

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 Clarity™ 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 ...*

Bill Yee **ca technologies**

Allan Mills  Digital Celerity LLC
Manage > Lead > Govern

Jerry Shea  Digital Celerity LLC
Manage > Lead > Govern

Digital Celerity is a PMI Registered Education Provider
(As such your employees will receive PMI PDU's for our training classes.)



Tenth Anniversary
... Since 2003



Guiding your best path Clarity Project Portfolio Management

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

3

Implementing Clarity PPM v13.2 Portfolio Management – 10 min

4

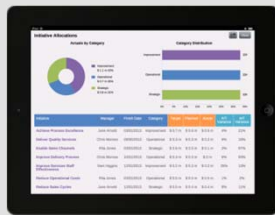
Questions and Answers – 30 min

Changing the way we plan and work

Driving success together above and below the line

CA Clarity™ 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



Company
Executives

Above-the-line



CA Clarity™ PPM

Fully Integrated Single Source of Truth

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



- Enterprise Class Solution
- 3-Tier Architecture
 - Fast, Strong, Secure, Scalable
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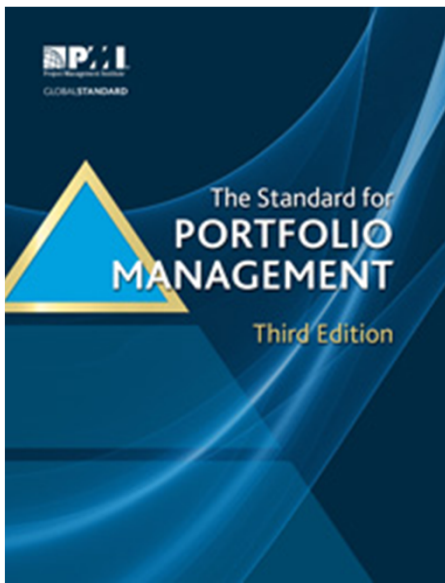


Project Teams
And Leaders

Below-the-line

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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.

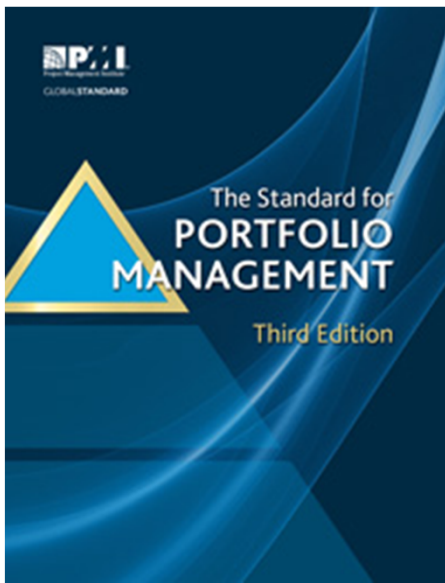
– Project Management Institute

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DEFINITION

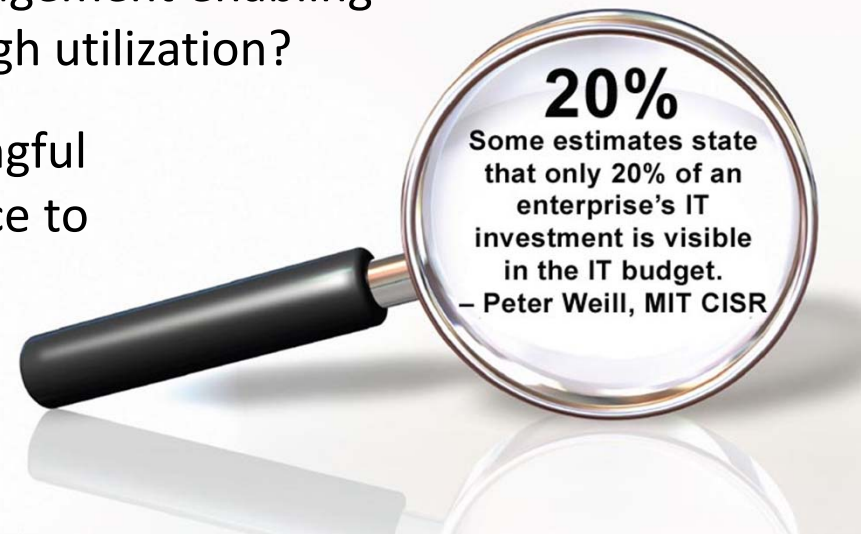
... Portfolio Management includes processes, tools, and techniques to identify, select, prioritize, govern, allocate resources, monitor, and report contributions of the portfolio components to, and their relative alignment with, organizational objectives.

– Project Management Institute

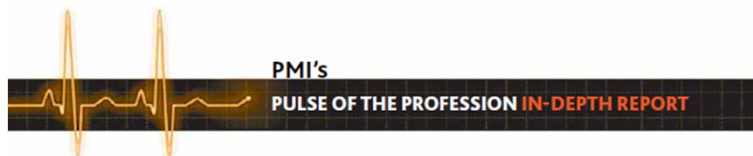


What problems are you trying to solve, or opportunities to exploit?

- 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?



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 portfolio management = Increased 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](#)

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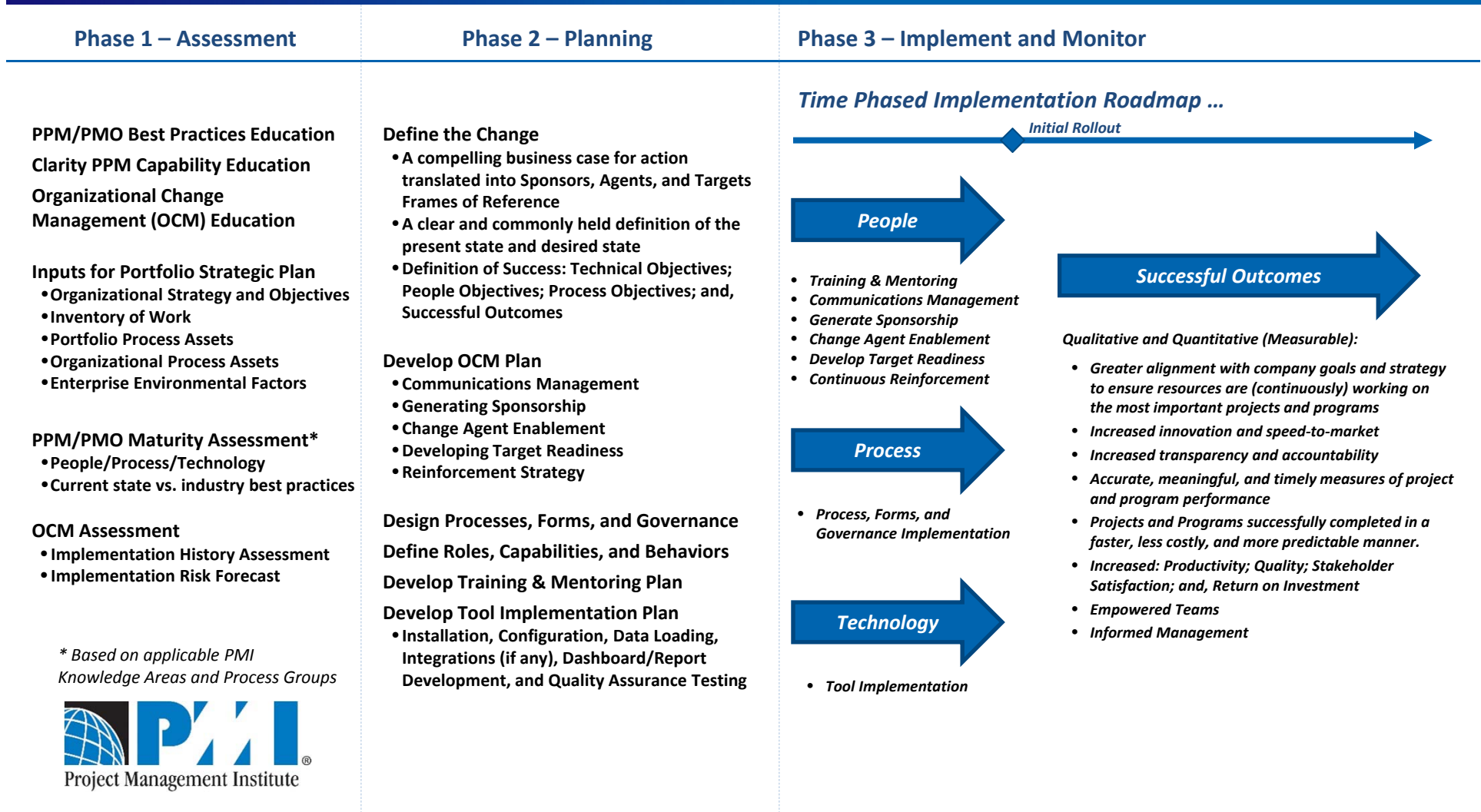
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Digital Celerity's Transformation and Execution Leadership Model for Portfolio Management



Thank
You



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