,520	IN PLAN	13,968
VARIANCE	1,424,480	VARIANCE	11,032

In Plan	Roadmap Item*	Sponsor	Start	Finish	Totals				Linked To	2019-Q1	2019-Q2	2019-Q3	2019-
					Capacity	Total Cost	Capital Cost	Operating Cost		Total Cost	Total Cost	Total Cost	Total Cos
<input checked="" type="checkbox"/>	PPM User Support	Anderson, Christopher	Jan 01 2019	Dec 31 2019		120,000	0	120,000	PPM User Support	30,000	30,000	30,000	
<input checked="" type="checkbox"/>	PPM Self-Serve Knowledge Base	Allen, Timothy	Jan 01 2019	Jun 28 2019	2,316	324,240	0	324,240	PPM Self-Serve K...	215,040	109,200	0	
<input checked="" type="checkbox"/>	PPM Integration to Corp Warehouse	Abbott, Karl	Jan 01 2019	Mar 29 2019	1,024	143,360	0	143,360	PPM Integration t...	143,360	0	0	
<input checked="" type="checkbox"/>	Classic vs Modern Gap Analysis	Abbott, Karl	Jan 01 2019	Mar 29 2019	1,024	143,360	0	143,360	Classic vs Modern...	143,360	0	0	
<input checked="" type="checkbox"/>	Power BI Training and Familiarisation	Abbott, Karl	Jan 01 2019	Mar 29 2019	1,024	143,360	0	143,360	Power BI Training ...	143,360	0	0	
<input type="checkbox"/>	v15.6 Release		Mar 08 2019			0				0	0	0	
<input checked="" type="checkbox"/>	PPM Video Training Production	Allen, Timothy	Apr 01 2019	Jun 28 2019	780	109,200	0	109,200	PPM Video Trainin...	0	109,200	0	
<input checked="" type="checkbox"/>	PPM Vendor Time Integration	Abbott, Karl	Apr 01 2019	Sep 27 2019	1,560	218,400	0	218,400	PPM Vendor Time...	0	72,800	145,600	
<input checked="" type="checkbox"/>	Upgrade to v15.x	Allen, Timothy	Apr 01 2019	Jun 28 2019	520	72,800	0	72,800	Upgrade to v15.x	0	72,800	0	
<input checked="" type="checkbox"/>	Delivery Management	Carmen, Ed	Apr 01 2019	Jun 28 2019	1,040	145,600	0	145,600	PPM Delivery Man...	0	145,600	0	
<input checked="" type="checkbox"/>	Strategic Power BI Dashboard	Carmen, Ed	Apr 01 2019	Jun 28 2019	1,040	145,600	0	145,600	Strategic Power B...	0	145,600	0	
<input type="checkbox"/>	v15.6.1 Release		Jun 09 2019			0				0	0	0	
<input checked="" type="checkbox"/>	PPM In-App Chat Support	Allen, Timothy	Jul 01 2019	Sep 27 2019	1,560	218,400	0	218,400	PPM In-App Chat ...	0	0	218,400	
<input checked="" type="checkbox"/>	Task Management	Carmen, Ed	Jul 01 2019	Sep 27 2019	1,040	145,600	0	145,600	PPM Task Manage...	0	0	145,600	
<input checked="" type="checkbox"/>	Mobile Timesheets	Carmen, Ed	Jul 01 2019	Sep 27 2019	1,040	145,600	0	145,600	PPM Mobile Time...	0	0	145,600	
<input type="checkbox"/>	v15.7 Release		Sep 09 2019			0				0	0	0	
<input type="checkbox"/>	PPM Support ChatBot	Allen, Timothy	Oct 01 2019	Dec 27 2019	1,536	215,040	0	215,040	PPM Support Chat...	0	0	0	
<input type="checkbox"/>	Delivery and Financial Dashboards	Carmen, Ed	Oct 01 2019	Dec 27 2019	1,024	143,360	0	143,360	Delivery and Fina...	0	0	0	
<input type="checkbox"/>	Vendor Invoices	Allen, Timothy	Oct 01 2019	Dec 27 2019	1,024	143,360	0	143,360	Vendor Invoices	0	0	0	
<input type="checkbox"/>	Change Freeze		Dec 01 2019	Jan 15 2020		0				0	0	0	
<input type="checkbox"/>	v15.7.1 Release		Dec 09 2019			0				0	0	0	
<input type="checkbox"/>	BMO Delivery Framework		Jul 20 2019			0				0	0	0	





ROADMAP ITEM \*

**PPM Video Training Production**

In Plan      START: Apr 01 2019      FINISH: Jun 28 2019

MUST HAVE: Search...      SPONSOR: Timothy Allen

NOTE:

[PPM Video Training Production](#)

DELETE      DEPENDENCIES      DONE

- DETAILS
- CONVERSATIONS
- STAFF
- TASKS
- LINKS
- FINANCIALS
- RISKS
- ISSUES
- CHANGES
- STATUS
- DOCUMENTS

PROJECT SUMMARY

PROJECT NAME *		PROJECT ID	SCHEDULER FORMAT	WORK STATUS
PPM Video Training Production		PR1202	Microsoft Project	Requested
START *	FINISH *	% COMPLETE	PROJECT TYPE	STATUS REPORTING
Apr 01 2019	Jun 28 2019	0%	Proposal	Not Required
DEPARTMENT OBS				
Corporate > Product Management				
OBJECTIVE				

STAKEHOLDERS

MANAGER	SPONSOR	STEERING COMMITTEE
Administrator, System	Turner, Beth	Search...
PROJECT MANAGEMENT OFFICE	FINANCE AND GOVERNANCE	
Olney, Pam	Granger, Paula	

RISKS, ISSUES, CHANGE REQUESTS

OPEN RISKS TOTAL	OPEN ISSUES TOTAL	OPEN COST CR
0	0	0
OPEN RISKS RED	OPEN ISSUES HIGH PRIORITY	OPEN SCHEDULE CR
0	0	0

NEW TASK

Search or filter...



COLUMNS

Waiting to Pull

- Integrate LMS Users from Clarity PPM  
MAY 12
- Record General Training  
MAY 12
- Record TM Training  
MAY 12
- Record FM Training  
MAY 12
- Record Admin Training  
MAY 12
- Configure LMS Badges  
MAY 12
- Setup LMS Wiki

Planned

- Record RM Training  
MAY 12
- Record PM Training  
MAY 12

In Progress

- Setup Recording software  
MAY 17
- Install LMS v1.5  
MAY 17

Accepted

- Review Available Recording Software  
MAY 12
- Create training video list  
MAY 12
- Setup LMS Hardware  
MAY 3
- Review Available LMS platforms  
MAY 12

Archived



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Vendor Invoices

Delivery Excellence

Delivery Management

Mobile Timesheets

Task Management

Advanced Analytics

Power BI Training and Familiarisation

Strategic Power BI Dashboard

Delivery and Financial Dashboards

COLORS None Unapproved Pending Approval Approved Completed On Hold Cancelled

# Questions?

Portfolios are dead, long live the Roadmap

# Coming up

What's happening in the next session

01

Manage work your way with modern task management

02

How much can be done to configure the Modern UX?

03

Hands-on with Jaspersoft Adhoc Reporting

# Thank you for attending

SESSION TITLE



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Website

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Let us know how we  
can improve!  
Don't forget to fill out  
the feedback forms!