Introductions

- Take 5 Minutes

- Turn to a Person Near You

- Introduce Yourself

- Business Cards
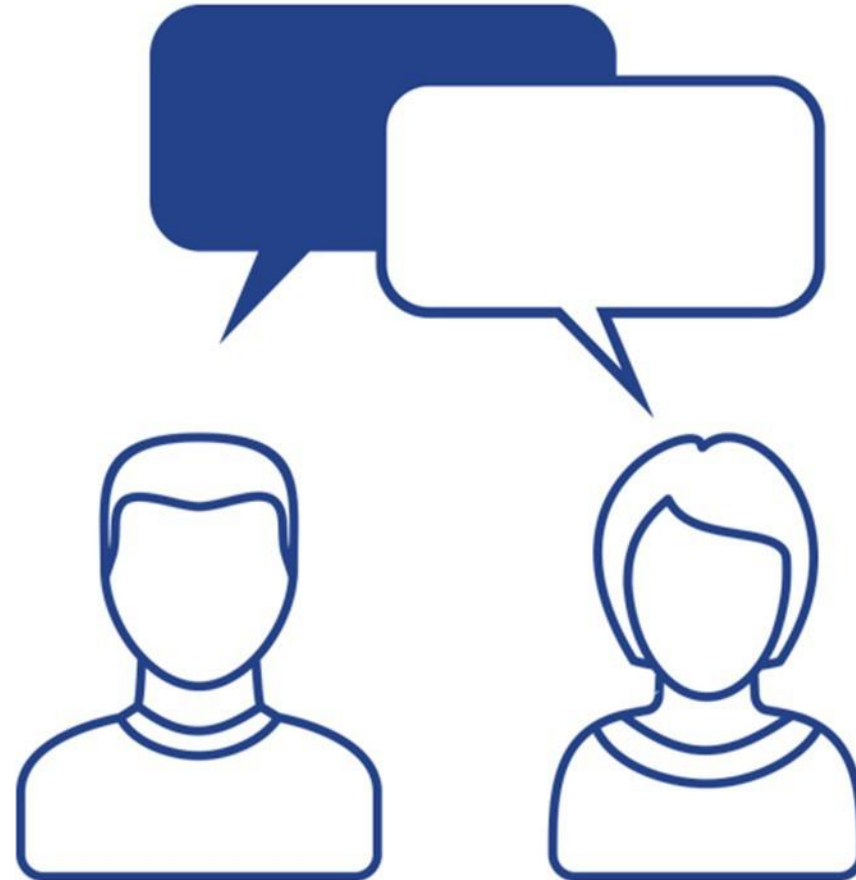
Quick Poll

- 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?

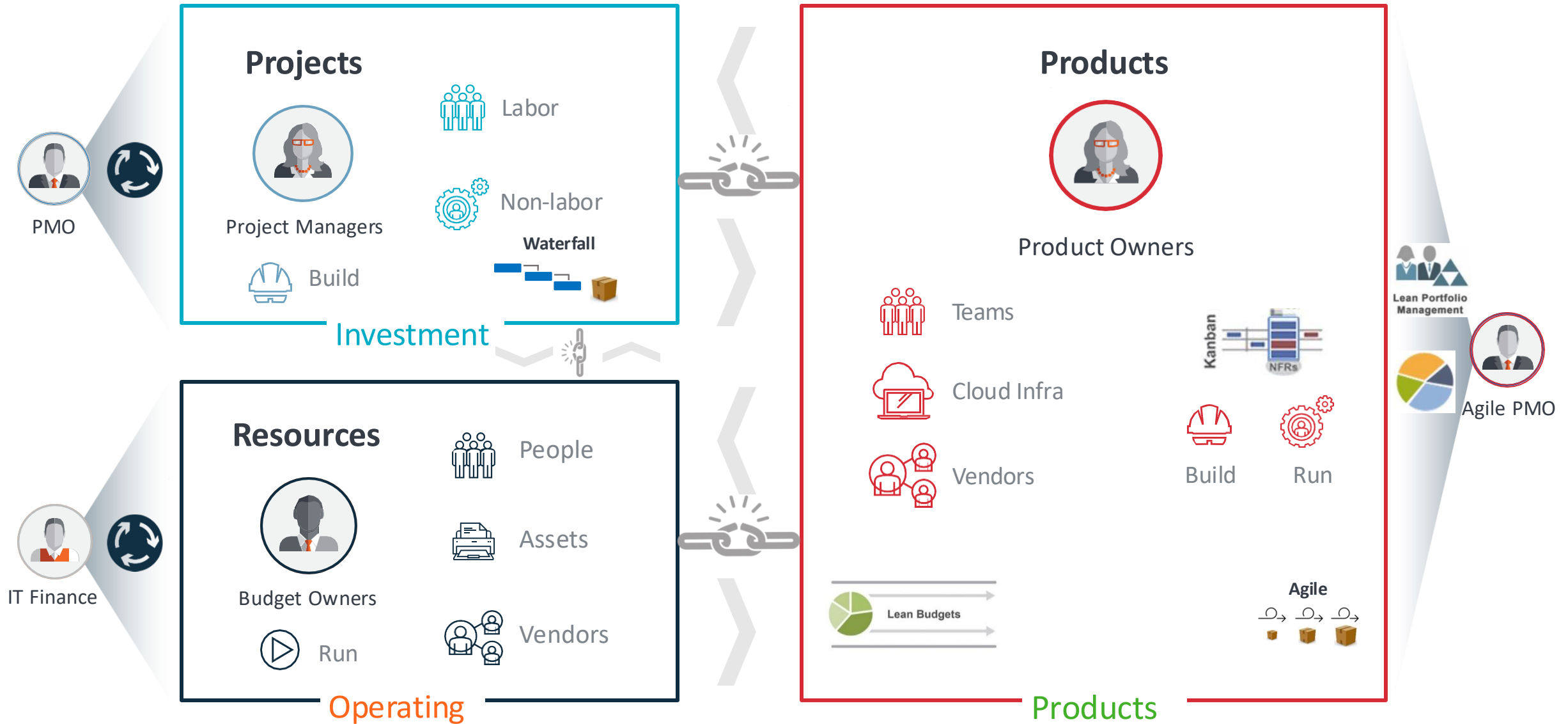- How many have or will shift from project to product operating model?

Agenda

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

Challenges

Investment / Operating / Products Disconnect

PMO

Projects

Project Managers

Labor

Non-labor

Waterfall

Build

Investment

IT Finance

Resources

Budget Owners

People

Assets

Run

Vendors

Operating

Products

Product Owners

Teams

Cloud Infra

Vendors

Kanban

NFRs

Build

Run

Lean Budgets

Agile

Lean Portfolio Management

Agile PMO

Products

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
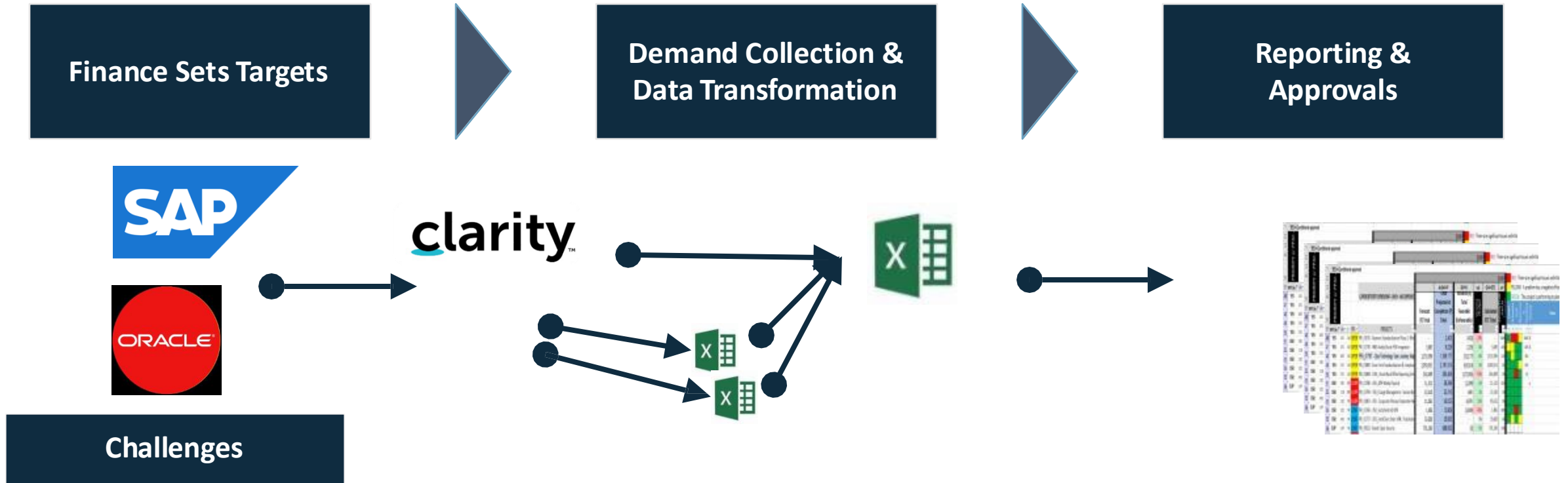Systems of record for financial data

Budget Data
Required project budget/forecast data dimensions

TechValidate
by SurveyMonkey

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

Typical Planning Process

Finance Sets Targets → **Demand Collection & Data Transformation** → **Reporting & Approvals**

Challenges

- 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.

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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?
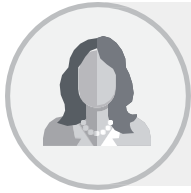
Discussion

- Does anyone have these challenges in their organization?

Apptio Introduction

Apptio. The Business System for Governing Technology

Sales *has* **CRM**

HR *has* **HRM**

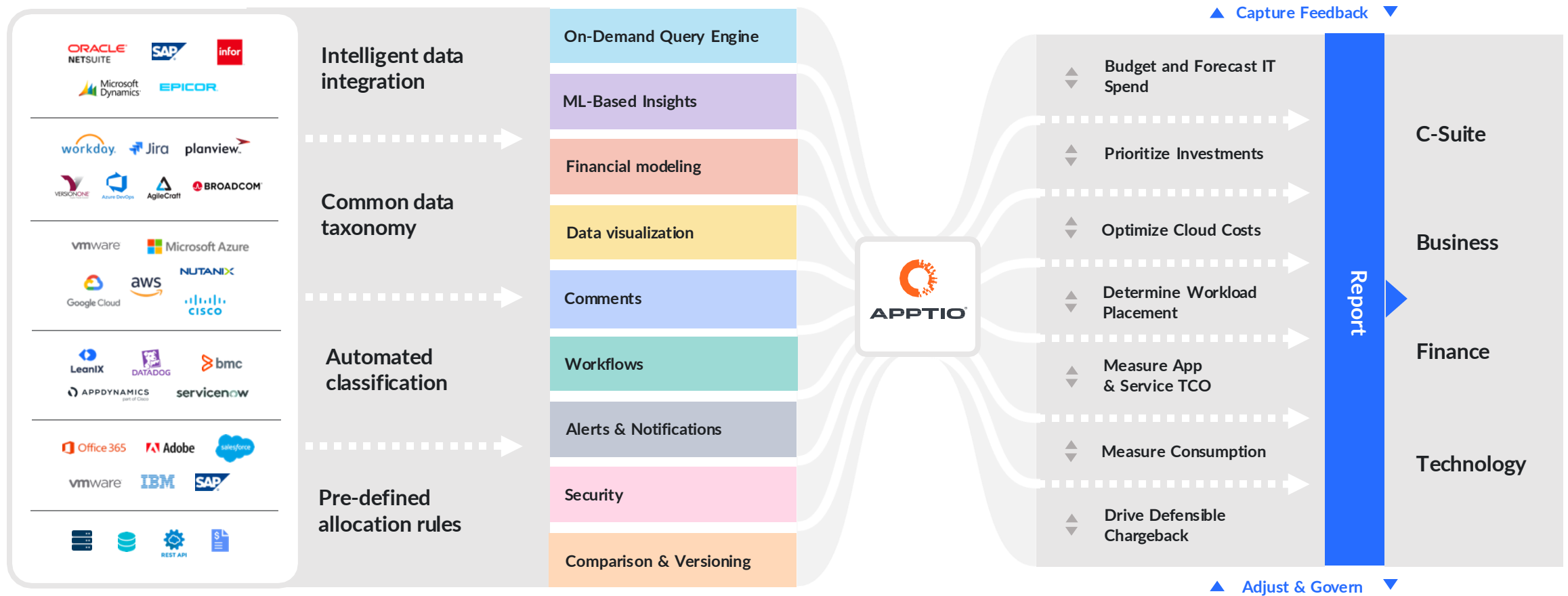**Marketing** *has* **RPM**

Finance *has* **ERP**

Technology Business Management

"TBM shifts focus from cost to value, accelerating the business technology agenda."

FORRESTER®

How Apptio Works

- Intelligent data integration
- Common data taxonomy
- Automated classification
- Pre-defined allocation rules

- On-Demand Query Engine
- ML-Based Insights
- Financial modeling
- Data visualization
- Comments
- Workflows
- Alerts & Notifications
- Security
- Comparison & Versioning

APPTIO

▲ Capture Feedback ▼

- Budget and Forecast IT Spend
- Prioritize Investments
- Optimize Cloud Costs
- Determine Workload Placement
- Measure App & Service TCO
- Measure Consumption
- Drive Defensible Chargeback

Report

- C-Suite
- Business
- Finance
- Technology

▲ Adjust & Govern ▼

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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

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

APPTIO®

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

- **Remove Complexity**
  - Remove finance-driven complexity from
  - Clarity and shift those processes to Apptio

- **Collaboration**
  - Better collaboration between the PMO and
  - IT Finance to avoid unwieldy hand-offs that slow down initiatives

- **Forecast**
  - Forecast changes in operational spend or
  - labor usage that a project will trigger post go-live

- **Contracts & Assets**
  - Support for tracking contracts and assets
  - related to a project

- **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 PPM into a financial product

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)
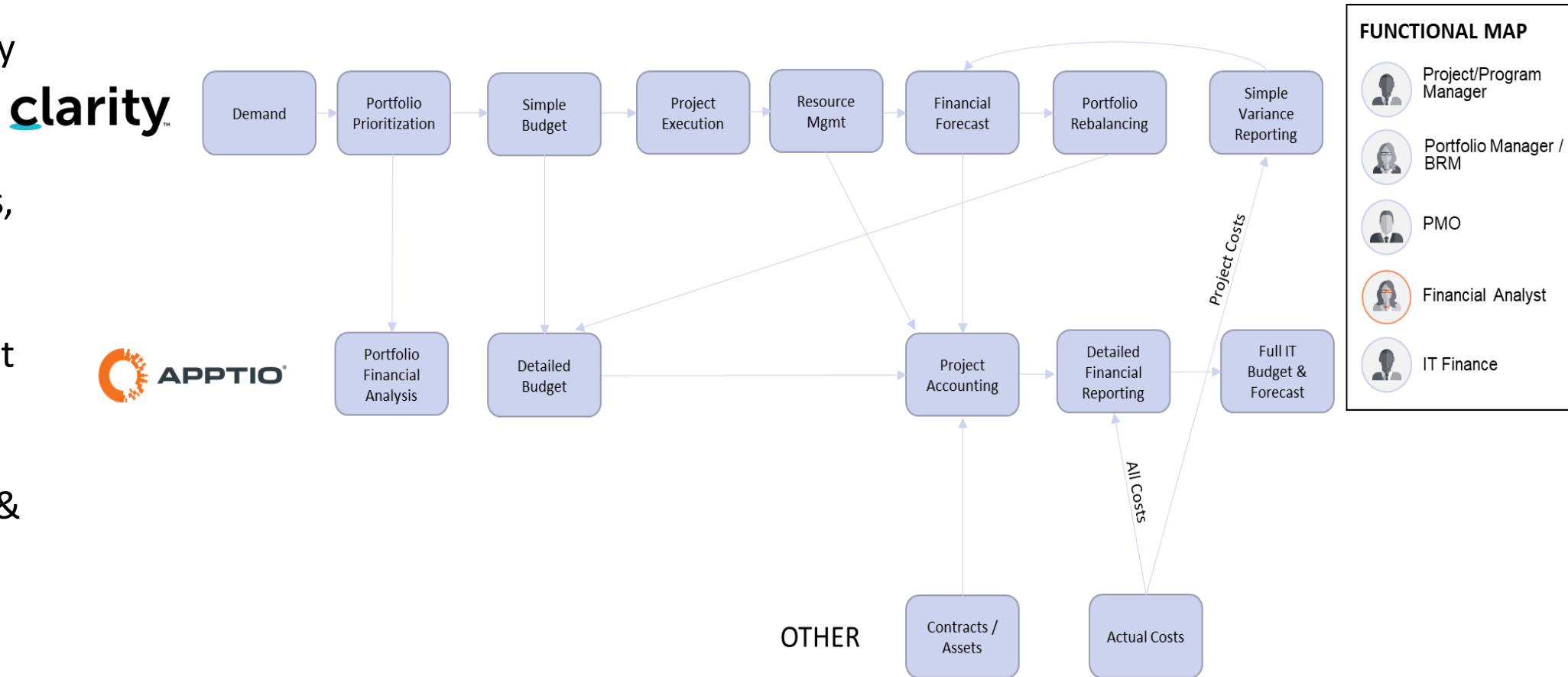
Non-uniform resource management process across systems

Project costs not being delegated to departments post-implementation
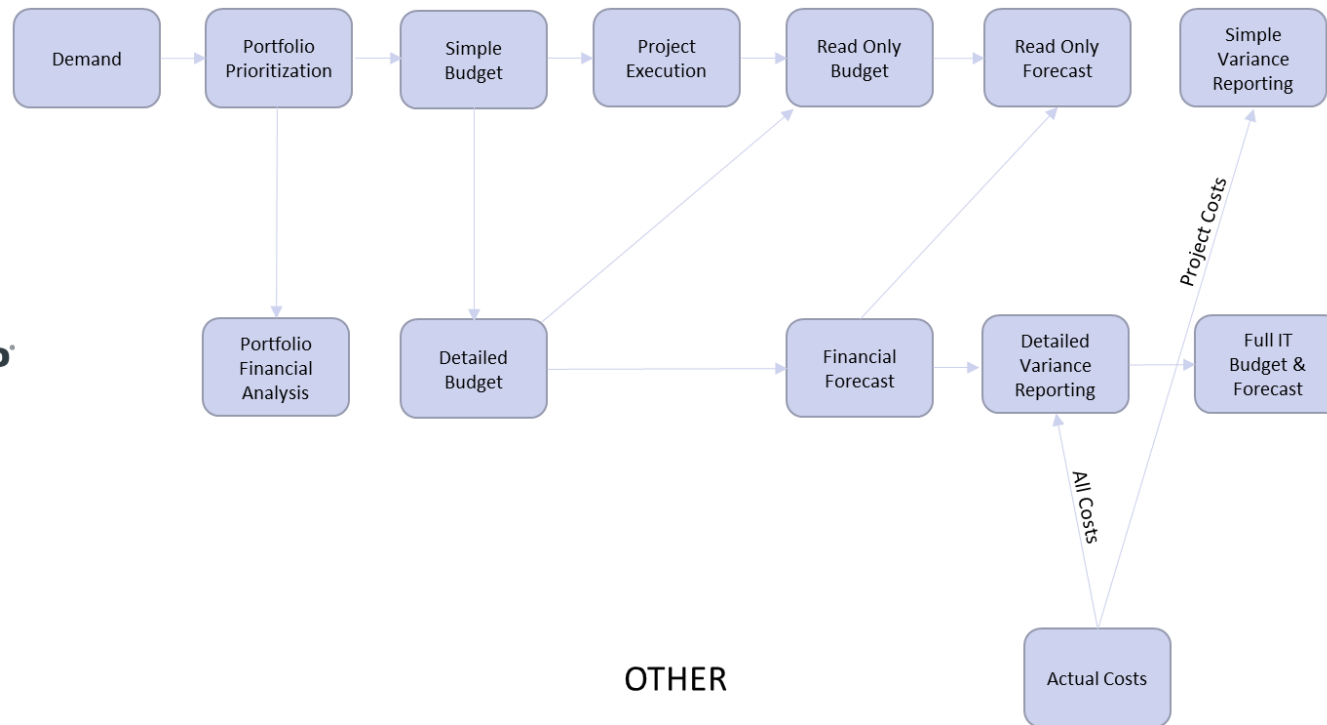
Typical Apptio / Clarity Data Flows

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

clarity

Demand → Portfolio Prioritization → Simple Budget → Project Execution → Resource Mgmt → Financial Forecast → Portfolio Rebalancing → Simple Variance Reporting

APPTIO

Portfolio Financial Analysis → Detailed Budget → Project Accounting → Detailed Financial Reporting → Full IT Budget & Forecast

Project Costs

All Costs

OTHER

Contracts / Assets

Actual Costs

FUNCTIONAL MAP

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

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

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
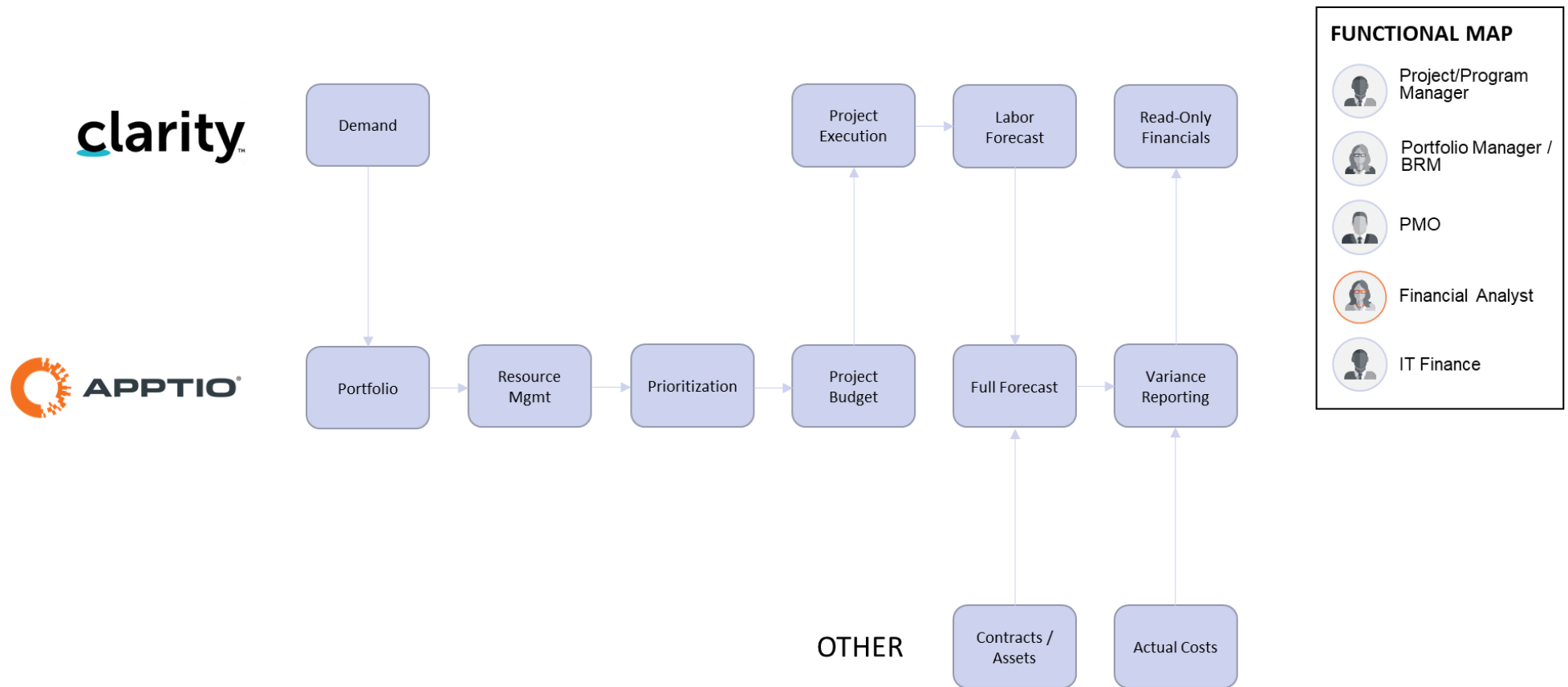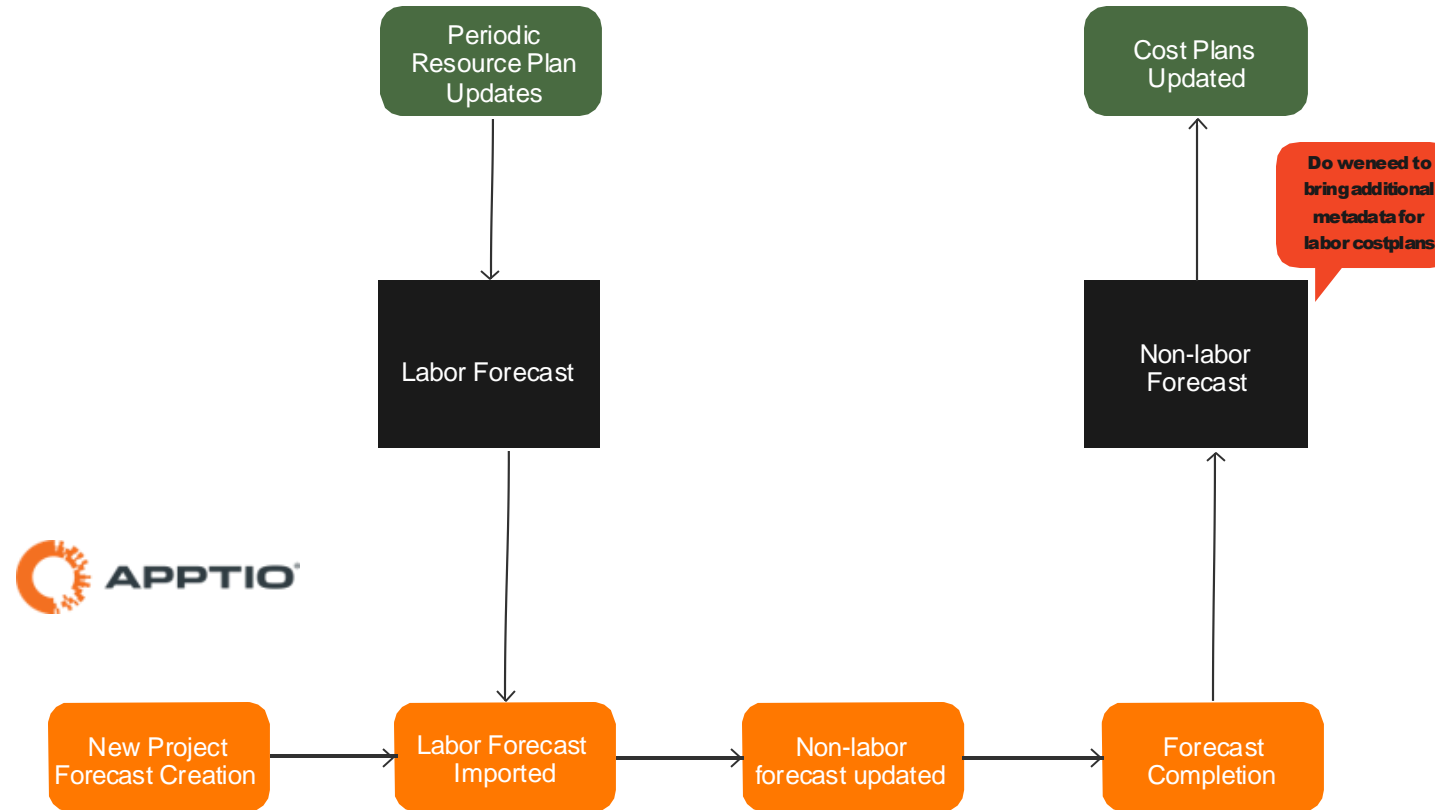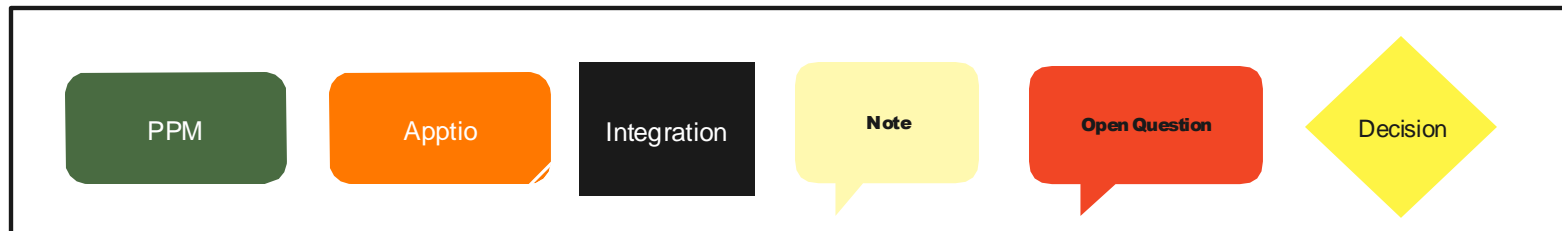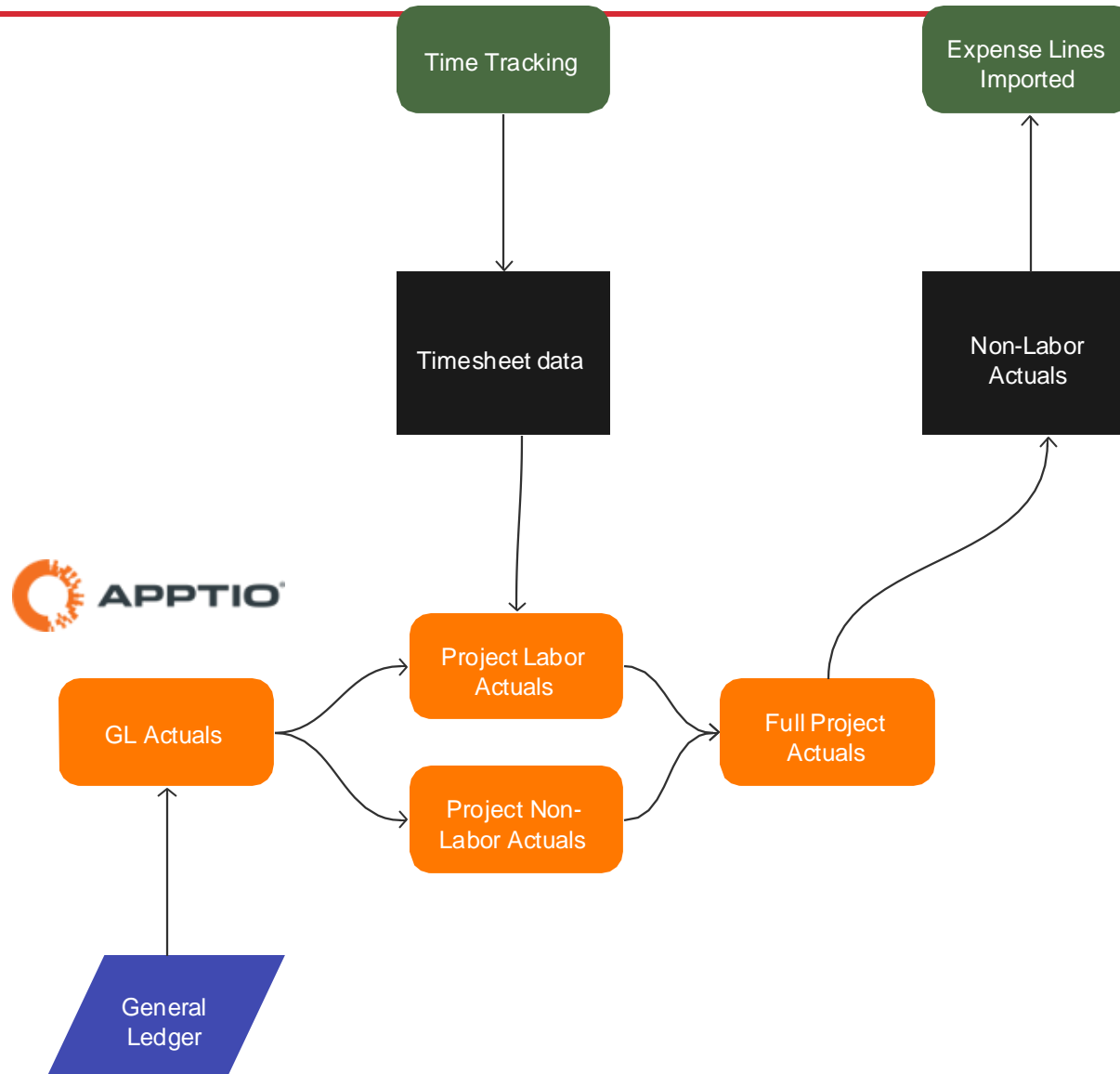
Labor, Budget, and Rate Sync
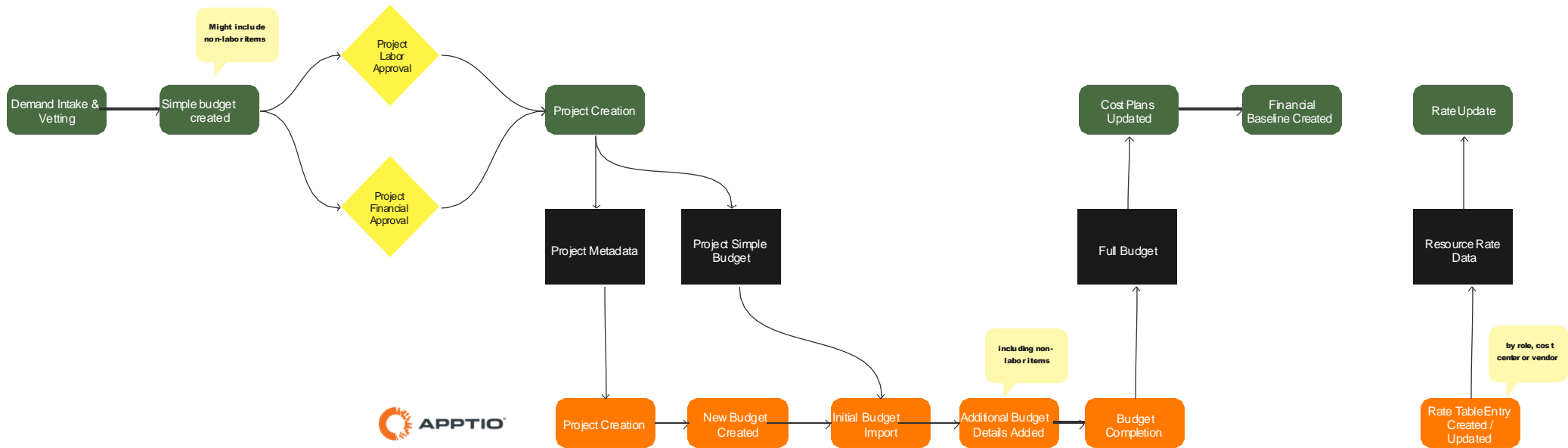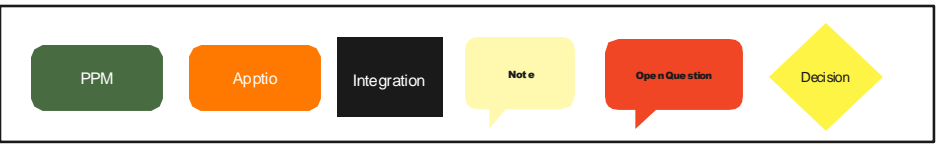
Labor & Non-Labor Forecast Sync

Labor & Non-Labor Actuals Sync

Questions?

Master Clarity with Rego University

Earn Certifications in Administration, Leadership, and Technical Proficiency

Let Rego be your guide.

Elevate Your Professional Expertise with Rego University Certifications

Rego is excited to introduce our **new certification programs**, designed to enhance your expertise in Clarity administration, leadership, and technical skills. These certifications provide hands-on experience and knowledge to excel in your career.

Certification Requirements:

✓ **Completion**: 12 units per certification track

✓ **Eligibility**: Open to all Rego University attendees

Important Reminder:

To have your certification **credits tracked**, ensure you **complete the class surveys in the app** after each session. This step is critical for certification progress.

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

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.

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