



regoUniversity

SAN DIEGO • 2023

# How TBM can Support Org Planning and Workforce Management

**Your Guides:**  
Rob DeLeo and Hollie Potts

# Part I: Introduction

# Introductions

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

# Agenda

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- ITFM vs CPM
- Overview of Apptio
- How Apptio can Fill the Gaps
- Workforce Management in Apptio
- Real World Examples

# Part 2: ITFM vs CPM



CPM

# Corporate Performance Management (CPM)

Corporate performance management (CPM) is an umbrella term that describes the methodologies, metrics, processes and systems used to monitor and manage the business performance of an enterprise. Applications that enable CPM translate strategically focused information to operational plans and send aggregated results. These applications are also integrated into many elements of the planning and control cycle, or they address BAM or customer relationship optimization needs. CPM must be supported by a suite of analytical applications that provide the functionality to support these processes, methodologies and metrics.

# Differences Between ITFM and CPM

## ITFM

## CPM

IT (Finance & Non-Finance)

**BUILT FOR**

Corporate Finance

IT financial planning and reporting (ATUM Compliant)  
(cost centers, depts, business units, projects)

**FOCUS**

Cross company financial planning and reporting  
(revenue, expense, income statements, all labor)

Auto-generated budget consolidation, OPEX and  
CAPEX line items, depreciation and amortization

**EASE OF USE**

May require lengthy and cost prohibitive  
customization for IT expense detail

Supports key IT resource relationship details  
(contract, assets, labor)

**DETAIL LEVEL**

Cost center and account code detail lacking  
key details to explain IT spend

Out-of-box Budget-Actual variance reporting  
(comparison, trends and variance by dimension)

**REPORTING**

Reporting geared for account code and cost center  
summary financials

Quick time-to-value

**DEPLOYMENT**

Customized services and training for IT planning and  
onboarding



# Discussion

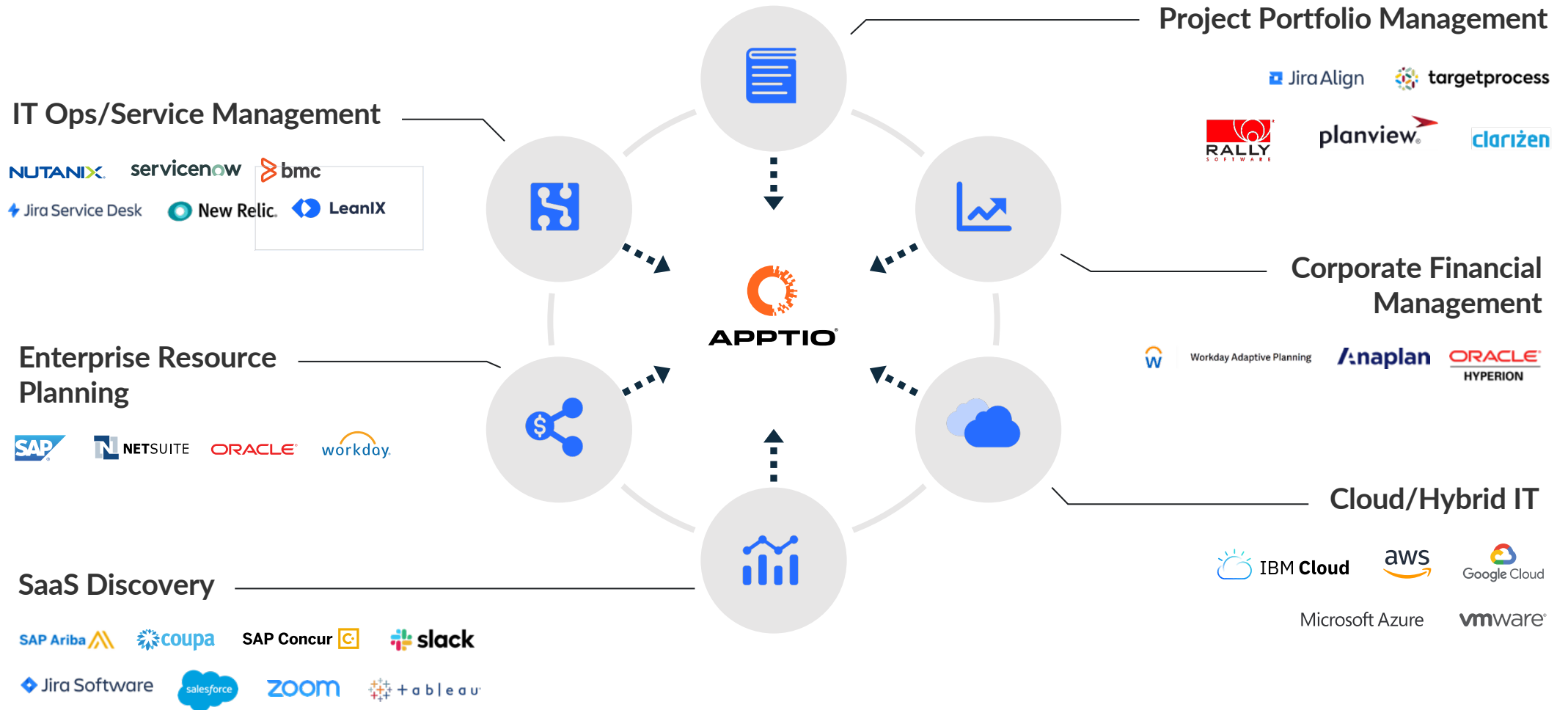
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What ERP/CPM  
Tools are you using?



# Part 3: Overview of Apptio

# Apptio: The Strategic Financial Decision Engine



# Part 4: How Apptio fills the Gaps

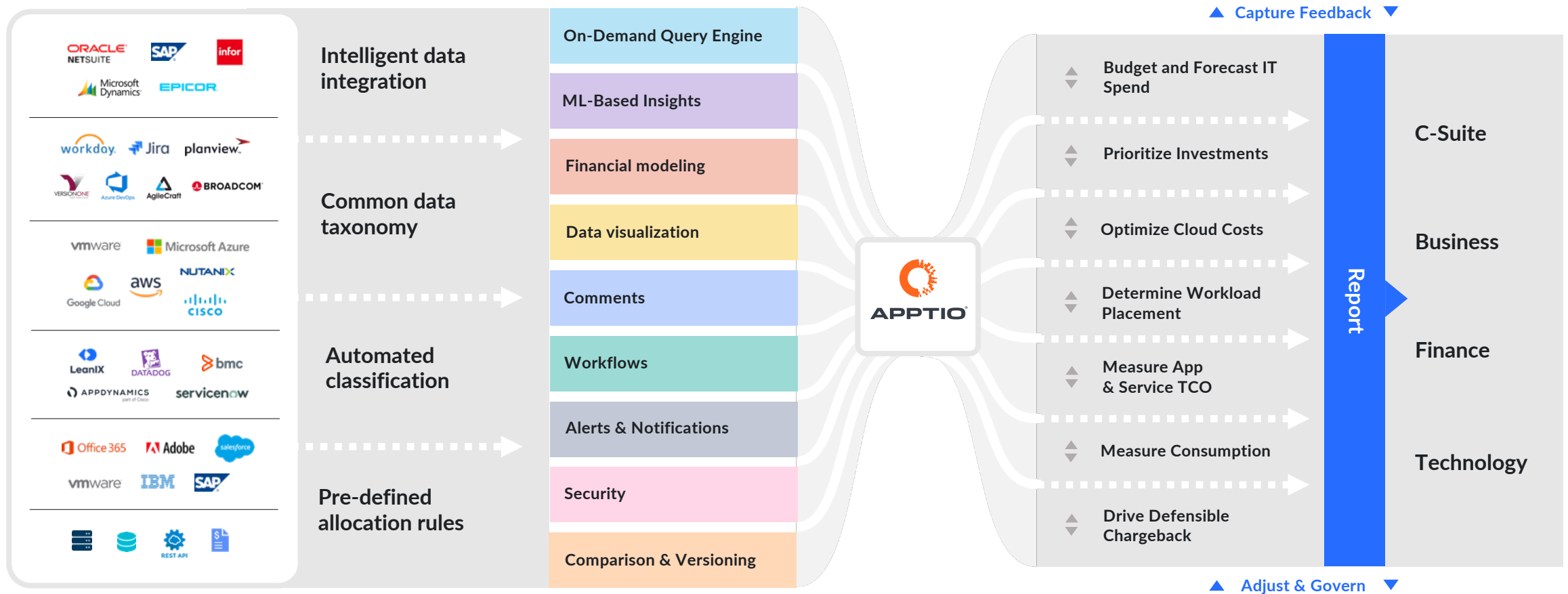
# Common Gaps

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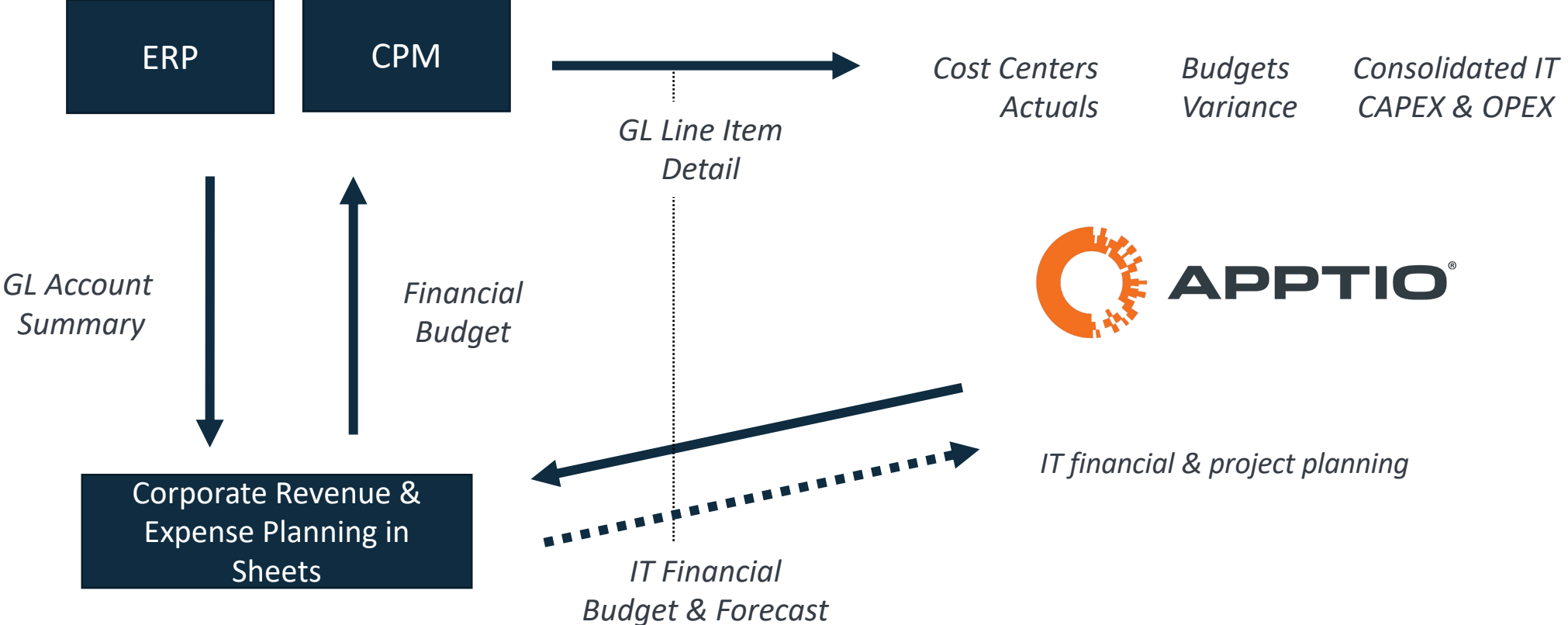
- Vendor/Contract Details
- Labor Details
- Labor Capitalization
- Capital Purchases
- Benchmarking IT Costs
- IT Total cost of Ownership
- Service Costing

What other Gaps does your CPM tool leave?

# How Apptio Works



# Better Together: Apptio & CPM/ERP





# Discussion

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Is Apptio integrated  
into your CPM Tool?

# Part 5: Workforce Management in Apptio



# Workforce Management

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- Workforce management is a strategic process that involves identifying, analyzing, and forecasting an organization's current and future workforce needs.
- In Apptio, workforce planning is crucial for aligning human resources with business goals, optimizing resource allocation and workforce costs while maintaining productivity.

# Labor Planning in IT Planning

- Plan by Headcount
- Fully Burdened Labor Cost
- Scenario Planning
- Assign labor resources to Projects with IIP

FY2023 Budget Budget: Open

Expenses Department: All Departments Project: All Projects Range: FY2023

Summary Labor Labor Activity Contracts Assets Other

TOTAL HEADCOUNT (AVG): FY2023 TARGET: 0 VARIANCE: N/A  
**172**

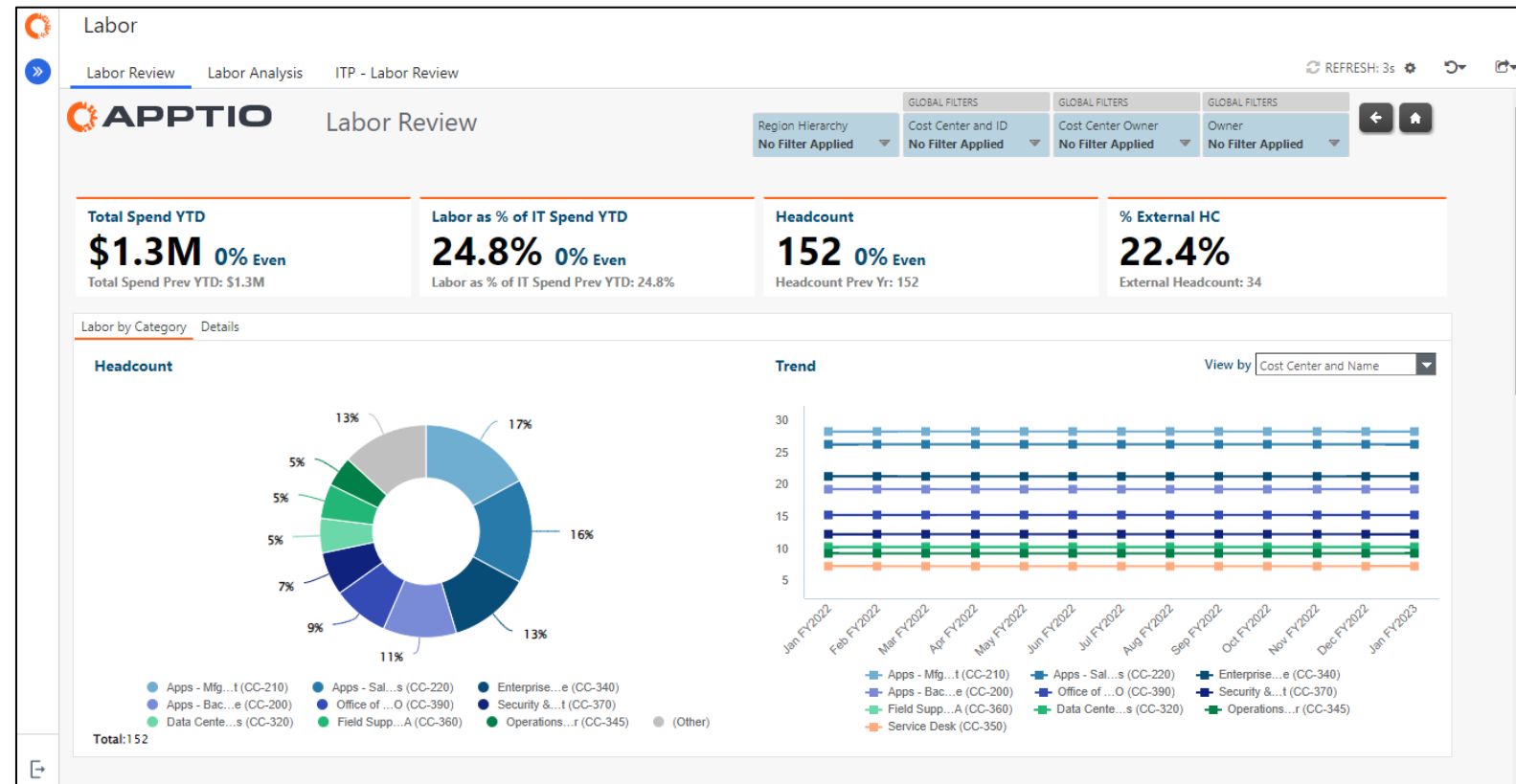
EXISTING HEADCOUNT (AVG): FY2023  
**146**

Layout

Cost Center	Employee Type	Role	Location	Currency	Base Compensation	Adjustment %	Quantity	Start Date	End Date	Jan FY23	Feb FY23	Mar FY23	Apr FY23	May FY23	Jun FY23
Apps - Back Office	Internal	Sr. QA Engineer	Chicago, IL	USD	90,000	0%	1	1/1/21		1	1	1	1	1	1
Apps - Back Office	Internal	Software Engineer	Chicago, IL	USD	90,000	0%	1	1/1/21		1	1	1	1	1	1
Apps - Back Office	Internal	Sr. Software Engineer	Chicago, IL	USD	100,000	0%	1	6/1/20		1	1	1	1	1	1
Apps - Back Office	Internal	Software Engineer	Chicago, IL	USD	90,000	0%	1	6/1/20		1	1	1	1	1	1
Apps - Back Office	Internal	Manager, Back Office Applic	Chicago, IL	USD	110,000	0%	1	1/1/21		1	1	1	1	1	1
Apps - Back Office	Internal	Sr. Software Engineer	Chicago, IL	USD	100,000	0%	1	1/1/21		1	1	1	1	1	1
Apps - Back Office	Internal	Sr. Software Engineer	Chicago, IL	USD	100,000	0%	1	6/1/20		1	1	1	1	1	1
Apps - Back Office	Internal	Software Engineer	Chicago, IL	USD	90,000	0%	1	6/1/20		1	1	1	1	1	1
Apps - Back Office	Internal	QA Engineer	Chicago, IL	USD	70,000	0%	1	1/1/21		1	1	1	1	1	1
Apps - Back Office	Internal	QA Engineer	Chicago, IL	USD	70,000	0%	1	1/1/21		1	1	1	1	1	1
Apps - Back Office	External	System Engineer	Chicago, IL	USD	108,000	0%	1	10/1/21		1	1	1	1	1	1
Apps - Back Office	External	System Engineer	Chicago, IL	USD	108,000	0%	1	10/1/21		1	1	1	1	1	1
Apps - Back Office	External	Sr. Program Manager	Chicago, IL	USD	180,000	0%	1	10/1/21		1	1	1	1	1	1
Apps - Back Office	Internal	Business Analyst	Chicago, IL	USD	90,000	0%	1	3/1/20		1	1	1	1	1	1
Apps - Back Office	External	Project Manager	Chicago, IL	USD	144,000	0%	1	10/1/21		1	1	1	1	1	1
TOTAL				USD	16,382,000		146			146	146	146	146	146	146

# Labor Reporting in Cost Transparency

- Analyze workforce data to identify trends, patterns, and potential issues.
- View data by Cost Centers, Roles, Location, etc.





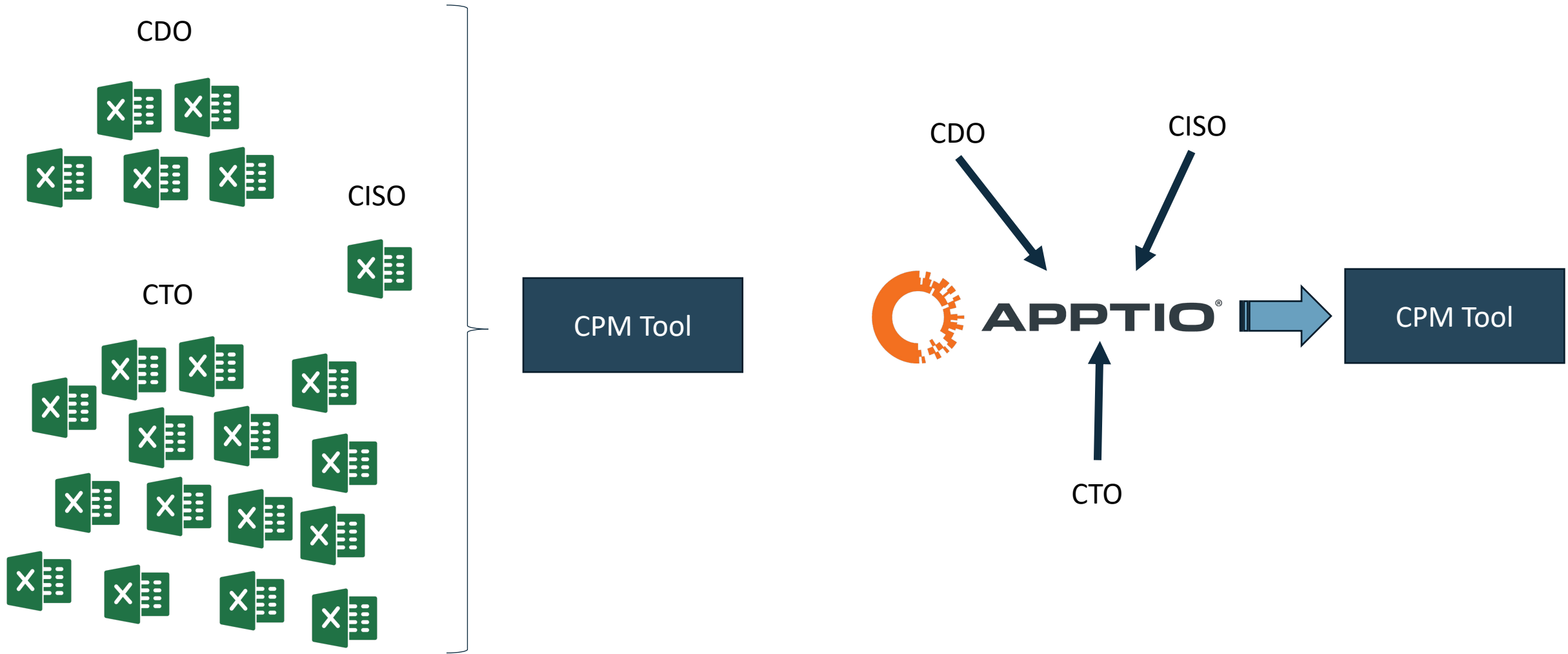
# Discussion

What tools do  
you use for  
Workforce  
Management?

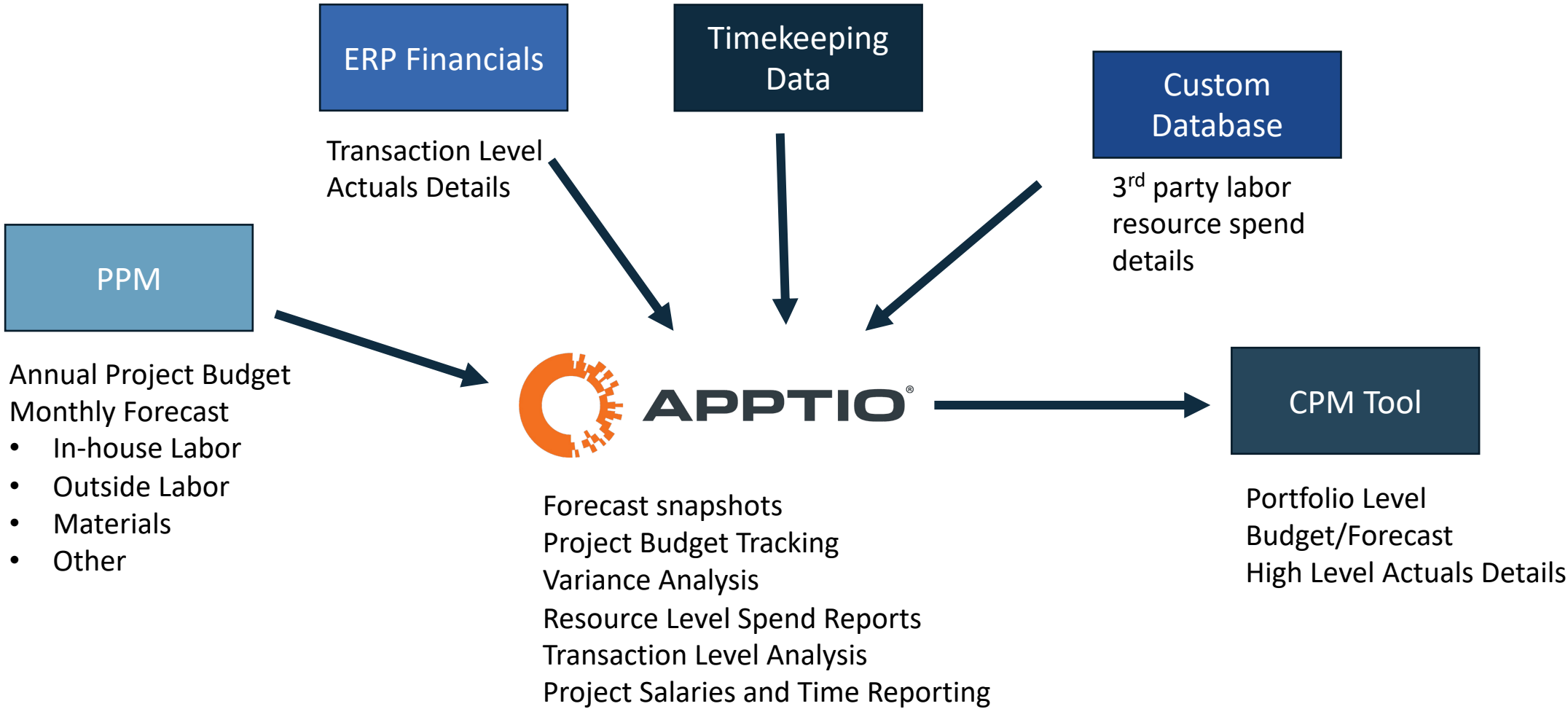
# Part 5: Real World Examples

<Descriptor>

# Consumer Products Company



# Telecommunications Company



# Questions?





# Surveys

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



# Thank You For Attending Rego University

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- 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.



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