



regoUniversity 2019

SAN DIEGO

# Apptio and Clarity, Complementary Tools

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# Introductions

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



# Quick Poll

- How many use Apptio in some part of the organization?
- How many have already looked into using Apptio?
- How many are using Clarity to track non-project data (time, resources, forecasts, etc)?
- How many have PMs using Excel to track project costs?
- How many are also doing work in Agile tool?
- How many have or will shift from project to product operating model?

# The State of Investment Planning



## Funding Model

Only **15%** have made changes to their funding process to account for Agile



## Limited visibility

**87%** of organizations are budgeting for IT in spreadsheets, with no aggregate view of spend across disparate GLs



## Business Case

**43%** cite misalignment with business priorities as the primary cause of project failure.



## Collaboration

**70%** struggle to foster collaboration between finance and development teams



# What is Apptio?

- Apptio is the market-leading IT Financial Management (ITFM) / Technology Business Management (TBM) solution for IT organizations
- It is a business management system to measure technology investments, plan for the future, and communicate the business value of IT.
- It helps IT leaders make data-driven business decisions by providing analytics and insights into the cost, quality, and value of IT.
- It automatically aggregates, cleanses, and establishes relationships across large amounts of data from disparate sources

APPTIO®  
**IT Planning**

APPTIO®  
**Project Financial Planning**

APPTIO®  
**Agile Investment Planning**

APPTIO®  
**Agile Insights**

# Apptio Products for Investment Planning

## IT Planning

- Automate the planning process, to reduce variance and increase forecasting
- Review actuals-to-plan in IT-relevant categories to shift investments and optimize spend
- Perform what-if analysis across time to adjust resources as business needs dictate

## Project Financial Planning

- Score & evaluate proposals for funding approval
- Build detailed financial plans with direct & indirect project costs
- Plan capital labor & forecast long-tail run costs
- Allocate departmental resources to project initiatives
- Forecast the business impact of the portfolio

## Agile Insights

- Visualize team labor spend & utilization
- Understand the cost to develop, innovate and maintain Agile products
- Track and analyze capitalized and operationalized labor spend and progress toward targets

## Agile Investment Planning

- Align portfolio investment with business strategy
- Build & manage financial plans that span waterfall & agile roadmaps
- Plan, track and adjust teams to ensure value delivery
- Assess the impact of current and planned Capex on operational budget
- Plan investments for Agile and project work in a single system

# BRIEF DEMO

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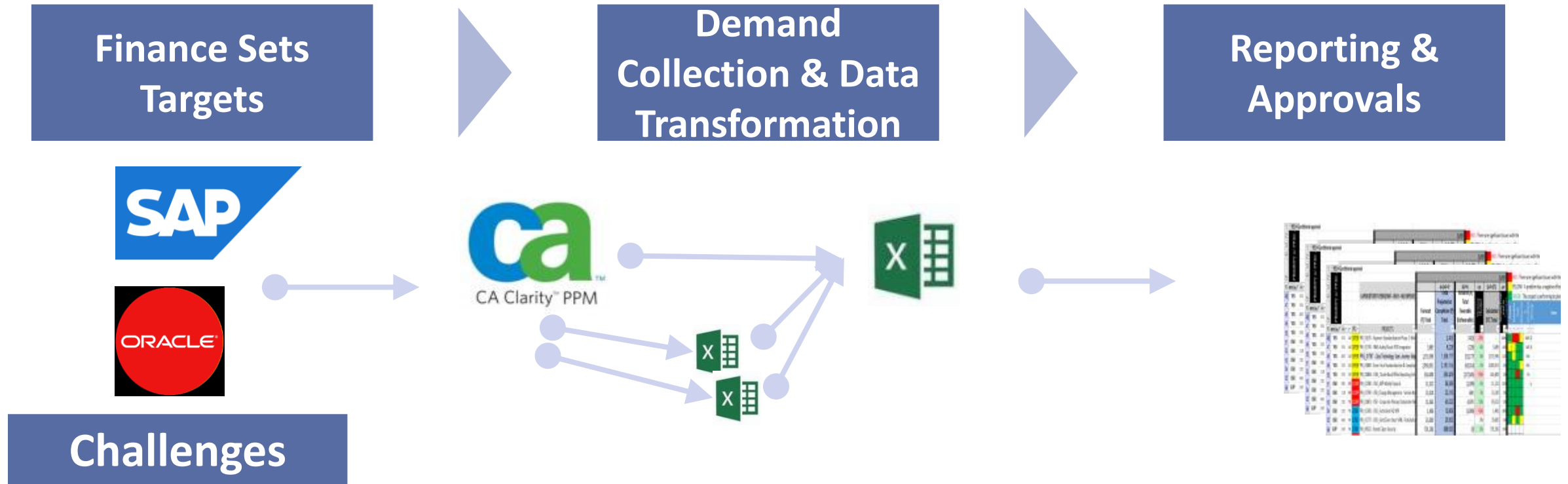
# Clarity / Apptio Joint Solution



Let Rego be your guide.



# Typical Planning Process

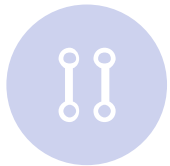


- Leadership **lacks visibility** and requires granularity for control
- Heavy **manual** efforts to transform the data
- Larger **margin for error** possible depending on tool selection
- **Time-consuming** across multiple FTE's to prepare leadership presentations
- **Inability to scale**

# Typical Pain Points for PPM/Finance Ecosystem

Pain Point	Description
Disconnect between PPM / Finance System level of detail	Limited alignment between level of detail in PPM and level of detail in financial systems
Lack of Taxonomy Alignment	Differences in what costs are called in PPM vs. financial system including how reported
Limited insight into Run the Business / Operational costs post project implementation	Project costs not being delegated to departments post-implementation to understand Run costs
Data misalignment	Inability to join data across systems (such as resource allocations, timesheets, and actual costs)

# Ideal Apptio + PPM Outcomes



## Unify

Unify portfolio and operational IT budgeting/forecasting process



## Forecast

Forecast changes in operational spend or labor usage that a project will trigger post go-live



## Remove Complexity

Remove finance-driven complexity from PPM and shift those processes to Apptio



## Contracts & Assets

Support for tracking contracts and assets related to a project



## Collaboration

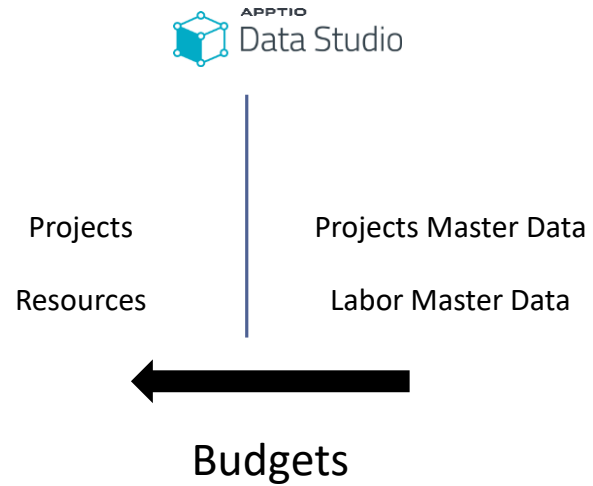
Better collaboration between the PMO and IT Finance to avoid unwieldy hand-offs that slow down initiatives



## Best of Both Worlds

Use the best functionality of each system – giving both the PMO and IT Finance the capabilities they need

# Apptio Complements Clarity



## Plan Work to Deliver Projects

- Project intake & selection
- Labor planning for execution
- Task scheduling & management

## Plan Costs of Project Work

- Project funding & budget approval
- Plan spend for all resources
- Project impact on build & run costs

# Clarity / Apptio Typical Integration Flows

## Scenario 1

- Maximize use of Clarity functionality
- One-way integration with Apptio – Financials, Portfolio, RM
- PMs have financial responsibilities, but stay entirely in Clarity
- Financial Analysts & Senior leadership use Apptio

## Scenario 2

- Use Clarity for most functions, but limited financials
- Bi-directional integration with Apptio – Financials sent to Clarity read-only
- PMs have limited financial responsibilities, only responsible for internal labor cost

## Scenario 3

- Maximize the use of Apptio functionality – Prioritization, Portfolio Mgmt, RM
- Portfolio & Resource Mangers use Apptio
- Bi-directional integration with Apptio
- PMs are split between systems – using Apptio for financials and Clarity for everything else



# Best Practice Recommendations

- Approach

- Leverage the best capabilities of Clarity/Apptio for a joint solution
- Customer experience focus -- one place to do things
- Don't turn PMs into financial analysts

- Desired Outcomes

- Bi-directional, multi-point Apptio/Clarity integration
- Alignment of time tracking, resource mgmt, etc to TBM within PPM, with PPM feeding data to Apptio
- Streamlined cross-tool demand management / project lifecycle process
  - Demand, prioritization, project selection, approval, & handoffs between tools
- Streamlined cross-tool project-related financial processes
  - Budgeting, forecast, baseline, change control, & handoffs between tools

# Getting Started with Apptio

Function	Apptio products	Key capabilities	Time to value
Manage Financials	IT Financial Management Foundation	<ul style="list-style-type: none"> <li>• Create a starting budget and compare multiple plan versions</li> <li>• Track and communicate status of the planning process</li> <li>• Control, optimize and plan labor, asset and vendor costs</li> <li>• Track IT spend from Executive Dashboard View (CIO-1)</li> </ul>	8 – 10 weeks
Manage Financials of Projects	Project Financial Planning	<ul style="list-style-type: none"> <li>• Allocate department labor resources to projects</li> <li>• Calculate and forecast multi-year project costs</li> <li>• Forecast and delegate future project run costs to departments</li> <li>• Capture investment requests from the business</li> </ul>	5 - 8 weeks
Understand & Optimize Resources & Investments	Agile Insights	<ul style="list-style-type: none"> <li>• Analyze the cost of labor resources dedicated to a product</li> <li>• Compare completed work to planned activities</li> <li>• Identify team activity not associated to product work streams</li> <li>• Monitor team's yield and quality of work over time</li> </ul>	8-10 weeks
Plan and Prioritize Agile Investments	Agile Investment Planning	<ul style="list-style-type: none"> <li>• Capture investment demand from the business</li> <li>• Prioritize product investments</li> <li>• Plan business value of product investments</li> <li>• Create roadmaps that connect feature &amp; investments to strategy</li> </ul>	3-5 weeks

# Questions?



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## Instructions for PMI credits

- Access your account at pmi.org
- Click on **Certifications**
- Click on **Maintain My Certification**
- Click on **Visit CCR's** button under the **Report PDU's**
- Click on **Report PDU's**
- Click on **Course or Training**
- Class Name = **regoUniversity**
- Course Number = **Session Number**
- Date Started = **Today's Date**
- Date Completed = **Today's Date**
- Hours Completed = **1 PDU per hour of class time**
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# APPENDIX: Clarity / Apptio Integration Details



Let Rego be your guide.



# Clarity / Apptio Architecture Considerations

## Functionality Cross-Over

- Demand intake
- Portfolio Analysis & Reporting
- Resource Management
- Project Labor Forecasting
- Project Non-Labor Forecasting (Contracts, Assets, etc)
- Project Budget

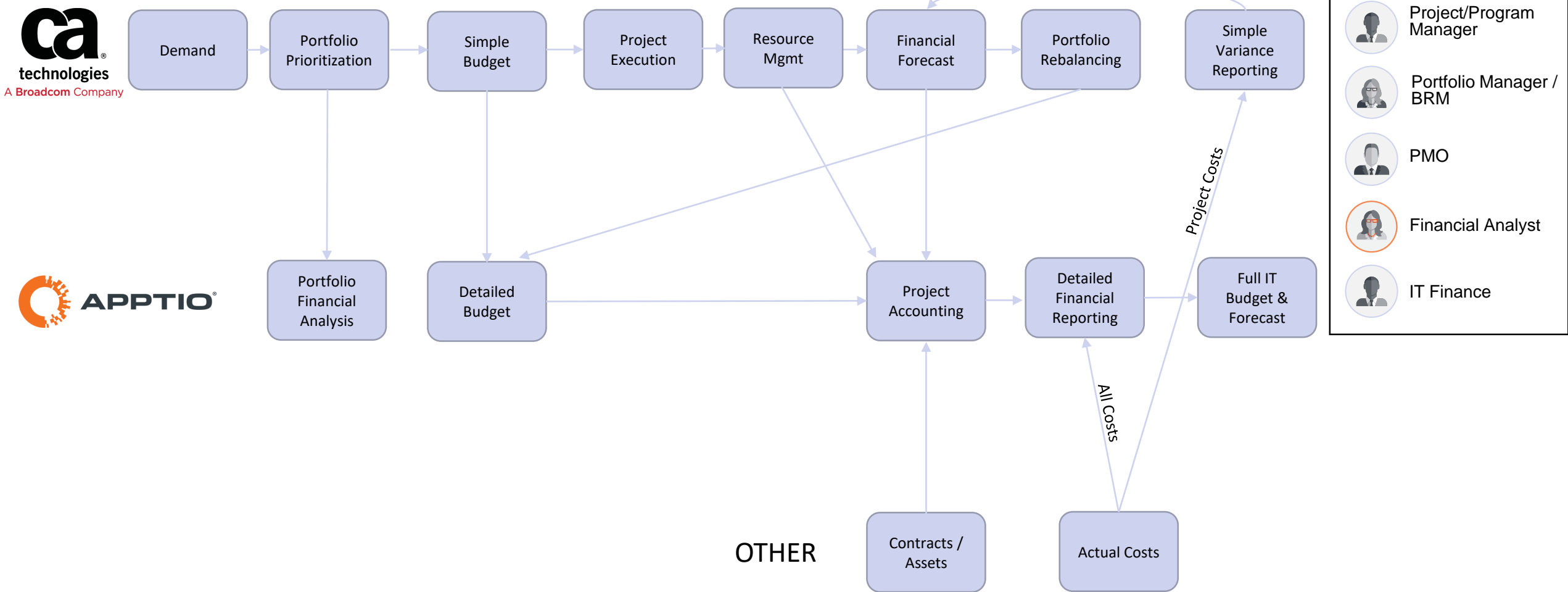
## System of Record Decisions

- Idea/Demand
- Portfolios
- Resource Availability/Allocations
- Project Labor Forecasts
- Project Non-Labor Forecasts (Contracts, Assets, etc)
- Project Budget

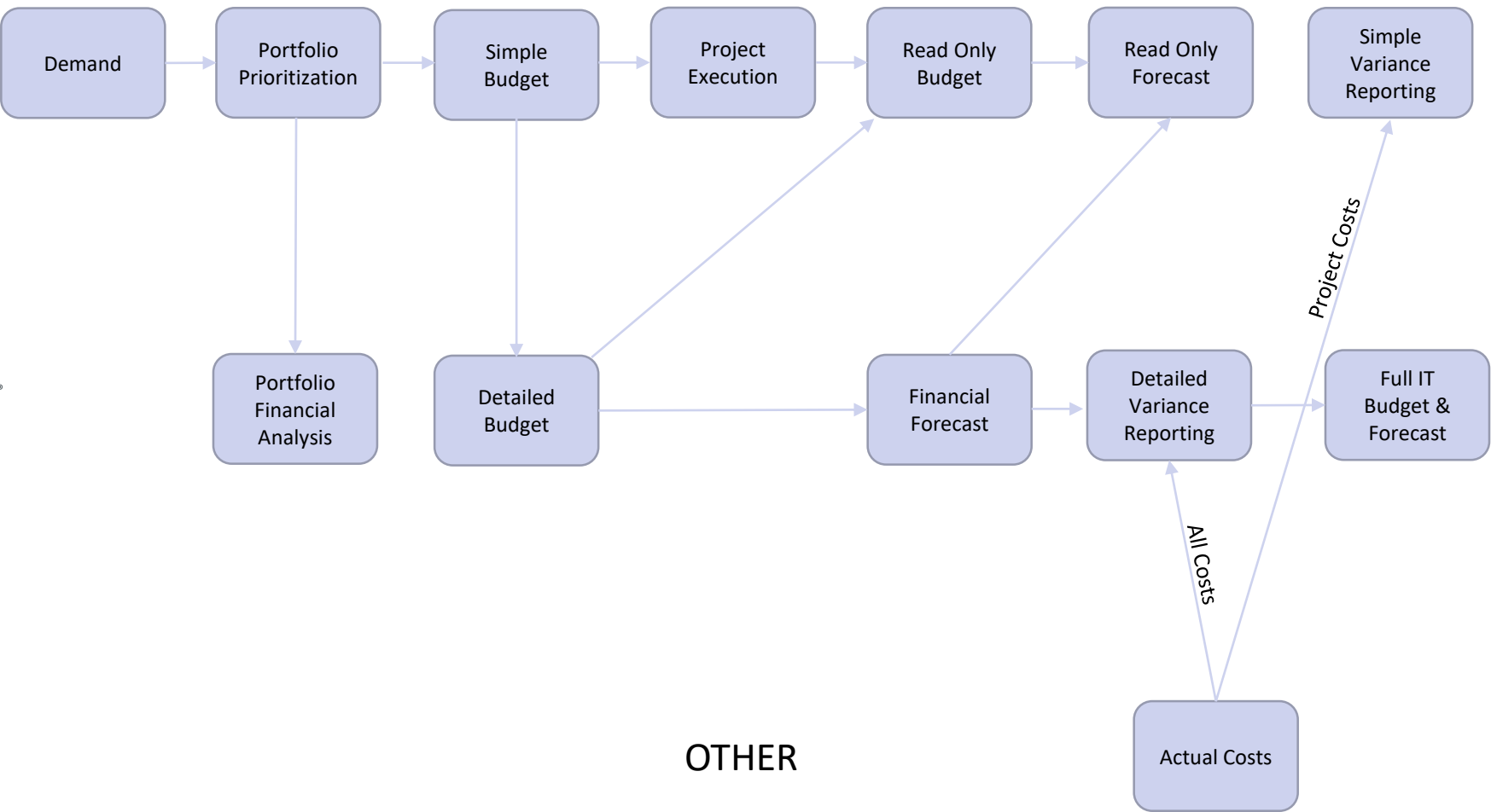
## Integration Points

- Demands
- Portfolios
- Resource Availability/Allocations
- Asset Mgmt
- Contracts
- Project Labor Forecasts
- Project Non-Labor Forecasts (Contracts, Assets, etc)
- Project Budget

# Apptio + Clarity Data Flows – Example #1



# Apptio + Clarity Data Flows – Example #2



OTHER

**FUNCTIONAL MAP**

Project/Program Manager

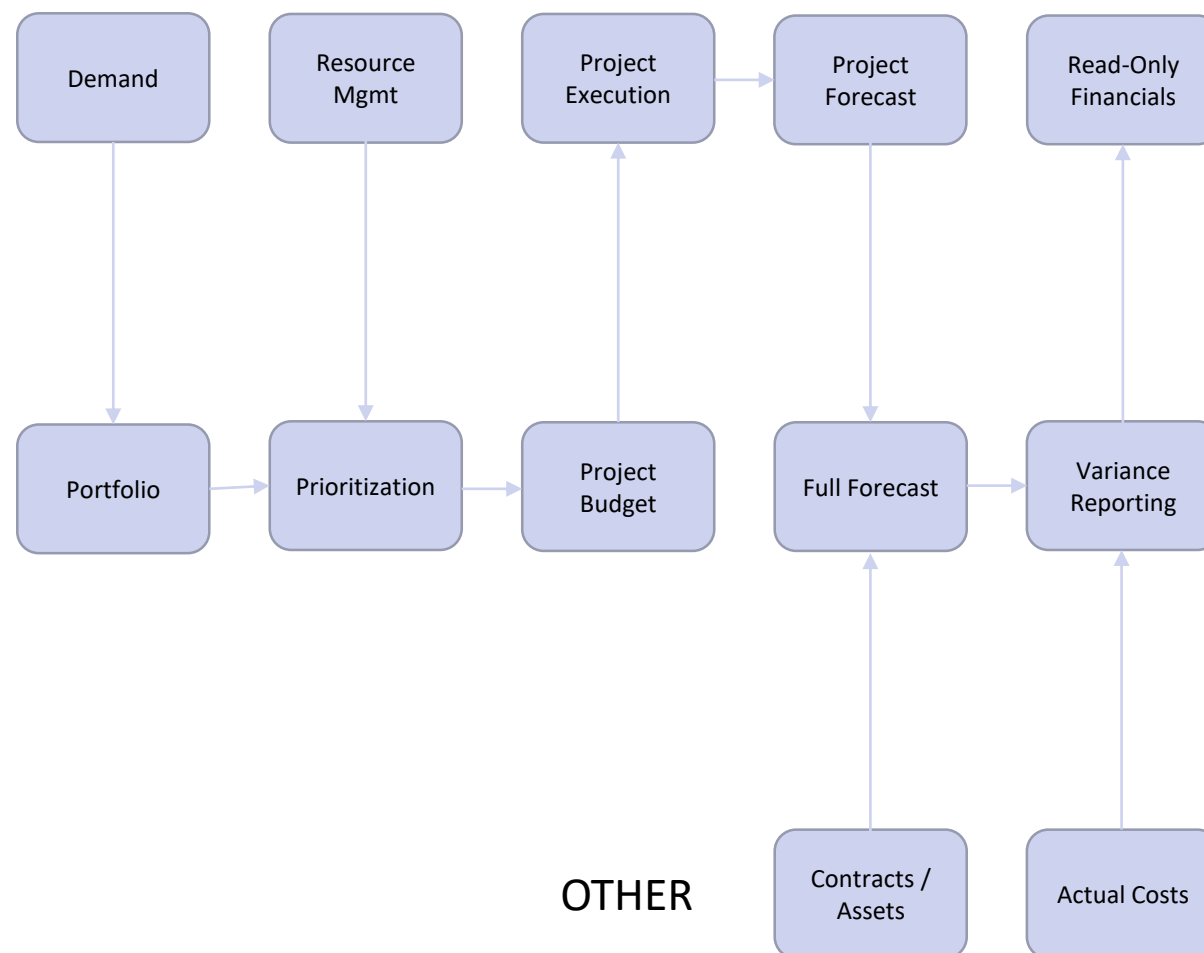
Portfolio Manager / BRM

PMO






Financial Analyst

IT Finance

# Apptio + Clarity Data Flows – Example #3



## FUNCTIONAL MAP

-  Project/Program Manager
-  Portfolio Manager / BRM
-  PMO
-  Financial Analyst
-  IT Finance

# Datalink + regoLink: Apptio <-> Clarity Connector

- Bi-directional, multi-point Clarity <-> Apptio integration
- Faster and more efficient than OOTB Apptio to Clarity datalink connector
- Can handle millions of records
- Utilizes Rego's Data Extraction Tool & Data Importer
- Flexible options
- Performance metrics
- One-time fee; no maintenance

