As agile’s impact and influence on organizations continues to grow, teams have become the cornerstone of the enterprise. The latest version of CA Project & Portfolio Management (CA PPM) responds with support for team-based planning—from defining the team, to project and task allocation, to capturing and incorporating team data across financial plans. Also included in this latest release are new roadmapping and mobile app features, as well as new levels of integration between CA PPM and CA Agile Central.
Agile, the iterative, team-based approach to development, now dominates the global business landscape. According to the Project Management Institute, almost three-quarters of today’s organizations use some type of agile approach. Other surveys suggest that upwards of 80 percent of U.S. companies are using agile in at least some areas of their organization.

With agile, teams are the name of the game. According to the Agile Manifesto, “Self-organizing teams encourage great architectures, requirements, and designs—skilled and motivated team members who have decision-making power, take ownership, communicate regularly with other team members, and share ideas that deliver quality products.”

Owing at least in part to agile’s popularity, Deloitte has concluded that the entire organizational structure has largely shifted from traditional hierarchies to a “network of teams.” Teams have emerged as the heart and soul of the organization; businesses are performing team-based planning like never before. And they’re turning to vendors for support.

CA has recognized the importance of delivering tools that assist organizations in building, enhancing, tracking and empowering the team. The latest version of CA PPM is centrally focused on providing support for team-based planning, from defining the team to project and task allocation and the capturing of team data.
Team-Based Planning

Team administration: Defining the team

The first step in building a new team is defining it. CA PPM facilitates this with a comprehensive, searchable list of existing teams within the organization. Administrators search for the specific team they’re looking for or create entirely new teams with an unlimited number of members.

To populate a new team, administrators use the search capability to locate an individual or a pre-existing collection of people that together comprise an organizational breakdown structure (OBS). New team members can be identified and added to the team in a single step.

Individuals are often assigned to multiple teams. From this page you can see how much of each member’s time is allocated, easily identify members who are over-allocated and adjust as required. Clicking on a team member’s allocation percentage shows the percentage of their time designated to each team.

Because most organizations have already organized individual resources into groups, this feature provides a quick and easy way to populate teams using existing structures.

CA PPM's team definition capabilities allows the administrator to allocate resources to a specific team and easily adjust individual allocations across multiple teams.
Allocating teams to a project

As with staffing teams, staffing projects shouldn’t be a complicated process. CA PPM’s project staffing module allows the project manager to allocate resources and roles toward a specific project. Now they can allocate an entire predefined team as well—but in the context of the project. Individual members, roles and now teams can be easily swapped out as projects evolve and resource requirements change.

Assigning teams to tasks

Once a team is populated and allocated to a project, managers can assign specific tasks within the project to a team. CA PPM has simplified this process by incorporating a project task board. Once the necessary tasks have been defined, the project manager can click on an individual task for a pop-up panel through which one or multiple roles, individual resources or teams can be assigned to it.

Users can leverage the same task board to get more specific details on the task, access lists of activities still outstanding to complete the task, and collaborate in-app and in-context through a messaging feature.
Timesheets for teams

Once teams are defined, allocated to projects and assigned tasks, the work gets underway. CA PPM facilitates the entering of time so team actuals can be easily captured. Anyone responsible for recording time simply clicks on the team name to access the tasks page, where all tasks that team is responsible for are visible and grouped together within the scope of a specific project. Here, the user can enter time spent on each individual task, each day.

Time entry via mobile devices

Team members are always looking for more convenient ways to enter time. Beyond the simplified time-entry process described above, CA PPM’s mobile app allows users to fill out timecards from any place and at any time. The CA PPM mobile app is single credential sign-on enabled, which means users may log in by simply re-entering the same username and password they use to access other SSO-enabled corporate accounts.
Populating cost plans with team data

CA PPM now allows individuals, roles and teams to be treated as a singular resource and assigned to a project, not only simplifying the allocation process but also helping to manage team costs associated with each project.

Project managers who previously could only view individual or role data can now visualize entire team data. Depending on selected preferences, they can see a team’s start and finish dates, booking status, estimated time of completion, total allocations and total actuals over the course of the project.

Treating teams like any other resource means organizations can incorporate entire teams into their cost plans as a single unit. With each team’s time entry, CA PPM incorporates that information into the overall cost plan, illustrating its immediate impact on project financials. Costs are aggregated, dispersed across the plan and made available across multiple fiscal periods using the CA PPM rate matrix.

FIGURE 6.

CA PPM helps organizations easily manage team costs associated with each project.

At a glance: CA PPM’s team-based planning enhancements

The latest version of CA PPM focuses on team-based planning, treating teams as single resources and providing users with the ability to define new teams, add or remove teams from a project, assign teams to specific tasks, and more easily record the team’s time spent on each task, which is then automatically reflected in the project’s financials.

CA PPM Roadmapping

“Organizations evolving to become more agile must use a balance of top-down and bottom-up techniques to get more complete resource information and maximize value delivery.”

— Gartner
Early-stage planning should be easy. Too often, users are required to articulate project details such as features, budgets, program investments, architectural plans and team allocations at too granular a level for nascent projects. Earlier this year, CA PPM introduced a lifecycle roadmapping tool that simplifies top-down strategic planning.

Most IT demand management tools promote tactical bottom-up planning, which overemphasizes iterative fixes. According to Gartner, “Potentially high-value efforts sometimes linger in a queue while teams continuously work through a backlog of aging, lower value demand for maintaining established products and services.” CA PPM’s roadmapping tool enables top-down planning that places focus on projects that drive innovation while maximizing efficiencies and productivity.

This collaborative planning tool enables stakeholders to visualize business outcomes and their supporting initiatives through the development of a lightweight, notional plan for the fiscal year (or other planning period). Only when necessary do users break the roadmap down into business cases that define cost estimates, benefits, resource requirements and other details.

Rather than constructing hundreds of business cases or intricately defining hundreds of projects that will never launch, users start by defining a roadmap based on the strategic outcomes executives are looking to achieve, and only develop full business cases for near-term projects. This dramatically reduces the time spent preparing business cases and introduces a far more productive process than that found in traditional planning.

CA is now introducing new roadmapping features that bring additional value to customers, specifically in support of team-based planning. Among those features:

- The ability to easily import projects.
- The ability to “clip” financials and limit visibility to the current roadmap horizon, or to “unclip” and see the entire spend.
- Enhanced connections to underlying project data, including the ability to drill down into details, sync projects with a roadmap by scenario and link roadmap items to an underlying project.
- Target-based planning that provides the ability to easily define targets and plan based on available funding, capacity or goals to achieve desired benefits.

CA PPM roadmaps include timeline, board and grid views; users toggle from one to the next to access the information they need.

**Roadmap grid view**

The grid view provides a spreadsheet-like mechanism for target-based planning. Here, items can be run against one or multiple “targets,” such as benefit, capital cost and operating cost. Targets (in the form of goals or constraints) turn either green or red depending on whether they’ve been met or exceeded, providing a visual cue as to what can and cannot be achieved under selected parameters.

Users can mark one or more roadmap items as “in plan,” and the target calculations update accordingly. Users may also filter out specific columns, pivot and organize roadmap items by group. This is a powerful feature for evaluating different investment options.

Within the grid view, we’ve now introduced time parameters that can be defined by the user looking to include per-period details in the roadmap. Portfolio managers typically have a total cost they manage to, and this visual breakdown of costs on a per-period (monthly, quarterly or yearly) basis ensures costs remain on schedule and overruns are identified and addressed before delivery is negatively impacted.
Timeline view’s scenario comparison

The timeline view allows users to visualize investment options by selecting a time horizon and pivoting between customizable categories such as executive sponsor, outcomes and project status. Users may display multiple different attributes—CAPEX, OPEX and Capacity, dependencies and funding responsibilities—associated with a roadmap item.

Within the timeline view, users may now perform side-by-side comparisons of baseline plans against the actual work in progress or against current-quarter plans to ensure they’re in sync, or to identify specific factors that have changed since the original plan was approved. This feature illustrates deltas that, when clicked, display details to help analyze and understand the differences.

Users can compare baselines against a variety of different scenarios, such as more capacity, additional funding or funding reductions, and can create different scenarios to evaluate how product development will be impacted by these changes.
Configurable Investment Types

Organizations typically have their own preferred terminology for their investments. Some companies undertake “projects” or “programs”; others prefer “engagements,” “campaigns” or “initiatives.” Some companies produce “products”; others create “offerings” or “capabilities.” It isn’t always easy or intuitive to shoehorn these concepts into industry-standard buckets.

With CA PPM, customers can now use the terminology they use every day rather than be forced into using unfamiliar and sometimes inapplicable terms. This enhancement reduces unnecessary friction, lessens the learning curve and minimizes the need to translate between the business and the CA PPM solution.

CA PPM + CA Agile Central: Investment Integration

By integrating CA PPM and CA Agile Central, organizations balance agility and governance by connecting the enterprise portfolio to the work of agile teams. CA PPM provides the business lens that delivers stakeholders a strategy perspective, while CA Agile Central provides the execution lens to prioritize and track delivery of work on a synchronized cadence.

Individual CA Agile Central investments may encompass a number of features, each with their own associated activities spanning multiple teams and departments. CA Agile Central Investments provides a single, comprehensive view of all the activities across the enterprise being done in support of a specific investment.

CA Agile Central directly consolidates this data in one location for a business-centric view that allows organizations to make better steering decisions, more tightly align strategy with daily work, track and manage delivery and leverage key data to quickly and accurately measure performance.

Previously, CA PPM projects integrated with CA Agile Central Portfolio Hierarchy such as Initiatives—one PPM project to one agile initiative. The latest integration links a CA PPM project and its associated funding to one or more investments within CA Agile Central. Managers can now perform iterative funding inside CA PPM and tie it directly to a collection of features within a given investment in CA Agile Central.
CA PPM leverages CA Agile Central investment data: A typical scenario

An organization’s PMO makes funding decisions via CA PPM for a collection of capabilities or features. A project is set up inside CA PPM that has a series of tasks associated with it. The team has a funding increment that will be dedicated to a set of capabilities. The team executes those capabilities using CA Agile Central.

When a CA Agile Central investment is created, the features associated with that investment are defined and assigned to multiple teams. As each team executes against their tasks, information such as status and time tracking is shared by CA Agile Central with CA PPM, providing managers with deep visibility into how funding increments are aligning with agile teams’ work in progress.

CA PPM Responds to Changes in the Business Environment

As organizations adopt new technologies and cultures and focal points change, CA PPM strives to meet new business requirements. With agile projects 28 percent more successful than traditional ones, agile is now firmly ensconced across the enterprise landscape. As its dominance continues, teams will become increasingly relevant in every organization.

The latest release of CA PPM addresses the growing importance of teams, facilitating efforts to build and allocate them and track team financial information as a single resource. CA’s commitment to teams is further underscored with new, direct ties between the work being executed by teams in CA Agile Central and the portfolio management functions of CA PPM. Together, these solutions empower teams and make organizations more productive, more innovative and more insightful.

For more information, please visit ca.com/ppm