

Unlock the Power of Data—and the Power of Your Organization

PPM + BI = Success Through Reliability, Security and Confidence

Integrating a modern, powerful BI solution with a PPM suite creates a springboard that can take an organization to the next level driving project execution in a different way.

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The Need for Business Intelligence

Project portfolio management (PPM) software suites have evolved significantly in just the last few years. No longer simply straightforward task-consolidation tools, they have become powerful enterprise solutions capable of everything from investment planning and management to collaboration and workflow automation across concurrent initiatives.

However, in one crucial aspect—reporting—they have changed very little.

Reports today look more impressive, of course. Thanks to the increased amount of information captured, they are more detailed and feature better visuals, such as heat maps instead of simple traffic lights. Dig deeper, though, and it's clear that fundamentally, these reports are still little more than data summaries.

Years ago, that was fine. PPM solutions were reactive tools, designed to provide analysis of things that had already happened and help managers address related problems.

But it's not enough anymore. Today's projects are being recognized as the delivery arm of strategy, and a tactical summary of previous events doesn't help organizations move forward. What happened is still important, but it's just as vital (or more so) to know why it happened, what it means and what needs to be done.

Organizations need more than just reporting. They need business intelligence.

Business Intelligence: Connecting Strategy and Execution

Business intelligence (BI) tools have evolved, too. Far more than powerful analytics engines, modern BI is about end-user-driven visuals, with focused information from multiple sources, developed in an agile context. As Gartner puts it, "The BI market has shifted to more user-driven, agile development of visual, interactive dashboards with data from a broader range of sources. Data and analytics leaders should augment or upgrade traditional BI platforms to modern platforms that improve business value and speed time to insight."¹

Today's BI concepts are closely aligned with the modern approach to business management, one that is driving project execution in a different way. Successful organizations now connect strategy and execution through effective portfolio management, utilizing business intelligence to identify opportunities and competitive threats, and quickly pivot to address them as soon as they arise.

To effectively provide those insights, however, a BI solution needs the right data—the kind of data generated by PPM tools. That's why the integration of BI and PPM is so important.

And it's why CA Project & Portfolio Management is so powerful.

Understandable Data = Useful Data

Leading BI tools deliver on the goals Gartner identified, and they are already mobile-enabled, allowing all users in all environments to access valuable information without touching underlying source systems. This continues to evolve; for example, Microsoft® Power BI® integrates with the company's intelligent personal assistant, Microsoft Cortana®, offering engagement and ease of access that was unthinkable just a few years ago.

This ease of access doesn't automatically release the power of information for stakeholders, however. Even a powerful BI tool with an overly complex data model can result in bottlenecks.

For maximum impact, an integrated PPM solution with BI capabilities must feature powerful business intelligence and the right data model. It needs a built-for-purpose reporting warehouse that recognizes your security and automatically incorporates all custom fields. And most important, it has to be simple enough that your information is available—and understandable—for anyone who needs it.

CA Project & Portfolio Management is the only solution that delivers it all.

Quickly Move from Insight to Action

Modern strategy execution is where integrated BI and PPM solutions really shine. According to Forrester Research, "the new generation of embedded BI technologies places insights and analysis within business processes—the fastest path from insight to action."² For organizations seeking business agility, this is critical. Any tool that can shorten the time between the recognition of a need to change and the implementation of that change will soon prove to be invaluable.

Historically, delays between insight and action have been caused by two distinct factors:

- Inertia that prevents an organization from adapting quickly to shifting circumstances
- A lack of confidence in determining the right change to make, combined with the fear of making the wrong decision

BI-driven PPM helps overcome inertia by providing greater transparency into the disruption that changes are causing. It also assists project teams and the PMO in supporting change through greater visibility, better understanding of the specific disruptions caused and, by extension, improved support models.

The transformational value of an integrated solution, however, comes in support of the second factor: the lack of confidence that the right change is being pursued.

Here, BI allows for analysis of PPM's robust project data to move beyond an understanding of what has happened, why it occurred and what it likely means for future performance. BI provides insight into what should be done: prescriptive analysis that provides solid decision support for leadership and inspires confidence that the decisions made are the right ones.

The ability to make decisions more quickly—and know they're the right decisions—makes an integrated BI and PPM solution a key factor in business agility.

Impact Across the Entire Organization

How does integrating PPM and BI unlock so much potential? Consider a real-world example:

An executive team is conducting a portfolio review with the Project Management Office (PMO). But with CA Project & Portfolio Management (CA PPM), instead of using a PMO dashboard focused on triple constraints, the team can see performance information based on the criteria important to the organization. The CFO can see cost information against plan and current projections, and when costs are becoming problematic, drill down to specific elements and causes. Product teams can see forecasts for when new releases will be available to them, so they can plan with sales and marketing in real time and tailor their go-to-market strategy accordingly. This, in turn, generates more information for the CFO to consider on the benefits side of the financial ledger.

Meanwhile, the CEO is able to drive discussions around different potential approaches to a newly identified developing market opportunity, while all stakeholders can see how each of the proposed options will impact current and planned initiatives. All of this can happen in a single meeting, with seamless shifting from summary to details—and with graphics that minimize the need for interpretation. With Cortana's augmented-intelligence functionality, no one needs to get up from their seat, and each stakeholder can drive their own part of the analysis. After the meeting, everyone can review the information again on mobile devices while traveling to their next meeting, or from their laptops back in the office. And they never need to log in to the underlying PPM solution or even understand any of its functionality.

The ability to offer a truly integrated solution—with a modern BI tool sitting on top of a PPM data warehouse—opens up a level of management control and capability never before possible.

Organizations can tailor and customize CA PPM for their own use, creating fields that allow them to view projects by their own unique segmentation and filtering. Trained project and portfolio professionals can understand the causes of events and trends, and provide decision support analysis. Leaders can easily assess the benefits and implications of alternative approaches. And it doesn't require advanced data analysis skills.

This might sound like a fantasy. But it is the future of world-class PPM solutions.

Significant Benefits—and Significant Savings

In addition to all its other benefits, there is a strong cost-containment argument to be made for a true integration between BI and PPM solutions as well.

"Don't underestimate the value of optimized data for ad hoc reporting," Treb Gatte of Tumble Road LLC noted. "A typical department creates 50 ad hoc reports a year, expending 32 hours of effort and spending \$6,200 per report. 70 percent of the effort is spent writing queries and cleaning up the suboptimal data."

Gatte goes on to point out that "Optimized data and the right reporting tool significantly reduced ad hoc reporting effort, which can result in cost savings up to \$200,000 a year." That's likely a conservative number, but it speaks to the speed with which these solutions pay for themselves.

Conclusions: A Springboard to the Next Level

Integrating a modern, powerful BI solution with a similar PPM suite creates a springboard that can take an organization to the next level in several key areas:

- **Project performance metrics** — Instead of a simple record of what happened, build a roadmap for what needs to happen.
- **Dashboards and reports** — Move from static historic records to dynamic and interactive indicators of the future.
- **Project information** — Trust and leverage key data to support the business decisions most crucial for success.
- **Universal access** — Information is not limited to the project or PMO team's view of what will be shared and when. Instead, it is available at all times to all users, in all formats and at all levels of detail, and can be presented in the way each individual consumer desires.

PPM software solutions will continue to evolve, just as the evolution of business management is driving significant change in PMOs and portfolio management. When considering the needs of today's agile business, however, a wider view of the role of PPM is necessary.

Core functionality enhancements are important, to be sure, but on a greater level, these solutions must facilitate improved enterprise performance. And increased access to clear, useful information is often overlooked—even though it is vital for leaders, managers and team members to make better decisions in reaction to real-time conditions.

For any organization seeking to increase its agility, streamline workflows and ultimately thrive in today's ultra-competitive environment, an integrated project portfolio management solution isn't a luxury—it's an absolute necessity.

To learn more about CA Project & Portfolio Management, and how better business intelligence combined with powerful PPM can help your organization, visit ca.com/PPM

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1 Cindi Howson et al., Gartner Inc., "Critical Capabilities for Business Intelligence and Analytics Platforms," March 2, 2017.

2 Boris Evelson and John R. Rymer, Forrester Research, Inc., "The New Generation of Embedded BI Will Close the Insights-to-Action Gap," April 11, 2017.



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