



BUYERS GUIDE

Choosing the Right Project and Portfolio Management System

ca[®]
technologies

Executive Summary

In too many organizations today, innovation isn't happening fast enough. Within these businesses, skills are siloed and resources are misaligned. As businesses seek to speed innovation and meet their growth and revenue targets, they have to get maximum utility out of all their investments—including in the areas of IT infrastructure, product development and human resources. Toward that end, an enterprise's project and portfolio management (PPM) can either be a huge ally or significant adversary. That's why, when making a change in PPM platforms, it's so vital to make the right choice.

This buyer's guide is intended to help those decision makers tasked with making this critical buying decision—focusing on the characteristics that help enterprises address both their immediate and long term needs. This guide shows how leveraging a PPM platform that delivers both top-down, strategic portfolio management, as well as bottom-up project management capabilities, helps organizations maximize their ROI over the long term. It also shows how capabilities, such as agile planning, resource allocation and application portfolio management, increasingly represent essential requirements for speeding innovation to market.

Introduction

For today's organizations, new market drivers and global competition have placed an increased premium on agility and performance—and a decreased margin for error. Managing a modern enterprise means contending with two key mandates:

- **Working smart.** While the demands for capabilities and performance continue to grow, budgets remain tight. Consequently, maximizing the success of every project—and only taking on the right projects in the first place—is imperative.
- **Speeding innovation.** Organizations need to adapt to change and deliver new capabilities faster. Companies must squeeze maximum innovation out of each investment.

In order to meet these pressing demands, effective PPM capabilities can be an integral asset—and the lack thereof can be a tremendous liability. With effective PPM capabilities, organizations can shorten time to market for new products and services, better prioritize and allocate resources, improve the success rates of projects, reduce project costs and better exploit innovation.

For years, research firms have surveyed enterprises and showed that successful PPM solutions enable organizations to **boost the number of projects by 35%, reduce project costs by 37% and reduce project failure rates by 59%**. However, those kinds of results only get realized with the right PPM platform.

There's a broad array of PPM solutions available today. PPM vendors range from Fortune 50 enterprises to early-stage startups. Solutions range from comprehensive suites to narrow point solutions. Delivery options range from complex, on-premises deployments with extensive development and integration work to pay-as-you-go cloud options. For decision makers, finding the right solution is a matter of mapping the organization's top priorities and objectives to a platform's capabilities and strengths.

This buyer's guide provides decision makers with insights into the key factors to look for in choosing the optimal PPM platform, outlining the capabilities and attributes that distinguish leading solutions and that help ensure a PPM investment delivers maximum return on investment in the long term.

CRITERIA #1: The Right Tools for the Enterprise

Companies of all sizes change. The more comprehensive and flexible the PPM solution is, the better equipped you are to support IT and business managers throughout the project lifecycle. Look for these features:

The following are several key capabilities to look for in identifying a PPM solution that offers the broad utility required:

- Role-based experiences. Configured solution to support various roles and use cases, both within and across departments.
- Business-level configuration. With forms, objects and design wizards solution can be tailored to a department's need. For example, finance has to be compliant under Sarbanes-Oxley and Basel III.
- Enterprise-wide reporting. Dashboards with unified view of projects, resources, budgets, requirements and timelines—from across the portfolio.
- Global support. Look for multi-tenant PPM platforms that support multiple teams, regions, languages, currencies. If you operate abroad, make sure your vendor does too.

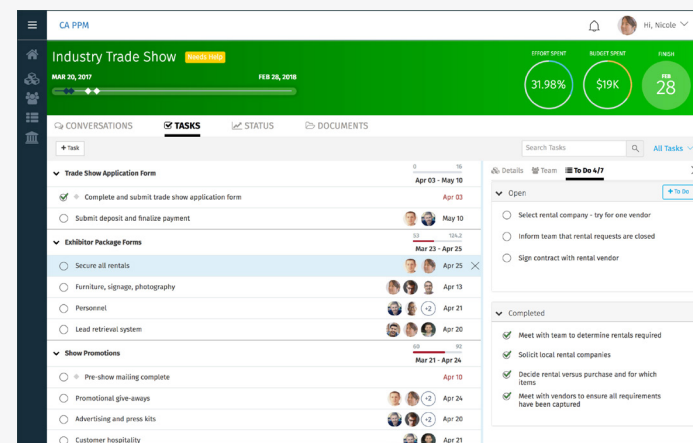
CRITERIA #2: Fast and Easy Set Up

It's important to find a solution that efficiently and affordably support short-term, *ad-hoc* projects. Look for a platform that offers:

Toward that end, look for platforms that offer:

- Software-as-a-Service delivery options to enable quick rollout and on-boarding of users and use cases.
- Flexible pricing options that don't require big upfront investments or long-term commitments.
- Pre-configured content to accelerate user training and deployment.
- Scalability, so organizations can quickly spin up investments and easily reduce users once a project is complete.

Figure A. Adaptive project management for the entire company.



CRITERIA #3: Strategic Portfolio Management

When assessing PPM platforms, decision makers should look for robust, strategic capabilities that enable effective strategic portfolio management. Effective PPM platforms need to:

- Facilitate and streamline the capture, rank and use of customer ideas, and enable team members to move seamlessly from ideas to road-map planning.
- Enable the community to suggest and vote on ideas. Then, team members should be able to seamlessly integrate ideas into a product backlog, for example, as a product requirement.
- Equip managers with what-if analysis capabilities that make it easy to consider the impact of changes to the portfolio, helping expose potential interdependencies and prevent unintended results.

CRITERIA #4: Application Portfolio Management

PPM platforms should help decision makers determine which applications to optimize, update and retire. It should also identify what software to run on premises and in the cloud. For this you need specific capabilities, including:

- Create an accurate application inventory in your portfolio that shows interdependencies among different software.
- Deliver predefined content that guides managers through the decision-making process of determining whether an application is a candidate for cloud migration.
- Identify the business value of each application in the portfolio.
- Specify technical conditions for each application in terms of quality, performance and availability.
- Allow users to rate applications based on the overall experience.

CRITERIA #5: Robust Demand Management

There are two areas to consider when managing demand. First, how can you capture the demands of the business? Second, what's your ability to meet those demands? The right solution should enable you to:

- Capture and manage current time utilization and costs, and measure the capacity available for additional work.
- Leverage crowdsourcing to identify the highest value ideas and provide customers and partners with a voice into the development of the product roadmap.
- Report on actual performance, and compare results against targets, and to drill down into interactive, real-time dashboards.
- Optimize product portfolios and corresponding product roadmaps with a holistic view of the entire innovation portfolio.
- Only the demand that fits into the agreed upon strategic objectives gets filtered into the portfolio, saving time and money.

CRITERIA #6: Unified Resource Management

An effective PPM solution must quickly find the right talent to solve the right problems at the right time. Look for a platform that maximizes a company's most valuable assets—the people:

- Track availability of full-time employees and contractors by role, location and skill set.
- Balance investment demands and resource capacity to effectively staff projects.
- Collaborate with team members to negotiate the right people for the job.
- Zoom in on and compare resources with specific skills and availability for faster staff allocation.

CRITERIA #7: Flexible Project Management

A PPM platform must accommodate a range of development approaches, including Agile, traditional and hybrid methods. This requires the following predefined content:

- Project methodology and defined attributes, which streamlines new project creation.
- Standard dashboards and reports for tracking success.
- Pre-built workflows and portlet views to expedite adoption.
- Automated synchronization, ensuring a project's updates are aligned with its associated process.

CRITERIA #8: Agile Planning

By enabling the rapid adoption of new development methodologies, such as Agile, PPM platforms can help speed innovation. This requires the following capabilities:

- Real-time visibility into requirement dependencies to better manage details and avoid duplication.
- A dashboard to provide a visual representation of the requirement's origin and lifecycle.
- Management of in-depth user stories, backlogs and sprints once a requirement is advanced to the development stage.
- Details on individual sprints, along with information on development teams, user stories and overall capacities.
- Simplified time entry to eliminate the need for separate pages, systems and forms, along with support mobile updates.
- Project watch lists that provide executives with the information they need to assess top projects and filter views by areas of interest.

Figure C. Built-in timesheets reduce administrative chores and ensure resource data is up-to-date.

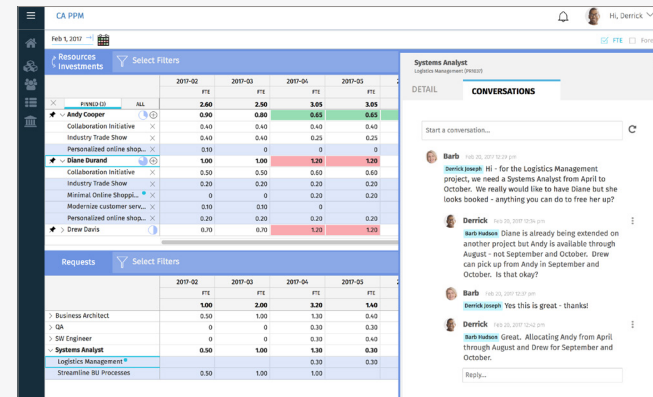
	Mon, 6	Tue, 7	Wed, 8	Thu, 9	Fri, 10	Sat, 11	Sun, 12	Total	ETC
WORK	8.00	8.00	8.00	8.00	8.00			40.00	
B2B Enhancements (PR1086)									
Database and UI Development (Construction Phase)		8.00	5.50		3.00			16.50	0.00
Industry Trade Show (PR1089)									
Follow up letters mailed (Post-show)			2.50					2.50	0.00
Marketing Campaign (PR1090)									
Initiate email - send information (Generate leads)				4.00				4.00	14.00
Paid search ads for the campaign series (Launch special offer)				4.00				4.00	68.00
Prepare attendee landing page form (Generate leads)	4.00							4.00	0.00
Prepare banner ads for selected sites (Launch special offer)					5.00			5.00	69.00
Other Work									
Vacation Time	4.00							4.00	

CRITERIA #9: Effective Collaboration

PPM platforms should enhance collaboration, both within and across teams, organizations, and regions. To streamline efforts and encourage user engagement, PPM platforms should:

- Foster the capture, sharing, prioritization, and sorting of ideas, and enable the efficient submission of these ideas into the appropriate development phase.
- Offer support for mobile devices.
- Deliver built-in collaboration tools.
- Provide virtual walls for Agile development users to enable distributed teams to collaborate and share visibility.

Figure C. Native collaboration tools make it easy to communicate with team members in context of the work at hand.

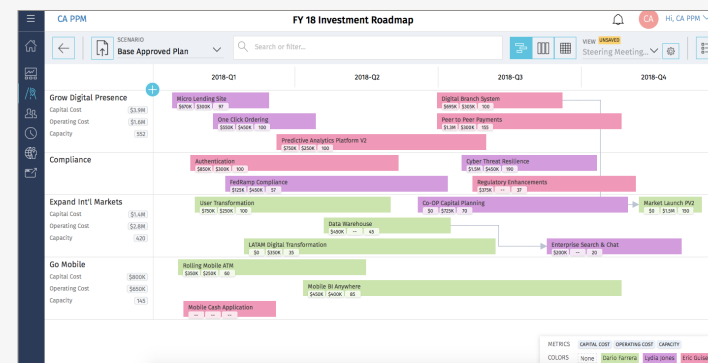


CRITERIA #10: Roadmapping for Strategic Investment Planning

Running a report shouldn't require manual data exports or technical team involvement. Look for a PPM solution with strong configuration management database functionality in order to make data-based decisions, including:

- Capabilities for clearly aligning top-level strategies with resources, requirements and schedules—throughout the innovation lifecycle.
- Rich reporting and what-if analysis to evaluate the impact of project changes.
- Reporting and dashboards that can be tailored by role.
- Fast, effective and current tracking of actual versus planned costs.
- Pre-configured reports and dashboards to show management what's going on.

Figure D. Roadmapping. CA Project & Portfolio Management (CA PPM) is built for the way people and organizations plan and work today.



CRITERIA #11: Insights for Data-Driven Decisions

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- Rich reporting and what-if analysis to evaluate the impact of project changes.
- Reporting and dashboards that can be tailored by role.
- Fast, effective and current tracking of actual versus planned costs.
- Pre-configured reports and dashboards to show management what's going on.

CRITERIA #12: Flexible Deployment and Ease of Use

The ease of deployment and rate of user adoption are critical factors in the ultimate return on a PPM investment. Following are a few key considerations:

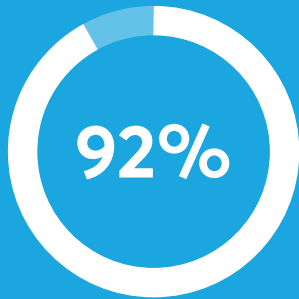
- A PPM solution delivered via a SaaS or hosted model can provide tremendous benefits.
- For those organizations that require on-premises deployment, carefully assess integration requirements and infrastructure needs.
- Configuration rather than customization. Advanced PPM platforms shouldn't require extensive technical staff work in order to be tailored to specific needs.
- Ease of use. The PPM solutions shouldn't require costly training for users to be productive with the new platform.
- Consistent user interface. By providing a familiar user experience across all key modules or capabilities.
- Support for your databases, servers, and defect tracking systems. In addition, support for multiple browsers, mobile devices and server platforms.

A man with glasses and a beard is looking at a laptop screen. He is wearing a dark shirt and a light-colored jacket. The background is blurred, showing other people in a meeting setting. The overall tone is professional and focused.

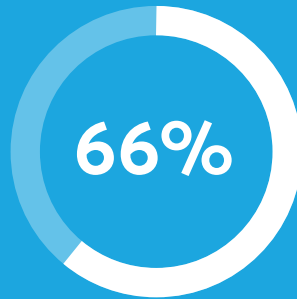
Conclusions

When looking to adopt a new PPM platform, senior executives will have key near-term objectives that absolutely have to be addressed if any investment is to be deemed a success. However, when making investment decisions, it's also important to balance these critical near-term requirements with the need to address more holistic, enterprise-wide, and long-term objectives. By finding a PPM solution that bridges these twin demands, organizations can be well positioned to wring maximum value from their PPM investments.

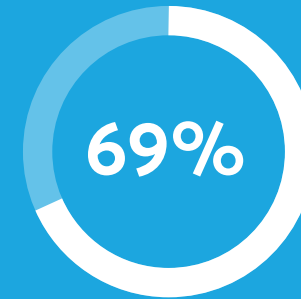
CA PPM represents a single platform that enables you to manage your entire innovation lifecycle and make more informed strategic investments.



of surveyed organizations rated CA PPM's portfolio management higher than the competition.



of surveyed organizations created one source of truth for all work as a result of adopting CA PPM.



of surveyed organizations consider CA's flexible configuration when selecting CA PPM.

Purchasing Worksheet



Use the questions below to create a chart that compares potential agile partners and their solutions.

RECOMMENDED QUESTIONS	Vendor 1:	Vendor 2:	Vendor 3:
Role-based experiences			
Business-level configuration			
Enterprise-wide reporting and dashboards			
Global support			
Fast and Easy Set Up			
Strategic portfolio management			
Application portfolio management			
Robust demand management			
Flexible project management			
Unified resource management			
Agile Planning			
Effective collaboration support			
SaaS, hosted, and on-premises options			
Broad deployment support			
Configurability			
Ease of use			
Pre-packaged training and support capabilities and content			

About CA Project Portfolio Mament

CA PPM helps you track and prioritize market and customer requirements and make better decisions on how to invest limited resources, so you can optimize your enterprise, IT, service and product portfolio.

Visit ca.com/ppm to learn more.

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.

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