Ensure Confidence with CA Project and Portfolio Management (CA PPM)

Understand value from strategy to portfolio to execution
Executive Summary

Challenge

In today’s application economy, your company’s competitive advantage is contingent on its speed to market with the next best thing. But, how do you know if the next best thing is the right thing for your business? How do you know if that thing or project aligns with your strategic vision? What’s the potential return on investment and over what period? What resources—human and financial—are required to deliver this project? What risks does the project introduce and how can these be managed? And what is the relative priority of this project against other active projects or those in the pipeline?

While these are basic questions that should be asked and answered before undertaking any new initiative, few organizations have the project and portfolio management maturity and capability to do so with any level of confidence.

That’s because, for many companies, insights are often hidden in various work teams and data silos; initiatives are selected based on subjective data or the loudest executive; and work is rarely tracked and measured against desired business outcomes.

Opportunity

What if you could make smarter enterprise portfolio decisions on where to invest finite resources to ensure they are doing the right things at the right times in the market for the best return at an acceptable level of risk? With CA Project & Portfolio Management (CA PPM), you can.

Benefits

When you use CA PPM, you’ll make quicker, more strategic decisions. You’ll terminate projects that cost more than they’re worth, discontinue services that don’t meet business needs and reallocate funds and resources from redundant or underutilized applications to new ideas. You’ll know exactly what innovations will meet your customer’s demands, and to be ready to execute on them at a moment’s notice. This is what it means to ensure confidence. And this is how you turn your organization into an innovation engine that drives your business forward.
Section 1:
Challenges

These days, it’s nearly impossible for executives to gain the complete visibility into their investment portfolios that they need to make sound, strategic decisions. That’s because managers use non-integrated, disparate systems and inefficient processes to track and report on progress, making insights difficult to find. Often, they must make choices based on hunches rather than on real-time metrics, available funding or resource constraints. What’s more, aspirational plans of the business, such as application rationalization, new capital investments and digital transformations, aren’t converted to realistic delivery scenarios. Subsequently, work teams aren’t allocated and aligned to these priorities, and never achieve the desired business outcomes and strategic benefits.

This lack of integration, visibility and alignment makes it challenging to answer these questions:

What am I investing in today?
Driving tomorrow’s success hinges on understanding today’s investments. Without a comprehensive inventory of your investments, from development projects to your application portfolio, you can’t begin to transform them. Numerous organizations’ overlapping projects and time investments can seem too complex to manage, and the value even more difficult to quantify.

Where are my resources?
Many teams aren’t able to pinpoint what their resources are working on now, or what they’re scheduled for later. This leads to difficulty in simply matching capacity with demand—in other words, simply maintaining, not scaling. If you’re struggling to keep up, how can you find the resources for new innovations or business initiatives?

Where should I invest tomorrow?
It can be difficult to know which innovations are the most valuable to your business and which are just distractions. If you had the capacity to focus on delivering innovations, which initiatives would you choose? Figuring out what improvements your business needs or even what your customers want from you can be a struggle at times. Without direct input from your customers and defined plans for new initiatives, innovations are at risk of failing.
Section 2: Opportunity

Imagine what you could do by unlocking more insights, planning better investments and driving faster results. You’ll work smarter when you gain insight into every aspect of your portfolio—including your investments, projects, products, services and resources—to unleash the productivity of your organization. You’ll be empowered by a comprehensive view of your investments, initiatives and resources with complete transparency into costs and status. You’ll identify which investments and projects are being executed correctly and aligned with the priorities of the business. And, most importantly, you’ll shine a spotlight on investments that aren’t paying off and resources that would be better used on other business initiatives.

Change is so rapid today, and taking the opportunity to understand, plan and prioritize faster can be your competitive advantage. With the ability to go beyond “keeping the lights on,” you’ll find the capacity and scale to execute. Intelligent resource utilization, clear understanding of requirements and alignment to strategic portfolio goals allows you to bring new products and services to market faster. As a result, you’ll transform your organization and grow it in ways you never thought possible.

The CA PPM solution enables you to:

- Create and manage strategic portfolio plans across the business, such as IT, finance, human resources, research and development, sales and marketing.
- Deliver new products and services to market across any industry, such as high tech, health care, financial services or the public sector.
- Manage projects with best practices and governance, but with a work style best suited for today’s user expectations.
- Execute projects across traditional and agile methods.
- Gain insights into demand, resources and financials to know when and where to change or stay the course.

Organizations typically look to niche software solutions or homegrown applications to manage this information and data. Often, these tools are restricted by silos, not integrated and require massive effort to accumulate data. However, organizations taking this approach will miss the opportunity to use one solution to act as the decision-making engine to help them work smarter and innovate faster. These market changes have increased your need for the CA PPM solution to minimize risk and accelerate innovation.
Section 3:
Capabilities

Make smarter portfolio decisions: portfolio management

CA PPM gives you all the tools you need to align your strategic investments with your corporate goals, bringing you the highest return on the use of your limited resources. You can create a strategic enterprise portfolio to drive your long-term goals and leverage top-down planning, model what-if scenarios, create business cases and proposals, as well as forecast demand.

With CA PPM, it’s easy to create, prioritize and evaluate investments against your own metrics, such as return-on-investment and break-even analyses. CA PPM provides you with a complete set of tools and reports that empower you to make smarter portfolio decisions about investment mix, project selection, timing, execution, sourcing, performance and anticipated outcomes.

Optimize your sources: resource management

CA PPM enables you to gain optimal results from your most valuable asset—your people. To speed time to execution and balance resource capacity with strategic demands, you need comprehensive visibility of resource allocation and availability across all active and scheduled projects—in real time—to enable immediate resource shifts and meet changing demand.

Project or resource managers can see project history to identify experienced resources and can schedule project plans based on the best available resources. They can see the availability of non-project members and assign them directly to tasks. CA PPM helps you work smarter by department, geography, project type, resource role or skill set.
Align and prioritize your investments: financial management

CA PPM provides the ability to manage long-term forecasts and short-term cost plans and budgets, while interfacing with ERP systems and financial tools. Capitalized expenditures are separated from expenses, and project costs can be distributed equitably across business units and departments for appropriate reporting and compliance.

Long-term forecasts can include financial estimates for anticipated roles, which are modified as the plan moves into execution. This gives you the visibility and opportunity to make financial decisions in time to impact project results. CA PPM allows you to view the financial aspects of your entire portfolio, acting as the decision engine to align and prioritize your investments with strategic aims.

Forecast and manage your budgets: cost management

Regardless of where project transactions originate, CA PPM can capture costs and account for them, revising the real cost of each project against the planned budget. CA PPM provides all the necessary tools for accurate planning, tracking and analysis of the financial performance of key projects. Project managers can create budgets and update forecasts at the summary or detail level, including labor, expenses, materials and equipment categories.

As the project progresses, forecasts are updated with aggregated accruals and estimates, giving managers visibility into the rate of project completion for financial analysis and chargeback allocations. Project managers can govern status and cost of all projects in real time and see if they are on plan and within budget, driving fiscal responsibility to the level where it has the most impact.

Deliver flawless projects: project management

CA PPM helps you deliver projects efficiently and flawlessly with enterprise program and project planning, estimating, budgeting, resource allocation, collaboration and time capture—all the tools you need for project execution.

CA PPM supports any level of project planning, from the most basic to the most sophisticated. With just a few mouse clicks, project managers can create simple plans for collaboration and the tracking of key tasks and milestones, or detailed plans for capturing all of the information in a complex project. All project requirements, resource and cost accounting activities are fully integrated, allowing for seamless management throughout the project lifecycle.

Rather than starting from scratch, project managers can build their plans from predefined templates with methodologies such as PMBOK and PRINCE2.

Speed project delivery: understanding agile execution

CA PPM addresses the unique project and resource management needs for agile teams. Customers have full visibility into the deliverables, costs and resources being executed in an agile method, allowing you to make informed resource allocation decisions required of agile teams.
With CA PPM, team collaboration is simple. Integrations into agile lifecycle management solutions like CA Agile Central (formerly Rally Software™) or other third-party systems provide a system of record for teams to exchange information, which means team members can find relevant information on user stories and status updates without searching through endless emails.

CA PPM delivers an accurate picture of agile project costing, deliverables and resourcing. Further, it delivers enterprise visibility into agile projects alongside traditional projects, providing the industry’s most complete and proven project and portfolio management solution.

Maximize the value of your applications: application portfolio management

Over time, your business may have accumulated a wide assortment of applications, which may now be redundant, underused or obsolete. Some may be out of alignment with your company’s strategic platform direction or out of compliance with policies. Others may even be complicating business processes. Lack of governance of these applications can slow down business and increase IT costs.

With CA PPM, you can build a complete inventory of your applications. And with detailed data on the risk, business value, costs, cloud suitability and technical condition of each application, you can make rationalization decisions about the future of applications in the portfolio. For example, applications may require update or expansion, or redundancies could exist.

CA PPM provides a set of predefined forms, content and configurations that walk you through the rationalization of your application portfolio, using surveys to assess risk, business value, financials, cloud suitability, technology fit and other factors. The solution then presents the information visually on a dashboard to enable fact-based portfolio decisions. Efficiencies in resources and budgets can be obtained when applications can be retired, outsourced or moved to cloud-based environments.

Communicate success to executives: dashboards and reports

Business leaders use CA PPM to gain insights into investment performance, project status, resource utilization and program value and profitability. Visualization and interactive dashboards bring relevance to important decisions and allow decision makers to interact with the data to analyze information and assess what-if scenarios.

CA PPM reporting allows customers to add ad hoc reports and execute them immediately or on a schedule. You can run and view reports in real time and save and back up reports in PDF, Rich Text Format (RTF), Microsoft® Word or Excel®. This capability is designed to record important data, execute reports on a regular schedule and back up the results.

Dashboards provide a visually rich and interactive approach to analyzing data and gaining further insights. Visualizations can display real-time CA PPM data outside of the solution, such as from a PowerPoint® presentation, Word document and more. Configurable dashboards allow individual users to create and manage dashboards to their liking and share information with other users.
Section 4:

Benefits

Move forward with confidence

With CA PPM, you can let the data tell the story by analyzing investment portfolios. Set the course by aligning projects and resources with business strategy. Continually evaluate and evolve projects, products and applications, so you don’t skip a beat.

By identifying under-performing projects, low-value investments, unnecessary costs and underutilized resources, you have the opportunity to make transformative changes. You can prove your competitiveness to the business and to your customers by streamlining processes, increasing efficiencies and reducing costs. And by understanding what your customers want, you can leverage your increased capacity to drive your business through innovation.
The CA Technologies Advantage

The CA PPM solution from CA Technologies is the industry standard in project and portfolio management solutions. We have decades worth of experience using our best-practice accelerators that ease your deployment, speed your time-to-value and reduce your risks. With industry-leading global support, world-class user education and built-in training tools, you can cut your training time in half, reduce the burden on your support staff and increase user adoption. Integrations are available to ERP systems, HR and user management systems, as well as application lifecycle management (ALM) integrations across a wide array of third-party business applications, including CA Agile Central. More importantly, you can join a global community of thousands of CA PPM users to share ideas, collaborate on the roadmap, see product demonstrations and exchange best practices. And finally, with delivery options that include SaaS, hosted and traditional on-premises, you can choose the approach that’s right for you.

Learn more about how CA PPM can help you manage your entire enterprise portfolio with confidence at ca.com/ppm.

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.