



SOLUTION BRIEF • CA PROJECT & PORTFOLIO MANAGEMENT



Crossing the Chasm Between Demand Intake and Business Outcomes

Modern solutions like CA PPM continue to raise the bar above last-generation IT demand management tools, continuously providing new features to ease the burden of the PMO, the financial manager, the resource manager and the product manager.

March 2018

In the last few years, new vendors looking to exploit the large and increasingly influential project and portfolio management (PPM) market have developed modules that “snap” into their SaaS platforms. These vendors claim their tools are easy to install, easy to manage and save customers money. It sounds too good to be true. And for most organizations, it is.

What these vendors fail to realize is the key reason for rapid growth in the PPM market has been the evolution of PPM software. What were once tactical tools focused solely on IT demand management have matured to meet the evolving needs of the modern digital enterprise. Today, PPM tools are strategic solutions that act as an engine for innovation and deliver real competitive advantages.

Modern solutions like CA Project & Portfolio Management (CA PPM) continue to raise the bar above last-generation IT demand management tools, continuously providing new features to ease the burden of the PMO, the financial manager, the resource manager and the product manager.

Perhaps the greatest value of this best-of-breed PPM solution is its ability to collect project, financial and resource data from across the enterprise and roll it up into a concise, visual storyline for the C-suite—all the insight and information required for top-level, data-driven decision making.

Plan Strategically From the Top Down, Not Tactically From the Bottom Up

With the latest version of CA PPM, CA has introduced new capabilities that continue to elevate the solution above pseudo-portfolio management models designed for IT demand management. While IT demand must be serviced, the vast majority of outcomes realized through a highly focused demand management approach are iterative fixes that fail to drive innovation and offer minimal value to customers.

Even if portfolio management starts with leadership-driven goals and objectives, when project execution is driven by low-level operational challenges like IT service tickets and departmental initiatives, the business shifts to a tactical, bottom-up approach. This dilutes the focus on innovation.

Most organizations know they cannot allow iterative fixes to dominate their business; they must implement and adhere to a top-down approach. This starts by communicating with stakeholders to define and prioritize the outcomes that will deliver the most benefit to the organization. These become business imperatives. They offer the most promise to organizations because they deliver the most value to customers. And they must always take precedence over IT demand management.

When it's not churning demand, your company is lighter on its feet, able to pivot on a dime and focused on projects that drive real innovation.

The New Features of CA PPM

At the center of the latest CA PPM release is the introduction of enterprise-level product portfolio management. CA is raising the bar by incorporating top-down investment planning capabilities into CA PPM for a comprehensive solution designed to drive better business outcomes and value across the organization.

You'll find a number of new features for users from product and project managers to financial and resource managers. But the true beauty of CA PPM is its ability to put actionable, high-value roadmapping data into the hands of business executives.

CA PPM maps funding to projects, illustrates where you are in the delivery process, and allows decision makers to evaluate existing projects against one another and against new possibilities as they emerge. It allows organizations to discover the best use of resources and identify the best possible direction for the business with real-time data.

Three Key Reasons PPM Requires Roadmaps

1. Planning should be quick and easy.

Traditional investment planning is cumbersome. Users are required to articulate project details—features, budgets, program investments, implementation and architectural plans, and team allocations—at a far too granular level just to get started. Time spent on the detailed planning of projects that may never happen can lead to organizational fatigue, and eventually to no meaningful planning at all.

Should an initiative be months out, users need to be able to get it on the roadmap and earmark necessary funding and work cycles without having to spend time detailing discrete capabilities or requirements. A roadmap integrated with investment planning allows organizations to prioritize initiatives based on value before they begin detailed planning.

2. Integrated project and portfolio management drives innovation.

Connecting current work with long-term vision—in effect, ensuring that the execution of initiatives aligns with long-term objectives—places the emphasis on innovation and broadens the realm of possibility across products and services. Integrated project and product portfolio management delivers:

- A top-down, integrated roadmap connecting capabilities being developed today with the anticipated needs of the future.
- Comprehensive investment management:
 - A complete picture of investments across multiple time horizons.
 - Integration of ongoing and planned work.
 - Visibility into the planned evolution of the product.
- Simplified, data-driven analysis of adjustments to the project portfolio:
 - Options and implications of adjusting execution, goals and objectives in an evolving environment.

3. Users need a single integrated vision of objectives.

Stakeholders need a method of visualizing and communicating a proposed set of objectives that are not yet ready for project managers to execute, but which require a common consensus. Today, many organizations use applications like Microsoft PowerPoint to prepare and present this content. But exporting and preparing the data can be tedious and time-consuming and does not allow for interaction between proposed initiatives and those already planned or underway.

The CA PPM roadmap feature serves as a communication vehicle. Users can easily view, pivot and sort investment information to get a clear picture of the projects being proposed, understand how those proposals will complement existing projects and ascertain the impact on current investment allocations. Together with the ability to visualize project dependencies, stakeholders gain a shared understanding of the work, which enables agreement on a common set of objectives.

The CA PPM Roadmap

There's no limit to the number or types of roadmaps that can be created in the CA PPM system. They might include product, architectural or feature roadmaps. Each roadmap includes multiple different views, including timeline view, board view and grid view. The user can toggle from one view to the next to access the information they need.

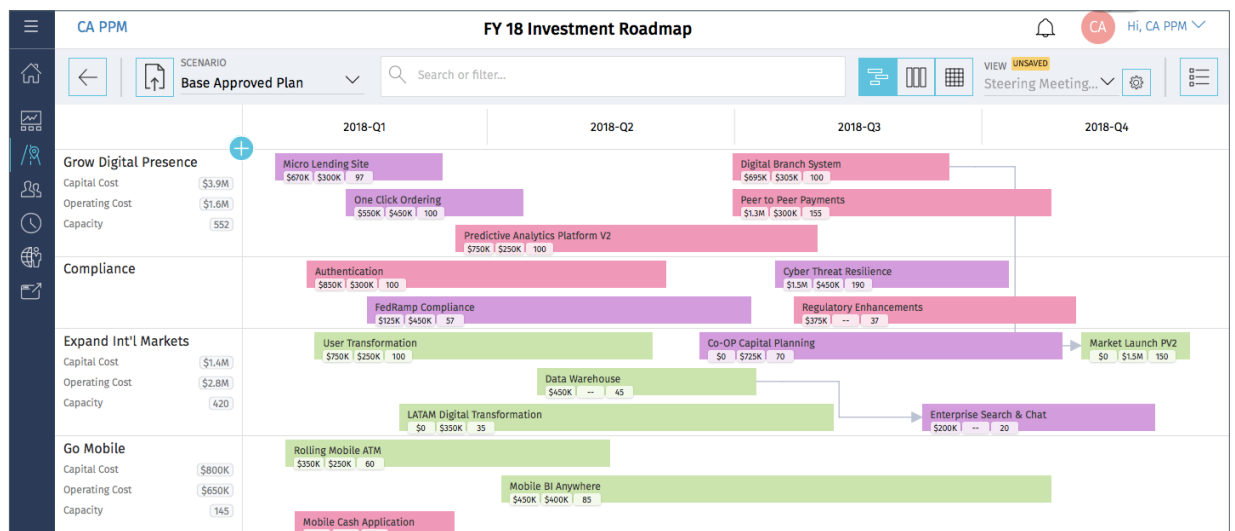
Roadmap timeline view

The timeline view allows users to visualize investment options by selecting a time horizon and pivoting between customizable categories such as executive sponsor, outcomes or project status. Information within can be color-coded to easily group and identify subcategories.

Because the roadmap owner frequently presents content to stakeholders, roadmap item details may be required. Accordingly, users may display up to three different attributes associated with a roadmap item, such as CAPEX, OPEX and Capacity, without leaving the page. They may also display dependencies and funding responsibilities for easy visualization.

Virtually all information associated with a roadmap item is available from within this view. Data can be filtered and dragged and dropped, and views can be saved for future reference.

FIGURE 1. Roadmap timeline views with configurable swim lanes can be colorized for displaying multiple dimensions, metrics and dependencies.



Scenario comparison

Within the timeline view, users also have the ability to compare baseline plans against the actual work in progress or against current quarter plans to see if they're in adherence or to identify specific factors that have changed since the original plan was approved.

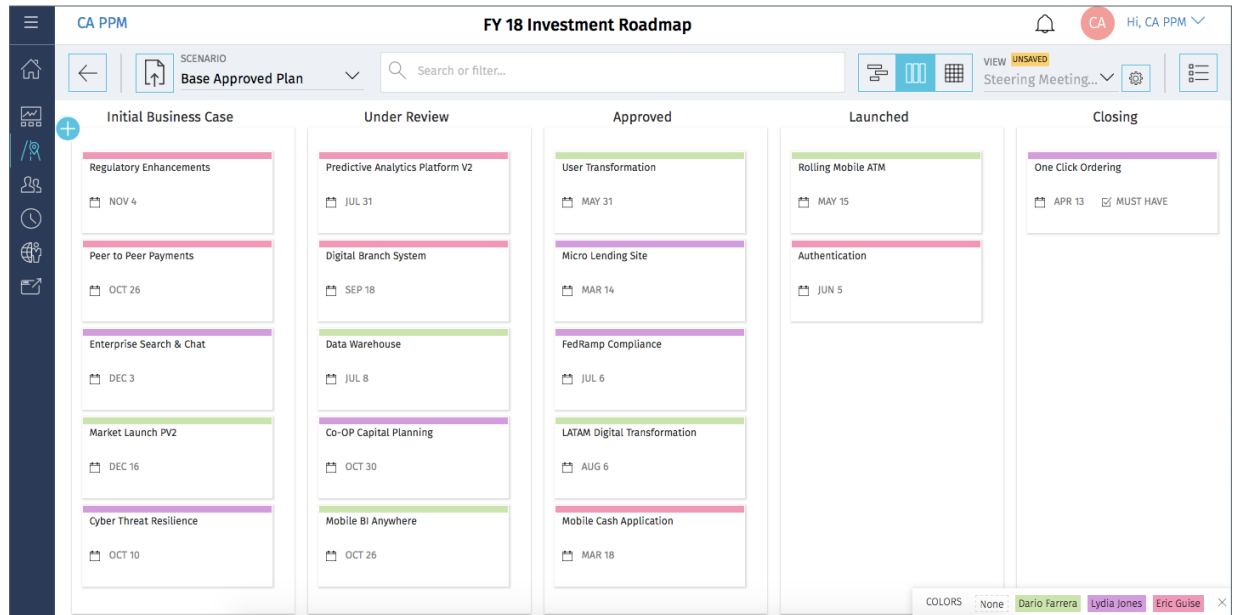
Additionally, users can compare baselines against a variety of different scenarios such as more capacity, additional funding or funding reductions. Users create different scenarios to evaluate how product development will be impacted by these changes.

Roadmap board view

Tasks are important, but managing them—keeping track of which have been assigned, which have been completed, who has accepted them and the status of each—can be a tedious process. The board view provides a clear, easy-to-use task management tool. Board view columns are defined by the roadmap item owner and might include status conditions like backlogged, on hold, pending, in flight, approved, etc.

A card representing each task is created and placed within any of the status categories to illustrate where each task is in its lifecycle. As status changes, tasks can be dragged from one category and dropped into another.

FIGURE 2. Investment roadmap within a board view, grouped by investments in lifecycle. Views can be easily grouped showing different criteria (e.g., by stakeholder).



High-value PPM tools that workers *want* to use

In recent years, easy-to-use consumer technologies have shifted user expectations in the enterprise. Business apps are now expected to be as simple and intuitive as those found on mobile phones. If they can't be mastered quickly, users download their own alternatives.

PPM tools must also be reflective of the way people work today. They must be social and allow for collaboration toward a unified goal. They must support a team-centric approach, and they must allow workers to operate with a greater degree of autonomy. But they must also continue to provide the powerful oversight and governance necessary to ensure resources are optimized to drive value.

CA PPM's improved user interface simplifies and streamlines the way people work now. This ensures user adoption and a pleasurable experience working in ways they want to work. It's more social, more team-centric and easier to use. And it continues to provide the approvals, oversight and governance necessary for managing a large portfolio.

Roadmap grid view

The grid view provides a mechanism for constraint-based planning. Most users begin the planning process with must-have items. These typically consist of carry-over items from the previous development cycle, compulsory compliance-related issues and items that are considered "essential."

Once must-haves are in place, they can be run against one or many constraints (such as budget or ROI) to illustrate what can and cannot be accomplished under the selected constraint parameters. Managers can see, for example, exactly what projects can be completed within a budget number they've entered as a constraint.

Leveraging spreadsheet-like technology, users may filter out specific columns, pivot and organize roadmap items using a "group by" feature. This is a particularly powerful tool when it comes to selecting between investment options.

FIGURE 3.

Investment roadmap in a grid view. Leveraging spreadsheet-like technology, users may filter out specific columns, pivot and organize roadmap items using a "group by" feature.

In Plan	Rank	Roadmap It...	Must Have	Start	Finish	Capacity	Total Cost	Capital Cost	Operating C...	Benefit	Sponsor
<input checked="" type="checkbox"/>	1	Authentication		Feb 01 2018	May 31 2018	100	1,150,000	850,000	300,000	0	
<input checked="" type="checkbox"/>	2	Cyber Threat ...	Required	Jul 25 2018	Oct 25 2018	190	1,950,000	1,500,000	450,000	0	
<input checked="" type="checkbox"/>	3	FedRamp Co...	Required	Feb 01 2018	Jun 27 2018	57	575,000	125,000	450,000	0	
<input checked="" type="checkbox"/>	4	Regulatory E...	Required	May 26 2018	Sep 07 2018	37	375,000	375,000	0	0	
<input checked="" type="checkbox"/>	5	User Transfor...		Apr 18 2018	Jun 27 2018	100	1,000,000	750,000	250,000	0	
<input checked="" type="checkbox"/>	6	Co-OpCapital...		Jun 10 2018	Sep 30 2018	70	725,000	725,000	0	0	
<input checked="" type="checkbox"/>	7	Data Wareho...		May 01 2018	Jun 30 2018	70	450,000	450,000	0	0	
<input checked="" type="checkbox"/>	8	LATAM Digital...		Feb 15 2018	Aug 01 2018	35	350,000	350,000	0	0	
<input checked="" type="checkbox"/>	9	Market Launch		Nov 06 2018	Dec 05 2018	150	1,500,000	1,500,000	0	0	
<input checked="" type="checkbox"/>	10	Rolling Mobil...	Carryover	Jan 30 2018	Apr 28 2018	60	600,000	350,000	250,000	0	
<input checked="" type="checkbox"/>	11	Mobile BI Any...		May 21 2018	Nov 20 2018	85	850,000	450,000	400,000	0	
<input checked="" type="checkbox"/>	12	Mobile Cash ...		Feb 01 2018	Mar 20 2018	50	600,000	350,000	250,000	0	
<input checked="" type="checkbox"/>	13	Enterprise Se...		Sep 01 2018	Nov 30 2018	20	200,000	200,000	0	0	
<input checked="" type="checkbox"/>	14	Predictive An...		Feb 20 2018	Jul 21 2018	100	1,000,000	750,000	250,000	0	
<input checked="" type="checkbox"/>	15	Peer to Peer ...		Jul 07 2018	Dec 21 2018	155	1,600,000	1,300,000	300,000	0	
<input checked="" type="checkbox"/>	16	Digital Branc...		Jul 06 2018	Sep 06 2018	100	1,000,000	695,000	305,000	0	
<input checked="" type="checkbox"/>	17	One Click Ord...		Feb 02 2018	Apr 17 2018	100	650,000	550,000	100,000	0	
<input checked="" type="checkbox"/>	18	Micro Lendin...	Carryover	Jan 21 2018	Apr 01 2018	97	670,300	670,000	300	0	

Roadmaps can be personalized with pick lists that allow users to save views and return to them as necessary.

Enhancements for Financial Management

Financial managers often struggle to perform the simple tasks necessary to ensure the financial health of both the project and the overall portfolio. Recently, CA has been focused on facilitating core financial management activities.

We've simplified the duties of the financial manager with the ease and familiarity of Microsoft Excel® spreadsheet functionality, embedded communication and collaboration features, and included direct links to the industry's most popular reporting and business intelligence tools. Our goal has been to equip financial managers with the visuals they need without requiring reconfigurations or multiple reports.

The most recent upgrade includes end-to-end financials for cost plans. Financial managers can now create new cost plans, update existing ones, select from among multiple attributes, copy and paste existing cell data and insert or remove data by row.

With CA PPM, financial managers get visibility deep into projects, perform thorough cost-plan analyses, drill down into transaction details and manage data like never before—all from within the solution and with the ease of a spreadsheet.

FIGURE 4.

Cost plans: Easy to use. Easy to configure. Easy to update. Excel-type functionality.

Group By	2018-01	2018-04	2018-05	2018-06	2018-07	2018-08	TOTALS
Cost Type*	Resource*	Transactio...	PLANNED	PLANNED	PLANNED	PLANNED	PLANNED
Operating	Mike Sampson	Internal Labor	82,160	0	0	0	367,600
Operating	Jason Berry	Internal Labor	18,720	0	0	0	62,400
Operating	Valerie Child...	Internal Labor	10,240	0	0	0	83,200
Operating	Henry Reed	Internal Labor	18,000	0	0	0	54,000
Operating	Sean Evans	External Labor	28,800	19,200	8,000	0	104,000
Operating			6,400	10,240	8,960	0	64,000

Enhancements for Project Management

The ultimate goal of an effective PMO is to deliver superior outcomes based on solid business decisions. In order to deliver, project managers need tools that cohesively bring elements together in a searchable collection of insights, metrics and notifications—without having to export data to external apps.

With each new release, CA PPM facilitates the project manager's need to answer key questions. Recently, we introduced the ability to create multiple organizational breakdown structures (OBS) inside CA PPM. Now users can connect an editable OBS to a project blueprint, aligning the project with a part of the business for simplified reporting.

We've also added filtering to the project tiles page and task board, providing additional flexibility for users to sort based on either predefined filters or through a text search. Users may, for example, search on an OBS to find all the projects associated with it, or search all projects assigned to a team member.

A final new feature of CA PPM is powerful functionality designed to further increase visibility. The "risks, issues and changes" page allows users to categorize risks and visualize them in a grid-like capacity to show associated attributes and provide for in-app communication between members trying to address these issues.

CA PPM: Innovation for the Digital Enterprise

Business capabilities have transformed tactical scheduling and timesheet management tools into one of your organization's most valuable strategic weapons. They help to:

- Prioritize and manage project investments across the entire organization.
- Improve decision making with real-time modeling and forecasting.
- Understand and assess what's going on inside your projects through multiple views of the data.

CA PPM is a mature solution that delivers actionable business intelligence. Its seamless integration with the world's most popular BI tools as well as integration with CA Agile Central combine to reach beyond project, resource, vendor and financial management to provide business intelligence for executive decision makers.

CA PPM, available both on premises and as a SaaS model, supports innovation, new product development and software project management for many of the world's largest and most successful organizations. Recognized by analysts as a leader in the space, CA PPM remains unmatched by any other solution on the market today.

Bottom Line

Bare-bones, low-cost PPM solutions are coming into the marketplace. Carefully consider whether you need a PPM solution that is only capable of providing low-level functionality for the project manager, or if your organization could benefit from PPM technology that provides 360-degree optics across your organization, delivers actionable business intelligence and enables extensive modeling and forecasting capabilities to make data-driven business decisions. Do not take the decision lightly.

To learn more about CA Project & Portfolio Management supports financial management, visit ca.com/PPM.

Connect with CA Technologies



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.

