Rego's TBM Journey Map

Tim Pietro
VP, Business Development
Rego Consulting

TBM COUNCIL
Standards Committee Member
FinOps Foundation

Welcome to IT Service TCO

The following summary page describes the reports and screens that are leveraged as part of the IT Service TCO process. Most users will access the first set of reports on the Executive Review. Other users, that are more engaged in the setup and administration of Service TCO, will access additional reports and screens where budget and distribution rules are put in place.
You can access the report or screen of interest from the links in on the left in each of the tabs below. Please note that you will have access to only those that are associated to your role

Real-Time Mode

Function Reports | Service Reports | Trend Reports | Plan Distribution | Commit and Actual Distribution | Metrics Reports | Costing Administration | Archived Reports

Reports

- Function Cost Report
- Gross Vs Net
- Financials to Cost Elements
- Data Quality and Exception Dashboard

Cost Pool 'Details' Page

Hyperlink number for details page

Q2 FY2014

Department Owner
DIAZ JR, GUILLERMO
GOPALRATNAM, VENBAKM C
JACOBY, REBECCA J
JORDAN, SHEILA B
MANVILLE, JOHN T
WU, KIN-CHING

Click on name to change bar graph

Headcount

Department Name	Department Number	# of Services	# of Programs	Q1 Plan	Q1 Commit	Q1 Actual
Department Name A	123456	1	4	$10	$11	$9
Department Name T	324563	2	2	$5	$6	$6
Department Name U	212357	4	2	$4	$1	$6
Department Name X	879432	3	4	$9	$1	$6
Grand Total		10	12	$28	$19	$27

Outside Services

Department Name	Department Number	# of Services	# of Programs	Q1 Plan	Q1 Commit	Q1 Actual
Department Name A	123456	2	5	$10	$11	$9
Department Name T	324563	2	5	$5	$6	$6
Grand Total		4	10	$15	$17	$15

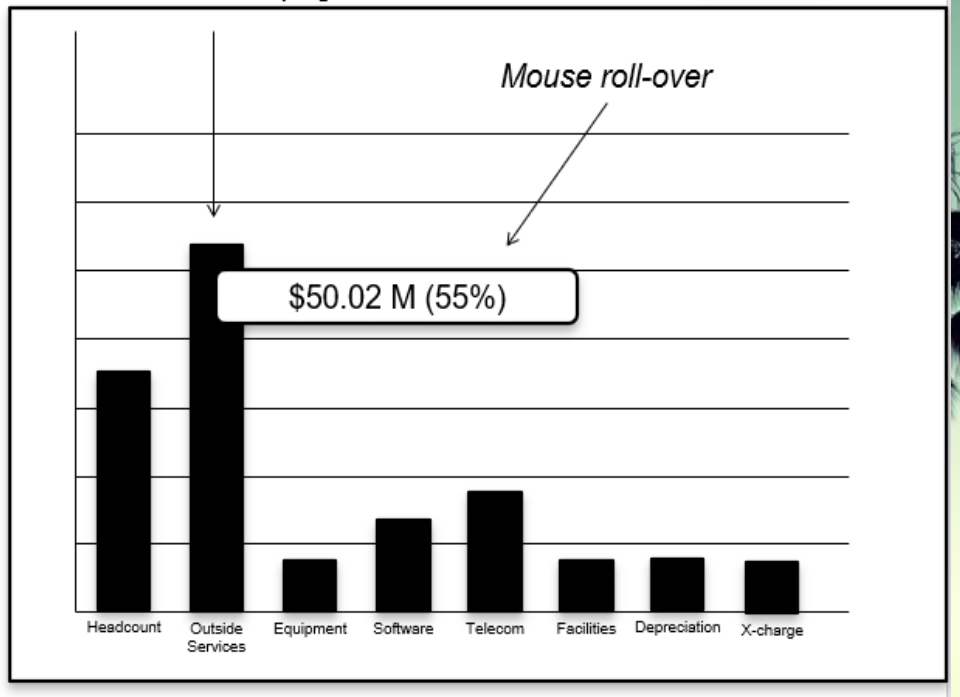
Cost Pool Home Page

Click on bar, sends you to details page

Q2 FY2014

Department Owner
DIAZ JR, GUILLERMO
GOPALRATNAM, VENBAKM C
JACOBY, REBECCA J
JORDAN, SHEILA B
MANVILLE, JOHN T
WU, KIN-CHING

Click on name to change bar graph



Disclaimers

Language Barrier

Run the Business
Change the Business

Top 5 Business Needs Driving IT Spend for 2023

45%
Increasing operational efficiency

44%
Increasing cybersecurity protections

38%
Transforming existing processes

36%
Improving the customer experience

27%
Improving profitability

CIO

IT is BIG Business

$4.6 Trillion

2023 Worldwide IT Spending Forecast (5.5% increase)

Gartner®

Culture

Ashley Petit
CIO

Tony Scott
Former US CIO

Jim Palermo
CIO

Rhonda Gass
CIO

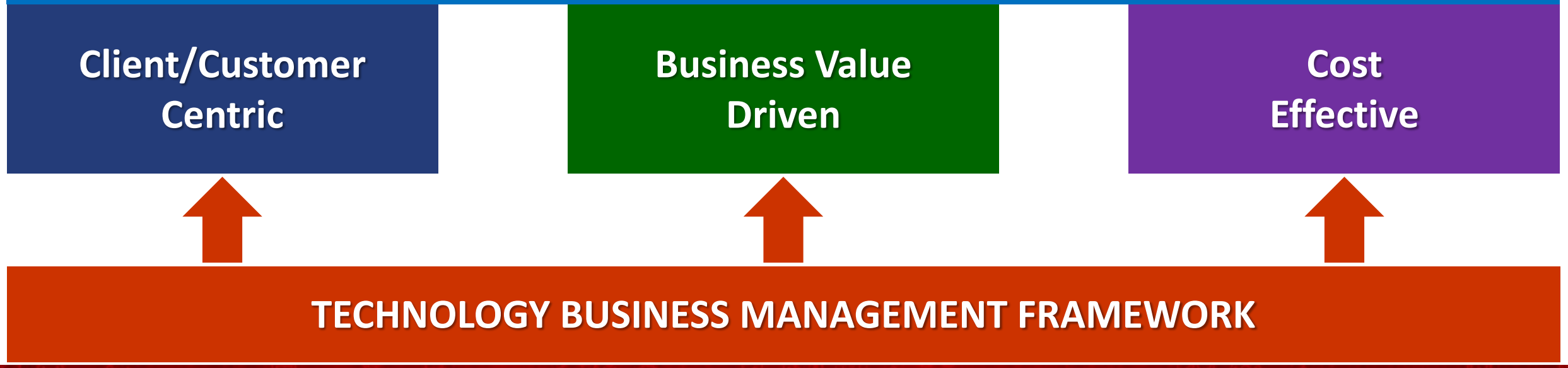
Culture

Culture =

The Entire IT Operating Model

IT as a Services Organization (ITaaSO)

"IT as a Services Organization" is a business model for running IT that delivers value as defined by IT's clients/customers in a cost-effective manner



Rego's TBM Journey Map™

1 =

2 =

3 =

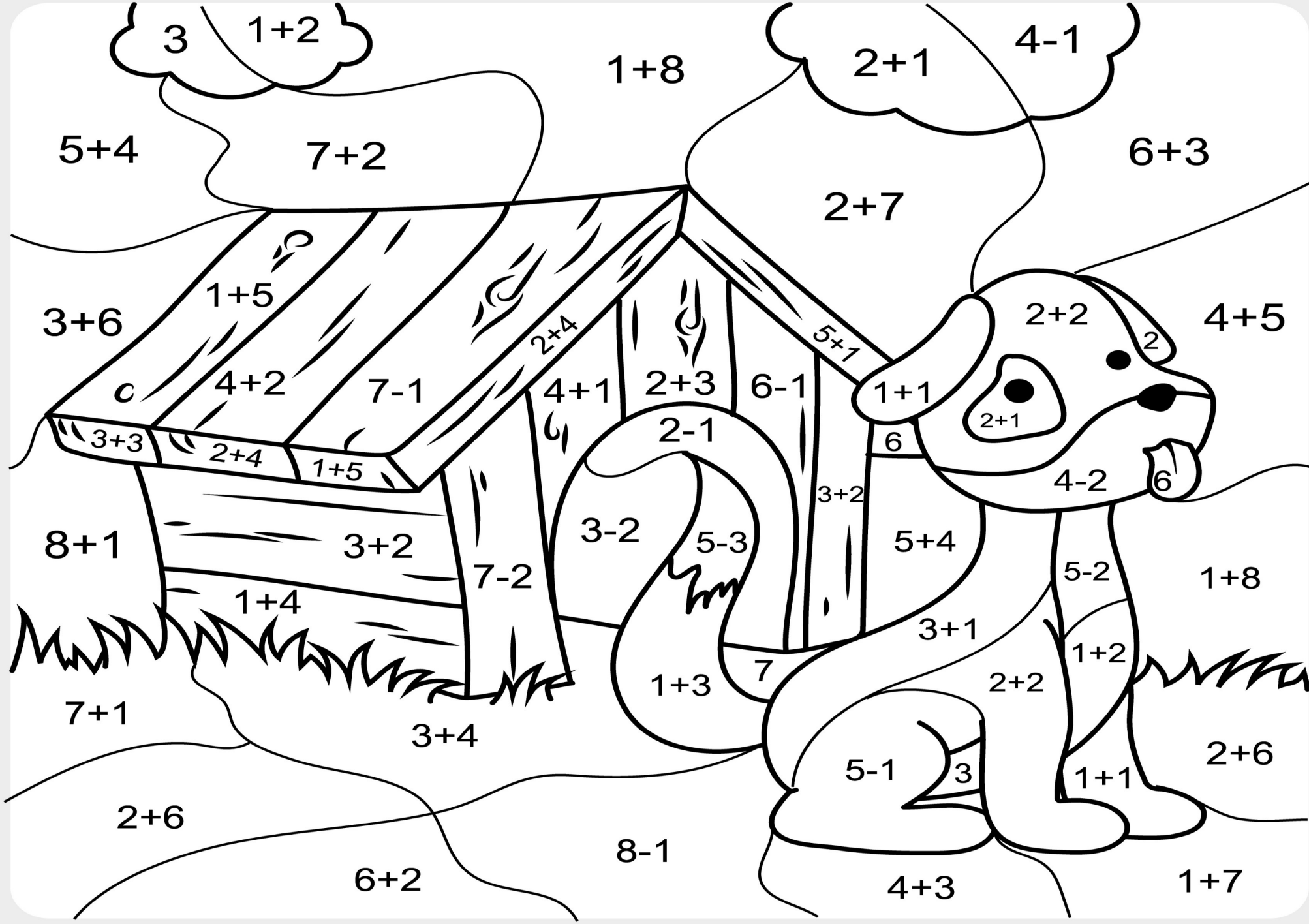
4 =

5 =

6 =

7 =

8 =


3
1+2
1+8
2+1
4-1
5+4
7+2
6+3
2+7
1+5
3+6
2+4
5+1
2+2
4+5
2
4+2
7-1
4+1
2+3
6-1
1+1
2-1
2+1
6
3+3
2+4
1+5
4-2
6
3+2
8+1
3-2
5-3
5+4
3+2
7-2
5-2
1+8
1+4
3+1
1+2
1+3
7
2+2
7+1
3+4
2+6
5-1
3
1+1
2+6
8-1
6+2
4+3
1+7

Rego's TBM Journey Map™

Change Process

- Define Vision & Strategy
- Define Success Indicators
- Create Transformation Playbook

Leadership Alignment

- Define Services Portfolio
- Define Service Roles & Responsibilities, Lifecycle & RASCI
- Define Core metrics and KPIs
- Define the Governance Model
- Identify Future Technologies

Define High Level Changes

- Communicate TBM Transformation to IT
- Pilot service teams, LifeCycle & develop RASCI
- Pilot service reviews

Activate Early Adopters

- Evangelize changes by CIO, leadership, and service owners
- Implement service portfolio & catalog
- Implement service teams
- Implement Governance and Change Leadership model
- Implement Service Reviews
- Establish a Service Roles Community of Practices

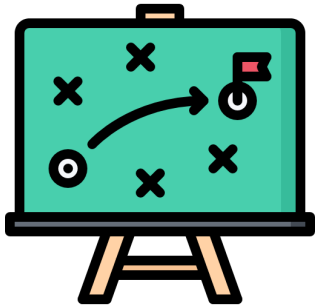
Operate & Accelerate Change

- Implement long-term incentives
- Iterate on service portfolio
- Iterate on service roles & RASCI
- Refine the governance model
- Foster Learning & Development
- Automate

Sustain & Optimize

Percent of Org Involved

1. Leadership Alignment



Define Vision & Strategy	Define Success Indicators	Transformation Playbook

Vision and Strategy One-pager

By leveraging Technology Business Management, we will now have a better way to discuss **needs**, **tradeoffs,** and **funding decisions** with the business in terms that they can understand while making the magic of IT happen behind the scenes.

Customer and Client Focused

- Facilitate operating IT as a Business – Business of IT
- Represent IT in terms of services and capabilities versus technologies
- Inform the business in terms they understand by leveraging our extended TBM Taxonomy and Portfolio of Services & Offerings

Cost Effective

- Provide true total cost of ownership and transparency
- Identify key cost levers to help facilitate the opportunity to reduce run-the-business costs
- Enable ability for reinvestment of savings into changing, growing, and transforming the business

Business Value Driven

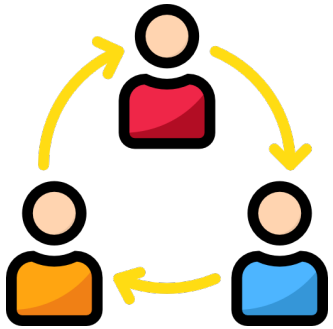
- Maximize value of IT investments
- Reduce time to capability through leverage & reuse
- Provide factual transparency for better investment decisions

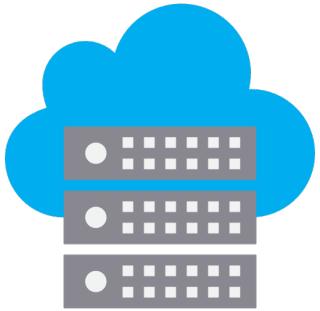
Before and After TBM

Bharat Amin
Retired CIO
TBM Council Board Member

Change Story

2. Define High Level Changes





Define Service Portfolio	Define Service Roles	Define Future Technologies

Define Taxonomy Hierarchy (ATUM)

TBM COUNCIL

Workplace Services	Service Type
Communication & Collaboration	Service Category
Video Conferencing	Service
Teams / WebEx / Zoom	Service Offering

Hardware People Process Apps

Hardware People Process Apps

Hardware People Process Apps

Define Service Portfolio & Catalog

Service Portfolio

Business Services	
Product Development	Marketing & Advertising
Customer Sales	Resource Planning
Order Management	Customer Care

Shared Services	
Accounts Receivable	Risk Management
Recruitment	Benefits
Healthcare	Compliance

Platform Services	
Database	Data Management
Data Analytics	Application Hosting
Development Platform	Content Management

Infrastructure Services	
Data Center	Voice Network
Data Network	Virtual Private Network (VPN)
Physical Compute	Back and Archive

Delivery Services	
Service Management Office (TBMO)	Portfolio Management Office (PMO)
Enterprise Architecture	Testing and QA
Service / Help Desk	Security / InfoSec

Workplace Services	
Desktops & Laptops	Smartphone & Tablets
Printers	Communication & Collaboration
Network Access	Remote Access

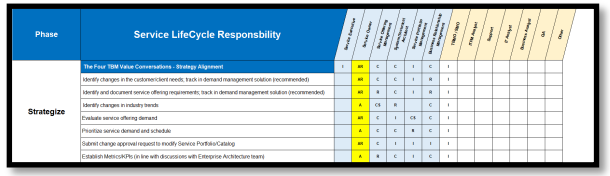
Service Catalog

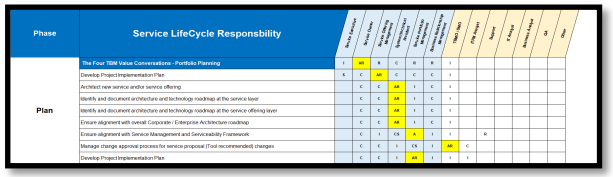
Desktops & Laptops	Smartphone & Tablets
Training	Software
UCaaS	Video Conferencing

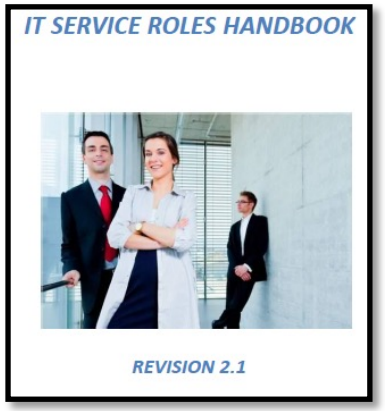
Service Roles LifeCycle & RASCI

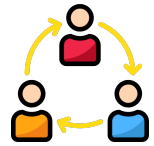
Services LifeCycle

Phase	Description
Strategize	Align with business strategy and client demand to identify needed service changes, connect to value creation, and leverage the IT portfolio. Then prioritize service roadmaps.
Plan	Translate service roadmaps and requirements into the project and implementation plans and share them with the business. Architect and design/reuse service solutions in response to service requirements.
Implement	Review service architecture with the business. Build, test, and deliver systems and solutions. Prepare business expectations, culture, and processes for service deployments and changes.
Operate	Support growth in service adoption and utilization by clients, reviewing value to validate alignment and identify course corrections. Handle service risk, events, issues, and provider relationships.
Optimize	Benchmark, measure, and review service performance to identify improvement opportunities to work into the service roadmap. Aggregate the service value results into the IT portfolio.





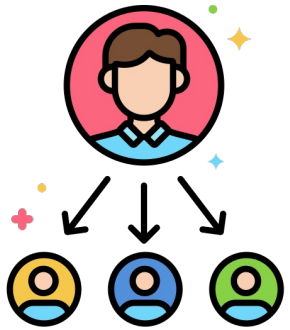




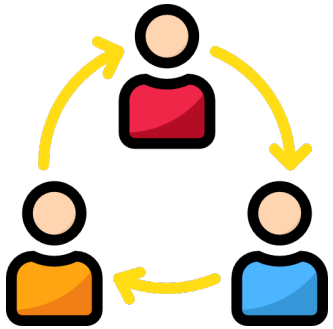
Community of Practices

Training & Development

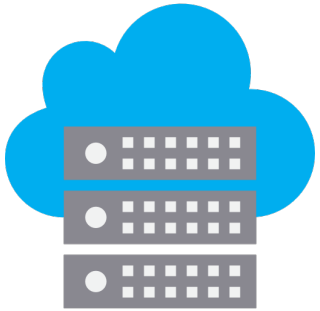
3. Early Adopters



Consistently communicate the TBM Journey

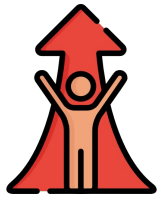


Pilot Service Teams



Pilot Service Reviews

Consistently Communicate the TBM Journey



CIO Top-Down Communication

Newsletters

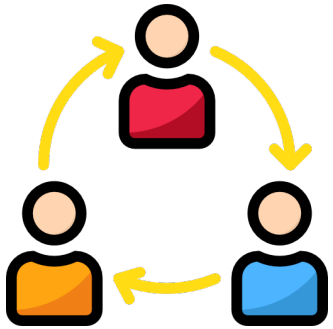
Global Webinars

Community of Practices

Show Value / Progress Early & Often

IT Leadership Trailer Videos

4. Operate and Sustain



Implement Governance & Change Leadership

Implement Service Roles

Implement Service Reviews

Service Reviews

Service Reviews are designed for each service team to tell a comprehensive story about enabling business outcomes through architecture, strategy, and specific services, explaining the value that is achieved from our investment.

Summary	IT Service Metrics	Decisions Needed
• This is your Portfolio view on the business outcomes you will achieve, and how it relates to Services executing on the strategies • Use high level quantitative metrics to show impact to services (drill down in Service metrics dashboard)	• Use the Services dashboard to tell a specific story • Show the Visual of Green and say, 'we're great on these, but we need to talk about the reds and the yellow, our areas of concern'	• Talk about the choices you have, and architectural decision needed • Relate this back to ''What keeps me up at night'

Architecture Roadmap	Investment Summary	Key Messages
• List only architecture items – this is NOT a list of every item on the implementation roadmap • Ensure this links to the Summary (same strategies listed) • Indicate use of continuous delivery in relation to this IT strategy	• Your TCO curves • State number of demand/ideas and active projects against your services. • Provide project statuses. • State how your CtB investments reduce your RtB spend.	• Three (3) distinct messages • Emphasize the key points from your presentation (relate each point back to material on previous slides or metrics dashboard) • Conclude and balance your story by highlighting your successes (from roadmap) and value (from Investment Summary or summary slide)

Let Rego be your guide.

Top 5 Business Needs Driving IT Spend for 2023

45%
Increasing operational efficiency

44%
Increasing cybersecurity protections

38%
Transforming existing processes

36%
Improving the customer experience

27%
Improving profitability

CIO

Cost

- Total Cost of Ownership
- Operate vs. Invest (RtB vs. CtB)
- Direct and Indirect Costs

Quality

- Total Case / Incident Count
- Service Request
- Service Restoration

Risk

- Resiliency
- Security
- Compliance – Audit
- Compliance – Lifecycle

Leverage & Reuse

- Total number of units
- # of applications by type
- # of vendors

User Experience

- Positive versus Negatives
- Volume of IT feedback

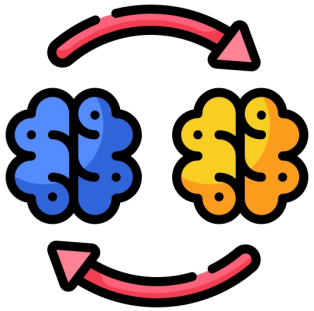
Speed to Capability

- Time to Capability
- Time to Provision
- Time to Adoption

Investment

- Capacity Management
- Demand & Project Management
- Run
- Grow
- Transform

5. Optimize



Foster Learning & Development

Automate

Iterate

Foster Learning & Development

TBM CONNECT

TBM Conference
FinOps CloudyCon new 23

APPTIO

FinOps Foundation

SA SAFe

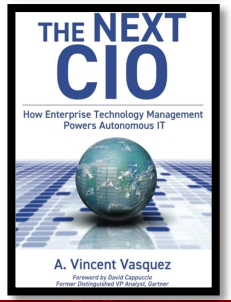
Apptio Certified Practitioner: ApptioOne TBM Studio Configuration
Overview | Learning Plan | Begin

Apptio Certified Practitioner: ApptioOne Maintenance & Improvement
Overview | Learning Plan | Begin

Apptio Certified Practitioner: ApptioOne IT Planning
Overview | Learning Plan | Begin

Apptio Certified Practitioner: Cloudability
Overview | Learning Plan | Begin

Apptio Certified Practitioner: Targetprocess
Overview | Learning Plan | Begin



Rego's TBM Journey Map™

Change Process

- Define Vision & Strategy
- Define Success Indicators
- Create Transformation Playbook

Leadership Alignment

- Define Services Portfolio
- Define Service Roles & Responsibilities, Lifecycle & RASCI
- Define Core metrics and KPIs
- Define the Governance Model
- Identify Future Technologies

Define High Level Changes

- Communicate TBM Transformation to IT
- Pilot service teams, LifeCycle & develop RASCI
- Pilot service reviews

Activate Early Adopters

- Evangelize changes by CIO, leadership, and service owners
- Implement service portfolio & catalog
- Implement service teams
- Implement Governance and Change Leadership model
- Implement Service Reviews
- Establish a Service Roles Community of Practices

Operate & Accelerate Change

- Implement long-term incentives
- Iterate on service portfolio
- Iterate on service roles & RASCI
- Refine the governance model
- Foster Learning & Development
- Automate

Sustain & Optimize

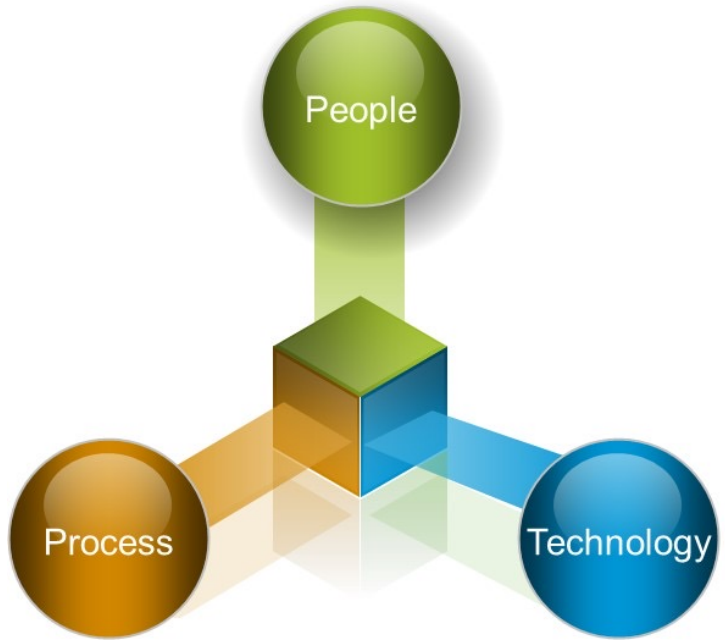
Percent of Org Involved

Yes…There Is A Work Plan

Level of Maturity	Activity	WK-1	WK-2	WK-3	WK-4	WK-5	WK-6	WK-7	WK-8	WK-9	WK-10	WK-11	WK-12	WK-13	WK-14	WK-15	WK-16	WK-17	WK-18	WK-19	WK-20	WK-21	WK-22	WK-23	WK-24	WK-25	WK-26	WK-27	WK-28	WK-29
Leadership Alignment	Define Vision & Strategy																													
	Define Success Indicators																													
	Define TBM Strategy & Playbook																													
Define High Level Changes	Define TBMO Charter (Joe Moore)																													
	Define & Assess Service Portfolio (Joe Moore)																													
	Define & Assess Service Roles																													
	Identify new behaviors																													
	Identify new technologies																													
	Identify ongoing TBM Playbook adoption opportunities																													
Early Adopters	Implement Service Portfolio																													
	Pilot Service Roles																													
	Pilot Service Reviews (Costs Only)																													
	Define Governance Model																													
	Communicate TBM																													
	Demonstrate Leadership Support																													
	Identify baseline metrics (Performance Metrics)																													
	Implement Service Roles																													
	Implement Service Reviews																													
	Implement Governance Model																													
	Training & Community of Practices																													
	Iterate on Service Portfolio, Roles & Reviews																													
Optimize	Refine Governance																													
	Implement long-term incentives																													
	Foster continuous learning & development																													
	Automate Metrics																													

Lessons Learned

- Technology Business Management is a **JOURNEY**
- TBM goes across the entire **IT OPERATING MODEL**
- Be diligent and cost out **EVERY** service from the start
- “Costs are **DIRECTIONALLY** correct” - You
- Start your journey map **TODAY**



Thank You!

Surveys

Please take a few moments to fill out the class survey.
Your feedback is extremely important for future events.

Add QR Code to class survey

Add QR Code to event survey

Questions?

Thank You For Attending Rego University

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!
Don't forget to fill out the class survey.

Phone
888.813.0444

Email
info@regoconsulting.com

Website
www.regouniversity.com