NYC Clarity User Group Meeting

New Portfolio Management Engine in 13.2 – A Deeper Dive

Thursday 9/19/13, 3:15 – 4:15 PM

Ca ClarityTM PPM

Fully Integrated Single Source of Truth



- Enterprise Class Solution
- 3-Tier Architecture
 - Fast, Strong, Secure, Scalable
- Highly Reliable (99.5% Uptime)
- Stage/Gate Process Automation
- Role Based Security
- Easily Configurable

Working together to support NYC Clarity Users' success ...











NYC Clarity User Group Meeting New Portfolio Management Engine in 13.2 – A Deeper Dive

- 1 Portfolio Management Overview 5 min
- 2 Clarity PPM v13.2 Portfolio Engine Demo 15 min
- Implementing Clarity PPM v13.2 Portfolio Management 10 min
- 4 Questions and Answers 30 min

Changing the way we plan and work Driving success together above and below the line

CA ClarityTM **Playbook**

Executive Planning and Reporting Solution



- Accessible via an iPad®
- Define strategy based on business goals, objectives, initiatives
- Engage and collaborate with key stakeholders on strategy
- Improve alignment of investments & resources to objectives
- Compare actuals to plans via Clarity PPM



Above-the-line



CA ClarityTM **PPM**

Below-the-line

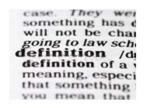
Fully Integrated Single Source of Truth

Resource Management, Portfolio Management, Project/Program Plans & Actuals, Project Financials, ...

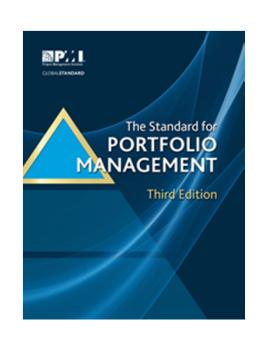


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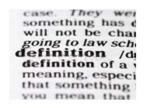


DEFINITION

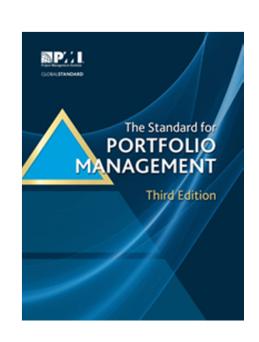


If project and program management are disciplines for doing the work right, portfolio management is the discipline for doing the right work. Portfolio managers oversee a collection of projects or programs and other work that are grouped together to meet strategic business objectives.

Project Management Institute



DEFINITION



... Portfolio Management includes processes, tools, and techniques to identify, select, prioritize, govern, allocate resources, monitor, and report contributions of the portfolio components to, and their relative alignment with, organizational objectives.

Project Management Institute

What problems are you trying to solve, or opportunities to exploit?

- Are you practicing portfolio management with effective results?
- Is your IT investment fully aligned with and enabling your strategies and priorities?
- Do you have the optimal mix of projects and programs based on an accurate understanding of: Return (ROI); Payback Period; Capex/Opex Investment; Risk; Cost; and, Resource Requirements.

• Do you practice enterprise resource management enabling forward looking resource planning and high utilization?

 Do you have timely, accurate, and meaningful measures of project/program performance to effectively monitor and control your project/program portfolio? Some estimates state that only 20% of an enterprise's IT investment is visible in the IT budget.

– Peter Weill, MIT CISR

Portfolio Management Research



PORTFOLIO MANAGEMENT



Portfolio management is more than a theory. Executed effectively, it delivers solid business benefits—whether it's greater efficiency or a boost to the bottom line.

Organizations that described themselves as highly effective in portfolio management increased the average number of projects meeting or exceeding their forecasted ROI by nearly 30 percent compared to those that described themselves as minimally effective.

	Highly effective at portfolio management	Minimally effective at portfolio management	% Increase
AVERAGE PERCENTAGE OF PROJECTS:			
Completed on time	68%	50%	36%
Completed on budget	64%	54%	19%
Met original goals and business intent	77%	65%	18%
Met/Exceeded forecasted ROI	62%	48%	29%

All of these benefits can give organizations a distinct advantage over competitors. Such forward-thinking strategic project planning transforms organizations from defensive and reactive to proactive and dynamic.

Portfolio management drives increased ROI and reduces risks—helping organizations consistently deliver business value, a rare commodity in today's volatile global marketplace.

The Result

Improved Increased portfolio = ROI and less risk = More powerful business value

Portfolio Management Research

http://www.forrester.com/The+ROI+Of+Project+Portfolio+Management+Tools/fulltext/-/E-RES47982



The ROI Of Project Portfolio Management Tools

A Total Economic Impact™ (TEI) Analysis Uncovers Significant Benefits



May 8, 2009
By Craig Symons with Tim DeGennaro, Margo Visitacion
2149 downloads | Rating:

ROI > 250%

WHY READ THIS REPORT

Project portfolio management (PPM) discipline has remained a significant effort in organizations of all sizes. Both inside and outside of IT, leaders are turning to PPM to better capture, manage, prioritize, and align investments and resources with the hopes of increasing the amount of business value they can provide. Organizations are choosing to implement PPM software solutions to provide a tool base for this objective. Almost anyone who has looked into the return on a PPM software investment has seen massive triple-digit returns advertised by these vendors. But is it true? The answer is, "Yes — it can be." A Total Economic Impact™ (TEI) analysis shows that a comprehensive PPM tool investment is likely to provide an ROI of more than 250%, whether delivered on-premise or via software-as-a-service (SaaS).

Tags: IT Management, IT Services, Outsourcing, Program & Project Management, Project Portfolio Management (PPM), Software-as-a-Service (SaaS), Tech Sector Economics US \$ 2495
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Digital Celerity's Transformation and Execution Leadership Model for Portfolio Management

Phase 1 – Assessment

Phase 2 – Planning

Phase 3 – Implement and Monitor

PPM/PMO Best Practices Education Clarity PPM Capability Education Organizational Change Management (OCM) Education

Inputs for Portfolio Strategic Plan

- Organizational Strategy and Objectives
- Inventory of Work
- Portfolio Process Assets
- Organizational Process Assets
- Enterprise Environmental Factors

PPM/PMO Maturity Assessment*

- People/Process/Technology
- Current state vs. industry best practices

OCM Assessment

- Implementation History Assessment
- Implementation Risk Forecast

* Based on applicable PMI Knowledge Areas and Process Groups



Define the Change

- A compelling business case for action translated into Sponsors, Agents, and Targets Frames of Reference
- A clear and commonly held definition of the present state and desired state
- Definition of Success: Technical Objectives; People Objectives; Process Objectives; and, Successful Outcomes

Develop OCM Plan

- Communications Management
- Generating Sponsorship
- Change Agent Enablement
- Developing Target Readiness
- Reinforcement Strategy

Design Processes, Forms, and Governance
Define Roles, Capabilities, and Behaviors
Develop Training & Mentoring Plan

Develop Tool Implementation Plan

 Installation, Configuration, Data Loading, Integrations (if any), Dashboard/Report Development, and Quality Assurance Testing

Time Phased Implementation Roadmap ...

Initial Rollout

People

- Training & Mentoring
- Communications Management
- Generate Sponsorship
- Change Agent Enablement
- Develop Target Readiness
- Continuous Reinforcement

Process

 Process, Forms, and Governance Implementation

Technology

Tool Implementation

Successful Outcomes

Qualitative and Quantitative (Measurable):

- Greater alignment with company goals and strategy to ensure resources are (continuously) working on the most important projects and programs
- Increased innovation and speed-to-market
- Increased transparency and accountability
- Accurate, meaningful, and timely measures of project and program performance
- Projects and Programs successfully completed in a faster, less costly, and more predictable manner.
- Increased: Productivity; Quality; Stakeholder Satisfaction; and, Return on Investment
- Empowered Teams
- Informed Management





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