



regoUniversity

NASHVILLE • 2022

Apptio and Clarity, Complementary Tools

Your Guides:

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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 have or will shift from project to product operating model?

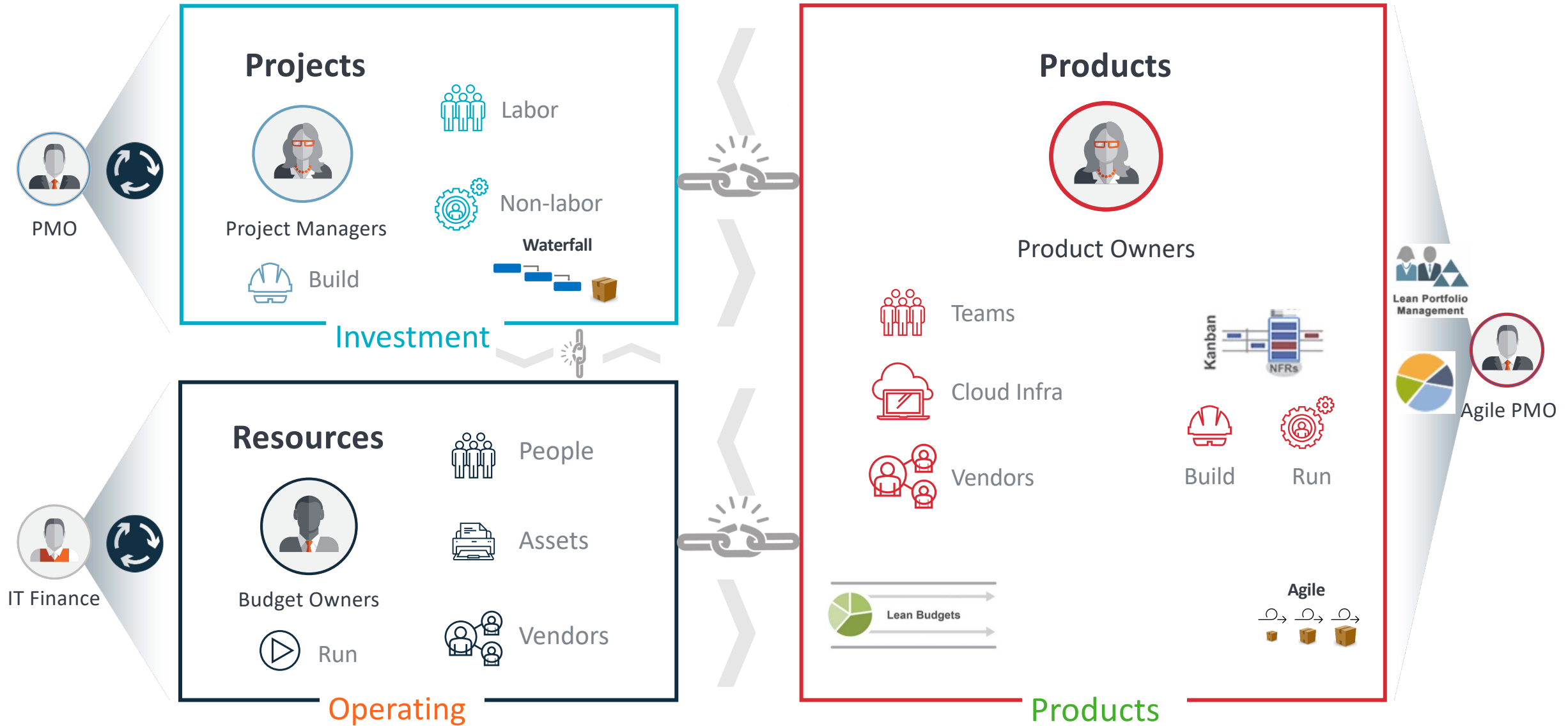
Agenda

- Typical Challenges
- Apptio Introduction
- Clarity / Apptio Solution
- Rego's BETA Integration

Challenges



Investment / Operating / Products Disconnect



Typical Points of Collaboration for PMO & Finance

Capex/Opex

Rules for classifying labor as capital or operating.



Integration Points

Integration points between PMO-owned and IT Finance-owned systems



Rates

Level of detail for rates, as well as the rates themselves



CIP

Trigger to CIP account for capital project completion (i.e. go-live)



Systems of Record

Systems of record for financial data



Budget Data

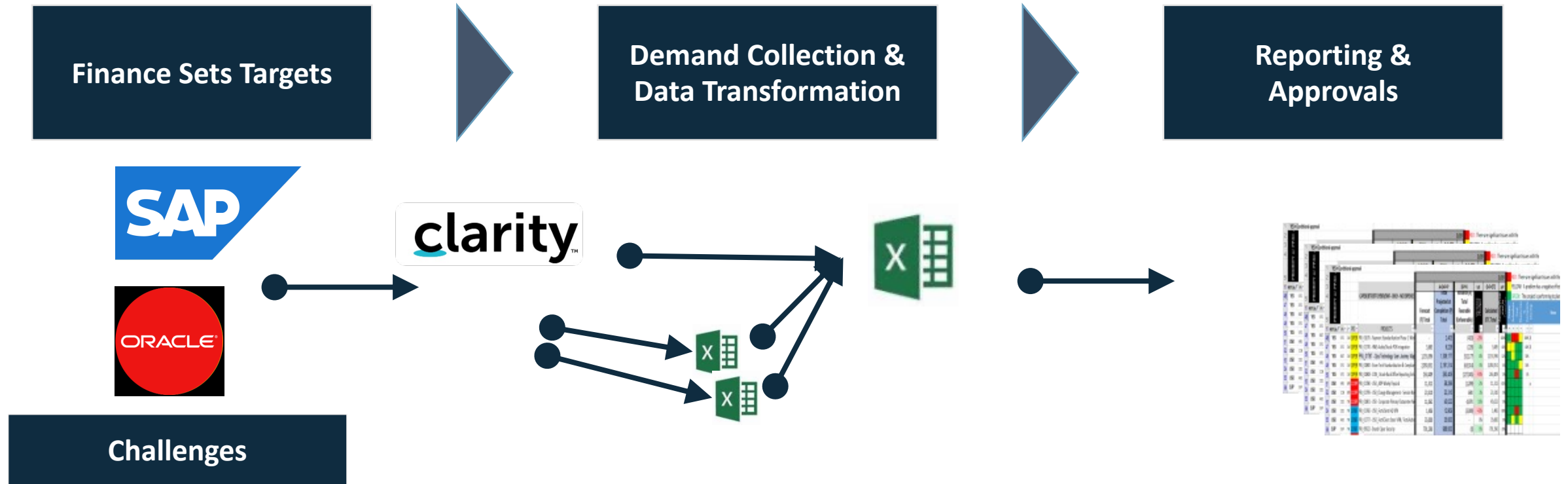
Required project budget/forecast data dimensions



70% of IT executives struggle to foster collaboration between project & finance stakeholders



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

PPM Financial Challenges

- ▶ **Complicated Processes & Reporting:** PPM systems with financial capabilities unnecessarily pull PMs into financial planning duties, and complicate processes for both PM and IT Finance teams
- ▶ **Limitations for Project Accounting:** Lack of system for true project accounting (Depreciation/amortization, vendors, cost centers, contracts, assets, GL accounts, etc)
- ▶ **Limits for Run the Business Planning:** Cannot plan out-year operational phase of projects, leaving PMO blind to realities of the full financial lifecycle of new initiatives.

Agile Financial Challenges

- ▶ **Investment Prioritization:** How are investments evaluated and prioritized in moving from waterfall to Agile or hybrid- Waterfall/ Agile environment?
- ▶ **Resource Optimization:** Where do we optimize resources to for new innovation, maintenance, and quality efforts?
- ▶ **Value Tracking:** How to we track the \$ value of product delivered based on the investments made and resources allocated?
- ▶ **Labor Capitalization:** How do we shift from traditional capitalized labor tracking and accounting to an Agile one, considering that time is no longer based on timesheet process?

Discussion

- Does anyone have these challenges in their organization?



Apptio Introduction



Apptio. The Business System for Governing Technology



Sales *has* **CRM**



HR *has* **HRM**



Marketing *has* **RPM**



Finance *has* **ERP**

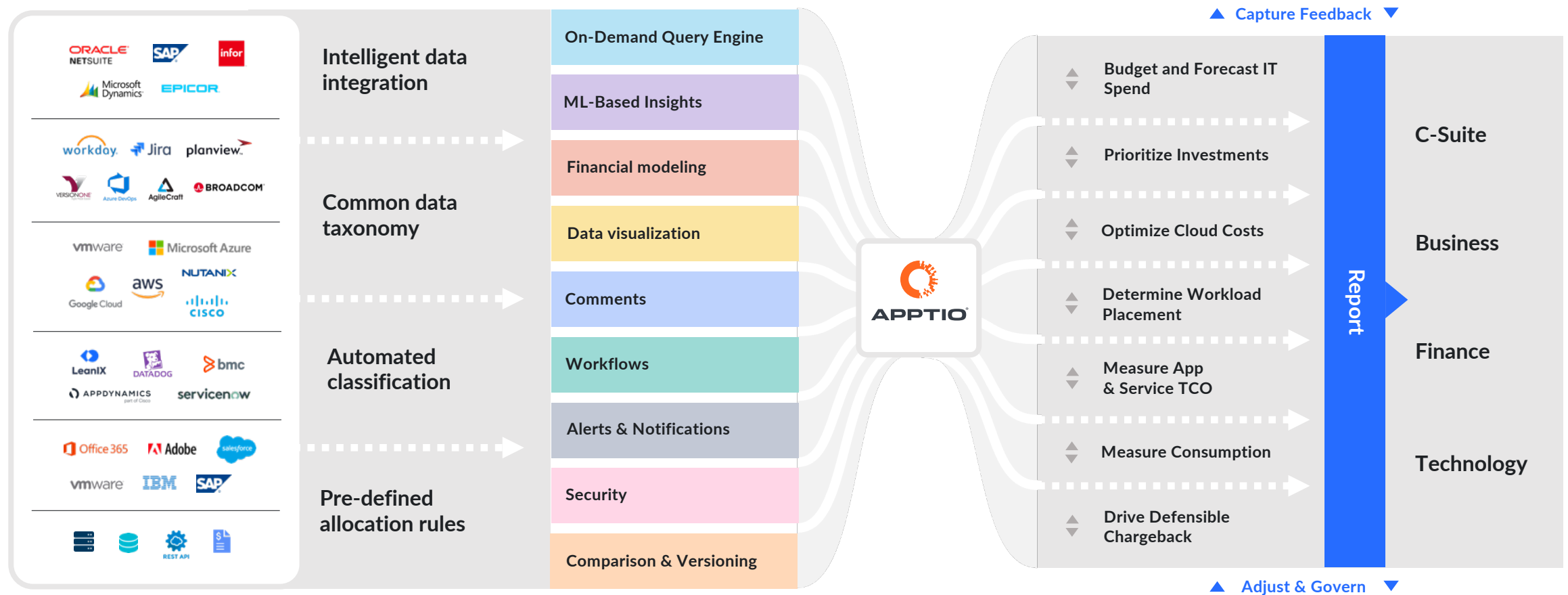


Technology Business Management

*“TBM shifts focus from cost to value,
accelerating the business technology agenda.”*

FORRESTER®

How Apptio Works



Communicate & Manage IT Value with Cost Transparency

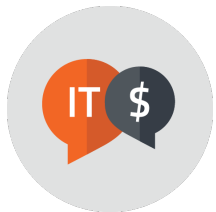


Understand True IT Costs

Weekly and monthly standardized business views of infrastructure, projects, vendors, labor and cloud – all in one place.

Informed Decisions

Fact-based data to make better decisions real-time



Communicate the Value of IT

Show the cost and consumption of business applications and services to explain and defend costs in terms the business understands.

Business Alignment

Get on the same page with business partners with a common language



Expose Cost and Consumption Levers

Provide each BU its share of IT project, application and service costs and where they can be impacted by adjusting consumption and quality choices.

Collaboration

BUs treat IT costs as their own and collaborate to maximize value and innovation

Clarity / Apptio Joint Solution



Discussion

- Is anyone using Apptio / Clarity jointly today?
How is it working (or not working) for you?



Apptio Complements Clarity

PPM

APPTIO
Data Studio



PPM Data	Apptio Data
Projects	Projects Master Data
Resources	Labor Master Data



Budgets

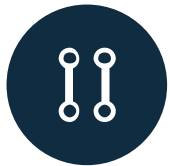
Plan Work to Deliver Projects

- 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

Apptio + Clarity 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 Clarity 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

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

Pitfalls to Avoid

Insufficient Clarity / Apptio integration

Duplicate entry of data, resulting in inefficiencies

Jumping between systems to find information, resulting in a poor customer experience

Lack of uniform project lifecycle management, including financial governance, across both PPM and Apptio

Data misalignment, with the inability to join data across systems (such as resource allocations, timesheets, and actual costs)

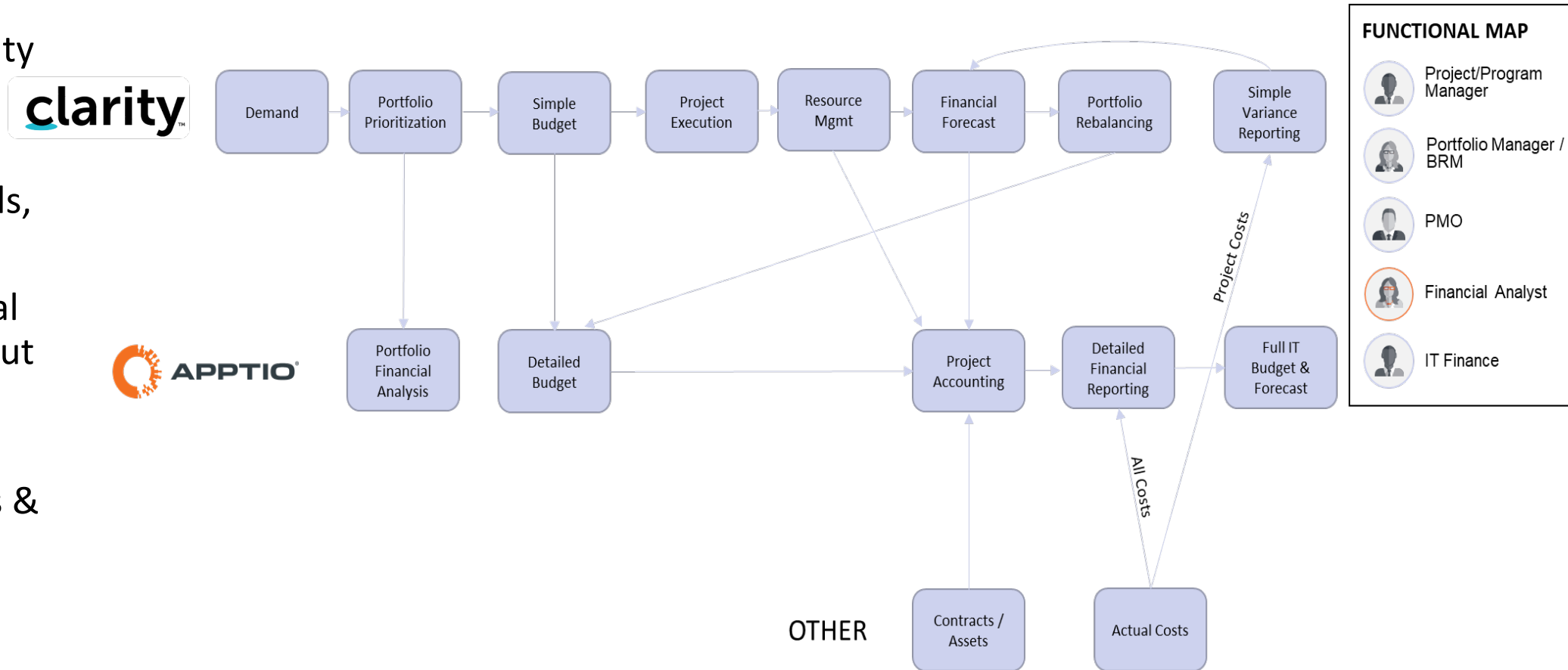
Non-uniform resource management process across systems

Project costs not being delegated to departments post-implementation

Typical Apptio / Clarity Data Flows

Scenario 1

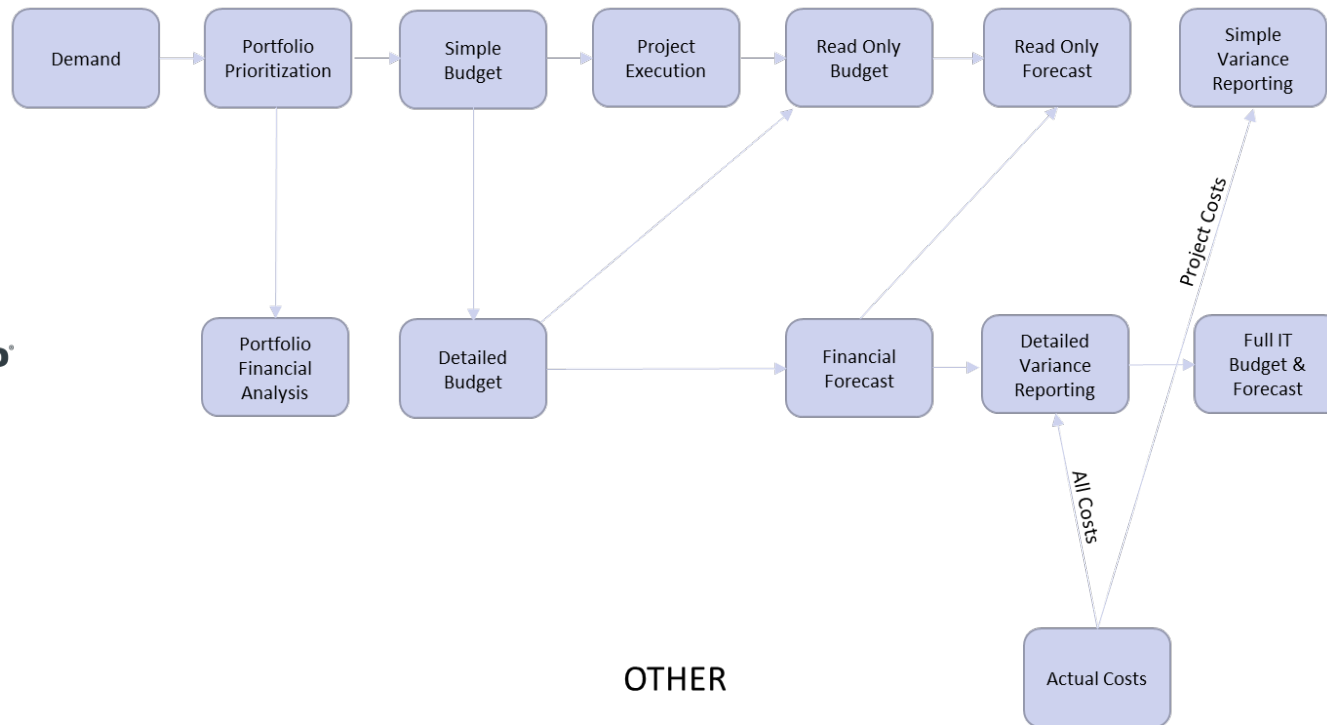
- Maximize use of Clarity functionality
- One-way integration with Apptio – Financials, Portfolio, RM
- PMs have financial responsibilities, but stay entirely in Clarity
- Financial Analysts & Senior leadership use Apptio



Typical Apptio / Clarity Data Flows

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



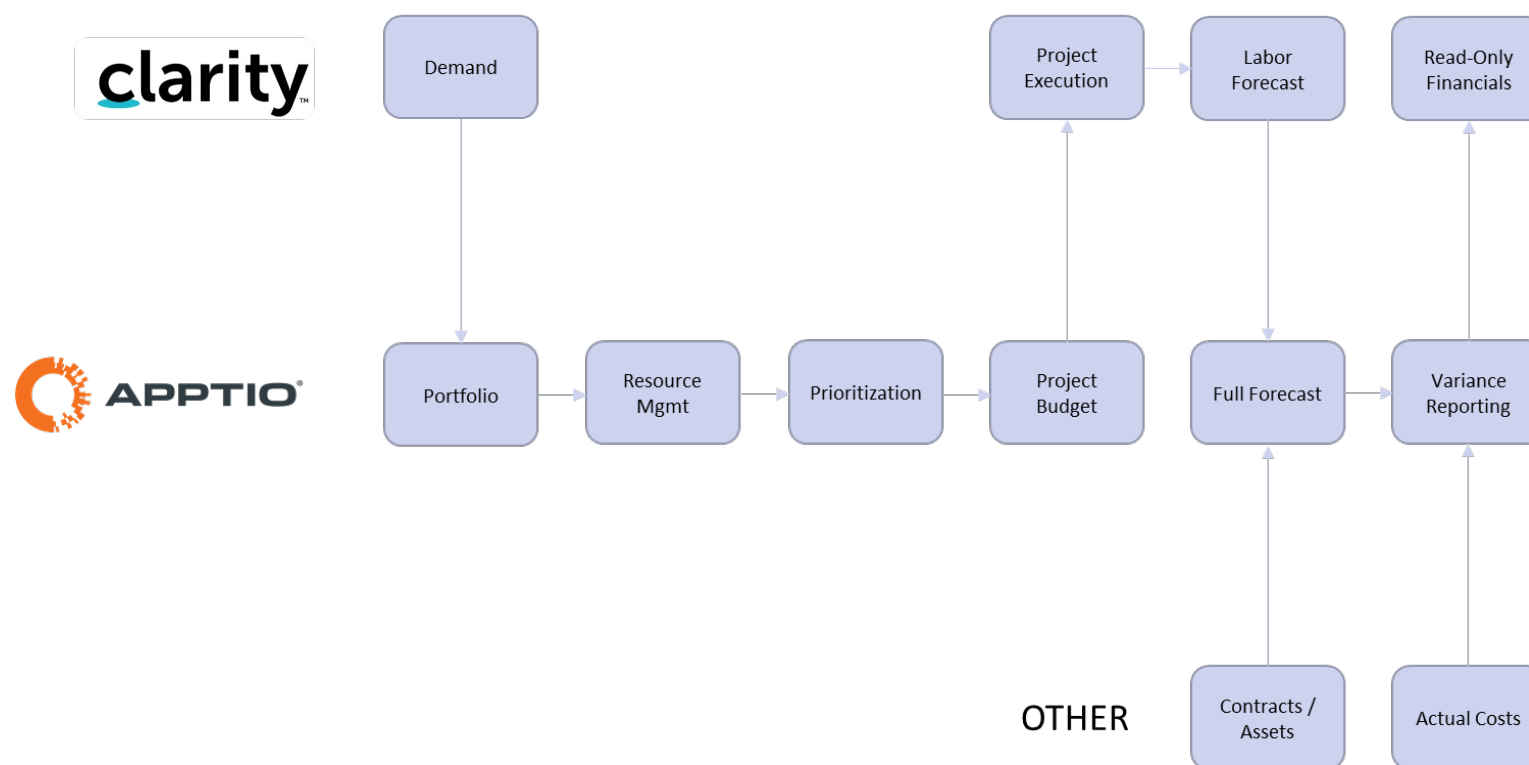
FUNCTIONAL MAP

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

Typical Apptio / Clarity Data Flows

Scenario 3

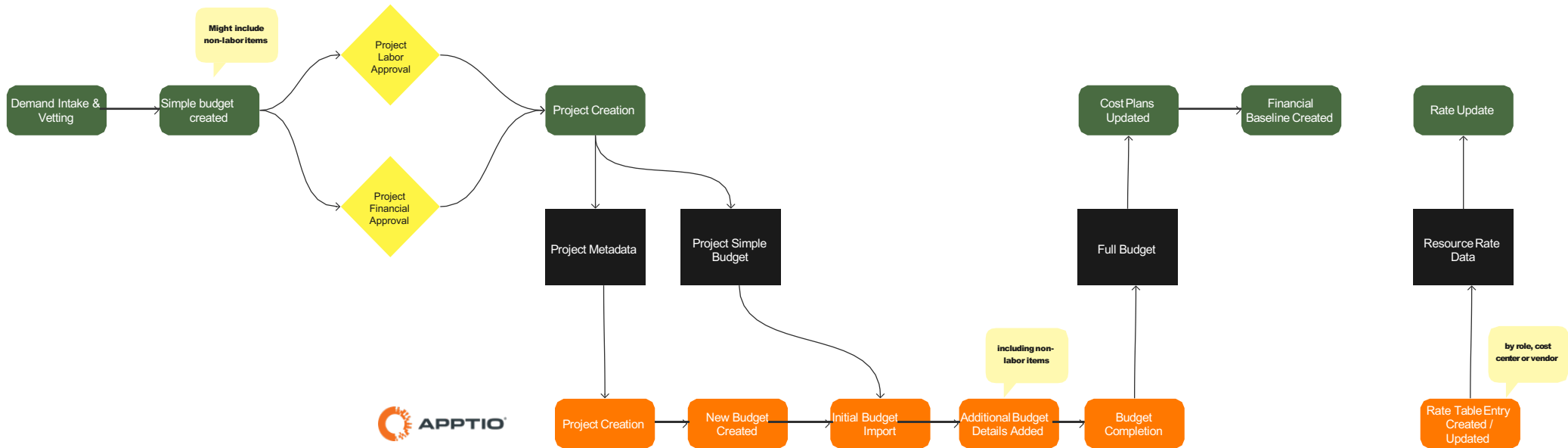
- Maximize the use of Apptio functionality – Prioritization, Portfolio Mgmt, RM
- Portfolio & Resource Mangers use Apptio
- Bi-directional integration with Apptio
- PMs are split between systems – using Apptio for financials and Clarity for everything else



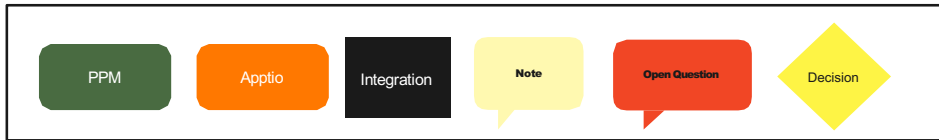
FUNCTIONAL MAP



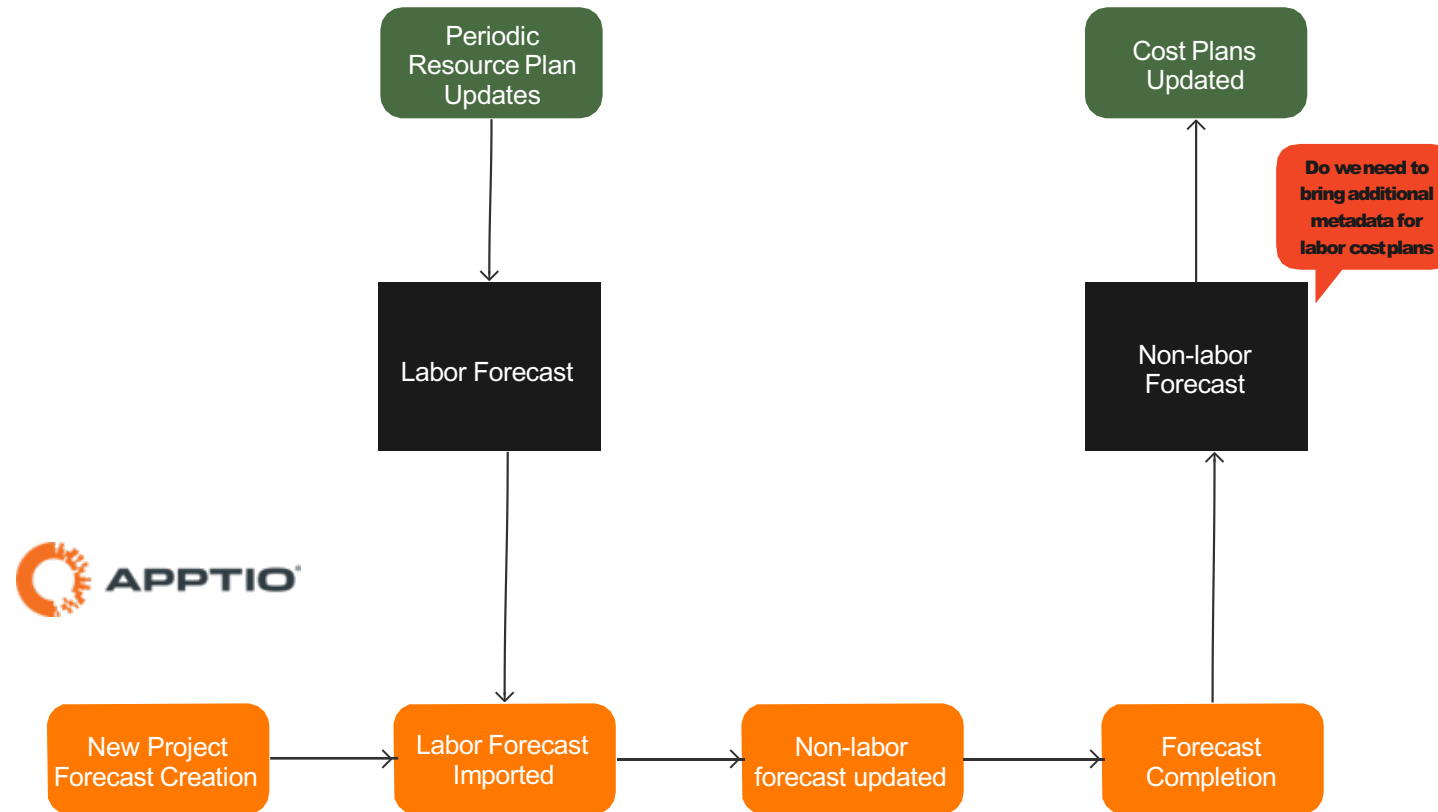
Labor, Budget, and Rate Sync



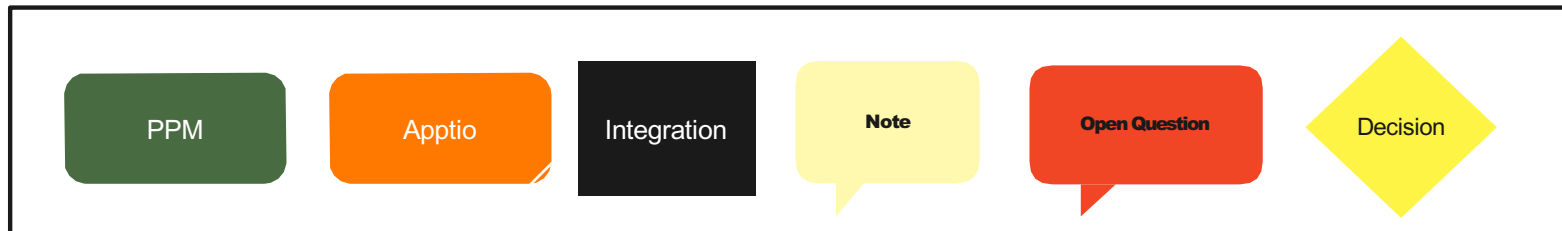
Legend



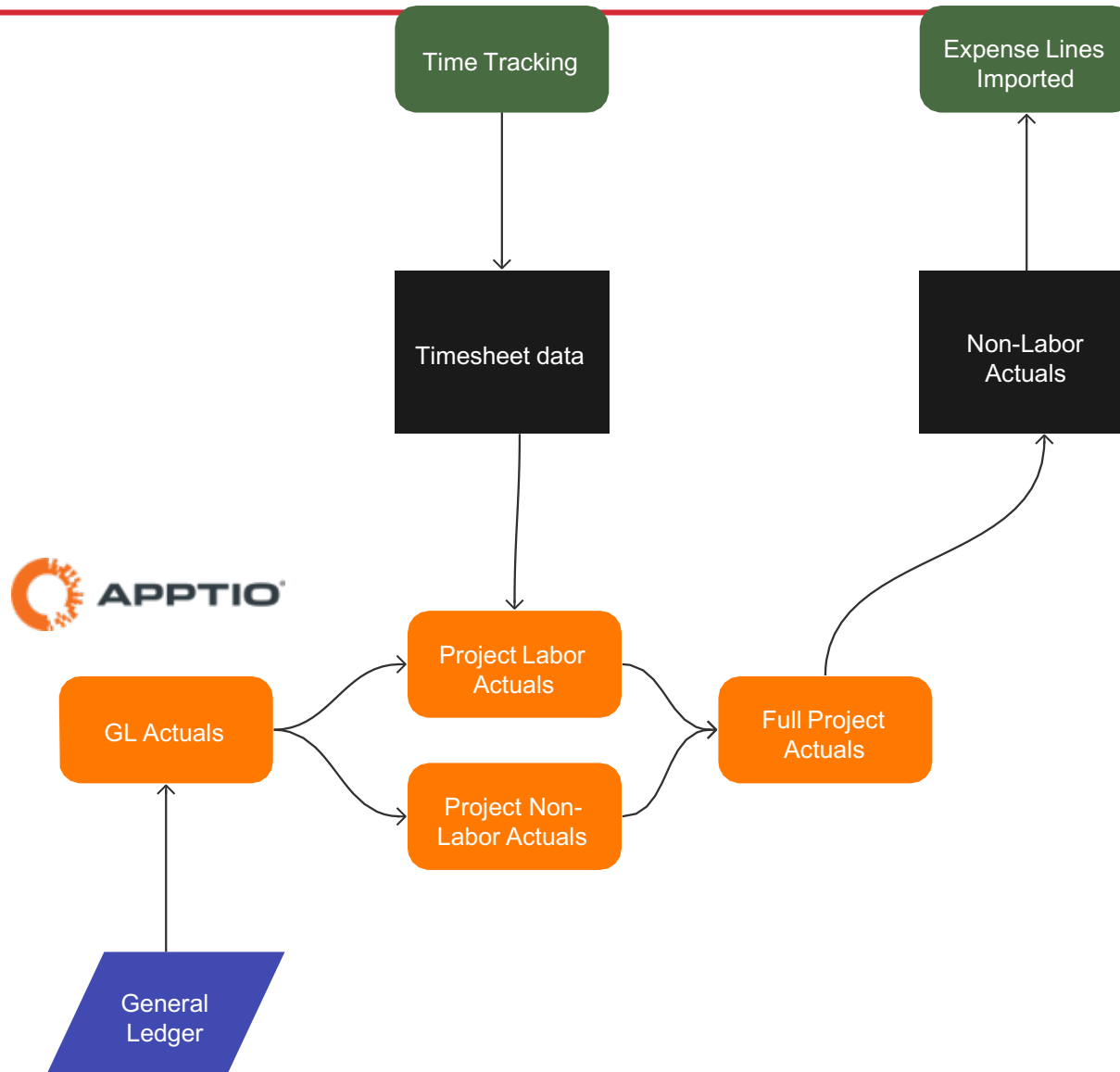
Labor & Non-labor Forecast Sync



Legend



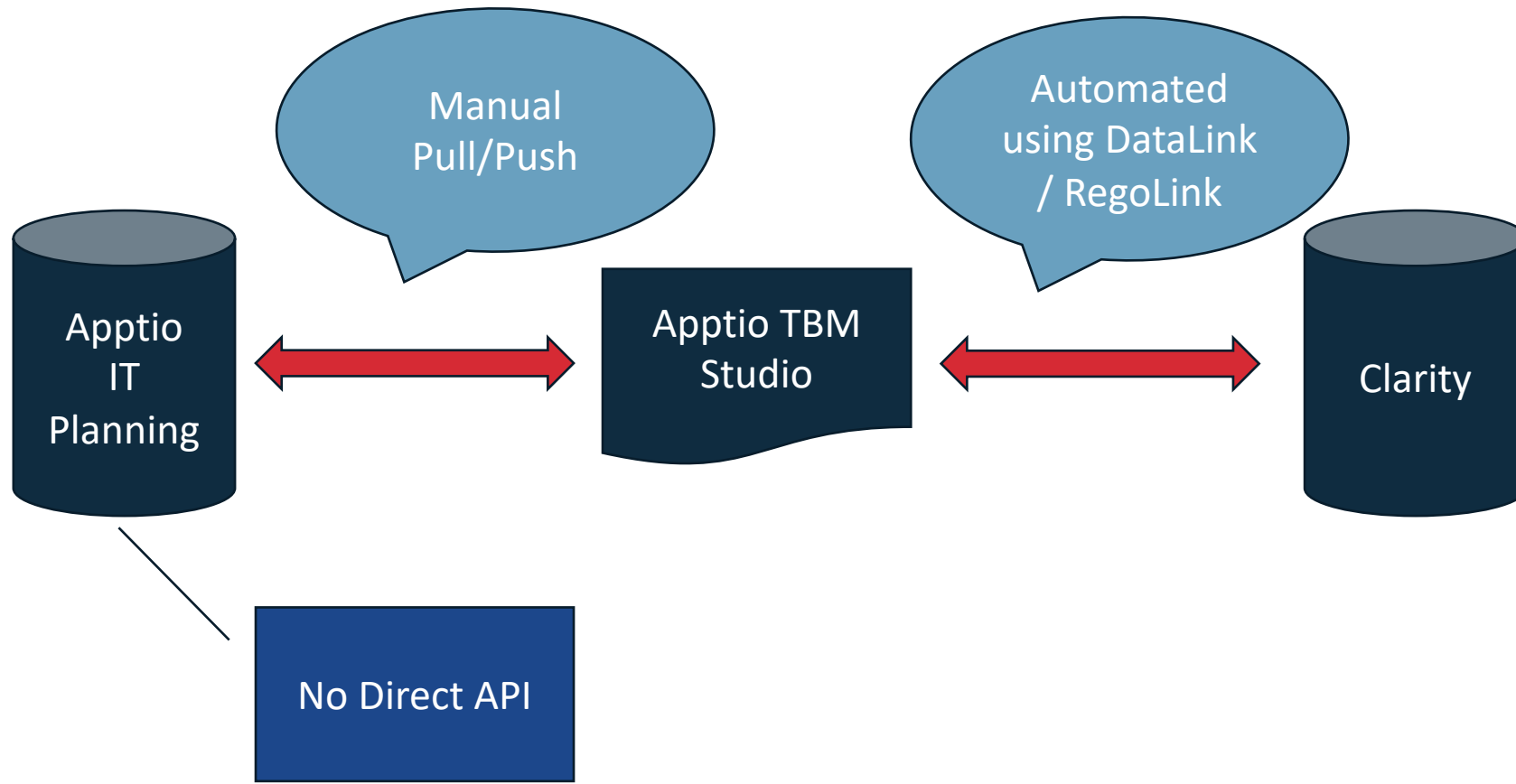
Labor & Non-labor Actuals Sync



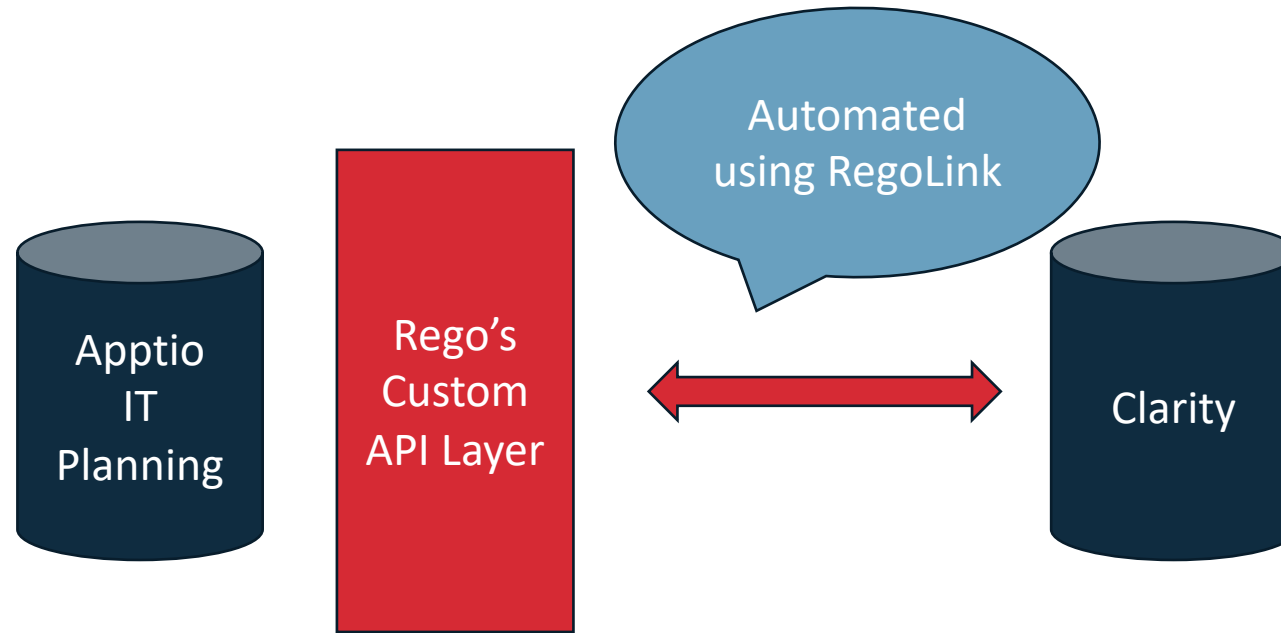
Rego Innovation - BETA



Standard Clarity-ITP Integration



Rego's BETA Clarity-ITP Integration



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 Provider = **Rego Consulting**
- Class Name = **regoUniversity**
- Course **Description**
- Date Started = **Today's Date**
- Date Completed = **Today's Date**
- Hours Completed = **1 PDU per hour of class time**
- Training classes = **Technical**
- Click on **I agree** and **Submit**



Let us know how we can improve!
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