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Apptio and Clarity, Complementary Tools

Your Guides:
Doug Greer and Eric Myers

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Introductions

- Take 5 Minutes

- Turn to a Person Near You

- Introduce Yourself

Quick Show of Hands

? How many use Apptio in some part of the organization?

? How many have investigated 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 a TBM office?

Agenda

- TBM & SPM
- Apptio Introduction
- Typical Challenges
- Clarity / Apptio Solution
- RegoSync

What Is Technology Business Management?

Founded in 2012 by CIOs and CFOs and governed by the TBM Council (non-profit 501 ©). TBM is a discipline and **framework** that enables organizations to manage their technology investments, services, and resources in a way that aligns with business goals and objectives.

TBM COUNCIL

Key Components:

- ✓ Cost Transparency
- ✓ Service Portfolio & Catalog Management
- ✓ Financial Planning & Budgeting
- ✓ Performance Measurement and Benchmarking
- ✓ Resource Optimization
- ✓ Business Alignment
- ✓ Continuous Improvement

Key Benefits:

- ✓ **Optimize:** Continuously improve the unit cost of technologies and services while keeping cost and quality in proper balance
- ✓ **Rationalize:** Better focus of time and resources on the services, applications, technologies, and vendors that drive the most value
- ✓ **Innovate:** Business and IT partnership that ensures maximum value from technology investments
- ✓ **Transform:** Provide mission/business partners with agility to "pivot" more quickly to exploit innovation and capitalize on new opportunities
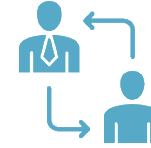
More About the TBM Council

Education & Certifications

Standards & Research

Communication & Collaboration

20,000 Members

9 Vertical Industries

Conference & Workgroups

Visit: https://www.tbmcouncil.org/
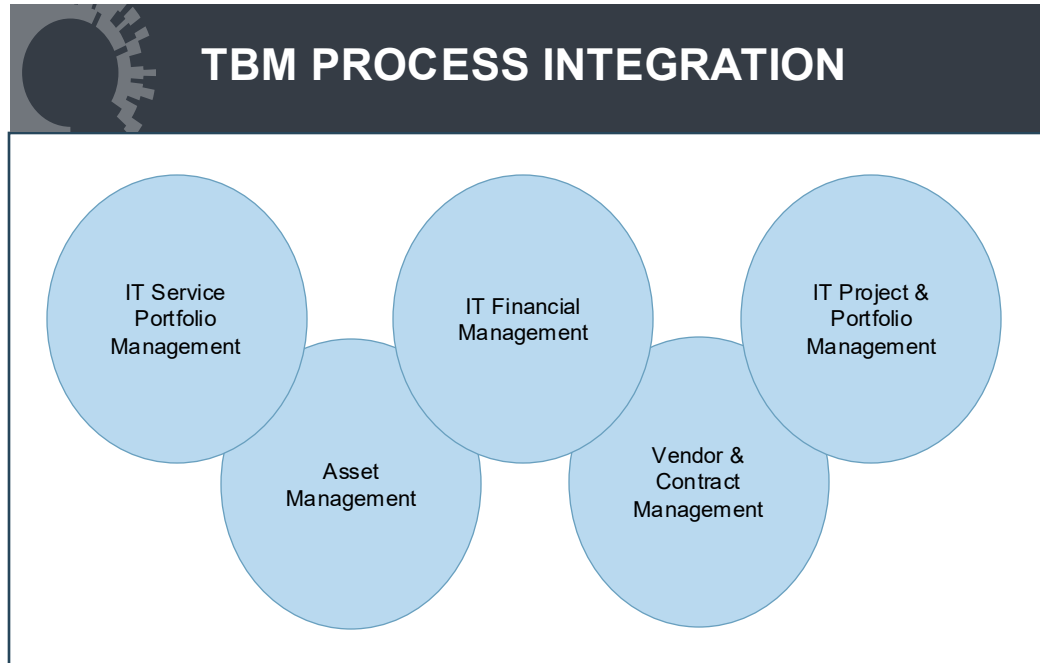
TBM Office (TBMO)

Coordinate Governance, Ensure Accountability, Drive Value Outcomes

Mission

Provide current information to IT and Business decision makers by increasing transparency into how IT efforts are performing and aligning with the business. Cultivate consistency across IT to enable more predictable results from planning to delivery and to drive greater efficiency.

TBM Office (TBMO)

TBM PROCESS INTEGRATION

- IT Service Portfolio Management
- Asset Management
- IT Financial Management
- Vendor & Contract Management
- IT Project & Portfolio Management

BUSINESS OUTCOMES

- **Strategic Alignment** through service and project portfolio management

- **Value Delivery** through portfolio, financial, and asset tracking

- **Performance Measurement** through metrics and reporting

- **Resource Management** through labor, software, and hardware tracking

- **Risk and Compliance Management** through policies, procedures, and contracts tracking

TBM + SPM: Better Together

Aligning Investment with Strategy and Execution

SPM: Driving Strategy Execution

- Captures ideas, demand, and prioritization aligned to business goals
- Enables strategic roadmaps and enterprise-wide visibility into initiatives
- Supports resource planning, capacity, and delivery governance
- Links projects and programs to business capabilities and outcomes

Plan & Prioritize
Strategic Roadmaps
Resource Planning
Business Outcomes

TCO & Transparency
Showback & Insights
Optimize Investments
Drive Accountability

Together, TBM and SPM create a closed-loop system:

- SPM prioritizes and plans work based on business strategy
- TBM quantifies the cost and value of that work
- Results feed back into strategic decision-making

TBM: Making Value Visible

- Translates execution into financial visibility (TCO, Run vs. Grow, ROI)
- Tags investment to services, products, and business units
- Drives showback/reporting to support funding conversations
- Enables continuous optimization through cost transparency

This partnership empowers IT and business leaders to make informed, accountable decisions across the full lifecycle of investment: from idea to impact.

Discussion

For those who have a TBM Office:

? Where does it sit in the organization?

? What are their responsibilities vs the PMO?

Apptio Introduction
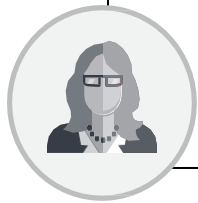
Apptio: the Business System for Governing Technology

Sales *has* **CRM**

HR *has* **HRM**

Marketing *has* **RPM**

Finance *has* **ERP**

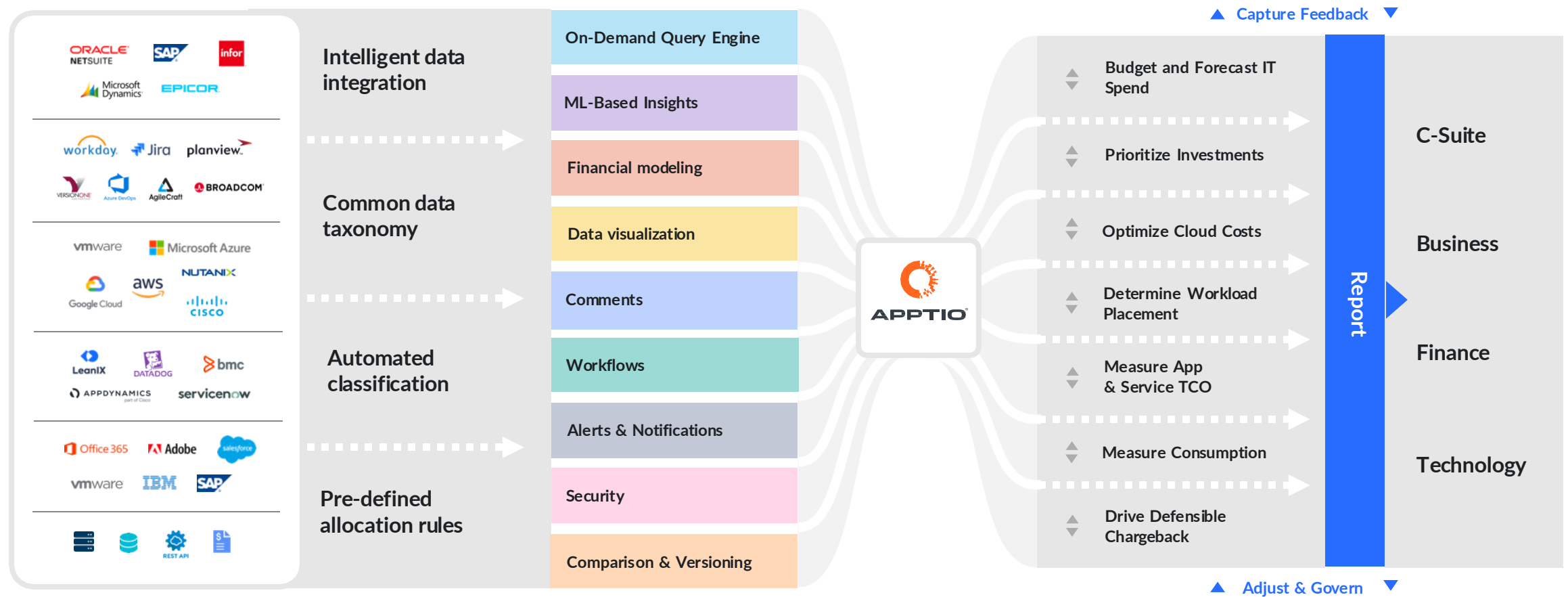## Technology Business Management

"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 ▼

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

Typical Apptio Use Cases: Costing

Costing

Costing provides full transparency into technology expenses by ingesting financial, operational, and business data to build an accurate total cost of ownership (TCO) model. It enables organizations to allocate shared services, map costs to applications and business units, and create defensible views of IT spend. By doing so, Costing equips leaders with the insights they need to rationalize portfolios, support strategic decisions, and communicate value in a way that business stakeholders can understand.

Typical Apptio Use Cases: Billing

Billing

Billing automates the creation of showback and chargeback statements that connect IT consumption with costs, making technology spending clear and actionable for business stakeholders. It pulls from the cost model to generate detailed, policy-driven invoices that reflect allocations, shared services, and usage metrics. Billing not only promotes accountability by linking consumption to financial responsibility, but also drives behavioral change by helping business units understand and manage the costs they incur.

Typical Apptio Use Cases: Planning

Planning

Planning modernizes the IT financial management process by replacing spreadsheets with a purpose-built platform for budgeting, forecasting, and scenario modeling. It enables IT and Finance teams to collaboratively plan at multiple levels—from towers and cost pools down to applications and projects—while providing real-time visibility into variances and trends. With integrated workflows, approval cycles, and analytics, Planning helps organizations streamline processes, improve accuracy, and align technology investments with business priorities.

Challenges

Investment / Operating / Products Disconnect

PMO

IT Finance

Projects

Project Managers

Build

Labor

Non-labor

Waterfall

Investment

Resources

Budget Owners

Run

People

Assets

Vendors

Operating

Products

Product Owners

Teams

Cloud Infra

Vendors

Lean Budgets

Kanban

NFRs

Build

Run

Agile

Lean Portfolio Management

Agile PMO

Products
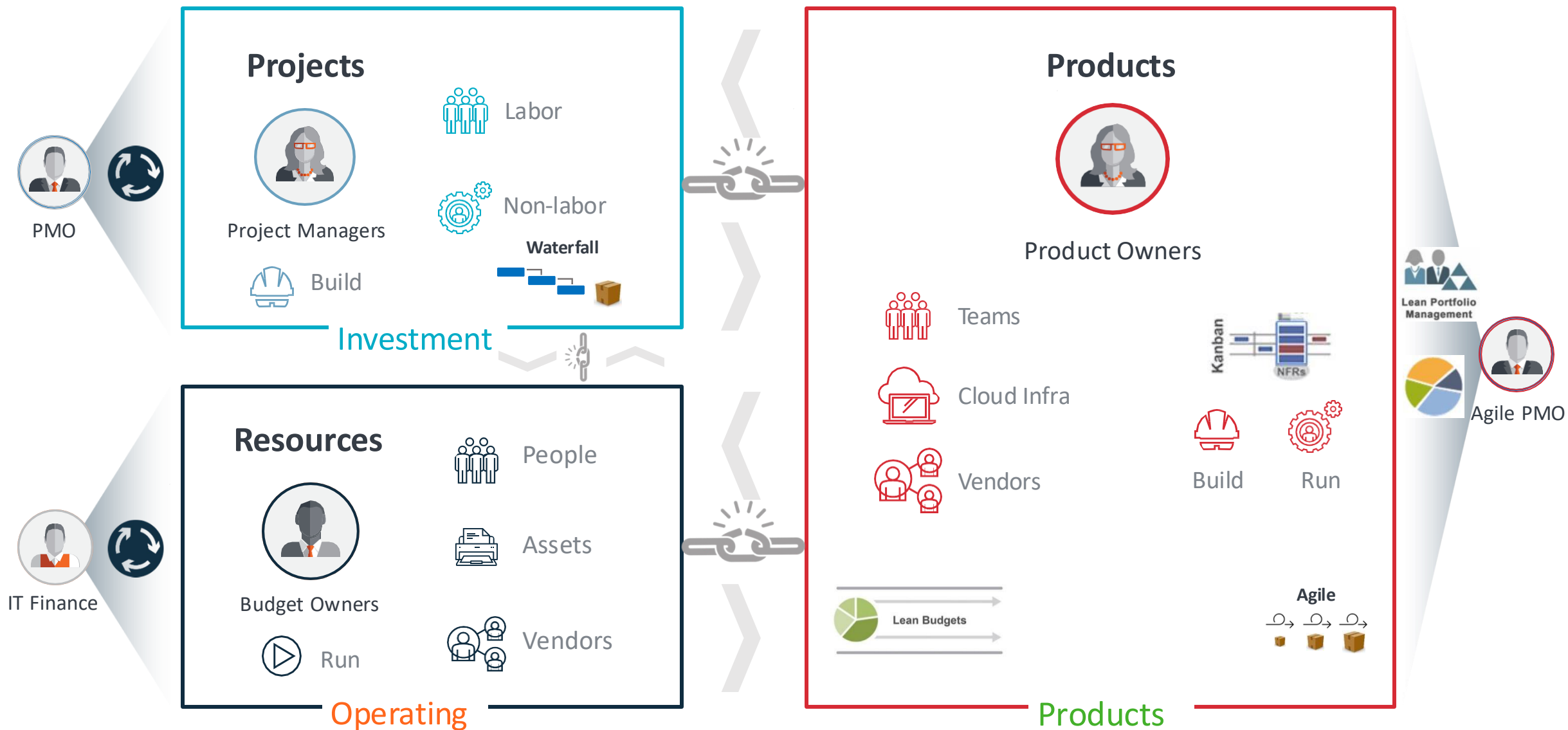
Typical Points of Collaboration for PMO & Finance

CapEx/OpEx

Rules for classifying labor as a capital or operating expense

Rates

Level of detail for rates, as well as the rates themselves

Systems of Record

Systems of record for financial data

Integration Points

Integration points between PMO-owned and IT Finance- owned systems

CIP

Trigger to CIP account for capital project completion (e.g., go-live)

Budget Data

Required project budget/forecast data dimensions

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

Typical Planning Process

Finance Set Targets	▶	Demand Collection & Data Transformation	▶	Reporting & Approvals

Challenges
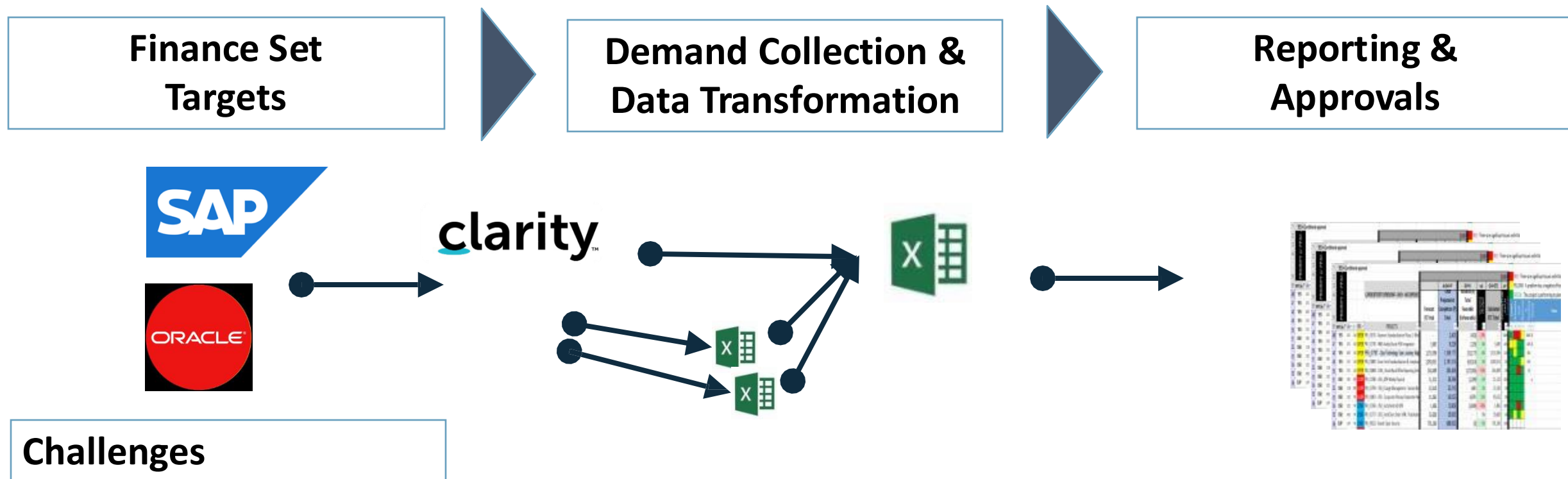
- Leadership lacks visibility and requires granularity for control
- Heavy manual efforts to transform the data
- Larger margin for error possible depending on tool selection
- Time-consuming across multiple FTEs to prepare leadership presentations
- Inability to scale

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PPM Financial Challenges

► **Complicated Processes and 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:** Can't plan out-year operational phase of projects, leaving PMO blind to realities of full financial lifecycle of new initiatives.

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 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 Agile, considering that time is no longer based on timesheet process?

Discussion

We have explored many challenges organizations encounter with funding, planning, and execution.

Who would like to share any of their challenges and what have you done to address them?

Clarity / Apptio Joint Solution

Discussion

? Is anyone using Apptio / Clarity jointly today?

? How is it working (or not working) for you?

Apptio Complements Clarity

PPM

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 & mgt

Plan Costs of Project Work

- Project funding & budget approval
- Plan spend for all resources
- Project impact on build & run costs

Apptio and 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 and 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 PMs into financial analysts

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, and handoffs between tools
- Streamlined cross-tool project-related financial processes
  - Budgeting, forecast, baseline, change control, and handoffs between tools

Pitfalls to Avoid

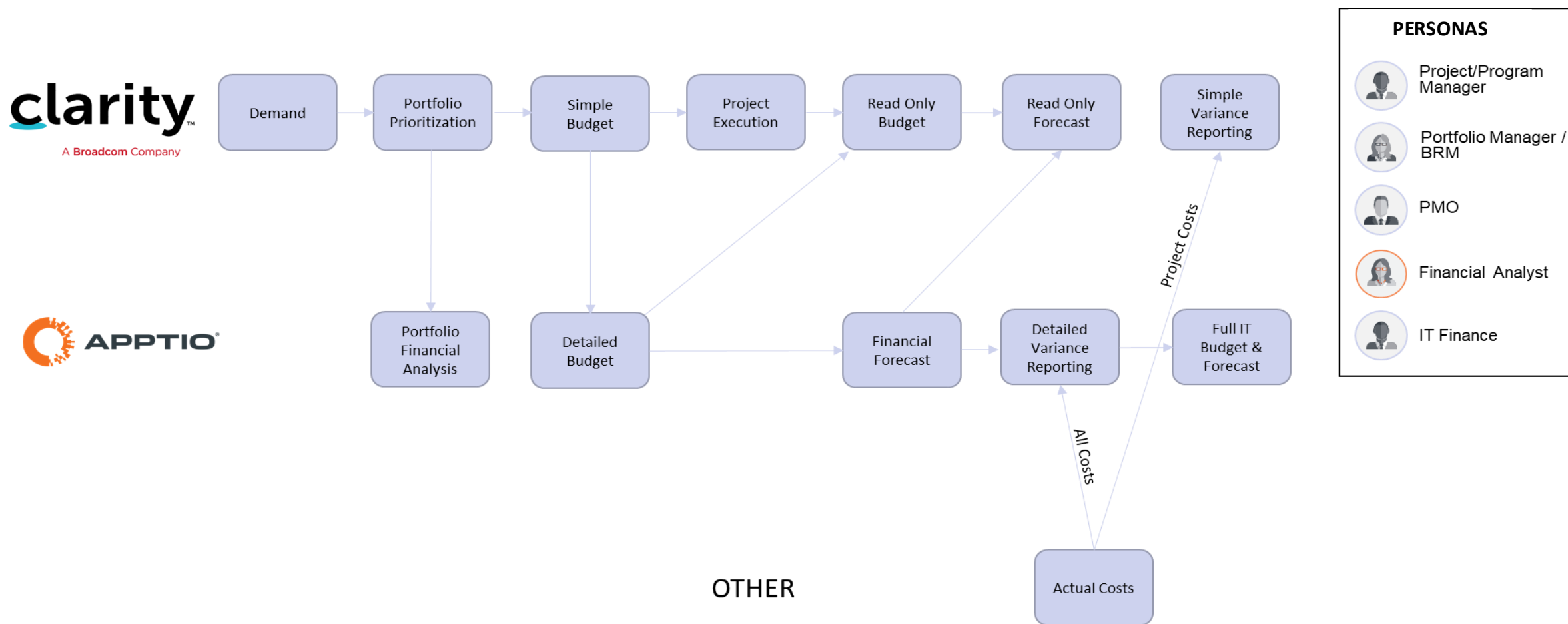| Insufficient Clarity / Apptio Integration	Duplicate data entry, resulting in inefficiencies	Project costs not being delegated to departments post implementation	Non-uniform resource mgt across systems
Lack of uniform project lifecycle management, including financial governance, across both PPM and Apptio	Data misalignment with the inability to join data across systems (such as resource allocations, timesheets, and actual costs)		Jumping between systems to find info, resulting in poor customer experience

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

- Personas: Project Program Manager, Portfolio Manager, PMO, Financial Analyst, IT Finance

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Typical Apptio / Clarity Data Flows
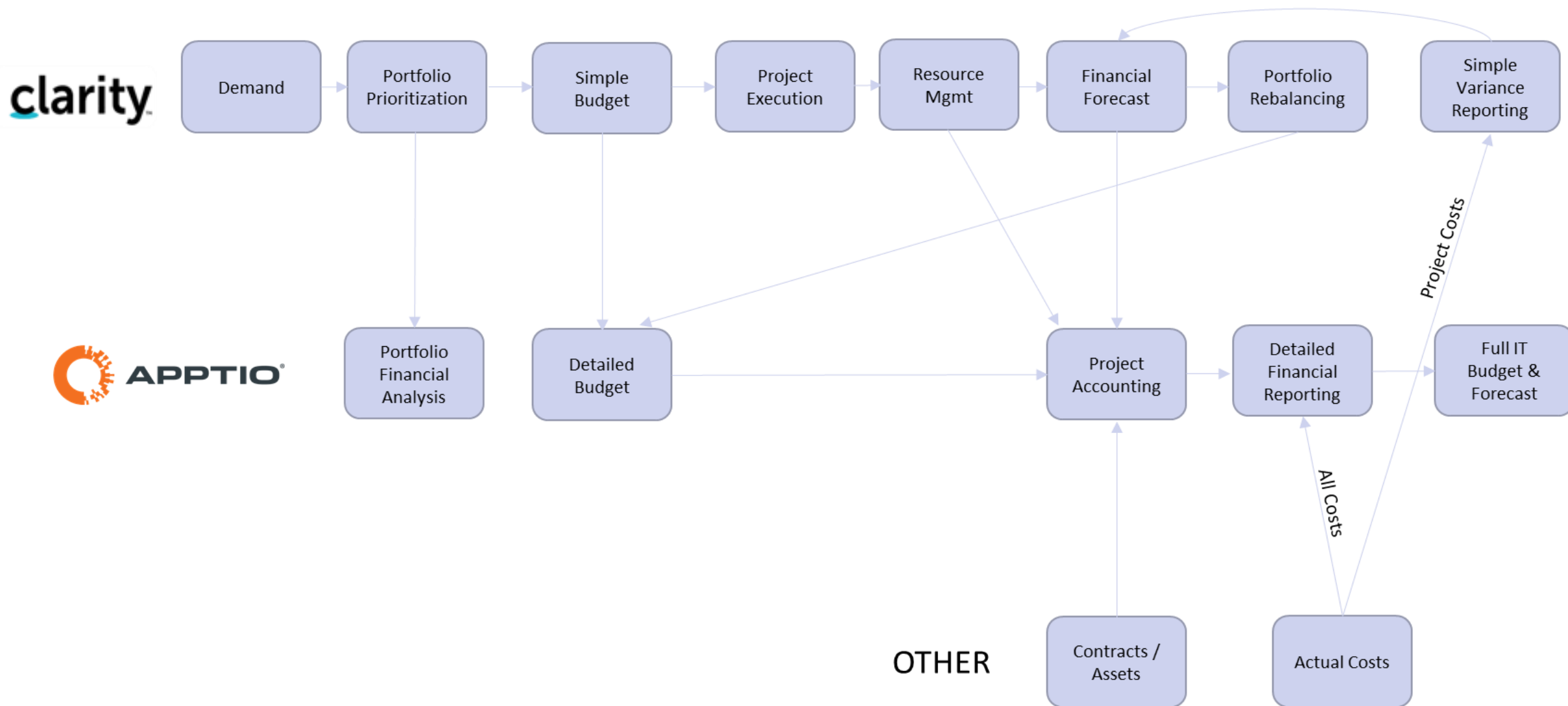
Typical Apptio / Clarity Data Flows

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

- Personas: Project Program Manager, Portfolio Manager, PMO, Financial Analyst, IT Finance

Typical Apptio / Clarity Data Flows

clarity A Broadcom Company

APPTIO

OTHER

Demand → Portfolio Prioritization → Simple Budget → Project Execution → Read Only Budget → Read Only Forecast → Simple Variance Reporting

Portfolio Financial Analysis

Detailed Budget → Financial Forecast → Detailed Variance Reporting → Full IT Budget & Forecast

Project Costs

All Costs

Actual Costs

PERSONAS

Project/Program Manager

Portfolio Manager / BRM

PMO

Financial Analyst

IT Finance

# 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

- Personas: Project Program Manager, Portfolio Manager, PMO, Financial Analyst, IT Finance

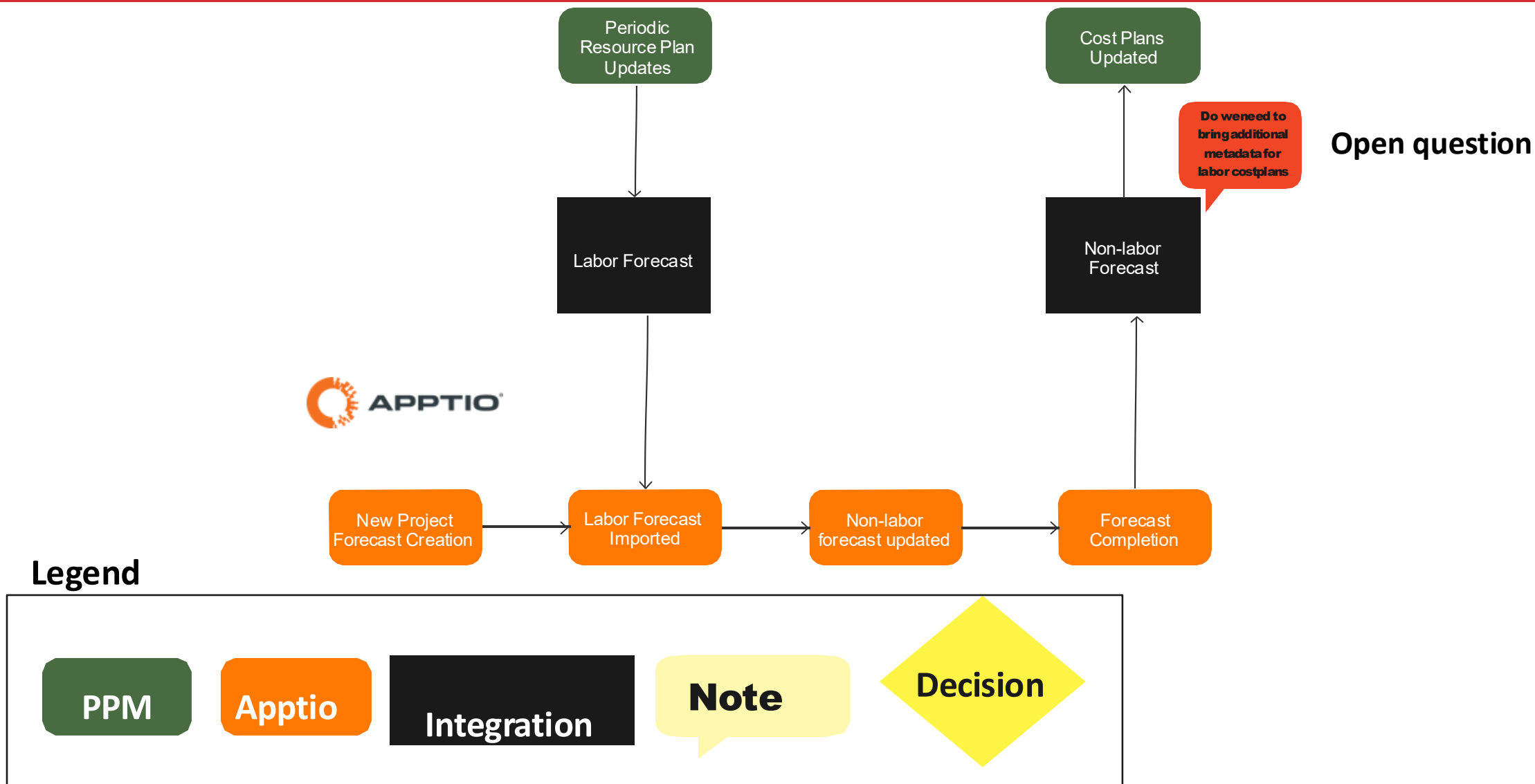# Typical Apptio / Clarity Data Flows
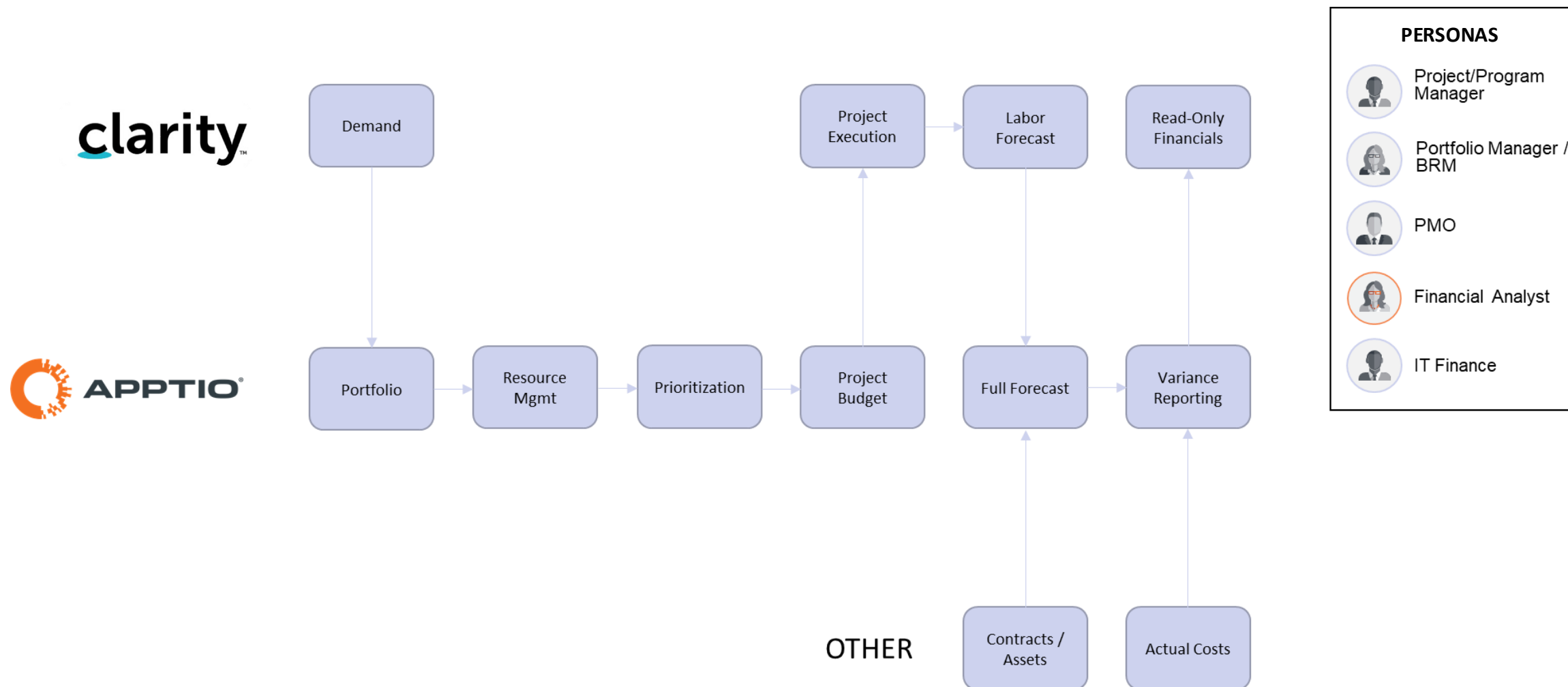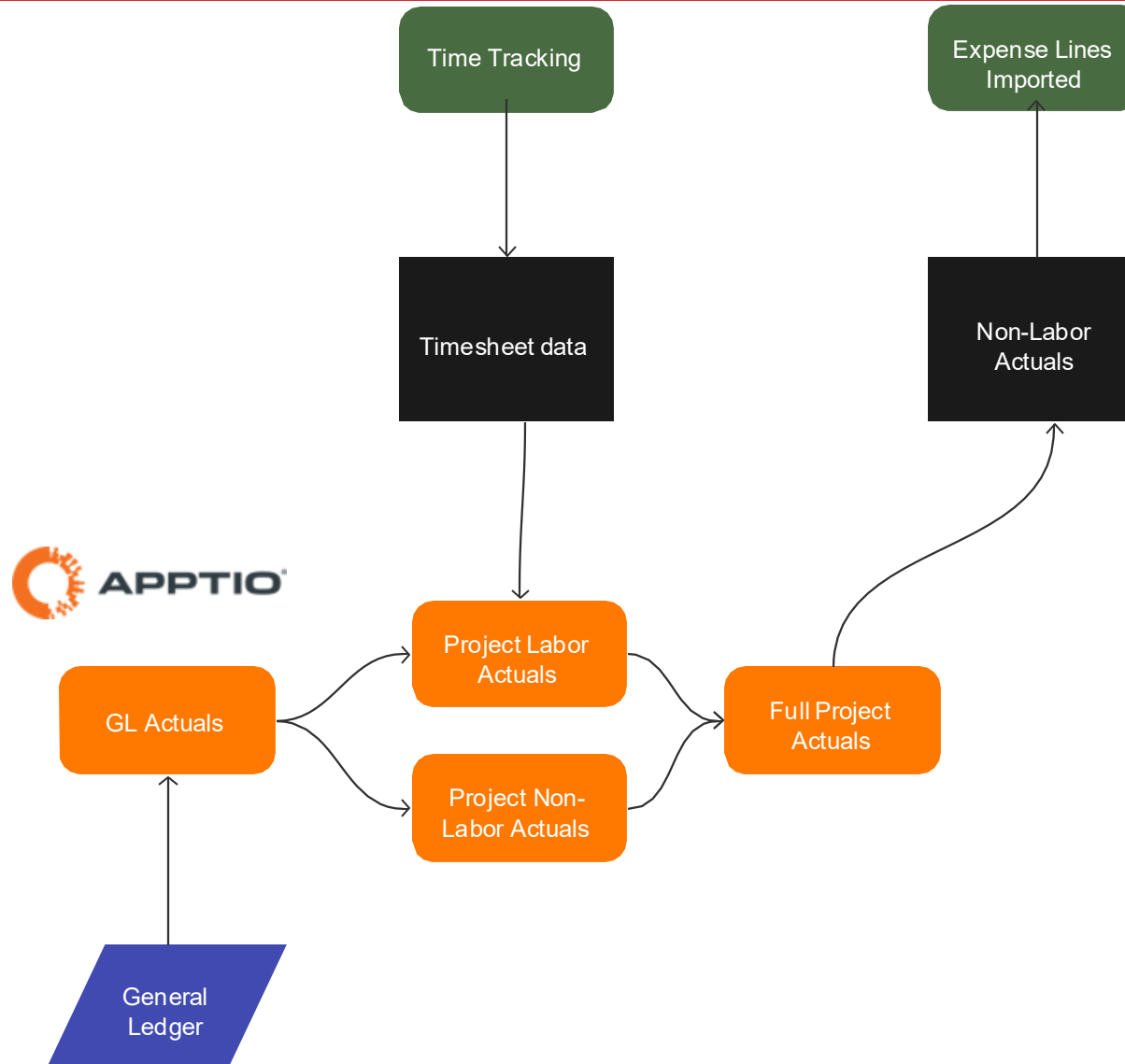
Labor, Budget, and Rate Sync
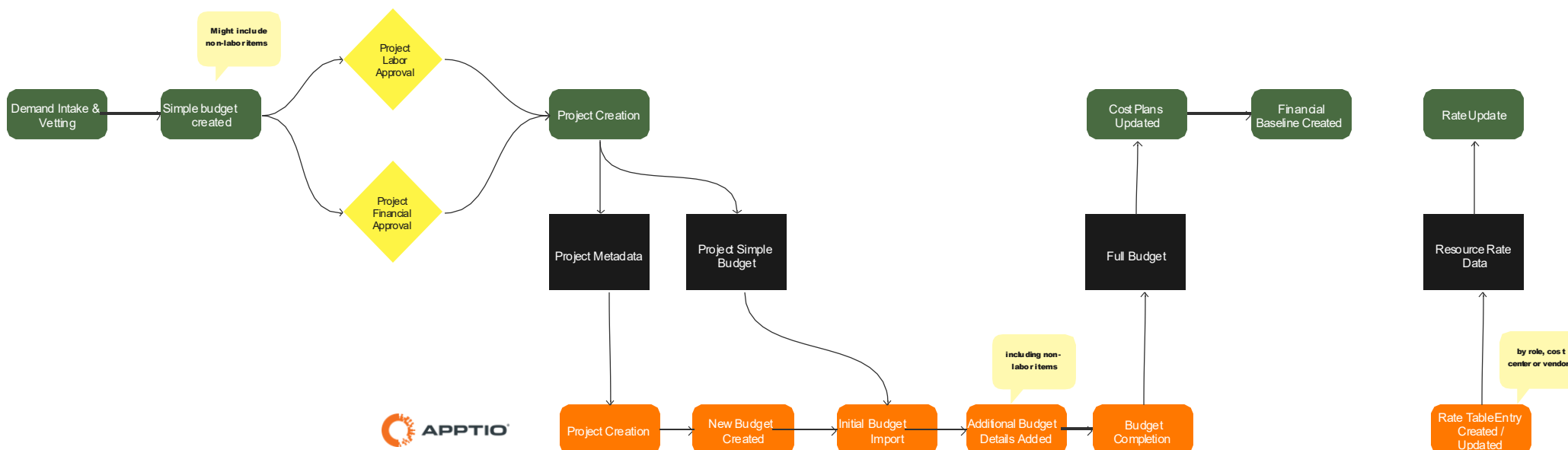
Labor and Non-Labor Forecast Sync

Labor and Non-Labor Actuals Sync

Full automation of the **IT Planning / Cost Transparency Data Exchange** Process

Configure
Customize what is transferred and where, including custom use cases
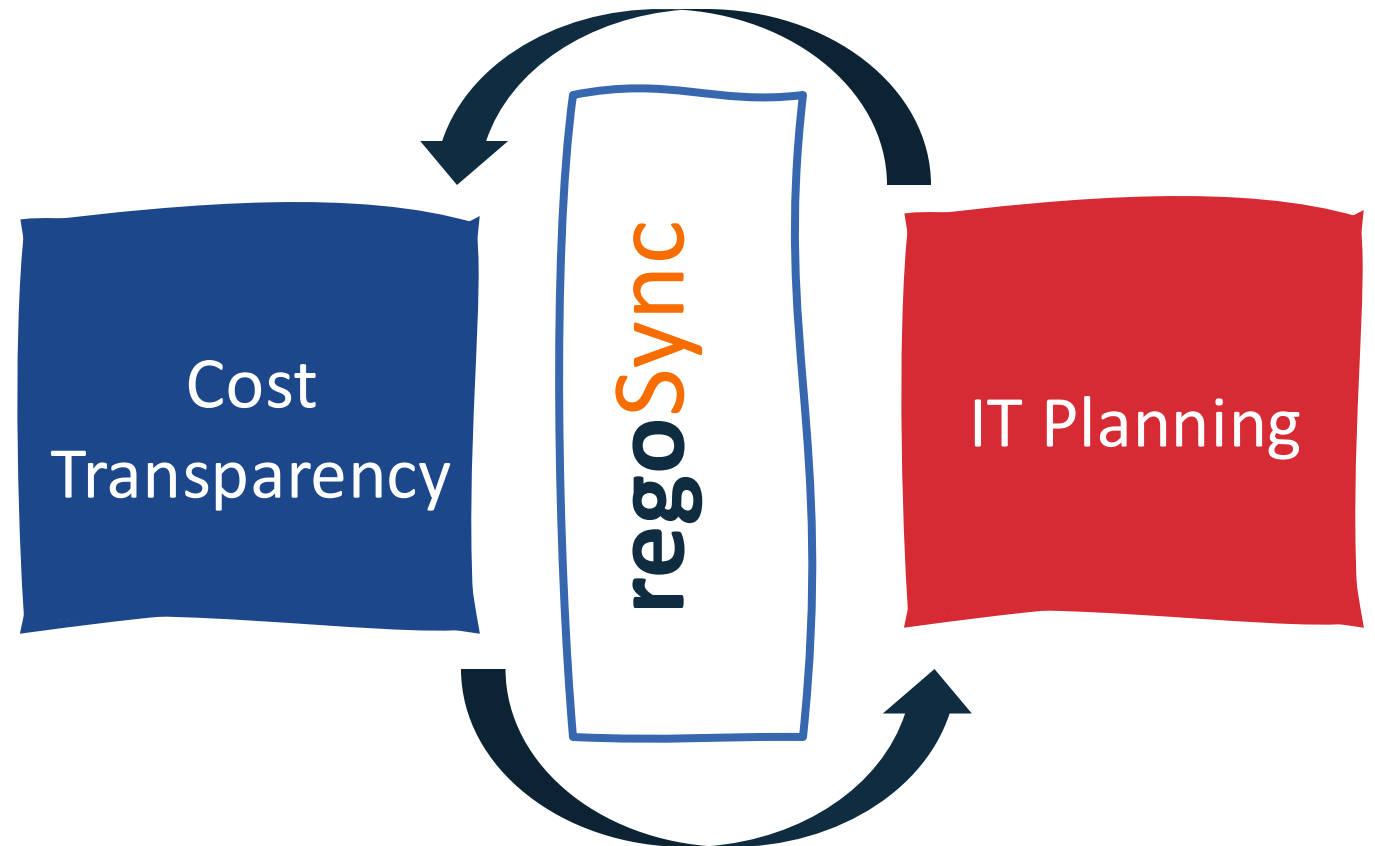
Schedule
Schedule the data sync between ITP and CT, running it as often as you like

Save Time
Eliminate manual processes, ITP extracts, and data loading

Cost Transparency

regoSync

IT Planning

Questions?

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

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- Click on **Visit CCR's** button under the **Report PDU's**
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- Class Provider = **Rego Consulting**
- Class Name = **regoUniversity**
- Course **Description**
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