

Turning Ideas into Business Outcomes

Modern PPM Tools 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.

Clarity 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.

Modern solutions like Clarity PPM continue to raise the bar above last-generation IT demand management tools with new features to help organizations transition from traditional project management to digital outcome management.

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 Clarity PPM continue to raise the bar above last-generation IT demand management tools with new features to help organizations transition from traditional project management to digital outcome management.

For the enterprise, Clarity PPM maps all the underpinning components comprising the business' digital products, such

as check-in kiosks at airports, checkout systems at retail stores or HR portals at work. Connecting work, teams and budgets to digital products gives executives the 360-degree visibility required to make smart business decisions.

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

With the latest version of Clarity 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 Clarity PPM

Clarity PPM is the first project portfolio management solution to combine strategic roadmapping with work, teams and financial planning. Mapping the underpinning components to the digital products, ensures stakeholders prioritize investments based on commercial outcomes.

Instead of one-off projects, you now continuously manage – via releases and maintenance – all the underlying software, services and processes comprising the digital product. By funding digital products, rather than individual departments or projects, you get clarity on the costs, benefits and ROI of your investments.

You'll also find a number of features for product and project managers to financial and resource managers. But the true beauty of Clarity PPM is its ability to put actionable, high-

value roadmapping data into the hands of business executives.

Three Key Reasons PPM Requires Roadmaps

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.

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. Mapping individual projects to sustainable digital products enables:

- 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.

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 Clarity 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 based on business benefits.

Clarity PPM Roadmaps

There's no limit to the number or types of roadmaps that can be created in the Clarity 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.

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.

Figure 1: Roadmap timeline views with configurable swim lanes can be colored for displaying multiple dimensions, metrics and dependencies.

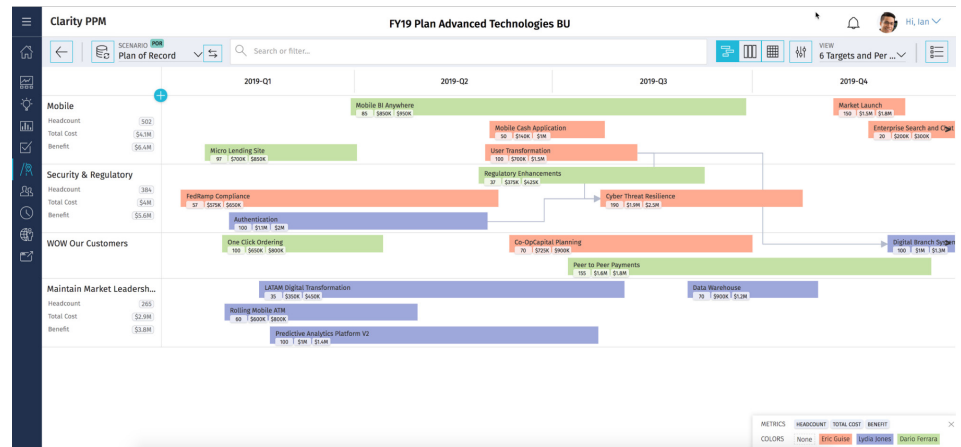
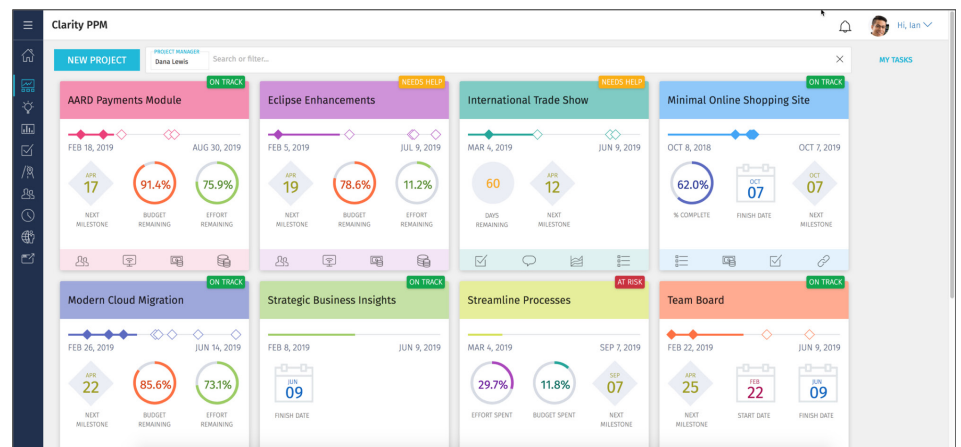


Figure 2: Investment roadmap within a board view, grouped by investments in lifecycle. Views can be easily grouped showing different criteria (for example, by stakeholder).



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.

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.

Configure the investment types to fit the way your organization operates – some call it investments or products, others use projects and programs. Then filter out specific columns, pivot and organize roadmap items into groups.

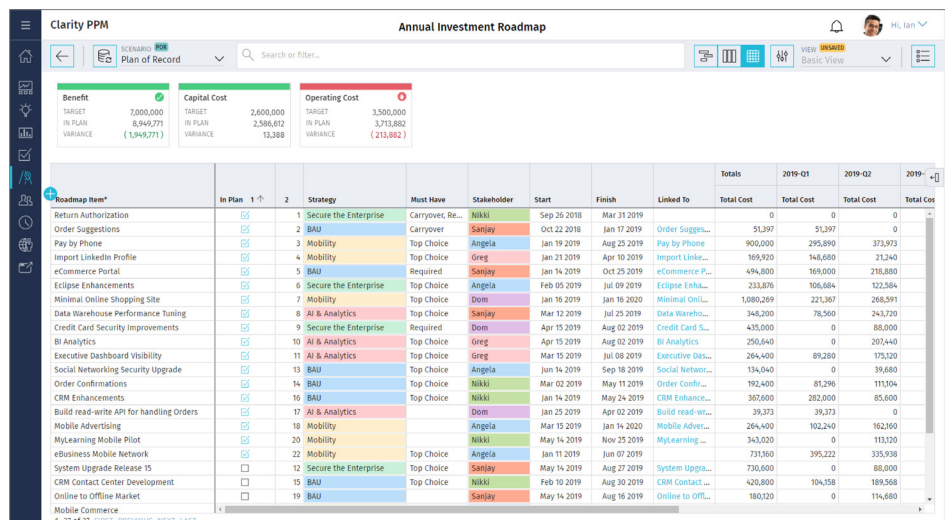
Roadmaps can be personalized with pick lists that allow users to save views and return to them as necessary.

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

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.



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 configurable fiscal periods and 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 Clarity 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.

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, Clarity PPM facilitates the project manager’s need to answer key questions. Recently, we introduced the ability to create multiple organizational breakdown structures (OBS) inside Clarity 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 Clarity 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.

Clarity 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.

Clarity PPM is a mature solution that delivers actionable business intelligence. Its seamless integration with the world’s most popular BI

Figure 4: Cost plans: Easy to use. Easy to configure. Easy to update. Excel-type functionality.

Cost Type	Resource	Transaction	2019-03				2019-04				TOTALS			
			PLANNED	ACTUAL	REMAINING	% SPENT	PLANNED	ACTUAL	REMAINING	% SPENT	PLANNED	ACTUAL	REMAINING	% SPENT
Capital			106,684	48,320	58,364	45%	102,396	14,240	88,156		233,076	62,560	171,316	27%
Operating			92184	33,060	64,124	34%	94,896	14,240	80,656		212,376	47,300	165,076	22%
	Computer	Software	5,000	0	5,000	0%	3,000	0	3,000		8,000	0	8,000	0%
	Sage Copeland	Internal Labor	0	4,000	(4,000)	0%	0	0	0		0	4,000	(4,000)	0%
	Karl Abbott	Internal Labor	1,500	1,980	(680)	132%	1,500	0	1,500		4,500	1,980	2,520	44%
	Rory Walker	Internal Labor	1,500	2,680	(6180)	512%	1,500	0	1,500		4,500	2,680	(3180)	171%
	Sam Rubio	Internal Labor	0	1,600	(1,600)	0%	0	0	0		0	1,600	(1,600)	0%
	Tanner Grant	Internal Labor	1,500	0	1,500	0%	1,500	0	1,500		4,500	0	4,500	0%
	Barb Hudson	Internal Labor	2,464	0	2,464	0%	2,464	0	2,464		5,040	0	5,040	0%
	Dana Lewis	Internal Labor	4,928	0	4,928	0%	4,928	0	4,928		10,880	0	10,880	0%
	Grace Thomas	Internal Labor	3,520	0	3,520	0%	3,520	0	3,520		7,200	0	7,200	0%
	Karl Abbott	Internal Labor	4,224	2,340	1,884	55%	4,224	1,440	2,784		8,640	3,780	4,860	44%
	Leigh Clark	Internal Labor	14,640	0	14,640	0%	10,560	0	10,560		25,680	0	25,680	0%
	Logan Everett	Internal Labor	18,480	0	18,480	0%	18,480	0	18,480		37,800	0	37,800	0%
	Mark Montoya	Internal Labor	2,464	0	2,464	0%	2,464	0	2,464		5,040	0	5,040	0%
	Ray Fowler	Internal Labor	5,632	0	5,632	0%	5,632	0	5,632		27,036	0	27,036	0%
	Sage Copeland	Internal Labor	3,520	0	3,520	0%	3,520	0	3,520		7,200	0	7,200	0%
	Sam Rubio	Internal Labor	7,040	0	7,040	0%	7,040	0	7,040		14,400	0	14,400	0%
	Sara Sumner	Internal Labor	14,784	0	14,784	0%	16,576	0	16,576		32,480	0	32,480	0%
	Thomas Grant	Internal Labor	4,472	0	4,472	0%	4,472	0	4,472		11,520	25,600	(14,080)	222%

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.

Clarity 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, Clarity 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 allows you to transition smoothly to a digital product-centric organization. Do not take the decision lightly.