



Apptio Targetprocess : Labor Financial Management

Introduction

- Introductions
- The Challenge
- Foundations
- The Journey
- How to Get Started



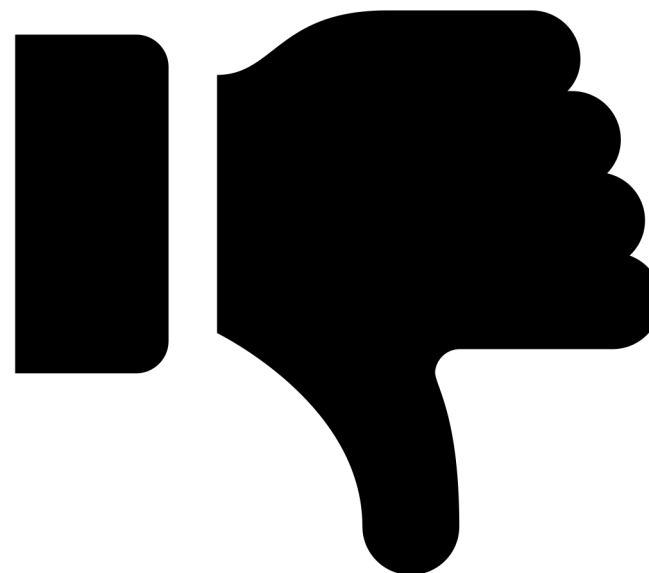
Corby James – Agile Sales Director

- 30 Years of Consulting on Software Engineering and Technology
- CTO, CIO, and CEO
- Scuba Instructor and
- Underwater Photog



Getting to Know You

Thumbs Up or Down



FINANCE

AGILE

WAGILE

PROJECTS

PRODUCTS

FUND PROJECTS
OR CAPACITY

PERSISTENT
TEAMS

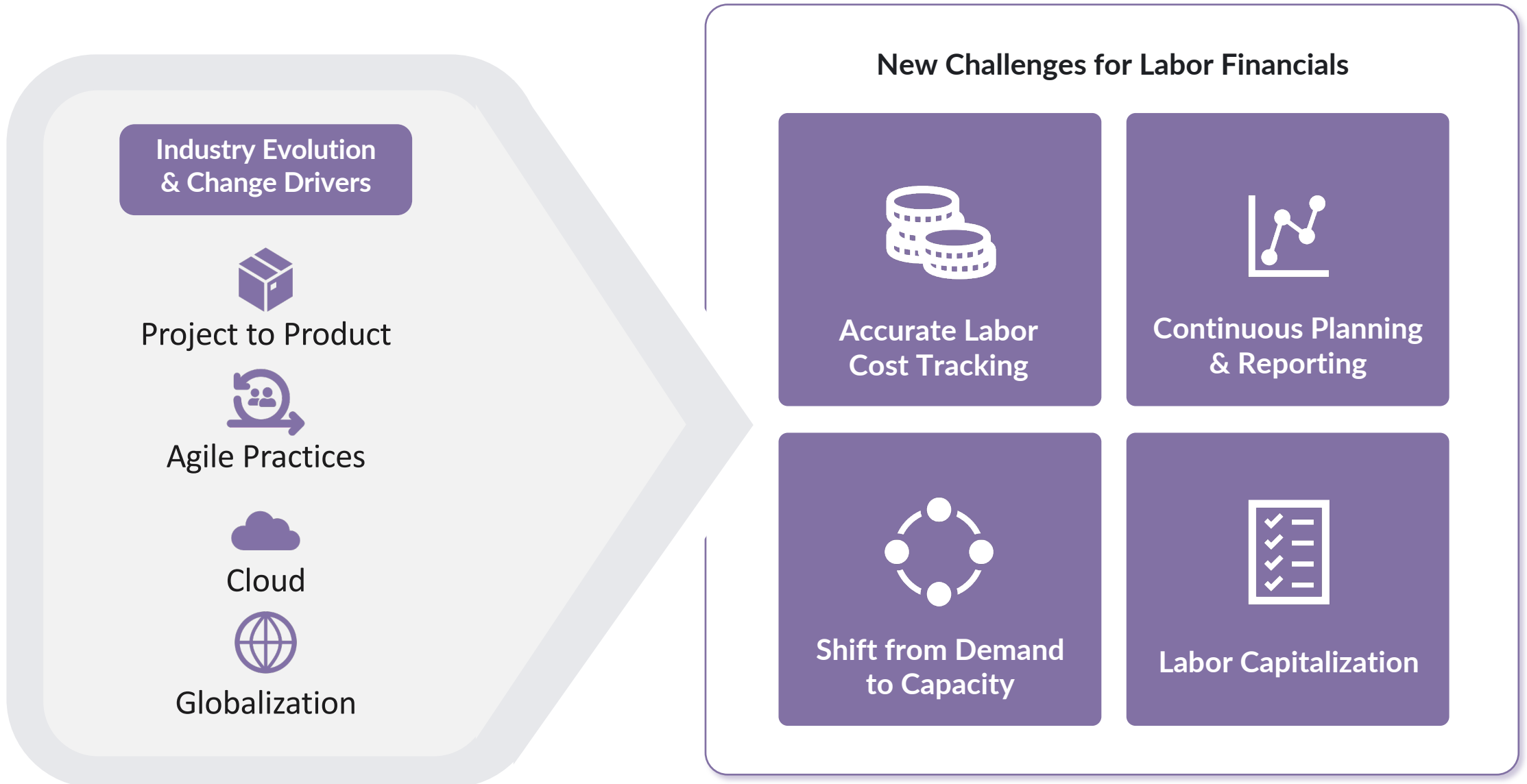
TIMESHEETS

SCALED AGILE FRAMEWOK

LEAN PORTFOLIO
MANAGEMENT

LABOR
CAPITALIZATION

TECHNOLOGY FINANCE CONTINUES TO EVOLVE



THE CHALLENGE

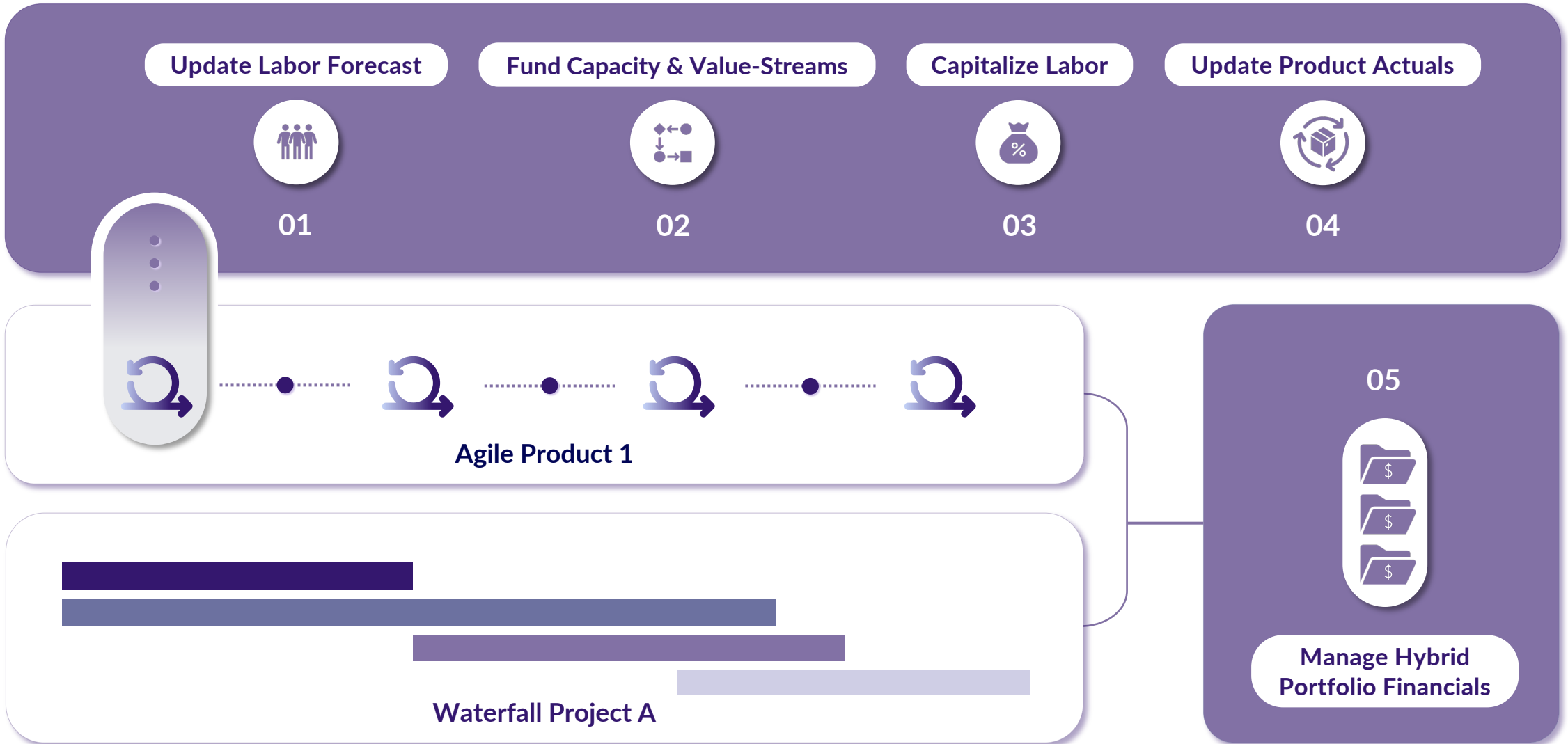


AS A CIO:

- WHERE SHOULD I SPEND MY NEXT DOLLAR?
- AM I FUNDING THE “RIGHT” WORK?
- AM I FUNDING THE WORK THAT WILL HELP ME MEET MY OBJECTIVES?
- WHAT IS MY HEADCOUNT AND HOW MUCH DOES IT COST BROKEN DOWN BY VARIOUS DIMENSIONS?
- I HAVE TO PIVOT. HOW DO I UNWIND ONE INITIATIVE IN FAVOR OF ANOTHER?



LABOR FINANCIAL MANAGEMENT



EMPOWERING TECHNOLOGY FINANCE TEAMS FOR AGILITY

Value Outcomes



Time Savings



Accuracy & Defensibility



Transparency & Visibility



Continuous Planning & Agility

Labor Financial Management



Update Labor Forecast



Fund Capacity & Value-Streams



Capitalize Labor



Update Product Actuals



Manage Hybrid Portfolio Financials

 **APPTIO** | Targetprocess

 **APPTIO** | ApptioOne



APPTIO PLATFORM: KEEPING FINANCE AND THE PMO ON THE SAME PAGE

PMO Responsibilities

Strategic Planning/OKRs

Value Planning

Work Prioritization

Resource Management

Cross-Product Dependencies

Shared

Monthly/Quarterly Close

Value Realization

Continuous Planning

Ideation & Analysis

Finance Responsibilities

Labor Planning & Forecasting

Capitalization

Manage Hybrid Financials

Finance Initiatives

Product TCO, P&L, & ROI



FOUNDATIONS

1

Connect Objectives
to Work, Work to
Labor, Labor to Cost

2

Segment Agile and
Non-Agile Work

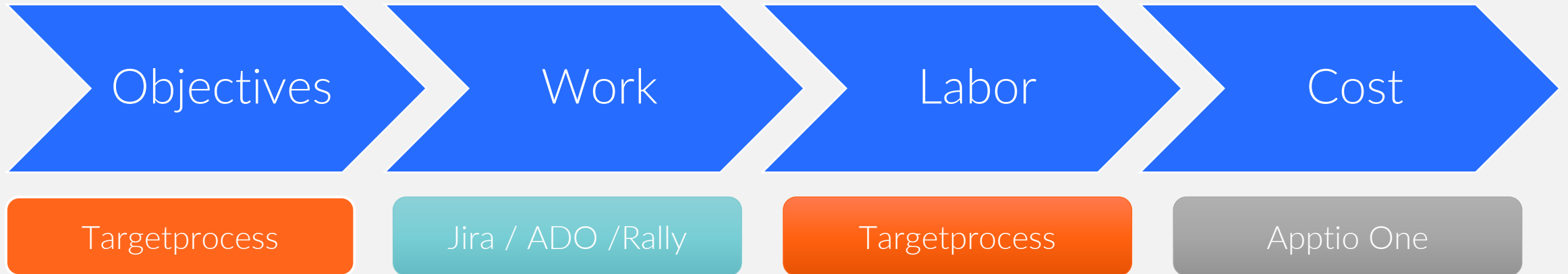
3

Run in the Roster +
Resource Financials

4

Integrate with Team
Tools

FOUNDATIONS



THE JOURNEY

Decisions

- Model for Cost Application
- Labor Dimensions – Organization, Scaling model, Business Unit, Run/Grow
- Capitalization Guidelines

Pitfalls:

- Not all agile
- Story points too immature
- Audit
- Over engineering



HOW TO GET STARTED

- Communicate with Finance and PMO/Execution
- Investigate funding capacity versus work
- Look for where you can eliminate time sheets



Questions?

