

# CA Project & Portfolio Management

## Portfolio Transformation Discovery Service

### At A Glance

Turn potential into productivity and plans into outcomes with the CA Portfolio Transformation Discovery service, a blended approach focused on helping you reduce the work about work. Discovery activities and demonstrations lead to developing a portfolio transformation plan and chart a path to enable continuous portfolio planning. This is a crucial element of modern business management and, ultimately, better business outcomes.

Your team will learn from the combined knowledge domains and experience of both CA Project & Portfolio Management (CA PPM) and CA Agile Central, often revealing how work really happens, and how to shift busy-ness into faster and better outcomes. The process concludes with next steps for owning and maintaining an ongoing roadmap aligned with modern business management principles.

#### KEY OUTCOMES

- **Reduce the work about work** by combining knowledge domains and experience of CA PPM and CA Agile Central.
- **Achieve continuous portfolio planning** with a practical, actionable transformation plan.
- **Create a Transformation plan** to align steps for owning and maintaining a roadmap with modern business management principles.

#### KEY SERVICES FEATURES

- **Discovery** activity with leading coaches engages and energizes your teams to evaluate your work management environment from a fresh perspective.
- **Demonstration** provides a safe and structured method for exploring the range of possibilities exposed during the discovery activity, adjusting timelines to a pace right for you.
- **Transformation plan** is packaged as modules sequenced for logical next steps toward continuous portfolio planning.
- **Coaching matters.** Our coaches have been there, done that, and gotten results for companies across many industries.

### Offering Overview

Modern business management supports overcoming the challenges created when both agile and traditional methods of working are used in one organization. Transform how your organization prioritizes, funds, tracks, and manages all work across different methods:

**Discovery** is an active kickoff that engages your teams in exploring new ways of thinking and doing, as well as evaluating your current environment. It's an energizing first step in continuous portfolio planning.

**Demonstration** refines your discovery findings into a range of possibilities. Each represents a step or stage in transformation, which can be adjusted to the pace that's right for your organization.

**Transformation plan** provides the confident next steps in your journey: initiatives sequenced for your unique needs and business outcomes.

Select the right mix of coaching and tools to evaluate the how of work, not just the what, for seamless, transparent and continuous portfolio management.

- Improve processes and speed
- Manage new work intake
- Prioritize
- Manage workflows

**Engage** is your starting point for portfolio transformation. This phase includes:

- Business drivers and objectives
- Mapping business outcomes to drivers and objectives
- KPIs mapped to business outcomes
- Identifying barriers: current-state issues obstructing achievement
- Identifying and scoping data collection required for root-cause analysis
- Developing a data collection plan

**Data collection** includes workshops, observations, interviews, documentation, questionnaires and data extracts for the next step in portfolio transformation.

Analysis collates and reviews the data, groups findings and starts the feedback loop.

**Recommendations** addresses common themes and root causes of key issues as a precursor to the initial transformation plan.

**Plan** includes co-creation, with your team, of a transformation plan, plus identifying initiatives using available tools and resources. Some initiatives may require new tools and resources, which are addressed across the transformation continuum. Prioritization and sequencing are a core part of the transformation plan; it reflects initiatives utilizing CA solutions and those that do not utilize CA solutions, and is focused on all organization transformation initiatives. The planning phase also includes effort and cost estimates for each initiative, where possible and appropriate.

Continuous portfolio planning is a crucial step on the journey to business agility and for creating nimble organizations that can sense and respond to changing business conditions.

| Patterns              | Desired Outcome   |
|-----------------------|---|
| Resource Management   | Ability to effectively and accurately manage resource capacity versus demand to optimize investment and delivery  |
| Strategic Governance  | Ability to manage investment execution across multiple stage gates, providing visibility into workload pipeline and active initiatives to defined execution requirement                       |
| Execution Velocity    | Single intake point, with minimal user effort for capturing incoming requirements for evaluation and delivery   |
| Financial Performance | Accurate and actionable data to manage actuals, forecast against plan to optimize investment and delivery and forecast across all organizational units  |
| Visualization         | Real-time visibility into KPIs and predictive indicators that support actionable information, and efficient collaboration with stakeholders, IT leadership and cross-functional organizations |

## The CA Technologies Advantage

CA Services works with you to align project goals to outcomes with the greatest value and helps accelerate business transformation through:

- **Organizational enablement**, enabling users and accelerating adoption for faster value realization.
- **Technology services**, implementing a flexible solution that grows and adapts to evolving needs while continuing to deliver incremental value.
- **Success management**, developing and executing a clear plan for long-term success.

For more information, please visit [Services for CA PPM](#)

CA Services has an unwavering commitment to your success. Our best practices and experience from thousands of engagements help you accelerate business value and achieve your desired business outcomes. CA Services helps you achieve those outcomes through enabling your organization, accelerating your technology services and managing your long-term success for full value realization.

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](#).