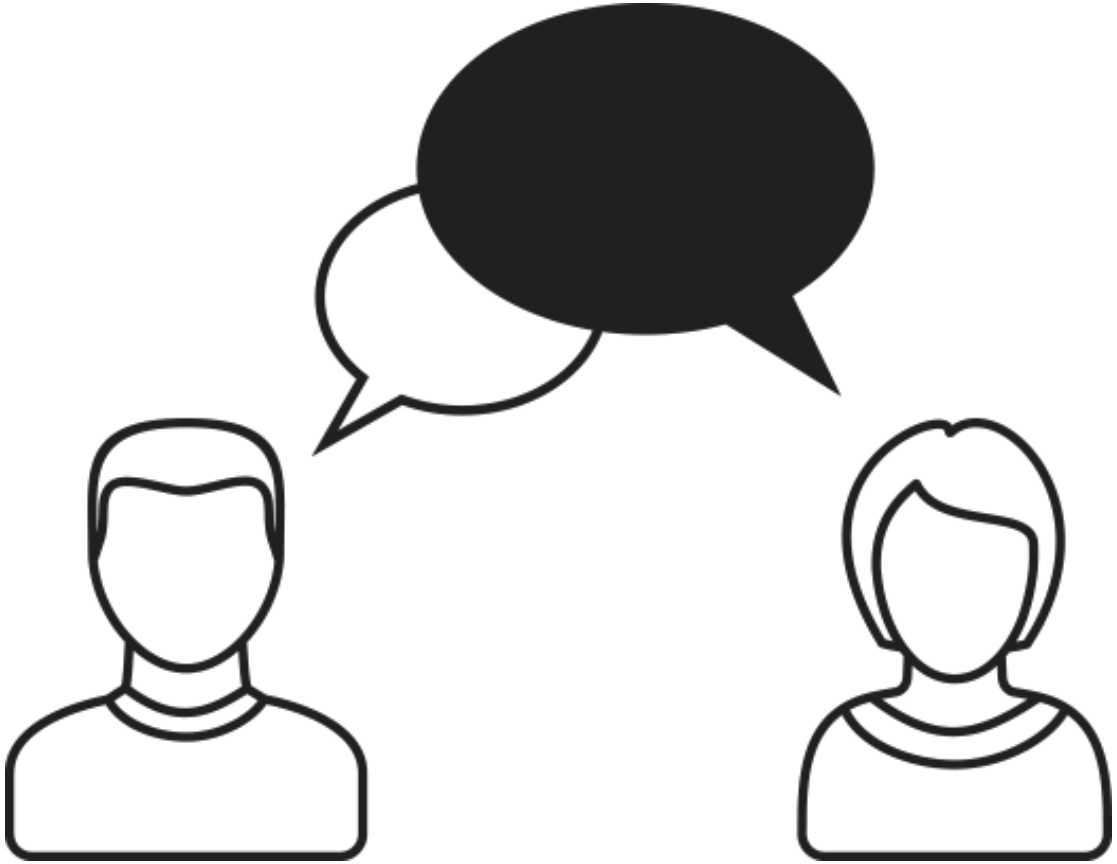
regoUniversity 2017

Beyond IT | Executive Selling and Business Transformation

Your Guides: Dan Greer

Introductions

- Take 5 Minutes
- Turn to a Person Near You
- Introduce Yourself



Agenda

- Non-IT/NPD Uses for CA PPM
- Use Case: Business Transformation
- Selling CA PPM Beyond Current Borders

Non-IT/NPD Uses For CA PPM

- Who Has Users Outside Traditional IT/NPD Development and Project Management?
  - What is the Group?
  - What is their Use Case?

Non-IT/NPD Uses For CA PPM: Rego Examples

- Internal Audit
- Business Transformation
- Sales Team
- Professional Services
- Strategic Planning
- Capital Planning
- Merger
- APM

Use Case: Business Transformation

regoUniversity 2017

Let Rego be your guide.

What Is Business Transformation?

- Business Transformation often referred to as Business Process Improvement, Operational Excellence, Process Performance even sometimes Six Sigma or Lean

- >90% of large enterprises have teams of resources focused on improving processes and quality across their organization

- Business Transformation activities involve identifying, evaluating and executing process improvement initiatives

Key Challenges With Managing BT Initiatives

- No easy way to gather and prioritize process improvement ideas
- Difficulty in managing and understanding the return on investment in BPI
- Difficulty promoting shared project execution best practice, i.e., replicable methodologies to deliver value such as PDCA, DMAIC, 5S etc.
- Reporting on financial benefits delivered as a result of business transformation initiatives
- Rolling out and managing the initiatives across a large global the organization

How Can CA PPM Assist With BT?

53% of Fortune 500 companies currently use Six Sigma to drive and manage change—82% when you look at just the Fortune 100.

– iSixSigma

Business Transformation is the way organizations radically change to re-align the business with specific strategic objectives. This involves complex changes to people, processes, and systems.

– Business Transformation, LinkedIn

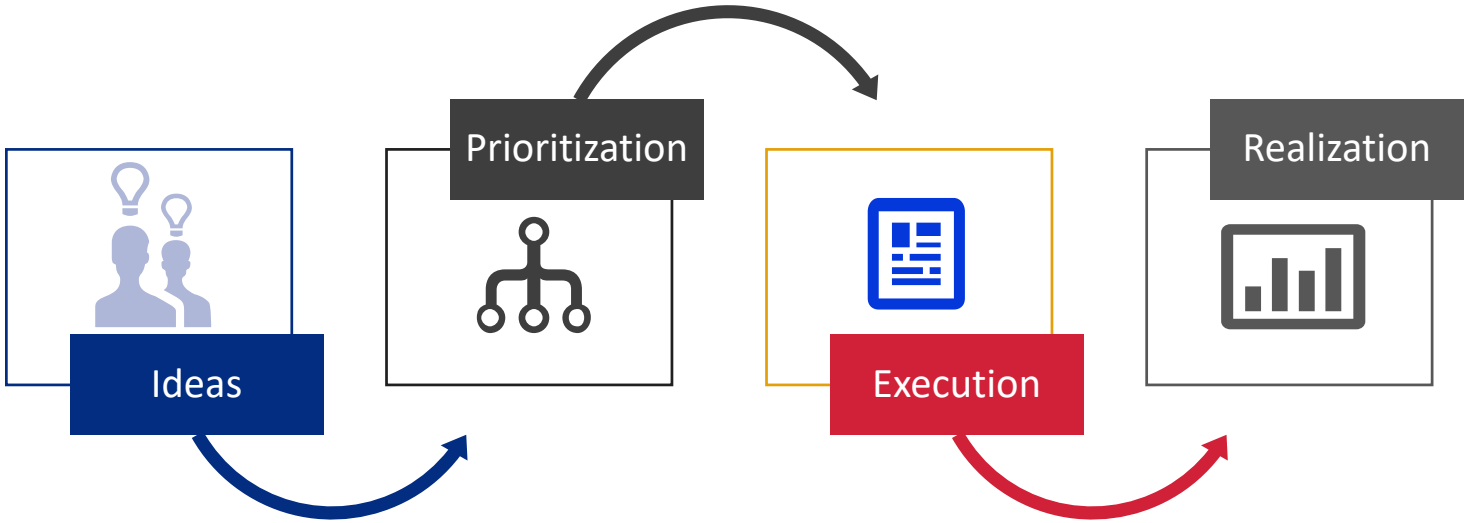
93% of US-based multinational companies are in some phase of changing their business models.

– KPMG Transformation Survey, 2014

With CA PPM You Can…

- Manage rapidly changing business conditions via dynamic portfolio prioritization
- Empower change agents to drive transformation efforts
- Accelerate the execution of initiatives
- Centralize data collection and reporting
- Instantaneously generate executive dashboards
- Quantify success through benefit realization reporting
- Publicize successes

Business Transformation Components



01
Ideas

Capture Ideas
Get an enterprise-wide solution to capture ideas and manage demand.

02
Prioritization

Choose the Right Initiatives
Score, compare, and analyze initiatives in a central location.

03
Execution

Access and Analyze
See an integrated project view, including project status reports, financials, and supporting documents.

04
Realization

Communicate Value
Choose role-based dashboards and reports with real-time financial and benefits metrics.

Rego Business Transformation Content Pack

Portlets 100+

50+ Custom Portlets

Processes 3

3 Optimized Processes

Excel Upload

Excel Upload Utility for Benefit Plan Loading

Project Plan

Starting Implementation Project Plan

20+ **Reports**

5 Detailed Reports

Security

Best Practice Security Configuration

Training Material

Pre-built Training Material and Videos

Jump-Start Now

Step-by-Step Decision Worksheet to Jump-Start Your Configuration

Business Transformation Content Pack

regoUniversity 2017

Let Rego be your guide.

Idea Management

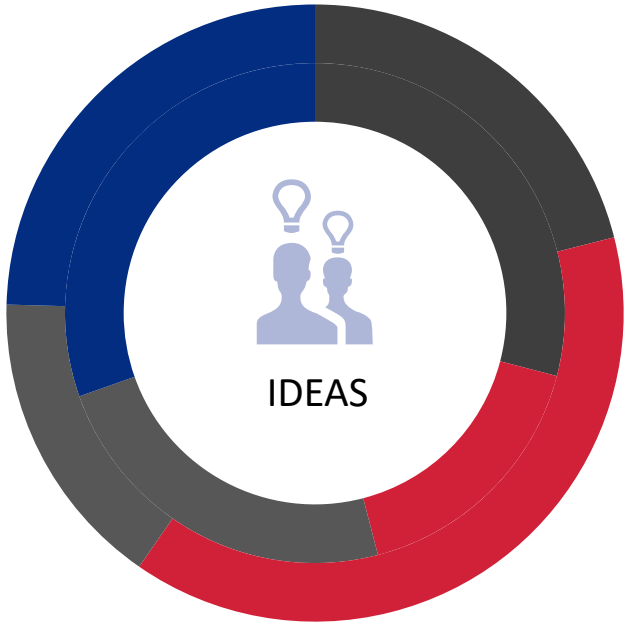
Capture the Possible

Collect

Collect opportunities across the enterprise

Customize

Customize analysis via configurable scoring and business case elements



03

Apply

Apply flexible benefits, estimate options

04

Assess

Assess ideas: dashboards, searches and approval workflow

Idea Management

Capture the Possible

Idea: New Online Application - *Properties - Main - Idea Summary*

Scenario: [--Select--]

Idea Summary

Subject	New Online Application	Status	Approved
Idea ID	ID1004	Progress	Not Started
Idea Type	Application Change	Work Status	Requested
Idea Category	COTS Evaluation	Requestor	Quinn, Randy
Idea Priority	High	Business Owner	Roberts, Beth
Fast Track		Manager	Martin, Paul
Objective	We need to upgrade the online application system to stay current with competitive websites	Start Date	1/1/2013
		Finish Date	8/31/2015

Alignment and Risk

Business Alignment		Goal	Grow the Business
Priority	3	Required	
Risk	60		

Alignment Factors

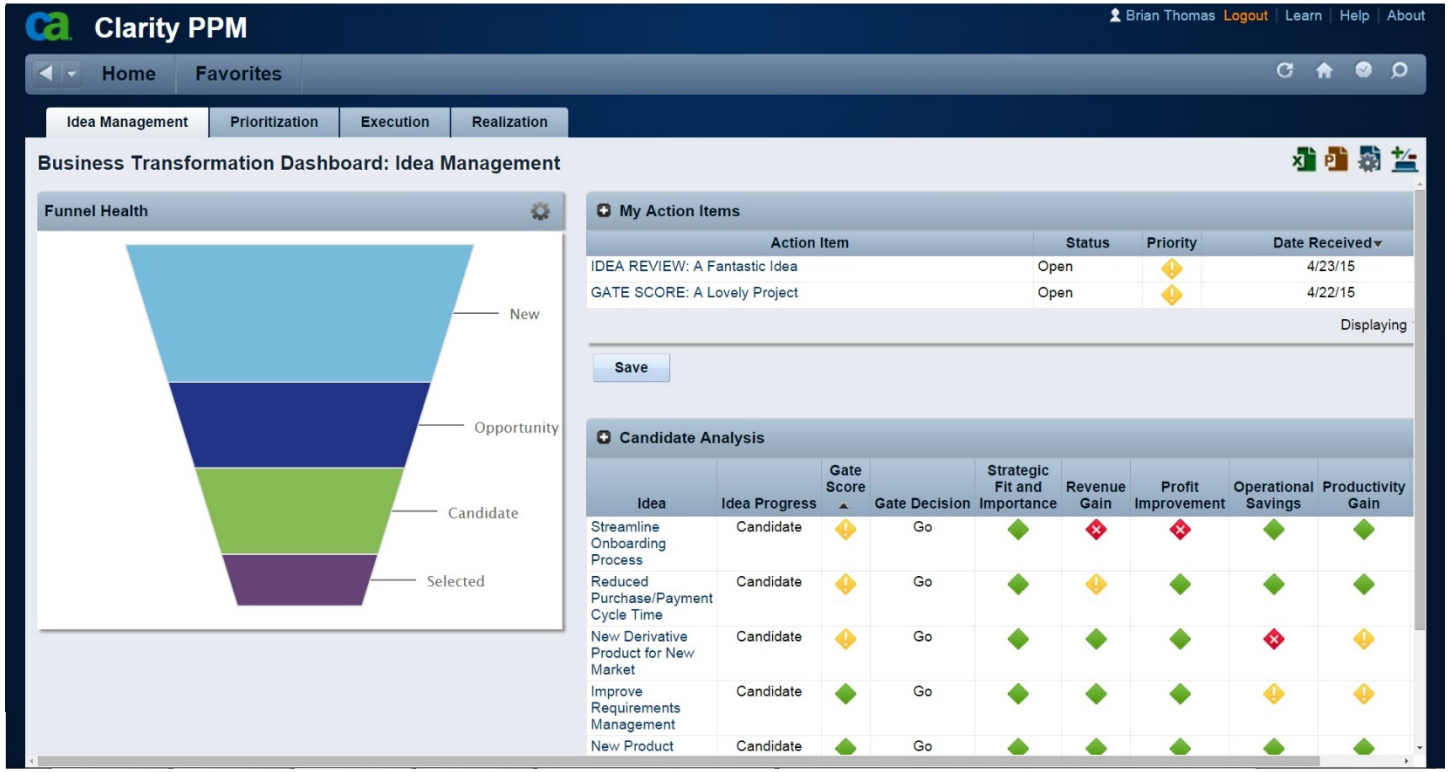
Corporate Priority	Low	Architectural Fit	Low
Business Unit Priority	Medium	Commercial Value	Medium
Regulatory Compliance	Supports Compliance Activities	Technology Compliance	Not in Compliance – but Stable

Description

Description		Risks	
Impact on Existing Initiatives		Benefit Description	
Dependencies		General Notes	

Idea Management

Capture the Possible



Idea Management

Capture the Possible

Cost/Benefit Upload

Benefit Plan Name	Benefit Plan ID	Description	Benefit Class	Benefit Subclass	2013	2014	2015	2016
Benefit Plan 1		Line Item 1	Increase Revenue	Headcount	10	20	30	40
Benefit Plan 1		Line Item 2	Reduce Cost	Infrastructure	15	25	35	45

	Resource Role	Cost Total	Actual Cost	Cost Variance		Amounts By Period											
						2015-01	2015-02	2015-03	2015-04	2015-05	2015-06	2015-07	2015-08	2015-09	2015-10	2015-11	2015-12
	Champion	58,576.00		58,576.00	Cost	2,464	2,240	2,464	2,464	2,352	2,464	2,576	2,352	2,464	2,464	2,352	2,576
					Actual Cost												
					Cost Variance	2,464	2,240	2,464	2,464	2,352	2,464	2,576	2,352	2,464	2,464	2,352	2,576
	Coach	58,576.00		58,576.00	Cost	2,464	2,240	2,464	2,464	2,352	2,464	2,576	2,352	2,464	2,464	2,352	2,576
					Actual Cost												
					Cost Variance		2,240	2,464	2,464	2,352	2,464	2,576	2,352	2,464	2,464	2,352	2,576
	Finance	58,576.00		58,576.00	Cost	2,464	2,240	2,464	2,464	2,352	2,464	2,576	2,352	2,464	2,464	2,352	2,576
					Actual Cost												
					Cost Variance	2,464	2,240	2,464	2,464	2,352	2,464	2,576	2,352	2,464	2,464	2,352	2,576
	Program Manager	58,576.00		58,576.00	Cost	2,464	2,240	2,464	2,464	2,352	2,464	2,576	2,352	2,464	2,464	2,352	2,576
					Actual Cost												
					Cost Variance	2,464	2,240	2,464	2,464	2,352	2,464	2,576	2,352	2,464	2,464	2,352	2,576
	Project Manager BT	175,728.00		175,728.00	Cost	7,392	6,720	7,392	7,392	7,056	7,392	7,728	7,056	7,392	7,392	7,056	7,728
					Actual Cost												
					Cost Variance	7,392	6,720	7,392	7,392	7,056	7,392	7,728	7,056	7,392	7,392	7,056	7,728
	SME	175,728.00		175,728.00	Cost	7,392	6,720	7,392	7,392	7,056	7,392	7,728	7,056	7,392	7,392	7,056	7,728
					Actual Cost												
					Cost Variance	7,392	6,720	7,392	7,392	7,056	7,392	7,728	7,056	7,392	7,392	7,056	7,728
	Team Lead	117,152.00		117,152.00	Cost	4,928	4,480	4,928	4,928	4,704	4,928	5,152	4,704	4,928	4,928	4,704	5,152
					Actual Cost												
					Cost Variance	4,928	4,480	4,928	4,928	4,704	4,928	5,152	4,704	4,928	4,928	4,704	5,152
Cost		**702,912.00**				**29,568**	**26,880**	**29,568**	**29,568**	**28,224**	**29,568**	**30,912**	**28,224**	**29,568**	**29,568**	**28,224**	**30,912**
Actual Cost																	
Cost Variance				**702,912.00**		**29,568**	**26,880**	**29,568**	**29,568**	**28,224**	**29,568**	**30,912**	**28,224**	**29,568**	**29,568**	**28,224**	**30,912**

Prioritization

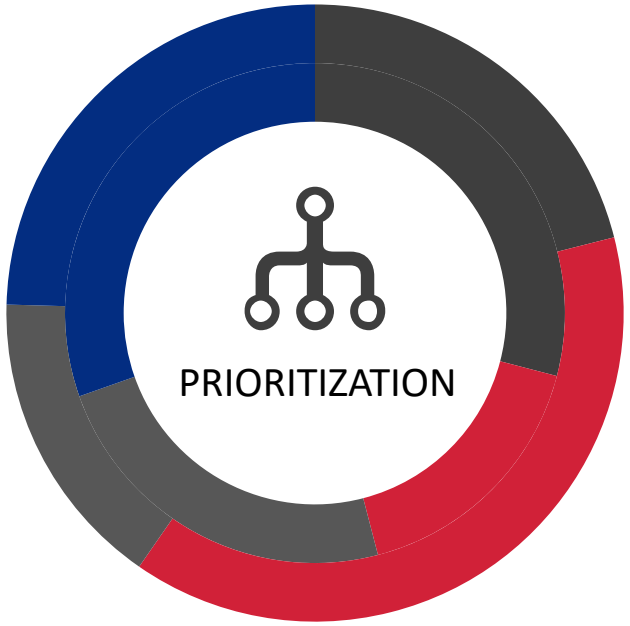
Accelerate Deployment and Speed Realization

Weigh

Weigh opportunity options to meet executive objectives

Model

Model “what if” scenarios for potential and inflight change initiatives



Balance

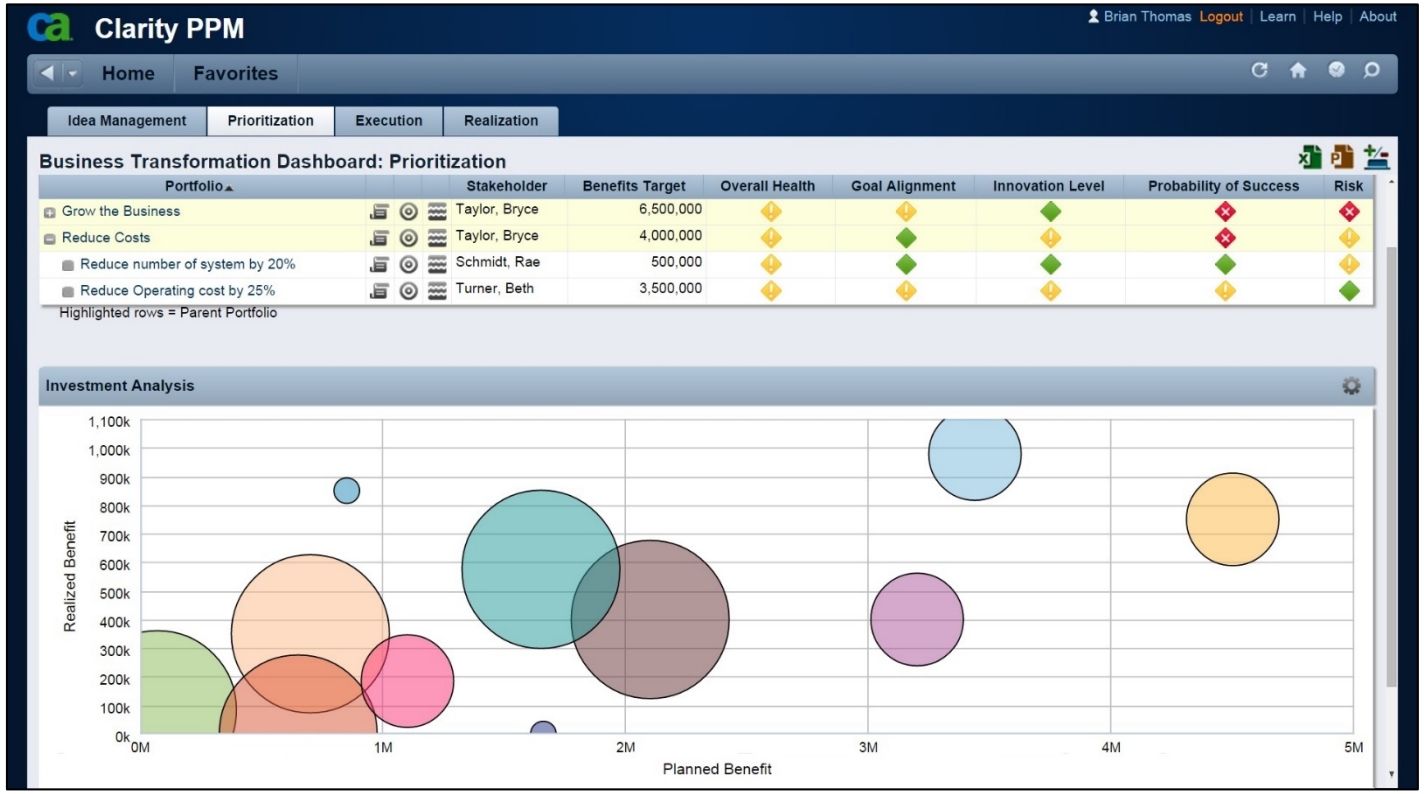
Balance investment mix to corporate targets

Automate

Automate annual planning and approvals

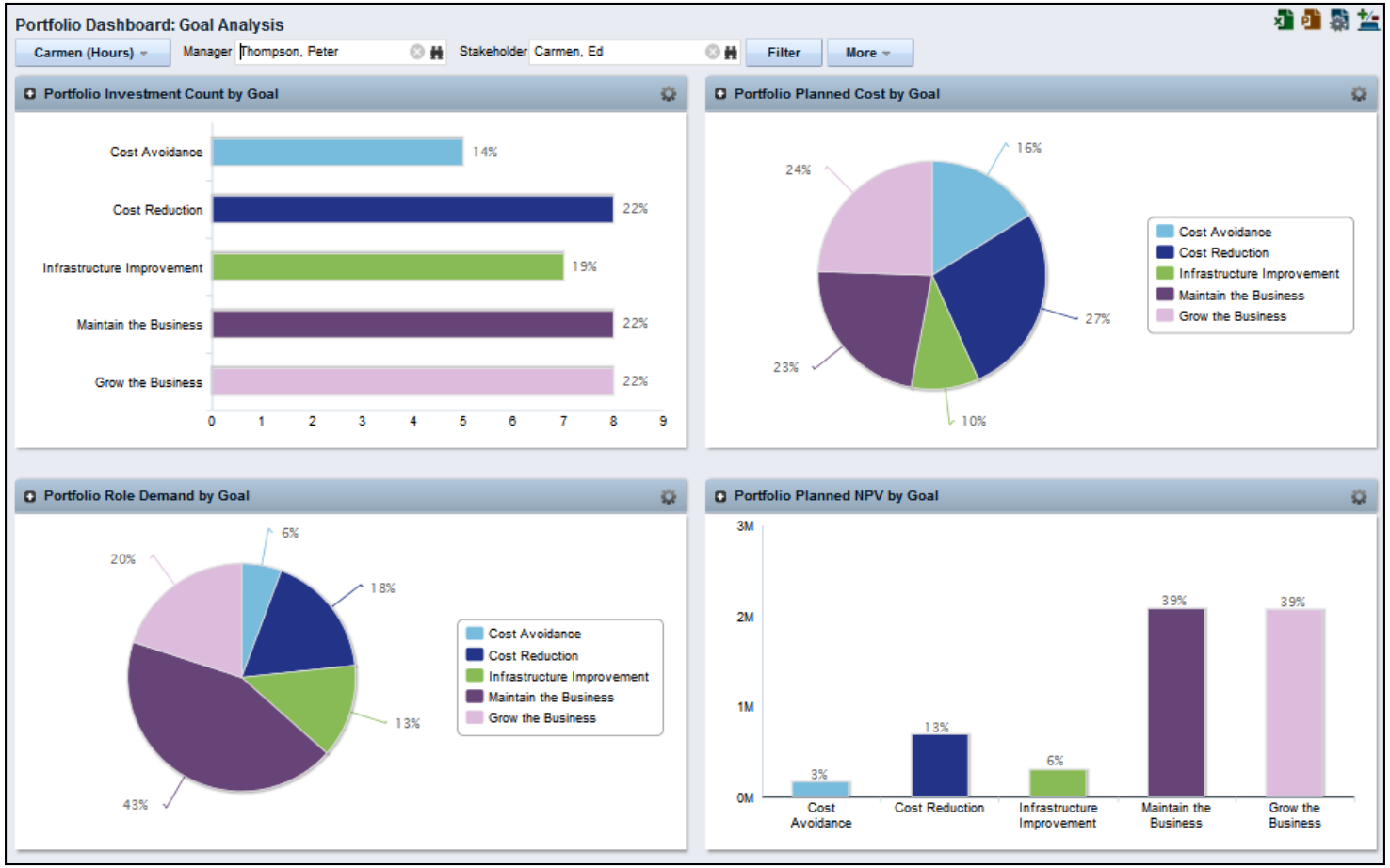
Prioritization

Accelerate Deployment and Speed Realization



Prioritization

Accelerate Deployment and Speed Realization



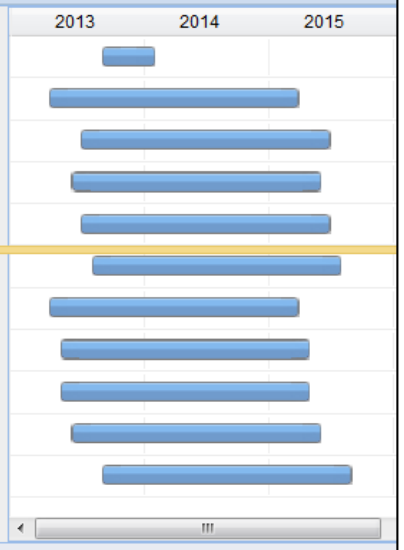
Prioritization

Accelerate Deployment and Speed Realization

Portfolio: Business Services - *Waterlines*

Filter: None

Rank	Investment	Start	Finish	Approved	Required	Planned Cost	Planned Capit...	Planned Operatin...	Role Demand
NR	CRM Enhancements	02.09....	04.02....	✓		367.600	231.600	136.000	3.089,97
1	Email	01.04....	31.03....	✓	✓	606.259	230.588	375.671	13.936,00
2	Security Infrastructure Service	01.07....	30.06....	✓		600.000	0	600.000	0,00
3	Regulatory Compliance Service	01.06....	31.05....	✓	✓	1.044.400	108.000	936.400	1.600,00
4	Customer Contact Center	01.07....	30.06....	✓		54.936	0	54.936	347,20
5	HR Self Service	01.08....	30.07....	✓		1.691.600	635.000	1.056.600	10.772,00
6	Online Web Portal Service	01.04....	31.03....	✓		2.109.810	418.475	1.691.321	21.652,00
7	Trading Forward	01.05....	30.04....	✓		300.000	0	300.000	0,00
8	Global Expense Service	01.05....	30.04....	✓		625.648	0	625.648	4.358,00
9	Cash Management	01.06....	31.05....	✓		387.584	150.000	237.584	208,00
10	Internal Marketing Portal	01.09....	31.08....	✓		752.855	227.662	525.184	7.840,00



	Planned Cost	Planned Capital Cost	Planned Operating Cost	Role Demand	Role: Architect
Above Waterline:	2.305.595	338.588	1.967.007	15.883,20	0,00
Distributed Target:	2.160.000	360.000	1.800.000	16.800,00	462,50
Variance:	--145.595	+21.412	--167.007	+916,80	+462,50
Below Waterline:	5.867.497	1.431.137	4.436.337	44.830,00	0,00

Execution

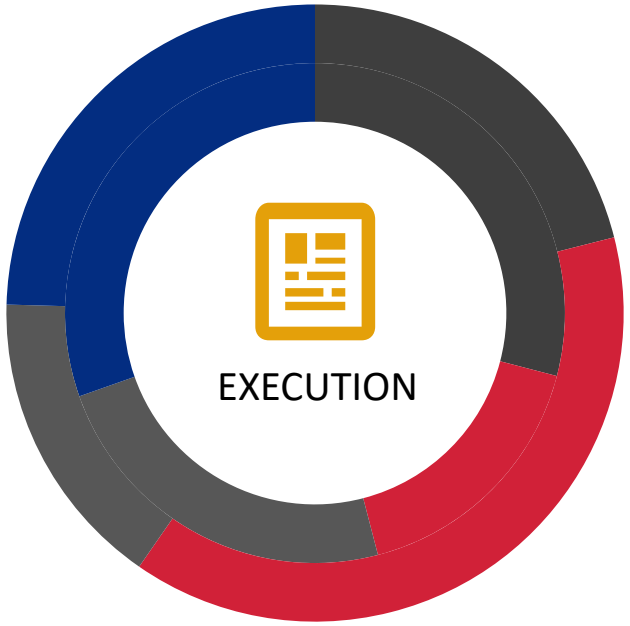
Accelerate Deployment and Speed Realization

Support

Support and automate task management for any methodology

Monitor

Monitor status and forecasts with dashboards and collaborative stage gate reviews



Manage

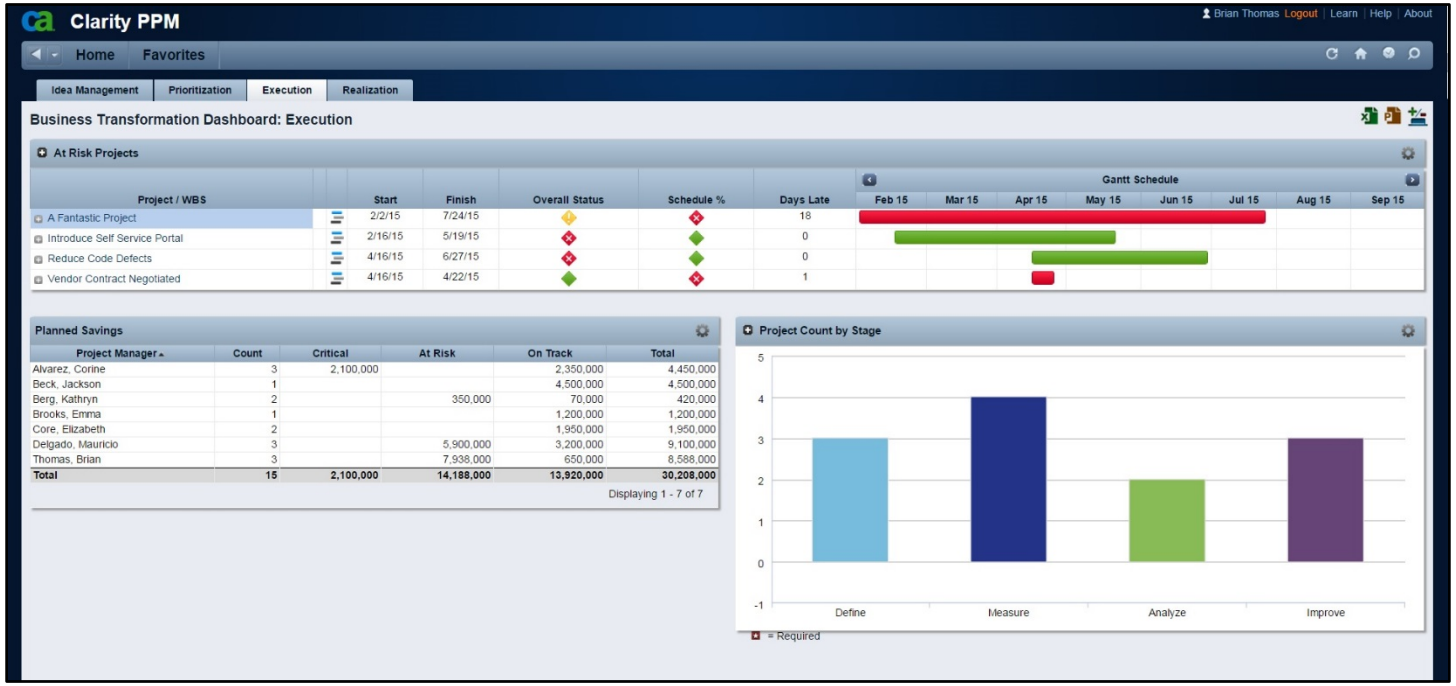
Manage resources using all levels of visibility

Access

Access documents with full in-product or integrated options

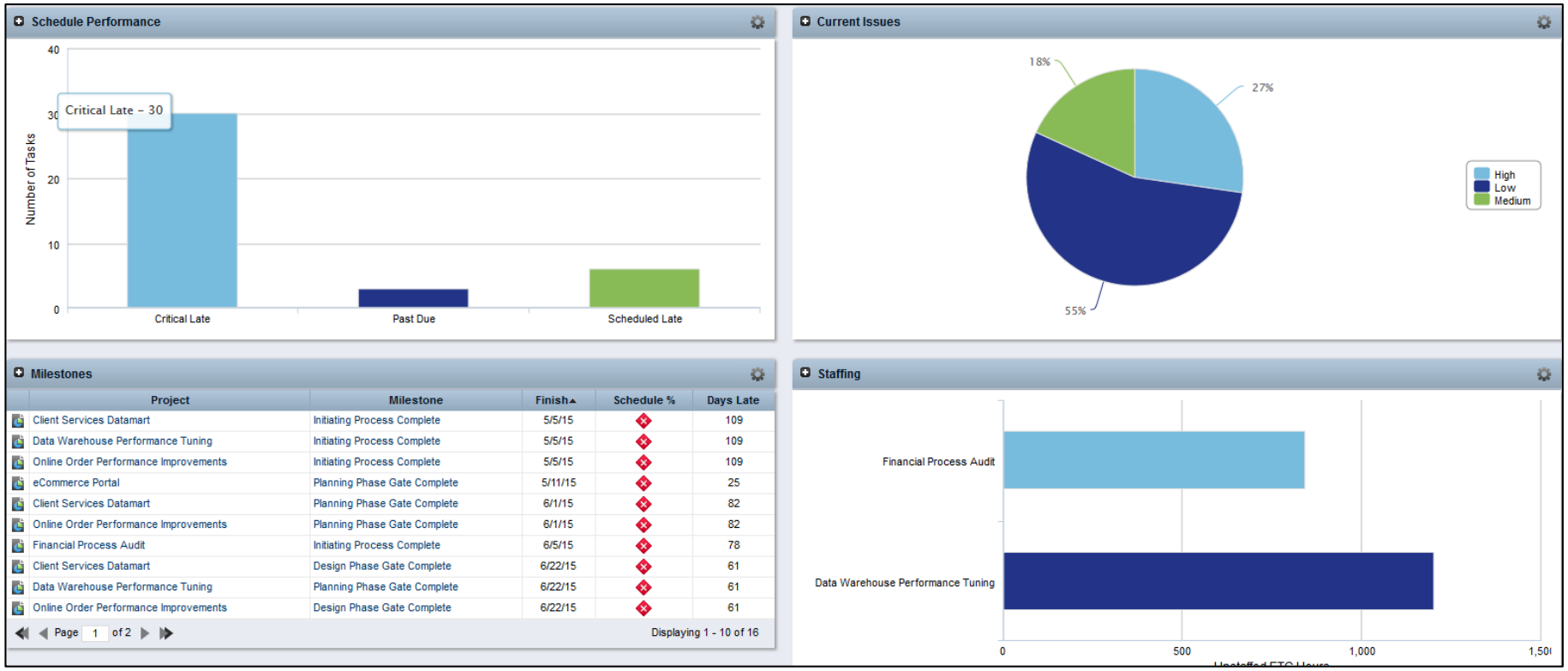
Execution

Accelerate Deployment and Speed Realization



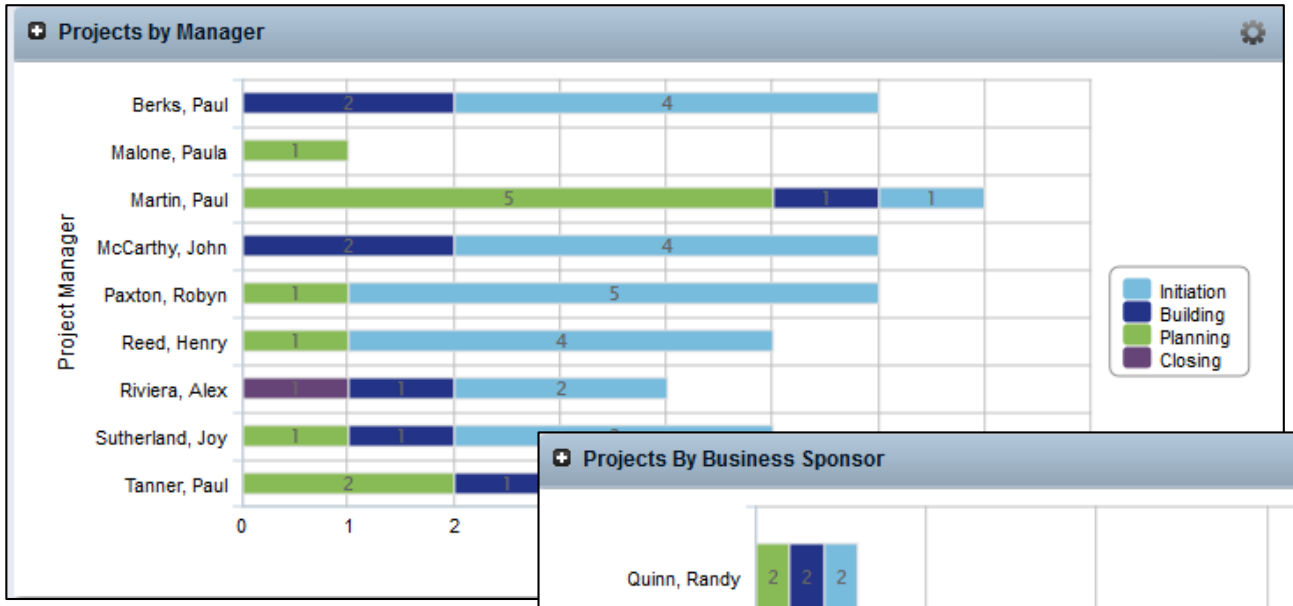
Execution

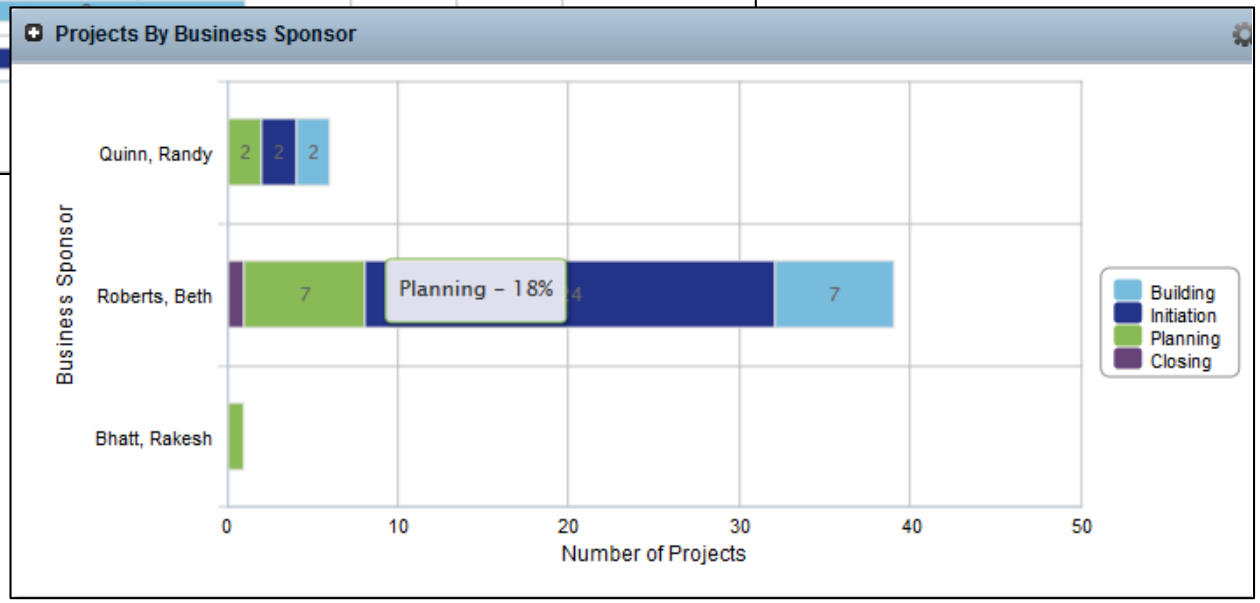
Accelerate Deployment and Speed Realization



Execution

Accelerate Deployment and Speed Realization





Execution

Accelerate Deployment and Speed Realization

Business Transformation Status Report: A Brilliant Project

Project Manager	Tennyson, Peter	**Status Report Date**	1/6/15
Project Type	Tier One Project	**Status**	Unapproved
Stage	Diagnostic	**Progress**	Not Started

Project Dates

	Start	Finish
Plan	10/1/14	1/15/16
Baseline	10/1/14	1/15/16
Days Late	0	0

Status Report Indicators

Overall	
Schedule	
Scope	
Benefit	

Metric Performance

Metric	Number of Cars
Target	1500
Baseline	1000
Last Month	1075
Current Month	1135
Trend	

Financial Performance

Planned Benefit	0.00
Planned Cost	0.00
Actual Cost	0.00
Estimate At Completion	511,794.59
EAC to Planned Variance	511,794.59
Planned ROI	0.00
Planned Breakeven	

Project Objective

Key Accomplishments

Voice of the customer interviews are well on their wa, however the involvement of key leaders is proving to be problematic in getting to the heart of the process issues.

Status Report Update

Slight delay in the voice of the customer meeting needing to be in essence redone due to the need of changing our approach.

Upcoming Activities

We have scheduled separate meetings with the leadership and the line level employees to try and improve our process discussions

Issues by Priority **Risks by Priority**

Current Issues More Issues...

Issue	Priority	Status	Target	Owner
Leadership involvement		Work in Progress	1/29/15	Tennyson, Peter
Need a second Process Owner		Open	1/29/15	Tennyson, Peter
Objective unclear		Work in Progress	1/29/15	Tennyson, Peter

Analysis by Phase Full Project Plan...

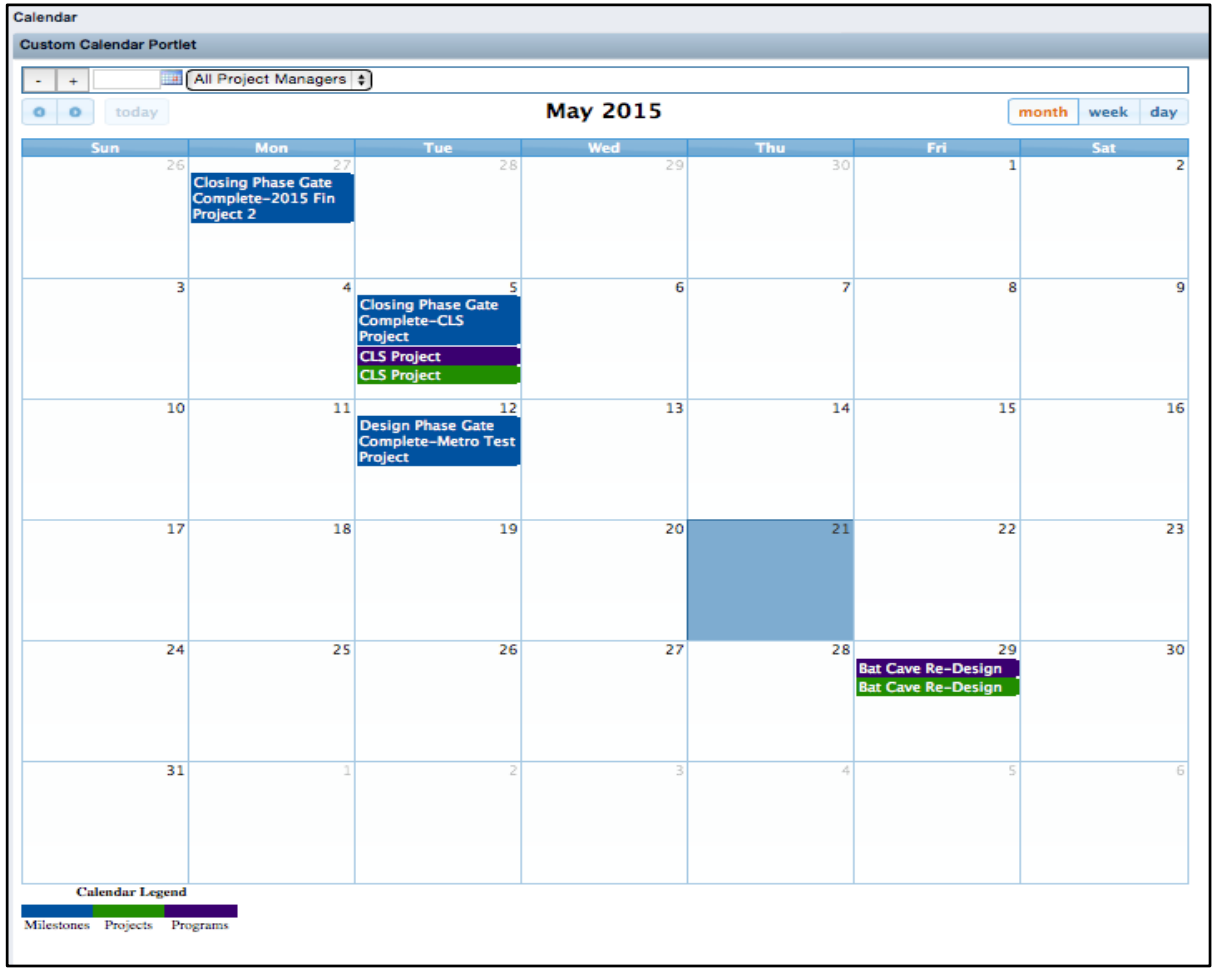
Phase	Start	Finish	Status	% Complete
Analyze	1/28/15	2/20/15	Not Started	0
Improve	2/23/15	4/24/15	Not Started	0
Control	5/4/15	9/9/15	Not Started	0

Team

Resource/Role	Project Role
Team Lead	Team Lead
Project Manager	Project Manager
Baker, Gregory	Project Manager
Green Belt	Green Belt
Black Belt	Black Belt
Allen, Timothy	Black Belt

Execution

Accelerate Deployment and Speed Realization



Benefits Realization

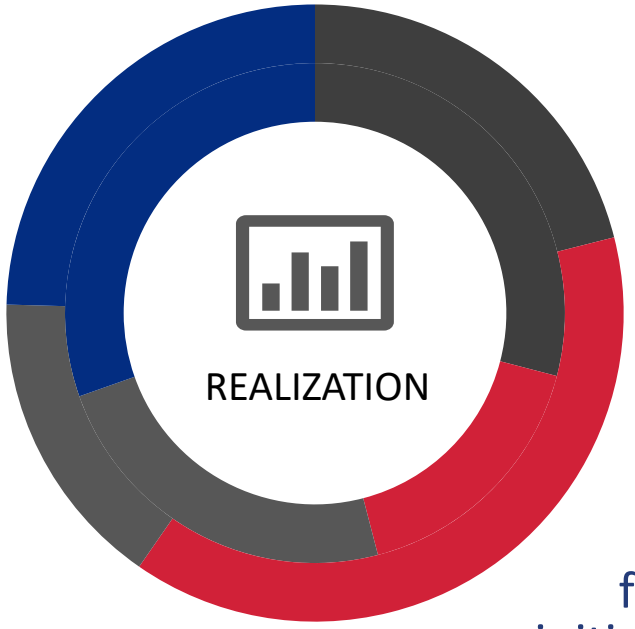
Track the Success of Your Transformative Initiatives

Support

Support the annual planning process with meaningful metrics

Access

Access real-time actionable analytics on status and realized benefits



View

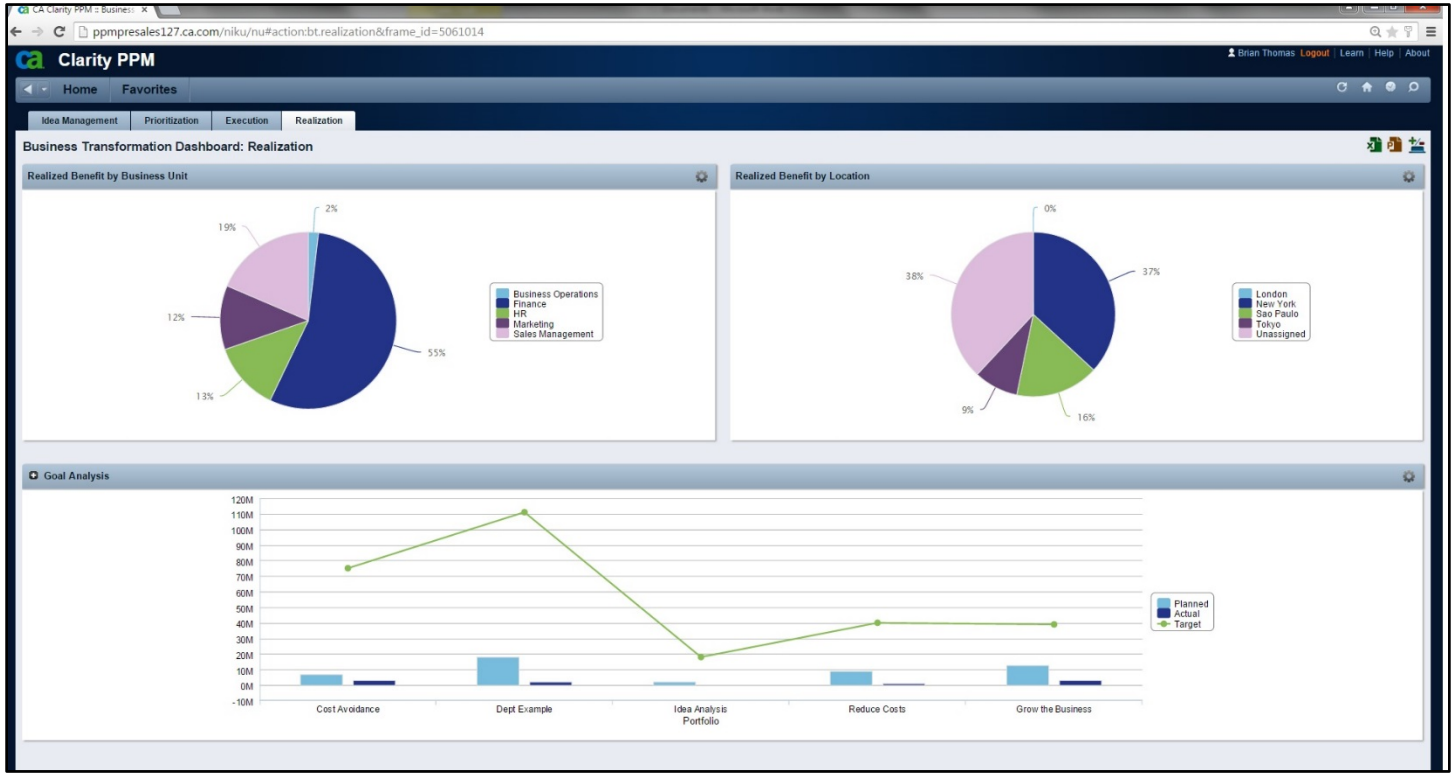
View online real-time dashboards and executive reports

Analyze

Analyze savings and forecasts by individual, initiative, savings category, department, location, product line, or process

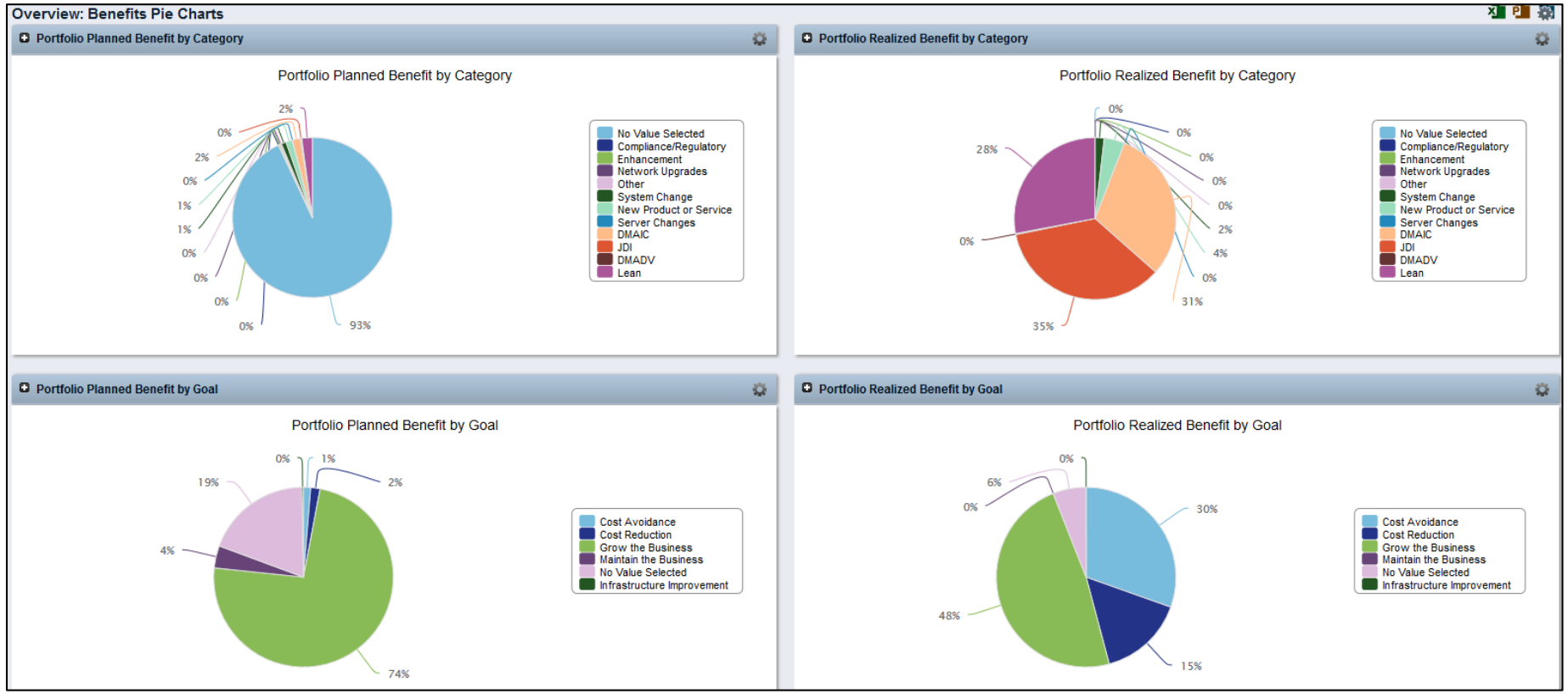
Benefits Realization

Track the Success of Your Transformative Initiatives



Benefits Realization

Track the Success of Your Transformative Initiatives

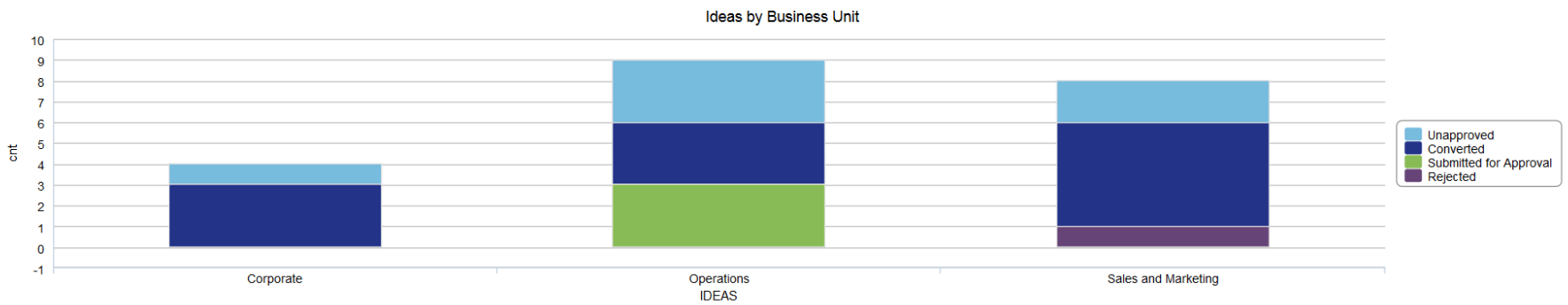


Benefits Realization

Track the Success of Your Transformative Initiatives

Overview: Benefit Portlets

Ideas by Business Unit

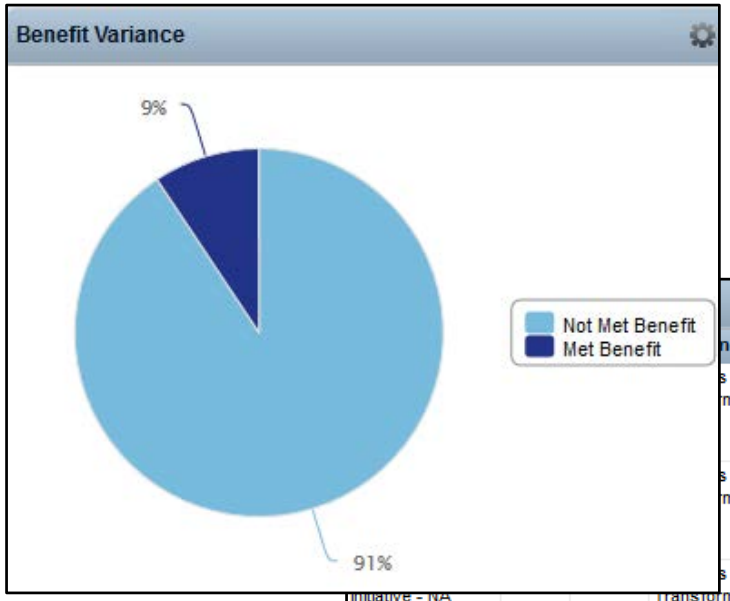


Realized Benefit Analysis

Investment	Department	Stakeholder	Manager	Goal	Type	Category	Objective	Satart	Finish	Benefit	Realized Benefit	Variance
A Fantastic Project	Business Transformat	Schmidt, Rae	Thomas, Brian	Cost Avoidance	Transform	DMAIC	Reduce Contractor Spend by 15%	2/2/15	7/24/15	3,438,000	205,000	(3,233,000)
Anesthesia Delivery	NPN		Tennyson, Peter		Major Project	New Product or Service		3/12/13	9/17/18	42,000,000		(42,000,000)
Atropia Retina Scan - Project	Product Development	Baker, Jesse	Miles, Paul		Major Project	New Product or Service		1/5/15	9/22/17	5,280,000		(5,280,000)
Aurascope XA - Project	Product Development	Baker, Jesse	Miles, Paul		Major Project	New Product or Service		5/5/15	12/19/17	4,650,000		(4,650,000)
Automated Security Enhancements	Shared Services	Roberts, Beth	Berks, Paul	Grow the Business	Infrastructure Deployment	Network Upgrades		6/5/15	9/17/15	950,000		(950,000)
BI Analytics	Business Operations	Roberts, Beth	Riviera, Alex	Grow the Business	Major Project	System Change		6/5/15	9/24/15	450,000		(450,000)
Brightlight 3000 - Project	Product Development	Butler, Cheryl	Miles, Paul		Major Project	New Product or Service		7/6/15	9/23/16	5,800,000		(5,800,000)
BYOD Management	Business Operations	Roberts, Beth	Tanner, Paul	Cost Avoidance	Major Project	System Change		8/3/15	2/5/16	600,000		(600,000)
Centricity	NPN		Tennyson, Peter		Major Project	New Product or Service		2/13/13	8/21/18	20,000,000		(20,000,000)
Change Mgt for Internal Portal	Shared Services	Roberts, Beth	McCarthy, John	Maintain the Business	Application Change	Enhancement		7/6/15	10/23/15	800,000		(800,000)

Benefits Realization

Track the Success of Your Transformative Initiatives



			nent	Objective	Category	Goal	Type	Manager	Email	Stakeholder	Planned Benefit	Realized Benefit	Variance
			s rmat	Reduce Operating cost by 25%	DMAIC	Cost Reduction	Transform	Berg, Kathryn		Turner, Beth	210,000	255,000	45,000
			s rmat	Reduce Support issues by 20%	DMAIC	Cost Avoidance	Transform	Thomas, Brian		Turner, Beth	1,950,000	2,400,000	450,000
Initiative - NA Region			s Transformat	Reduce vendor spend by 5%	DMAIC	Cost Avoidance	Transform	Alvarez, Corine		Turner, Beth	2,100,000	4,500,000	2,400,000
Leverage Existing IC for Training	4/16/15	4/22/15	Business Transformat	Acquire 2 companies	JDI	Grow the Business	Transform	Brooks, Emma		Turner, Beth	3,600,000	6,000,000	2,400,000
New Branding Initiative - AsiaPac Region	1/1/15	12/31/15	Business Transformat	Reduce Support issues by 20%	DMAIC	Cost Avoidance	Transform	Core, Elizabeth		Turner, Beth	3,300,000	6,555,000	3,255,000
Restructure LatAm Procurement Process	3/1/15	8/1/15	Business Transformat	Increase Revenue by 20%	Lean	Grow the Business	Transform	Thomas, Brian		Turner, Beth	18,000,000	47,000,000	29,000,000
Restructure AsiaPac Procurement Process	7/1/15	9/1/15	Business Transformat	Increase Partner revenue by 40%	Lean	Cost Reduction	Transform	Delgado, Mauricio		Schmidt, Rae	12,800,000	43,400,000	30,600,000

Benefits Realization

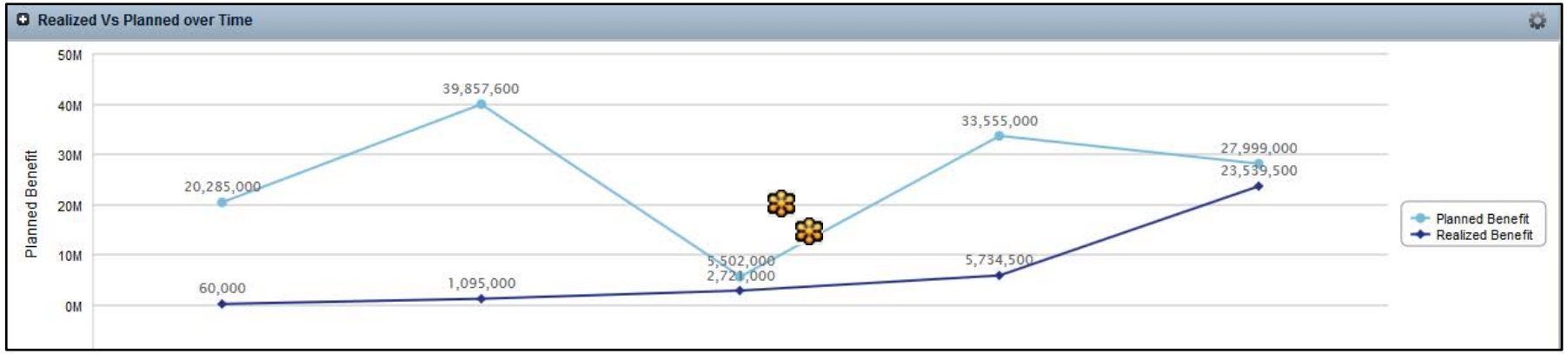
Track the Success of Your Transformative Initiatives

Benefit Forecast Review by Investment

Project Name	Status	Work Status	Alignment	Risk	Planned Benefit	Actual Benefit	Variance	% Variance
Improve Business Outcomes								
A Fantastic Initiative	Unapproved	Requested			3,920,000.00	170,000.00	3,750,000.00	4.34
A Process Improvement Project	Unapproved	Requested			3,050,000.00	2,150,000.00	900,000.00	70.49
Business Unit C Initiative	Approved	Requested			50,000,000.00	10,000,000.00	40,000,000.00	20.00
Business Unit D Initiative	Approved	Requested			3,675,000.00	2,000,000.00	1,675,000.00	54.42
Department B Initiative	Approved	Requested			5,280,000.00	3,500,000.00	1,780,000.00	66.29
Department D Initiative	Approved	Requested			74,400,000.00	102,000,000.00	-27,600,000.00	137.10
DOM Process Change	Unapproved	Requested			3,050,000.00	4,607,000.00	-1,557,000.00	151.05
Mobile App Enhancement	Approved	Requested			1,825,000.00	6,000,000.00	-4,175,000.00	328.77
Project XYZ	Approved	Requested			1,330,000.00	2,350,000.00	-1,020,000.00	176.69
Reorganize File Cabinets	Unapproved	Requested			3,050,000.00	2,608,000.00	442,000.00	85.51
Total					**149,580,000.00**	**135,385,000.00**	**14,195,000.00**	**90.51**
CEO Goal								
BRAVO Initiative	Approved	Active			51,100,000.00	0.00	51,100,000.00	0.00
Department A Initiative	Unapproved	Active			42,000,000.00	0.00	42,000,000.00	0.00
IRIS Initiative	Unapproved	Requested			264,570,000.00	0.00	264,570,000.00	0.00
Process Enhancement	Approved	Requested			3,300,000.00	0.00	3,300,000.00	0.00
Total					**360,970,000.00**	**0.00**	**360,970,000.00**	**0.00**
Cost Avoidance and Reduction								
A Brilliant Project	Unapproved	Requested			0.00	0.00	0.00	0.00
A New Initiative	Unapproved	Requested			0.00	0.00	0.00	0.00
Order Approval Process	Approved	Requested			1,750,000.00	0.00	1,750,000.00	0.00
RQS Enhancement	Approved	Requested			1,950,000.00	0.00	1,950,000.00	0.00
Time Approval Process	Approved	Requested			2,200,000.00	0.00	2,200,000.00	0.00
Workstation Consolidation	Approved	Requested			1,230,000.00	0.00	1,230,000.00	0.00
WPG Enhancement	Approved	Requested			3,900,000.00	0.00	3,900,000.00	0.00
Total					**11,030,000.00**	**0.00**	**11,030,000.00**	**0.00**
Increase Customer Value								

Benefits Realization

Track the Success of Your Transformative Initiatives



Selling Beyond IT

regoUniversity 2017

Let Rego be your guide.

Selling CA PPM Beyond Current Borders

- What has Worked For You in CA PPM Expansion?
  - How Did They End up Using CA PPM?
  - How Was It Funded?
  - Are Current Users Happy?
  - How Did You configure CA PPM? Partitions?

Selling CA PPM: Rego Thoughts

- Can’t Select What They Do Not Know About
- Need to Have a Plan Ready to Execute
- Understand Pain Points
- Must be Pretty

Questions?

regoUniversity 2017

Let Rego be your guide.

Thank You For Attending regoUniversity

Instructions for PMI credits

- Access your account at pmi.org
- Click on **Certification**
- Click on **Maintain My Certification**
- Scroll down to **Report PDU's**
- Click on Course Training (or other appropriate category)
- Enter **Rego Consulting**
- Enter Activity- **Enter Name of Course**
- Enter **Description**
- Enter **Date Started**
- Enter **Date Completed**
- Provide Contact Person **Name of Person to Contact**
- Provide Contact E-Mail **E-Mail of Person to Contact**
- Enter Number of **PDU's Claimed** (1 PDU per course hour)
- Click on the **I agree this claim is accurate box**
- Click **Submit** button

Let us know how we can improve!
Don't forget to fill out the class survey.

Phone
888.813.0444

Email
info@regouniversity.com

Website
www.regouniversity.com