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The Synergy Between the TBM, FinOps, and Agile Frameworks
Your Guides:
Jeff Barschaw and Stewart Kasen

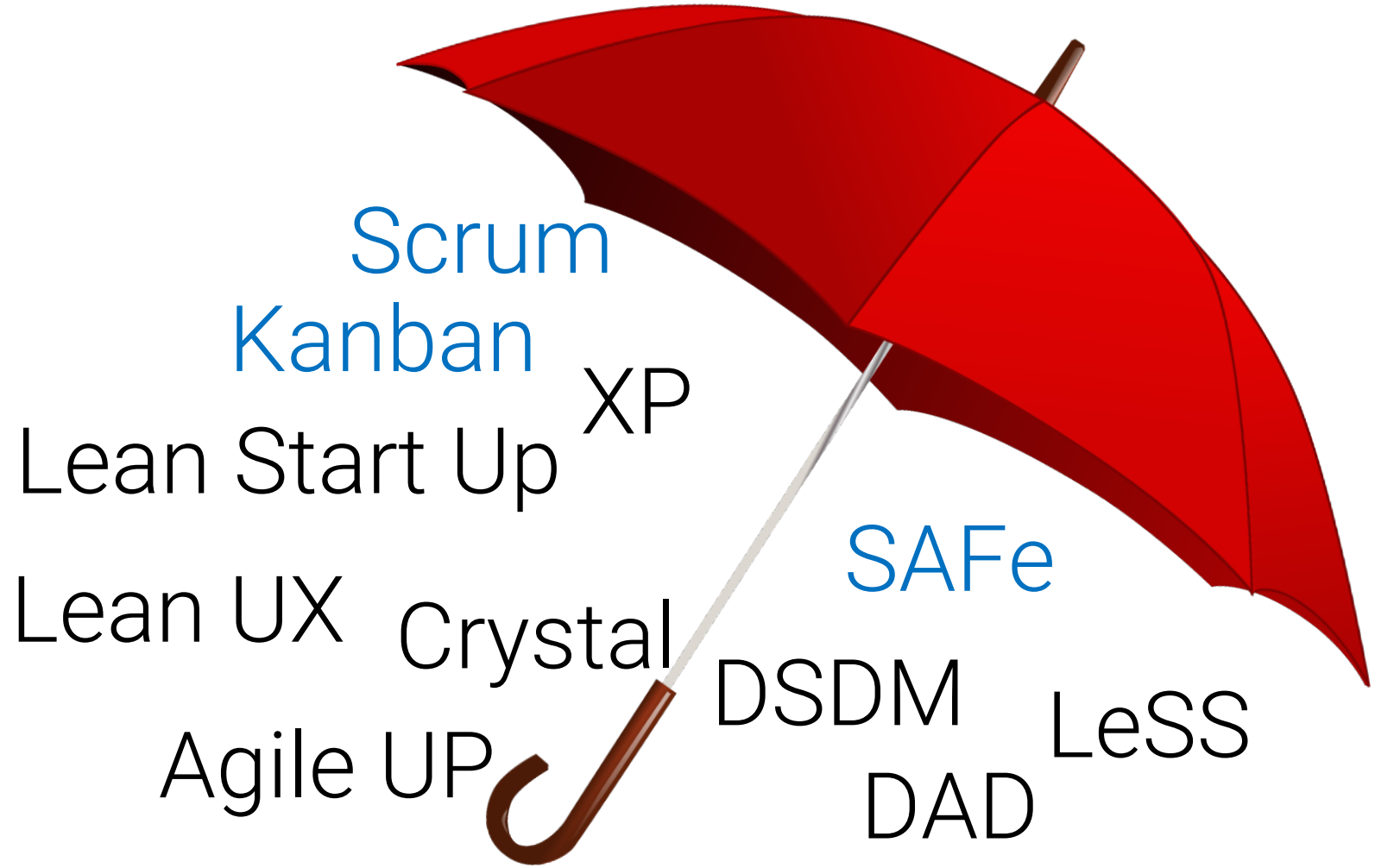
Agenda

- Introduction
- What are the 3 Frameworks?
  - FinOps
  - TBM
  - Scaling Agile Framework (SAFe)
- Timing is everything
  - Talk about the Monthly Sync of the 3 Frameworks
  - Defining planning to be sync with the other frameworks
- Driving value through Synergy
  - TBM, FinOps, Agile sync in the healthcare industry
  - Planned and Actuals Financials, what's being delivered, and adjusting to the results
  - Planned = TBM and Agile, FinOps and TBM bring in Actuals, Agile shows what was delivered, and then it informs your next years actions. Determines informed funding of cloud, infrastructure, and labor
- Takeaway: The importance of alignment across these three areas

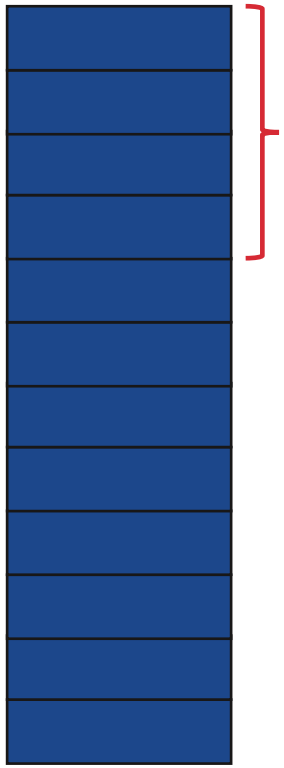
What are the 3 Frameworks?

The Agile Framework

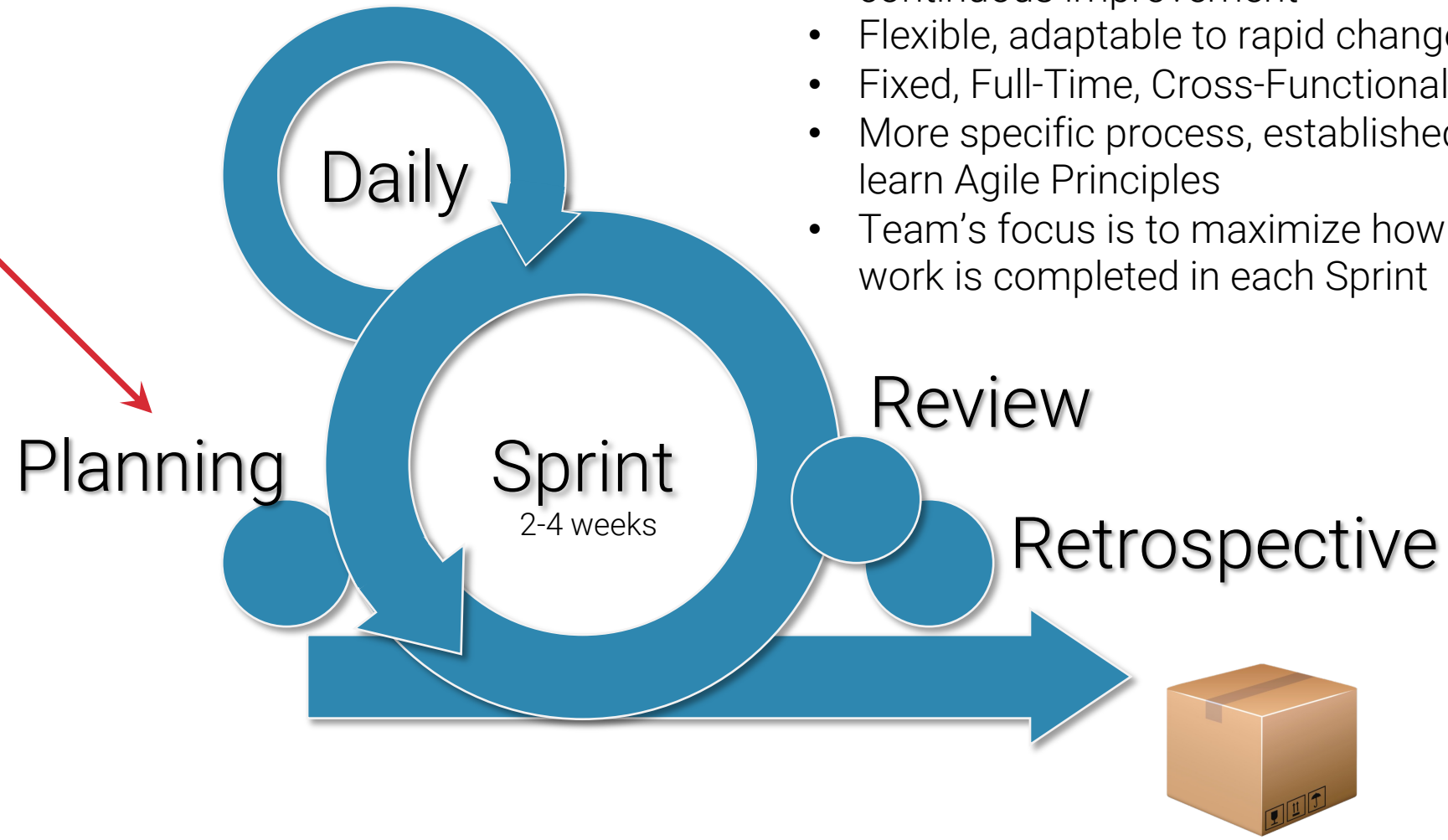
Agile Umbrella



Scrum

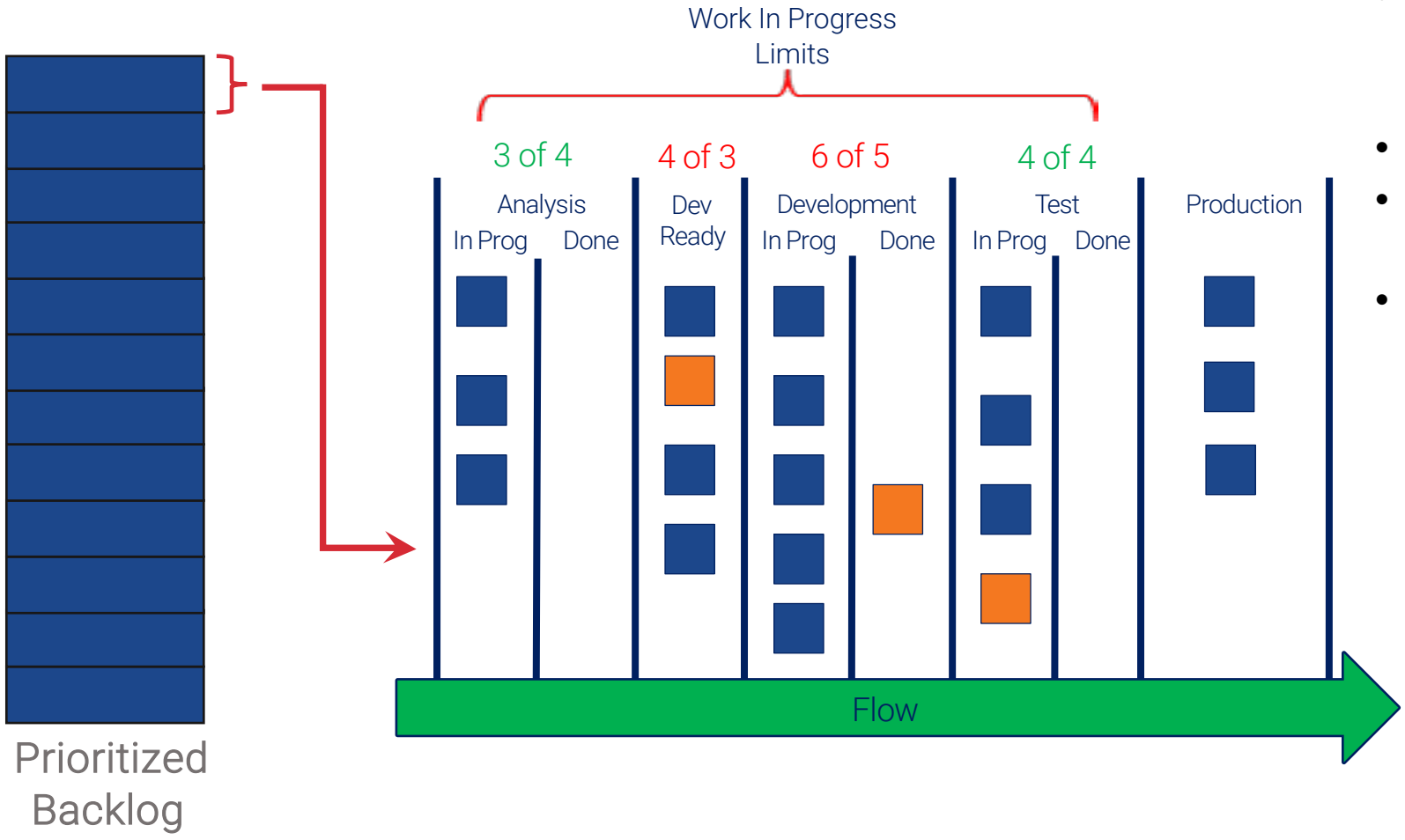


Prioritized Backlog



- Work organized into shorter Sprints and continuous improvement
- Flexible, adaptable to rapid changes
- Fixed, Full-Time, Cross-Functional Team
- More specific process, established way to learn Agile Principles
- Team's focus is to maximize how much work is completed in each Sprint

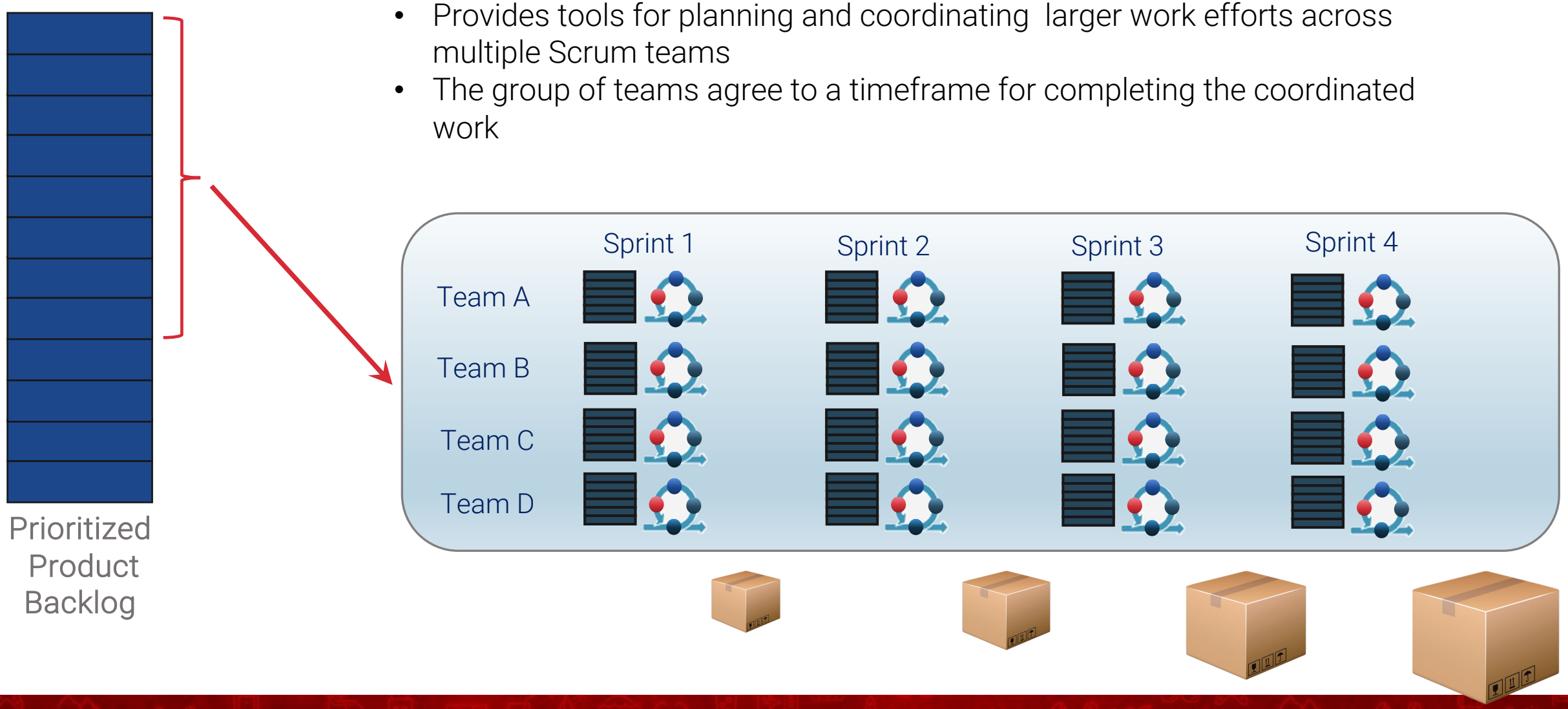
Kanban



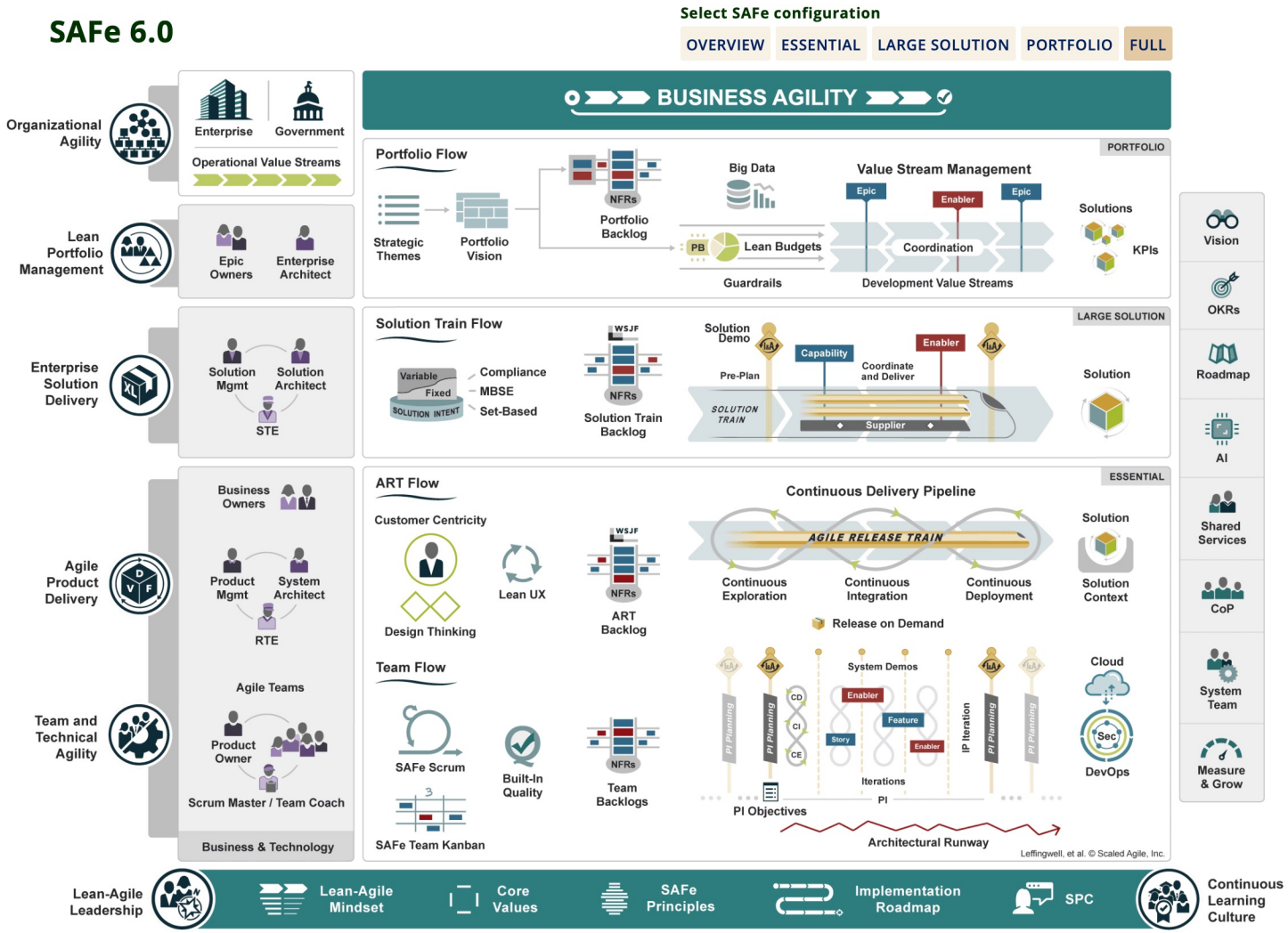
- Work items flow continuously through a well-defined sequence of steps
- Flexible, adaptable to rapid changes
- Fixed, Full-Time, Cross-Functional Team
- Team's focus is to reduce the time from start to finish of each work item

Scaled Agile

- The foundation of Scaled Agile is Agile Teams
- Provides tools for planning and coordinating larger work efforts across multiple Scrum teams
- The group of teams agree to a timeframe for completing the coordinated work

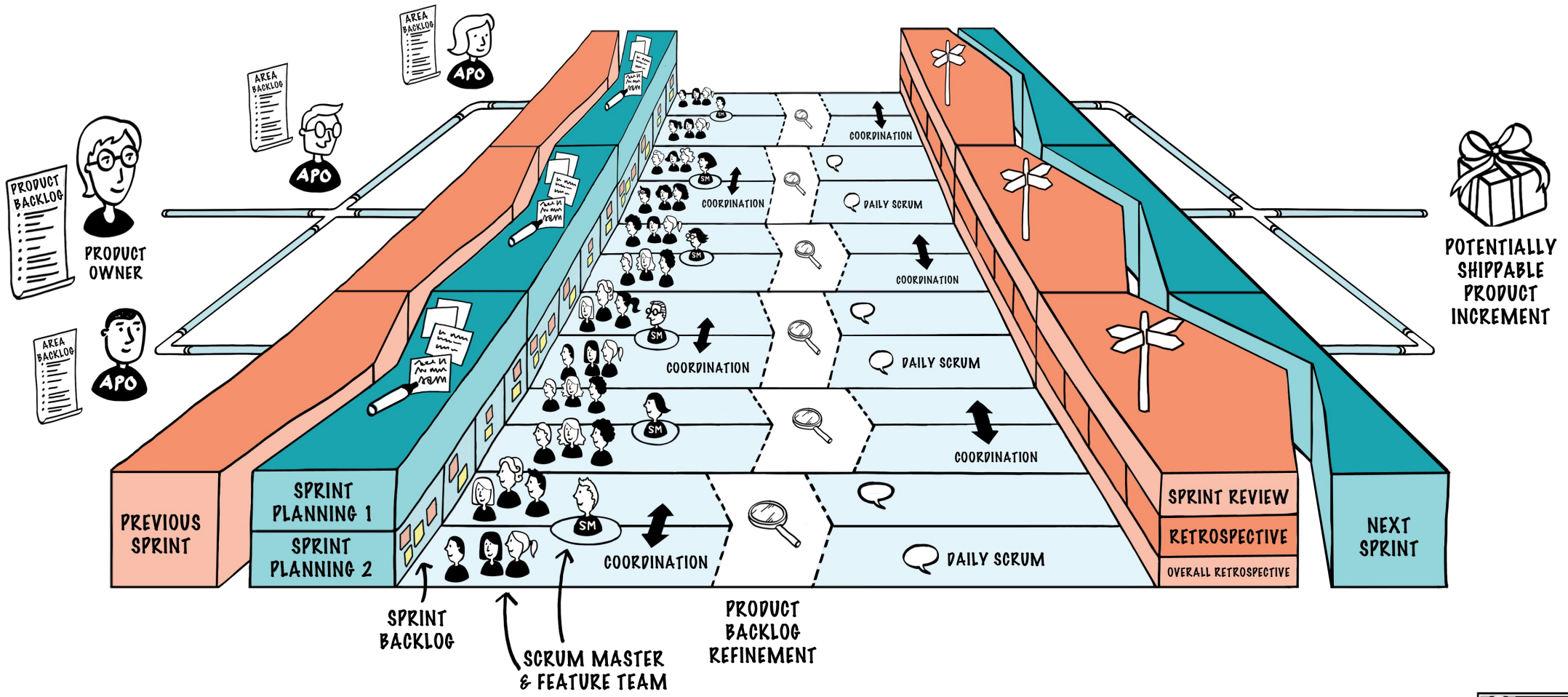


SAFe Framework



https://www.scaledagileframework.com/#

LeSS Framework



https://less.works/less/framework/introduction

Technology Business Management (TBM)

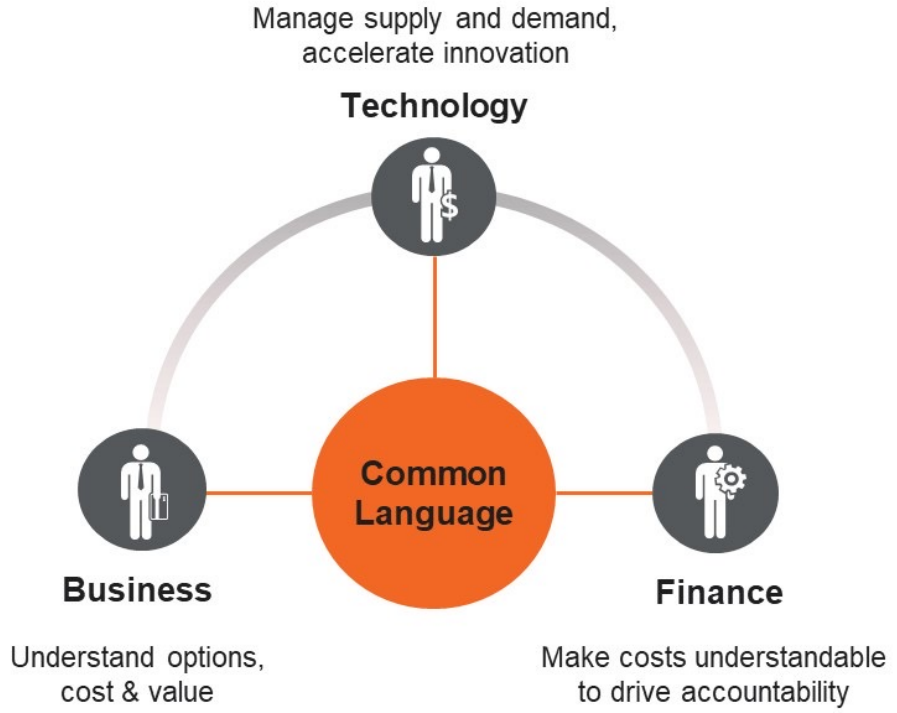
Technology Business Management (TBM)

A **framework** that accelerates business outcomes by giving organizations a consistent way to translate technology investments to **business value**.

- Founded in 2012 by CIOs and CFOs and governed by the TBM Council (non-profit 501 ©).
- Discipline focused on cost transparency, identifying the total cost of IT, and shaping demand for IT capabilities.
- TBM provides a **standard cost model** and **taxonomy of services**.
- Provides technology leaders with standards and validated best practices to communicate the cost, quality, and value of IT investments to their business partners.
- Designed to help IT leaders gain deeper insight into IT spending, budgets, and resources.

Education & Certification	Standards & Research	Community & Collaboration
TBM CONNECT 15,000 Members	9 Vertical Industries	Training & Certifications

TBM COUNCIL



TBM Council & Standards Committee

Ashley Petit
SVP & CIO
State Farm

Atticus Tysen
SVP & CISO
Intuit

Bharat Amin
EVP & CIO
Huntington Ingalls Industries

Eileen Baines
SVP & CIO
CoBank

Eric Auer
COO & CIO
Credit Suisse

Fumbi Chima
CTO
BECU

George Maddaloni
EVP & CTO
mastercard

Greg Sly
SVP of Platforms
verizon

Jeri Koester
CIO
Marshfield Clinic Health System

Les Ottolenghi
CIO
Stride

Mark Satterfield
CTO
Anthem

Nicole Hen
Practice Head
Wells Fargo

Paola Arbour
EVP & CIO
Tenet Health

Ralph Loura
CIO
Lumentum

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Stanley Black & Decker

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Business Development
rego consulting

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TBM Leader
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Nike

Carrolyn Gehrke
TBM Manager
John Deere

Fumbi Chima
CTO
Freddie Mac

John Wilson
VP of Costing
MetLife

Kelley Wendelborn
Sr. Manager
Lowe's

Adopted by over 2,000 companies since 2012

CONSUMER GOODS

L'ORÉAL
Johnson & Johnson
Unilever
PEPSICO
HERSHEY'S THE HERSHEY COMPANY
THE CLOROX COMPANY
Keurig DrPepper

MEDIA & ENTERTAINMENT

COX
LinkedIn
TimeWarner
Aol.
HEARST corporation

RETAIL & WHOLESALE

Cargill
Walmart
BED BATH & BEYOND
FedEx Express
SUPERVALU

FINANCIAL SERVICES

Bank of America
Deutsche Bank
MasterCard
BARCLAYS
LLOYDS BANKING GROUP
SEI New ways. New answers.
Morgan Stanley
JPMORGAN CHASE & CO.
DTCC
KeyCorp
Fannie Mae
M&T Bank
RBC
Invest With Confidence T.RowePrice
Goldman Sachs
Vanguard
AMERICAN EXPRESS
SOCIETE GENERALE
Jefferies

INSURANCE

ACE
Allstate You're in good hands.
FARMERS
Aetna
AON
MassMutual FINANCIAL GROUP
Nationwide
Prudential
State Farm
MetLife

HEALTHCARE & PHARMA

AmerisourceBergen
Cigna
SANOFI
KAISER PERMANENTE
Tenet Health
AMGEN
Humana
MERCK
blue of california
children's health

ENERGY & UTILITIES

Chevron
Exelon
Statoil
ExxonMobil
ENBRIDGE

MANUFACTURING

xerox
BOEING
AGCO
ABB
Stanley Black & Decker
Cummins
USS
Good things come from Sysco
NISSAN
Huntington Ingalls Industries
LOCKHEED MARTIN
BAE SYSTEMS
TEREX CORPORATION

TRAVEL & HOSPITALITY

AVIS
Marriott
ETIHAD AIRWAYS
IHG InterContinental Hotels Group
CAESARS ENTERTAINMENT
HILTON WORLDWIDE

PUBLIC SECTOR/GOV'T

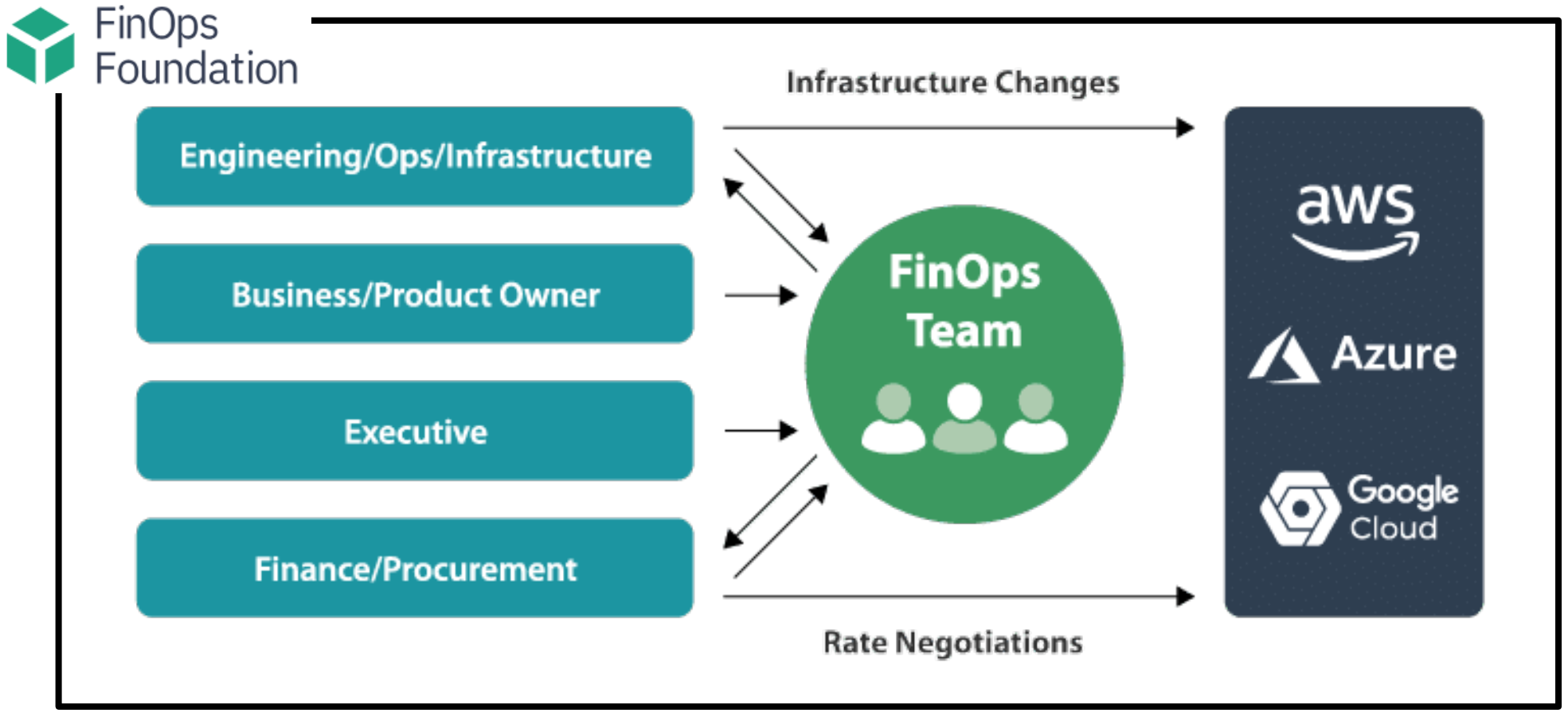
GSA
Caltrans
FEMA
Kansas Office of Information Technology Services

TECH & TELECOM

CISCO
at&t
MOTOROLA
Microsoft
box
intuit
salesforce
hp
ciena
ADP
Micron

The FinOps Framework

What is FinOps?



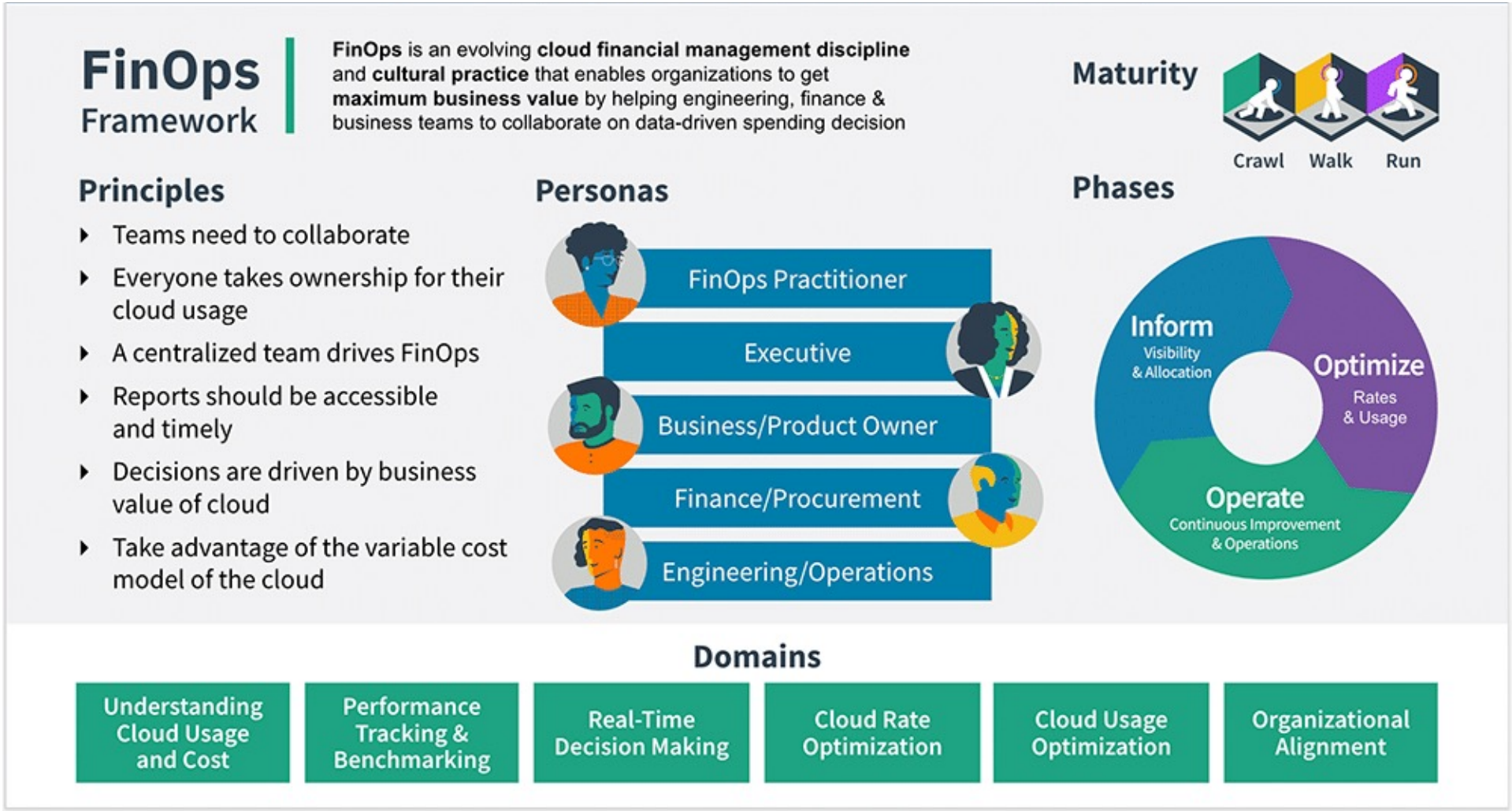
FinOps is an evolving cloud financial management discipline and cultural practice that enables organizations to get maximum business value by helping engineering, finance, technology and business teams to collaborate on data-driven spending decisions

What is FinOps?

FinOps Foundation

The FinOps Foundation is a Non-Profit with the mission:

To advance every individual who manages the value of cloud wherever they are



Driving Value Through Synergy

The Value of Synergy

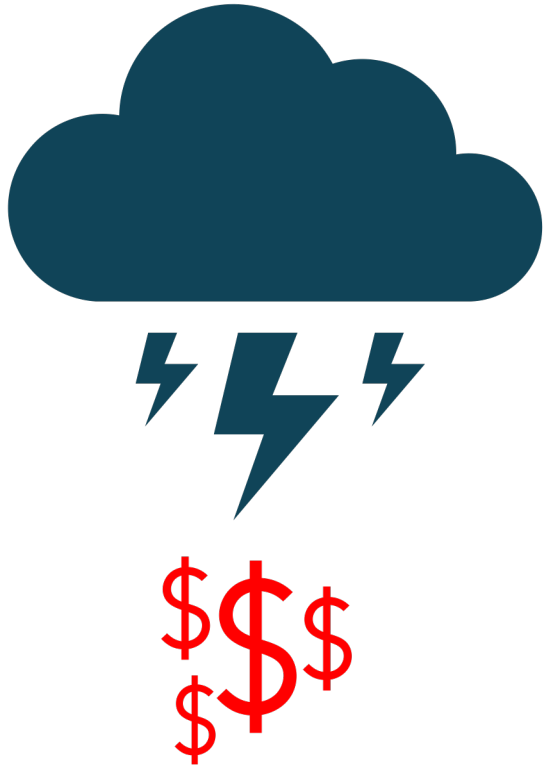
- Mutually Assured Benefit
  - IT Financial Budget Management Collaboration

The Value of Synergy

- Increasing the Speed of Delivery
  - Ford Mach-E Website

The Value of Synergy

- Emergency Collaboration Channels
  - Cloud Spend Anomalies



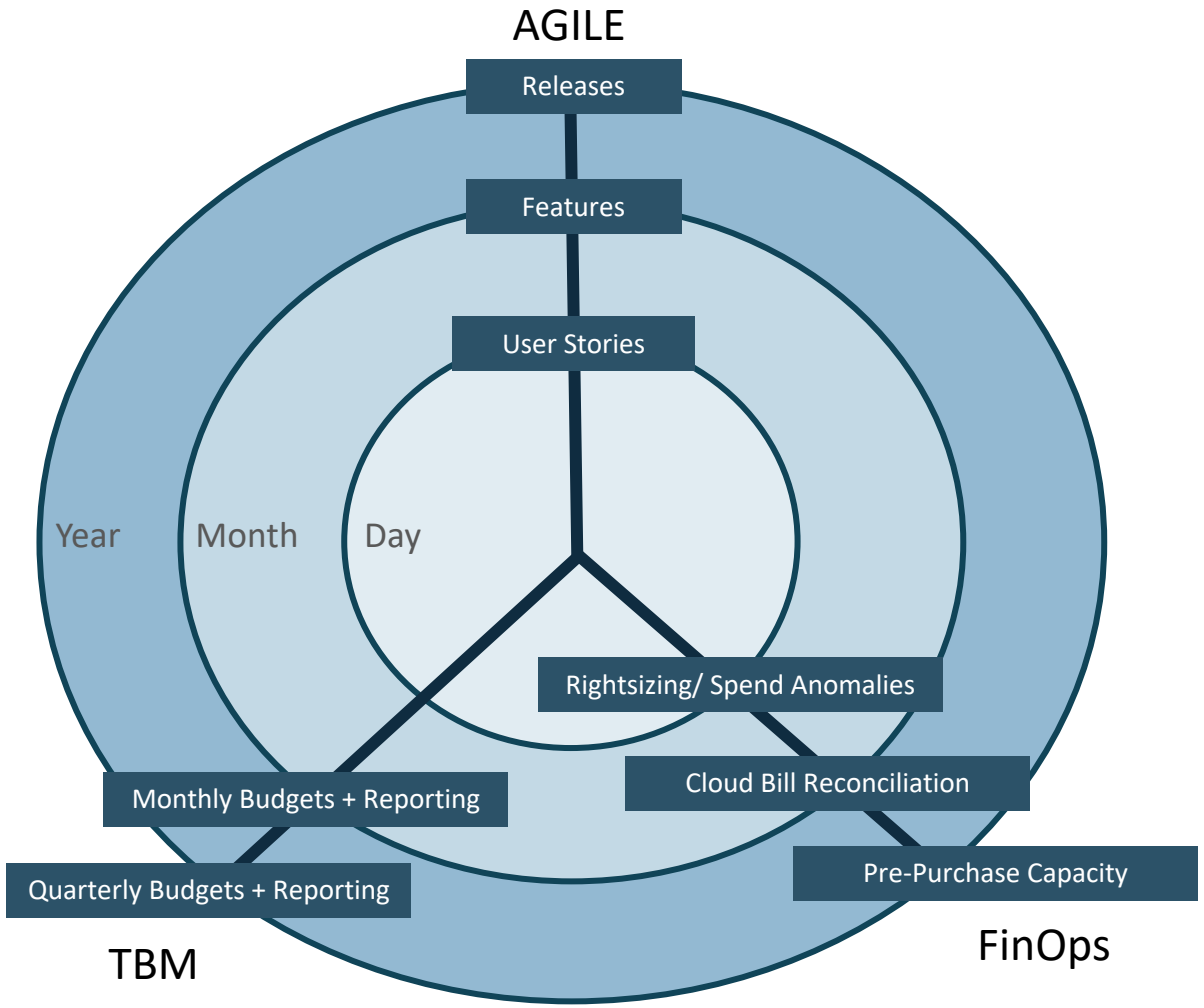
Timing is Everything

- **Agile**
  - User Stories: Day(s)
  - Iteration Planning: Week(s)
  - Features: Months(s)
  - Release: On Demand

- **TBM**
  - Financial Reporting: Month + Year
  - Budgets: Month, Quarter, Year

- **FinOps**
  - Cloud Bill Reconciliation: Month
  - Rightsizing: Day
  - Pre-Purchase Capacity: Year
  - Spend Anomalies: Day

Timing Relationships



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- Class Name = **regoUniversity**
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Let us know how we can improve!
Don't forget to fill out the class survey.

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