



# Financial performance is king.

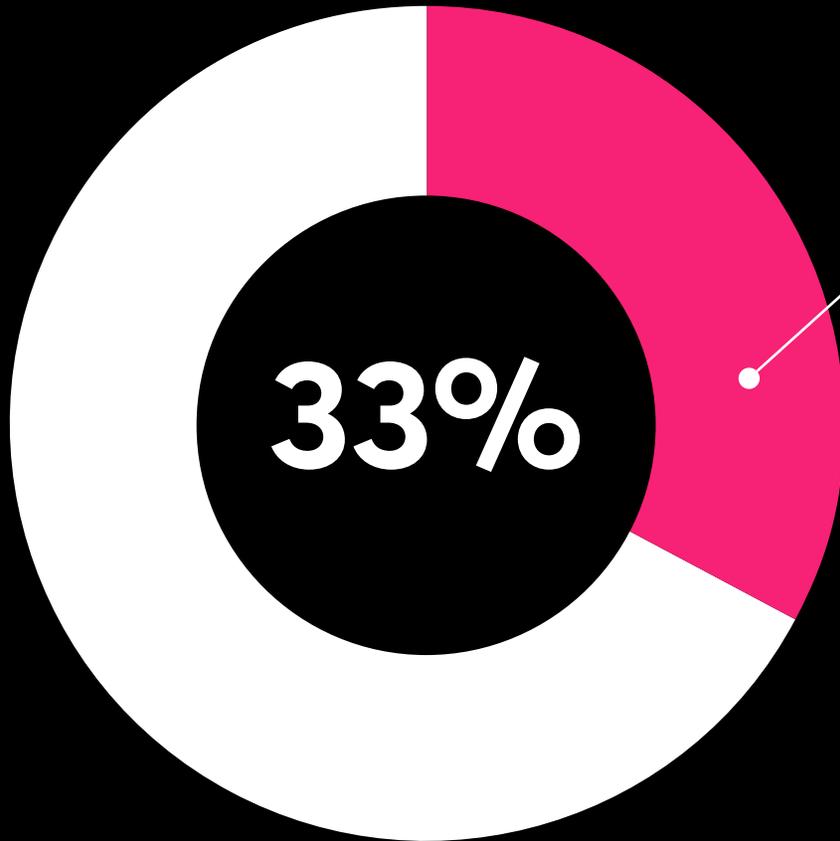
**So why are finance managers ignored in projects?**

# Being a finance manager can be a thankless task.

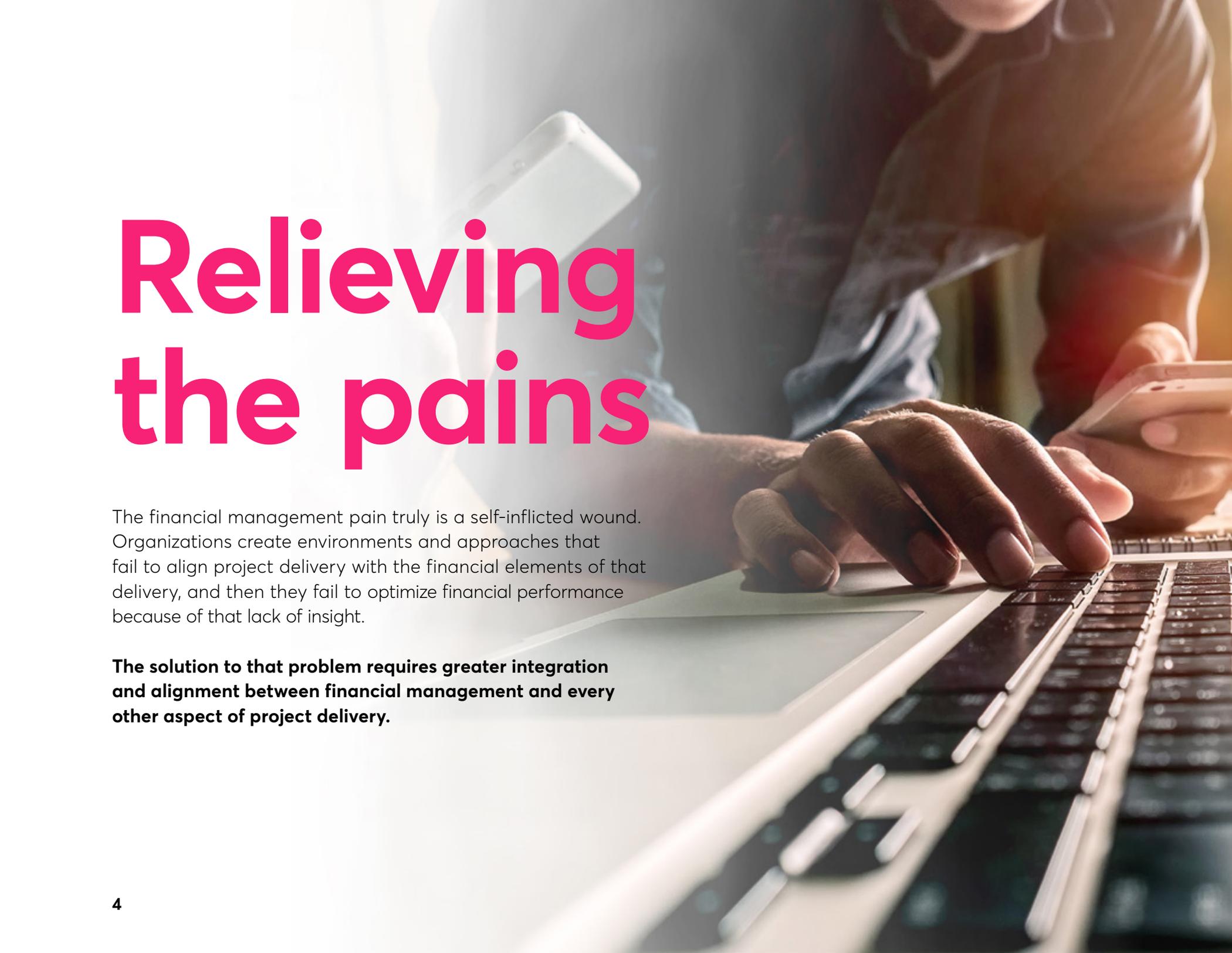
Finance managers are rarely, if ever, included in project planning, and if they are involved in the tracking of progress it's generally limited to status reports—for which they are dependent on the project manager. At the same time, all stakeholders expect to have the latest, most accurate information on the project financial situation available to them at all times, in a format that is tailored to their own individual needs.

To compound the problem, project management and financial management systems have traditionally been siloed: Projects are managed using resources and effort, with little attention given to cost. This means financial managers need to manually extract project data and map it to costs in their system, because at the end of the day, the financial metrics are what's most essential to the business.

**It doesn't have to be this way.**



**33 percent of organizations don't track project benefits after completion.<sup>1</sup>**

A close-up photograph of a person's hands typing on a laptop keyboard. The person is wearing a blue shirt. A white smartphone is visible in the background, held in the person's other hand. The lighting is warm and focused on the hands and keyboard.

# Relieving the pains

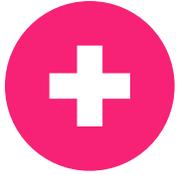
The financial management pain truly is a self-inflicted wound. Organizations create environments and approaches that fail to align project delivery with the financial elements of that delivery, and then they fail to optimize financial performance because of that lack of insight.

**The solution to that problem requires greater integration and alignment between financial management and every other aspect of project delivery.**

# Pain:

## No one wants to play with finance

When financial managers aren't involved in project decisions, mistakes get made. Even the most well-intentioned project managers don't have deep insights into financial matters. Therefore, their **decisions may prioritize resourcing or scheduling challenges instead of optimizing performance against financial goals.**



## **Pain relief:**

### **Put investment planning and management first.**

The fundamental purpose of modern project portfolio management (PPM) solutions is to support the selection of a project portfolio that has the best chance of delivering the business goals and objectives that have been set for the year.

The best PPM solutions provide real-time insight into financial plans, actuals and forecasts and allow for analysis of those numbers by project, team, business area, financial category, etc.

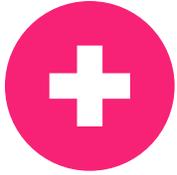
## **The result:**

Finance and project managers work together in one single solution to ensure decisions and actions are aimed at optimizing business outcomes.

# Pain:

## Financial reporting is a never-ending fire drill.

As organizations become more focused on business outcomes, the importance of tracking financial metrics increases. However, the lack of detailed financial management within project management tools makes it very difficult to create financial reports from those tools. Project managers find themselves manually running reports in spreadsheets, which is **time consuming, inefficient and prone to errors**.



## **Pain relief:**

### **Democratize access to data and reporting.**

When the PPM platform connects directly to the financial management or business intelligence software, users get anytime access to financial reporting directly from the PPM solution. That puts custom reports in the hands of all stakeholders—allowing them to see the financial data that is relevant to them, in their preferred format.

Decision makers become more self-sufficient, financial managers become more efficient, and everyone is empowered to make better decisions.

## **The result:**

When stakeholders can understand the financial implications of their decisions they greatly increase the likelihood of project success.

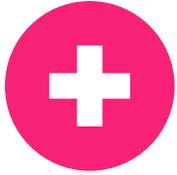
### **Bonus:**

With integrated financial management and work management, customer and supplier invoicing can be tied directly to project milestones that are updated in real time through the PPM solution.

# Pain:

**Financial analysis—  
if it happens at all—  
is onerous and inaccurate.**

Organizations have historically done a poor job of learning from financial mistakes committed in their projects. They repeatedly set unrealistic budgets, commit too little money to initiatives or find themselves with unallocated funds at the end of the year because of ineffective investment planning. These issues come about because of the inability to strategically analyze overall financial performance within the project delivery part of the business. There is **little-to-no insight into planning accuracy, required contingency amounts, or even total spend.**



## **Pain relief:**

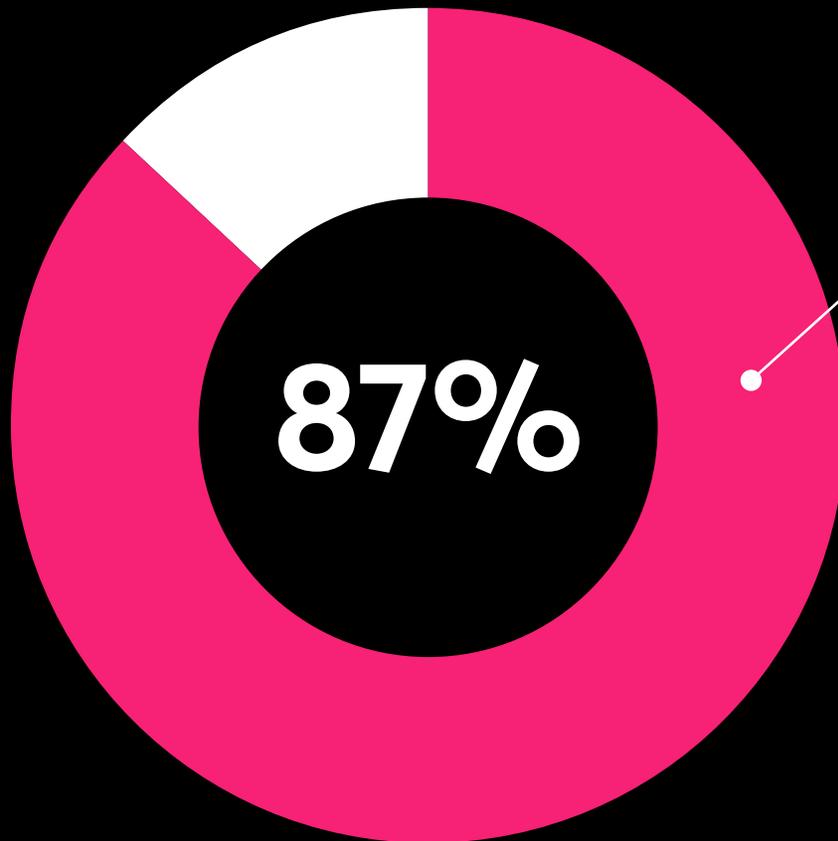
### **Democratize access to data and reporting.**

Today's leading PPM solutions comes with portfolio-level financial analysis, which shows how much was spent, where it was spent, and what type of spend it was. More significantly, it also allows for predictive analysis—modeling to see which projects offer the best return on investment, how much funding will be needed in different categories, etc.

These PPM platforms integrate with other enterprise applications—such as BI platforms—to deliver powerful financial analysis at a level that has never before been seen in project delivery.

## **The result:**

Achieve the best possible outcomes—with a managed level of risk—while continually evolving and optimizing processes.



**87 percent of surveyed organizations agree that trending capabilities that help to accurately predict project success or failure throughout the life of a project are important.<sup>1</sup>**



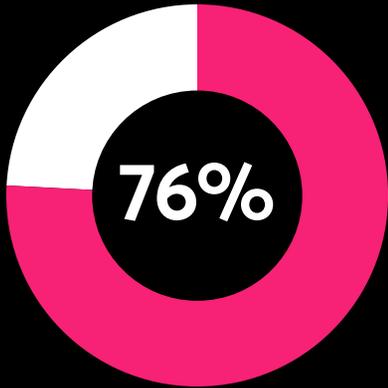
# CA Project & Portfolio Management lets you dig deeper into the finances.

**CA PPM simplifies the job of the financial manager with Microsoft Excel®-like functionality, embedded communication and collaboration features, and direct links to the industry's most popular reporting and business intelligence tools.**

---

CA PPM provides financial managers with the ability to visualize, manage and take advantage of data like never before—all from one single solution.

- Take charge of project budgets with CA PPM's customizable workflow and solve issues quickly with built-in social collaboration tools.
- With CA PPM's mobile dashboards, you end the unnecessary fire drills every time team members and executives ask for reports.
- Maximize project ROI with CA PPM's advanced financial analysis, real-time trending and forecasting, and open connections to most BI software.



## 76 percent of surveyed organizations rated CA PPM's ad-hoc reporting and dashboards as superior or better to the competition.<sup>1</sup>

CA PPM, a modern PPM platform designed for the way today's businesses—and today's financial managers—work. To learn more about how CA PPM can help your business become an engine of innovation, visit us at:

[ca.com/ppm](https://ca.com/ppm)

<sup>1</sup> TechValidate survey of 93 users of CA PPM, January 2017

CA Technologies (NASDAQ: CA) creates software that fuels transformation for companies and enables them to seize the opportunities of the application economy. Software is at the heart of every business, in every industry. From planning to development to management and security, CA is working with companies worldwide to change the way we live, transact and communicate—across mobile, private and public cloud, distributed and mainframe environments. Learn more at [ca.com](https://ca.com).

Copyright © 2018 CA. All rights reserved. All trademarks, trade names, service marks and logos referenced herein belong to their respective companies. This document is for your informational purposes only. CA assumes no responsibility for the accuracy or completeness of the information. To the extent permitted by applicable law, CA provides this document "as is" without warranty of any kind, including, without limitation, any implied warranties of merchantability, fitness for a particular purpose, or noninfringement. In no event will CA be liable for any loss or damage, direct or indirect, from the use of this document, including, without limitation, lost profits, business interruption, goodwill or lost data, even if CA is expressly advised in advance of the possibility of such damages.

CS200-389050

