



# Five Factors to Consider When Selecting a Project Portfolio Management (PPM) Solution

The modern enterprise engages in thousands of projects each year. Unfortunately, many companies lack the ability to align these projects with company goals and business strategies. Project Portfolio Management (PPM) platforms can help create business value by better aligning investments with company goals through improved resource management and visibility for business initiatives. PPM solutions have the potential to transform business execution and to provide executives, stakeholders, and project teams with new ways to collaborate and get work done more productively and effectively.

## **Five Factors to Consider:**

1. Strong Portfolio Management
2. Application Portfolio Management
3. Flexible Reporting & Actionable Analytics
4. Robust Financial Management
5. Enterprise Scalability

If your team is considering investing in a PPM solution, such as CA PPM, Planview Enterprise, ServiceNow PPM, or Clarizen, you should consider the following five factors before deciding on the optimal platform for you:

1. Does the PPM solution have *strong portfolio management capabilities*?
2. Does it support *deep application portfolio management*?
3. Does the PPM solution ensure *flexible reporting and actionable analytics*?
4. Does it have *robust financial management capabilities*?
5. Can the PPM solution enable *enterprise scalability*?

After interviewing users of each of the four above-mentioned PPM solutions, Apprize360 found that CA PPM meets all five of these solution selection criteria. CA PPM is a collaborative enterprise PPM solution that allows users to manage their entire innovation lifecycles and make more informed project strategic investment decisions.

In more detail, the factors to consider when selecting a PPM solution include:

1. **Does the vendor support strong portfolio management?** *Does the PPM solution help you align your strategic investments with your company goals? Is the PPM solution flexible enough to create stakeholder-specific portfolios that have variable projects, assets, applications, resources, and services?*

In portfolio management, it is important to align your project investments with your corporate goals. A modern PPM solution provides users with a structured environment to establish portfolio criteria, develop plans and “what-if” scenarios, and communicate strategic decisions to stakeholders. A modern PPM solution also enables a detailed analysis of project performance with the ability to understand true project costs and benefits. In addition, enterprises often create projects that require investments that reside in more than one portfolio. For example, a stakeholder may need to create an investment from a single budget that is dispersed and accounted for across multiple projects in more than one portfolio. CA PPM can support this use case by enabling the addition of a single investment across multiple portfolios. Other portfolio management considerations supported by CA PPM include:

- **Portfolio Modeling & Analysis:** Multiple hierarchical portfolio types, standard evaluation metrics, unlimited custom fields, top-down and bottom-up budgeting, and the ability to segment portfolio data by different metrics (e.g. benefits or resource constraints).
- **“What-If” Scenarios:** Portfolio “what-if” scenarios, automatic scenario generation, scenario-based resource capacity planning, automatic portfolio content creation, and dynamic portfolio content refresh.
- **Portfolio Optimization:** Portfolio dependencies, scenario comparisons, and traceability down into projects from the portfolio level.
- **Portfolio Performance Assessment:** Portfolio scorecards, configurable thresholds, and exception filtering.

2. **Does the solution offer deep application portfolio management?** *Does the PPM solution support the ability to make fact-based decisions regarding the cost, complexity, and rationalization of applications?*

Modern enterprises must understand historical and proposed investments into enterprise applications. One problem with such applications is that, over time, a business can accumulate a wide assortment of applications, some of which may become redundant, under-used, obsolete, out of alignment with your

company's strategic platform direction, or out of compliance with policies. Other applications may even be complicating business processes. A lack of governance of these applications can slow your business down and increase IT costs.

Application portfolio management facilitates the collection of critical information, such as application utilization, to support the rationalization of new investments or the proposed deprecation of non-critical applications. Other aspects that should be considered include:

- Application Portfolio Modeling: Supports application inventories, the collection of utilization information from each application, and the grouping of applications into parent-child structures.
- Application Portfolio Metrics and Analytics: Includes application rationalization, portfolio scorecards, best practice content, and current–future state analysis.

### 3. Can the solution support flexible dashboard creation and reporting with actionable insights?

*Does the PPM solution provide for a “single source of truth” and deep, actionable insights into projects and portfolios?*

CA PPM supports easily configurable and shareable dashboards that leverage true business intelligence to support actionable business insights.

- Portlets and Dashboards: Interactive visualizations and portlets, including personalized portlets that are shareable with other users, stakeholders, and executives. Dashlets can be created to support specific management business objectives.
- Reporting: Role-based reporting and ad hoc and custom reports. Includes self-service reporting with extensive out-of-the-box and user-defined metrics.
- Out-of-the-box Actionable Metrics: Leverages integrated reporting and analytics to produce actionable insights aligned with business objectives and company KPIs.

### 4. Can the solution support deep, integrated financial management? *Does the PPM solution allow you to accurately capture expenditures, access historic information and generate actionable financial reports?*

CA PPM's financial management capabilities support comprehensive bottom-up and top-down budgeting and planning that integrate directly with CA PPM resource management.

- Labor and Non-labor Tracking: CA PPM gives you the ability to create a unified view of all of your projects and your entire portfolio, while also providing insights into team productivity.
- Vendor and Contract Management: CA PPM vendor dashboards provides visibility into vendor headcount, actuals and allocation amounts across the resource pool.
- Charge-back Allocations: CA PPM allocates percentage splits at the overall project or individual task level.
- Cost and Rate Management: CA PPM can maintain multiple rate matrices that establish billing and cost rates for labor, expenses, materials, and equipment in multiple currencies. These rate matrices can also accept forward-moving rate changes without changing historical data.

### 5. Can the solution support the complex and scalability requirements of the modern enterprise?

*Does the PPM solution offer multiple deployment options and support enterprise collaboration?*






CA PPM is one of the most complete solutions available today, with a focus on enterprise scalability for deployment, performance, and solution completeness. This includes:













































- Deployment Options: CA PPM is offered through multiple delivery options, including on-premise, cloud, and hosted.
- Collaboration Capabilities: Enables real-time collaboration and communication to improve team productivity and support better executive visibility of project activity, project status, and risks.
- Mobility: In-app time tracking via a single mobile application that supports both iOS and Android.
- Availability: Support for 100+ locales with user-defined languages.

## Conclusion and Findings

To better identify how CA PPM compares against other PPM solutions – ServiceNow PPM, Planview Enterprise, and Clarizen – Apprize360 interviewed over 25 current and former users of each of the solutions. Interviews and our internal assessment focused on each of the solutions ability to meet each of the five selection factors outlined above. In our assessment, we found that CA PPM met all five selection factors and provided capabilities to meet the modern enterprise’s project and portfolio management needs.

### Legend

|   |  |  |  |   |
|---|--|--|--|---|
|  Fully Present |  Partial Functionality (~75%) |  Partial Functionality (~50%) |  Minor Functionality (~25%) |  Feature Absent (0%) |
|---|--|--|--|---|

|  | CA PPM  | ServiceNow PPM  | Planview Enterprise   | Clarizen  |
|--|---|---|---|---|
| <b>Ease of Use and Management</b><br>Intuitive navigation with a drag-and-drop user interface.   |    |    |    |    |
| <b>Breadth of Portfolio Management</b><br>Complete capabilities to plan, create, manage agile projects, including: <ul style="list-style-type: none"> <li>▪ <i>“What-if” Scenario Planning</i>: budget impact of proposed projects assigned target portfolio budget.</li> <li>▪ <i>Portfolio Optimization</i>: scenario comparison, portfolio dependency analysis, &amp; identify investments that are best aligned to key goals.</li> <li>▪ <i>Advanced Decision Support</i>: Strategic goals, map projects to corporate objectives, and classifies/scores projects.</li> </ul> |    |    |    |    |
| <b>Application Portfolio Management</b><br>Application portfolio management with application rationalization, application health, and business value.  |    |    |    |    |
| <b>Demand Management</b><br>Ability to capture ideas, define requirements, assess priorities & constraints.  |  |  |  |  |
| <b>Resource Management</b><br>Automated resource selection based on availability, capacity, & skill level with capacity management & resource reservations.  |  |  |  |  |
| <b>Financial Management</b><br>Budgeting, planning, forecasting with resource management tied into financial management.   |  |  |  |  |
| <b>Advanced Analytics and Reporting</b><br>Ability to create ad hoc, shareable dashboards & actionable insights.   |  |  |  |  |
| <b>Third-Party Integrations</b><br>Out-of-the-box integrations with third-party platforms.   |  |  |  |  |
| <b>Collaboration</b><br>In-Application communication, collaboration, and document management, project workspaces, and team activity feeds.   |  |  |  |  |
| <b>Mobility</b><br>Single mobile application that also supports time-keeping as well as key functionality of the desktop application.  |  |  |  |  |
| <b>Enterprise Scalability</b><br>High performing architecture with options for on-premise or multi-tenant deployment.  |  |  |  |  |