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an IBM Company
Orlando 2025
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Apptio • Targetprocess • Cloudability
Operationalizing the TBM Office
Creating a Well-Governed Office for Long-Term Success
Your Guides:
Josh Roberto & Eric Self

Introduction

Apptio Project vs TBM Practice

Apptio Project

Example of an initial implementation

Cost Transparency (Phase 1)

Initiate → Plan → Execute → Close

Ongoing approved roadmap implementations

Phase 2, 3, …. IT Financial Planning, SaaS Insights, Bill of IT….

Initiate → Plan → Execute → Close

Initiate → Plan → Execute → Close

Initiate → Plan → Execute → Close

PROJECT TEAM

- Project Management
- Change Management
- Business Analyst
- Technical Configurator
- Data Owners

TBMP Roadmap

Key Point: How will you manage teams with differing and competing priorities? Projects v BAU

TBM Practice will operationalize what TBM projects deliver through BAU handover and ongoing continuous improvement

TBM Advisory Group sets ongoing project priorities in conjunction with key stakeholders

TBM Practice

Sustainability ensures ongoing operational success

TBM Practice Director

- Continuous Improvement
- Roadmap and Strategic Alignment
- Value / Benefits Realization
- Change, Adoption and User Support

KEY OPERATIONAL FUNCTIONS

- Change Management
- Business TBM
- Technical TBMA
- Admin TBMA

KEY STAKEHOLDERS

- Business Rel. Mgrs
- Technology Managers
- IT Finance
- Service Owners

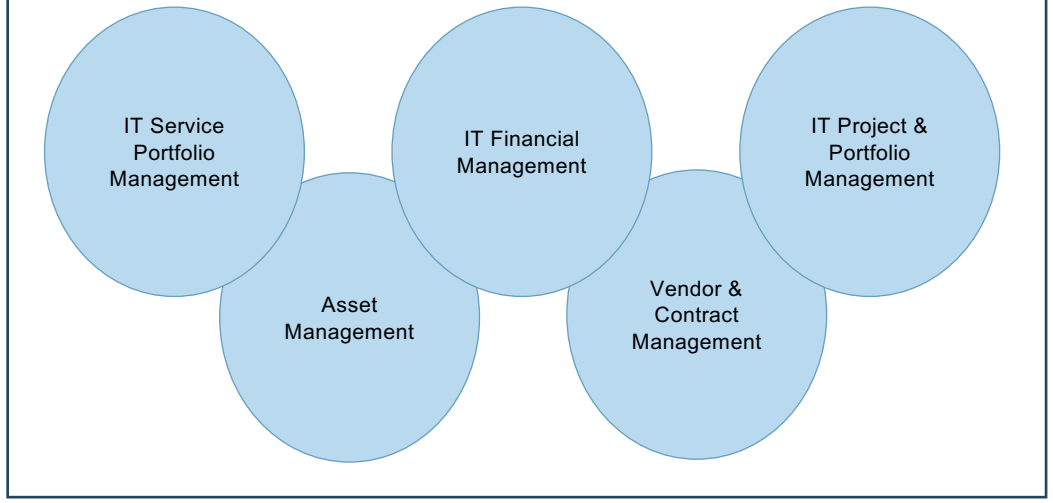
The answer: TBM Office

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 PROCESS INTEGRATION



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

Key Pillars of a Successful TBM Practice

TBM Practice Success

UNDERSTANDING STAKEHOLDERS

Ensuring ongoing TBM Executive Sponsorship

Understanding your stakeholders needs, priorities & concerns

Brief new stakeholders and explain why TBM

ORG CHANGE MANAGEMENT

Planning & resourcing for the level of change

Change Management strategy & ongoing user adoption metrics

Communications and training strategy

OPERATING MODEL

Establish a “fit for purpose” TBM Practice

TBM Advisory Group for ongoing operational direction & decisions

Understanding project vs ongoing operations

ROADMAP & USE CASES

Clearly defined & tracked TBM Roadmap

Use cases that are specific, measureable & trackable for value

Direct alignment to strategic IT initiatives

DATA QUALITY & MANAGEMENT

Data ownership & quality accountabilities

Don’t wait for perfect data. Publish 80/20 with Good / Better / Best

Data quality heatmap to drive improvements

TBM Transformation Outline

Develop and execute adoption of TBM principles and practices across IT and the business

Establish TBM Fundamentals	• TBM Vision Alignment • Overall organizational understanding and alignment to TBM principles and taxonomy
TBM Strategy	• TBM Strategy & Business Case • TBM Use Case Mapping • Align TBM value outcomes to IT Strategies and Objectives
Change Management	• Provide TBM Program Governance and Organizational Change Management • TBM Transformation Change Plan, including stakeholder analysis, communication planning, and coaching plan • TBM Governance / Operating Model • TBM Coaching and Training Workshops Held • Focus on optimizing the usage of TBM tool, ensuring value is being realized • Change Plan execution
Maturity Roadmap	• Develop Strategic TBM Roadmap to Drive Incremental Value over Time • Mature and evolve IT / Finance processes to support TBM

Governance

Symptoms of Governance-Related Issues

Inconsistent Data Feeds:

Monthly data inconsistencies add operational burden to TBM Office.

Adjustments Needed in Reporting:

TBM reports often require last-minute changes.

Process Non-Compliance:

Lack of adherence to defined practices, e.g., cloud tagging strategies.

Causes of Governance Challenges

Unrealistic Expectations:

- Desire for advanced capabilities like AppTCO within initial phases.
- Requests for Service Showback without foundational structures like a Service Catalog.

Use Case Complexity:

- Misunderstanding requirements and dependencies of use cases.
- Failing to align goals with achievable outcomes.

Dependency Constraints:

- Project timelines constrained by dependencies (e.g., waiting for ServiceNow implementation).

Aligning Use Cases with Crawl/Walk/Run Model

Use case alignment to maturity states for achievable outcomes.

Variances in obstacles between companies underscore the importance of early identification.

Steps to Enhance TBM Governance

Stakeholder Accountability:	Early involvement in decisions around cost strategies and reporting. Sets realistic expectations and fosters adoption.
Automation Opportunities:	Integrating data sources for timely and accurate information.
Clear RACI Framework:	Defined roles for data and process accountability.
Alignment of Reporting and Showback with Business Goals:	Using accessible language and aligning to business objectives.
Clarity on Cost Drivers and Realistic Stakeholder Expectations.	

Keeping the Sponsor Engaged and Satisfied

Embed TBM Outputs in Decision-Making:

- Show alignment of TBM outcomes with broader business goals.

Highlighting Achievements:

- Track and showcase goal achievements to stakeholders and sponsors.

Stakeholder Happiness:

- Ensuring stakeholder alignment to maintain sponsorship enthusiasm.

Key Challenges

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Key Challenges

EXECUTIVE SPONSORSHIP

TRAINING & EDUCATION

ADOPTION & PERCEPTION

Executive Sponsorship

The Role of Executive Sponsors

- Provide Vision and Strategic Direction
- Allocate Resources and Budget
- Champion TBM Initiatives Organization-Wide

Gaining Executive Support

- Align TBM Goals with Business Objectives
- Present Clear ROI and Business Cases
- Use Apptio's Benchmarking Tools to Demonstrate Value

Maintaining Engagement

- Regular Updates and Transparent Reporting
- Involve Executives in Key Milestones
- Highlight Successes and Recognize Contributions

Training & Education

A Training Plan's primary objective is to determine how to effectively develop the knowledge and skills of stakeholders so they can perform their roles efficiently and effectively once the change has been executed. It must address not only technical training, but also the processes to ensure there is an understanding of how the new technology fits within their job responsibilities.

A Training Plan consists of the following key elements:

Training Goals and Needs Analysis

- Define what the training will be designed to achieve
- Conduct a Training Needs Analysis (TNA) to understand the training needs of the various stakeholder groups

Training Approach & Content

- Formulate role or persona-based training approach, it is not a "one size fits all"
- Identify and train based on use cases suited to the training audience to bring the training to life
- Focus on the "why", the "so what" and most importantly "what's in it for me" not just the "how"
- Ensure there is a call to action to build change momentum and adoption

Training Delivery & Logistics

- Organize training logistics in a timely manner (room and stakeholder availability)
- Trainer requirements (quantity, skills, timing)
- Development and approval of content – materials, online training, communications
- Track and report training effectiveness – completion of actions, training attendance rates

Rego University

- Our clients asked us to create a forum where they could network with their peers, learn best practices, engage in debates and knowledge-sharing, and receive deep-dive technical training. In response to this, we created Rego University. Rego University is a compliment to TBMC.
- Every year we gather the best and brightest TBM, FinOps, and Agile professionals in one place, so we can learn together in interactive classes based on real-life experience.
- Reserve your spot for Rego University 2025 in Orlando, FL March 10-12.
- Learn more at https://regouniversity.com/apptio/

APPTIO PARTNER

TBM COUNCIL PARTNER

Perception & Adoption

Understanding TBM & Apptio Adoption Challenges

Perception of Apptio

Seen as an IT Finance, Costing, or Budgeting Tool

Some view it as "extra work" or something that can be done in Excel

Challenge: Aligning business and IT expectations around TBM

Signs of Poor Adoption

Low login rates, limited usage of reports

Users rely on spreadsheets instead of Apptio data

Executives do not engage with insights from Apptio

Barriers to Adoption

Lack of stakeholder engagement

Poor communication on value & benefits

Resistance to process change

Driving Engagement & Measuring TBM Success

3 Steps to Drive Adoption

Identify Stakeholders → Classify as Influencers, Supporters, or Blockers

Engage & Educate → Use training, roadshows, and targeted communication

Measure Success → Track data quality, usage, and business impact

Best Practices for TBM Success

Establish a **TBM Champion Network** for peer advocacy

Implement **Rewards & Recognition** programs

Use **targeted communication** (newsletters, success stories, FAQs)

Track **adoption metrics**: user engagement, report usage, and business outcomes

Common Obstacles

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Navigating Common Obstacles

Obstacle 1: Data Quality Issues

Solution: Implement Data Governance Policies

- **Define Data Ownership and Stewardship**
- **Use Apptio's Data Management Capabilities**

Obstacle 2: Siloed Information

Solution: Promote Data Sharing and Integration

- **Integrate Systems Using Apptio Connectors**
- **Establish Cross-Functional Data Teams**

Obstacle 3: Resource Constraints

Solution: Prioritize Initiatives Based on Impact

- **Conduct Cost-Benefit Analyses**
- **Focus on High-Value Quick Wins**

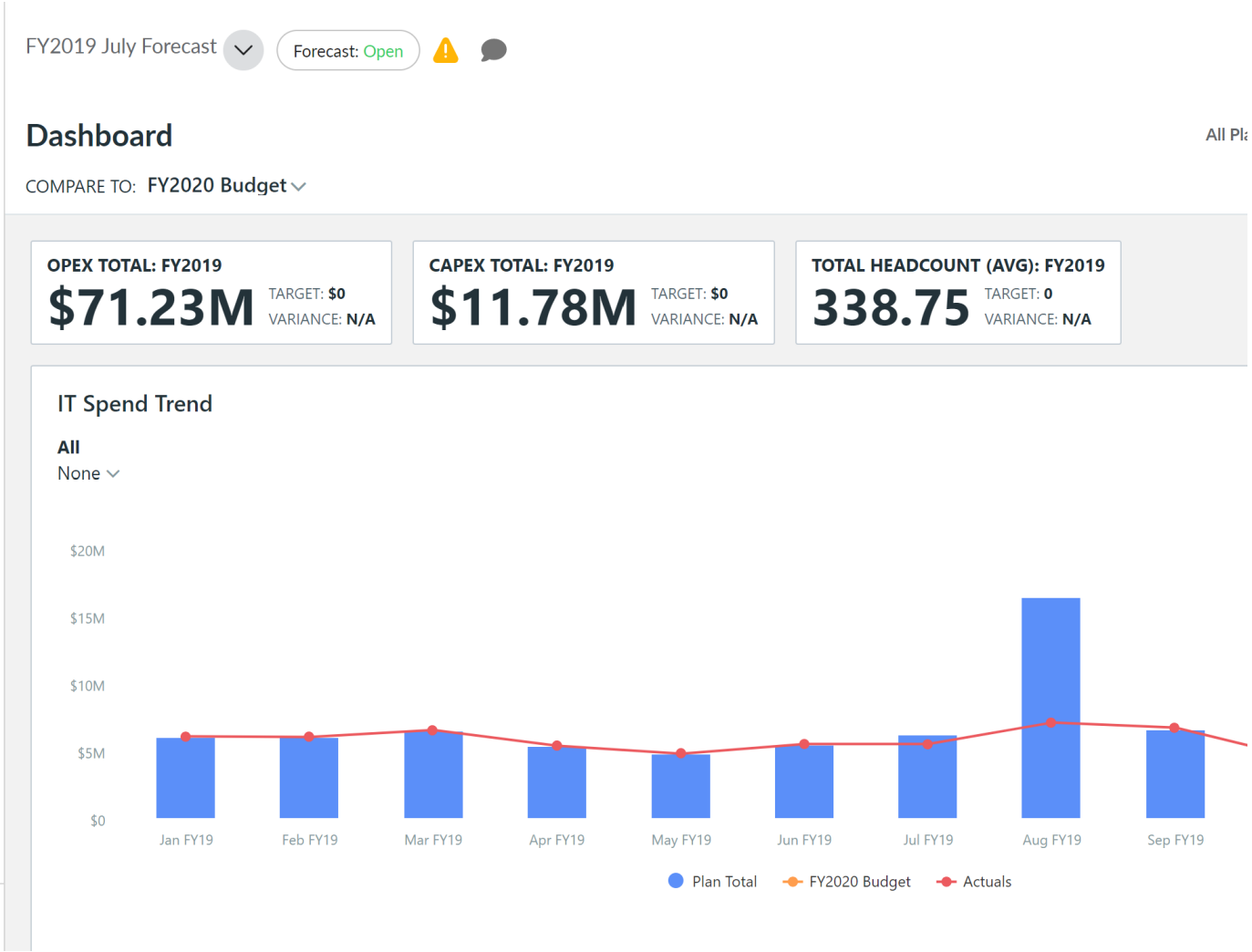
Obstacle 4: Stakeholders that don't trust/understand their data or how to use it

Solution: Data Literacy and Engagement Programs

- **Educate Stakeholders how to interpret and utilize data effectively**
- **Offer training sessions to build confidence in data usage**

Measuring the Value of TBM

Value in Practice: Budgeting and Forecasting

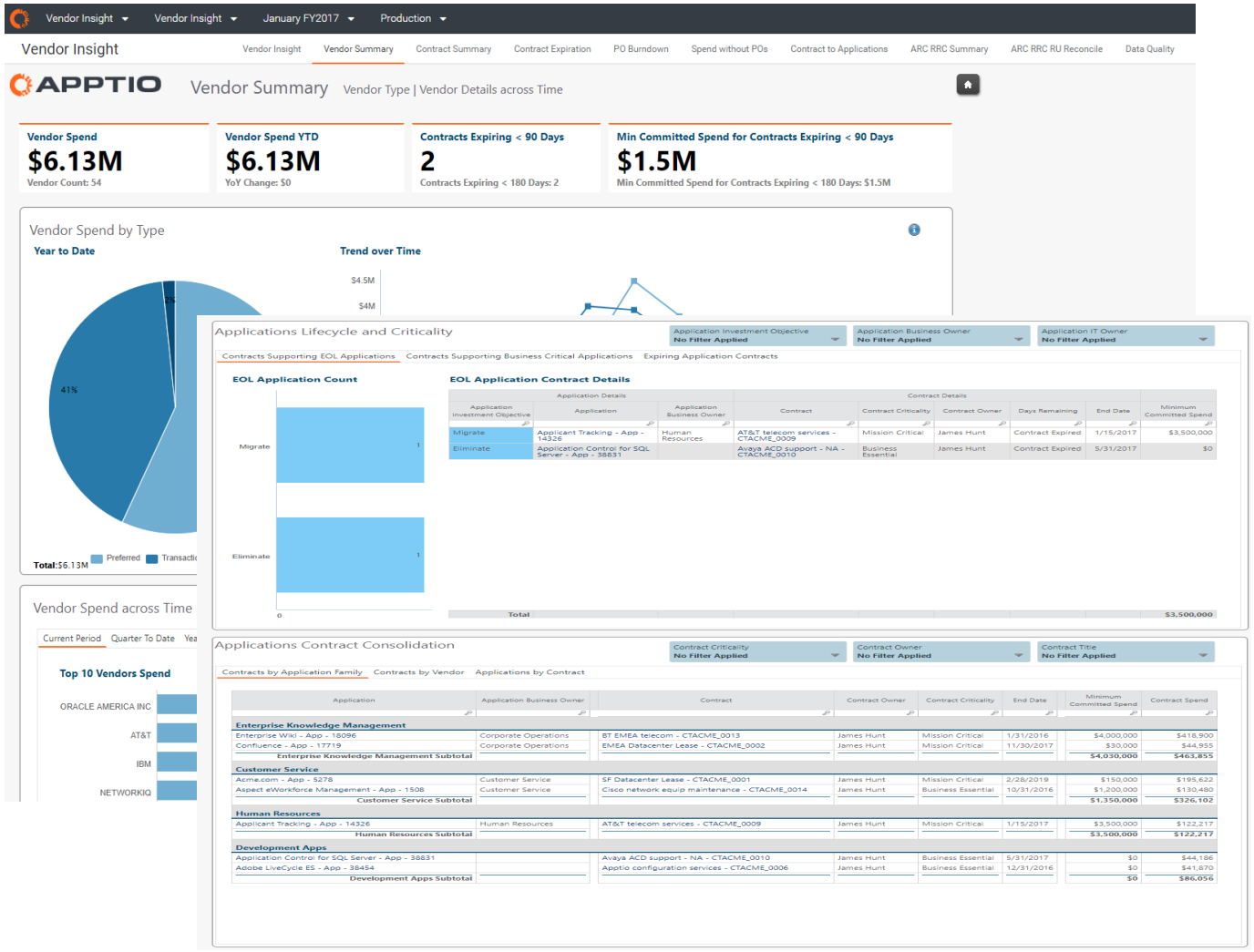


- How many spreadsheets eliminated in planning process?
- How much time was saved in the planning process?
- Plan versions
- Improved collaboration during planning

Value in Practice: Automation

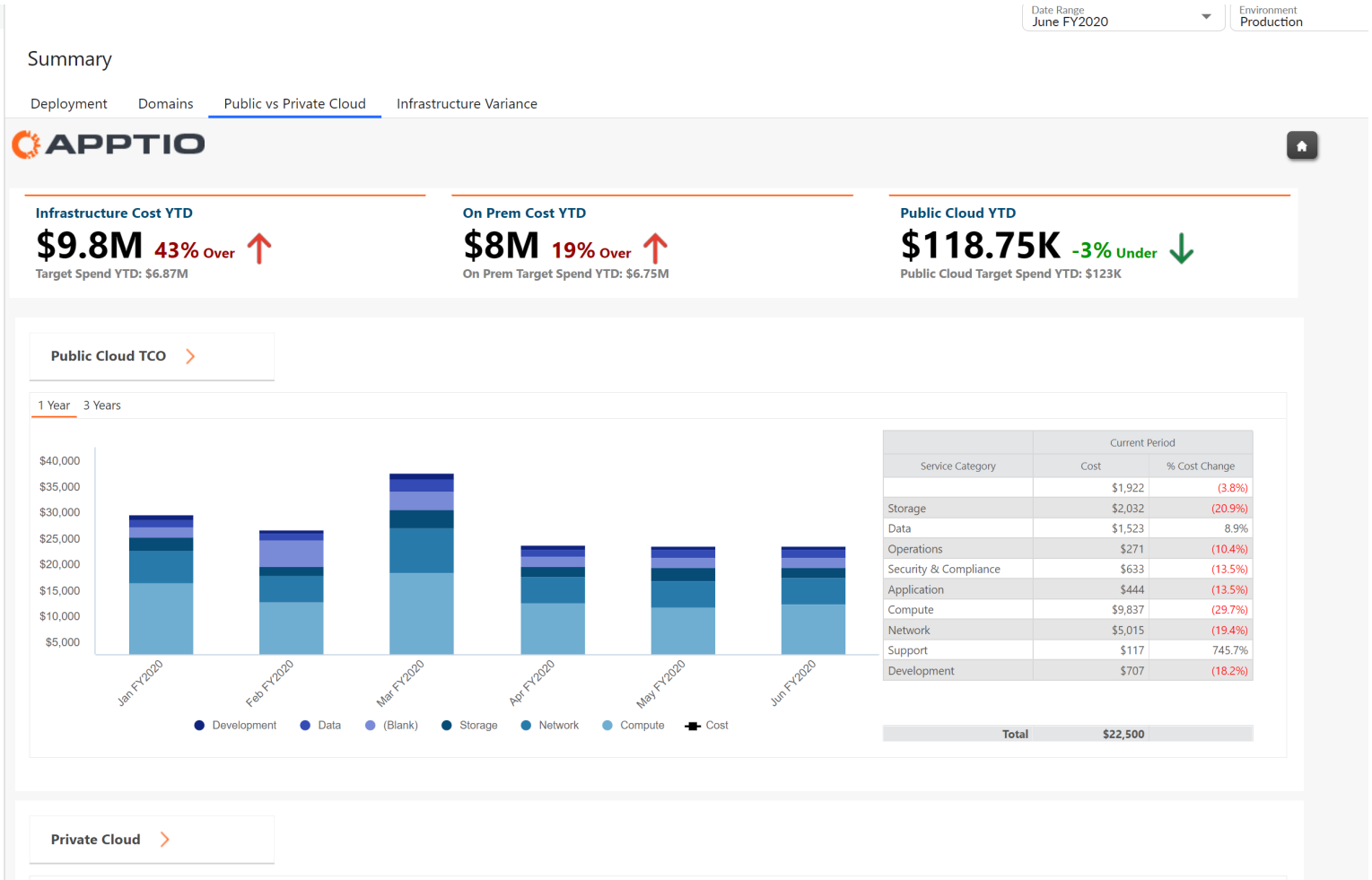
- DataLink
  - How many spreadsheets have been eliminated?
  - How many man hours eliminated from manual data extract and load?
    - What is the financial value of those hours
- Report automation
  - How many reports have been eliminated?
  - How many man hours have been eliminated due to report automation?
    - What is the financial value of those hours?

Value in Practice: Vendor Insight



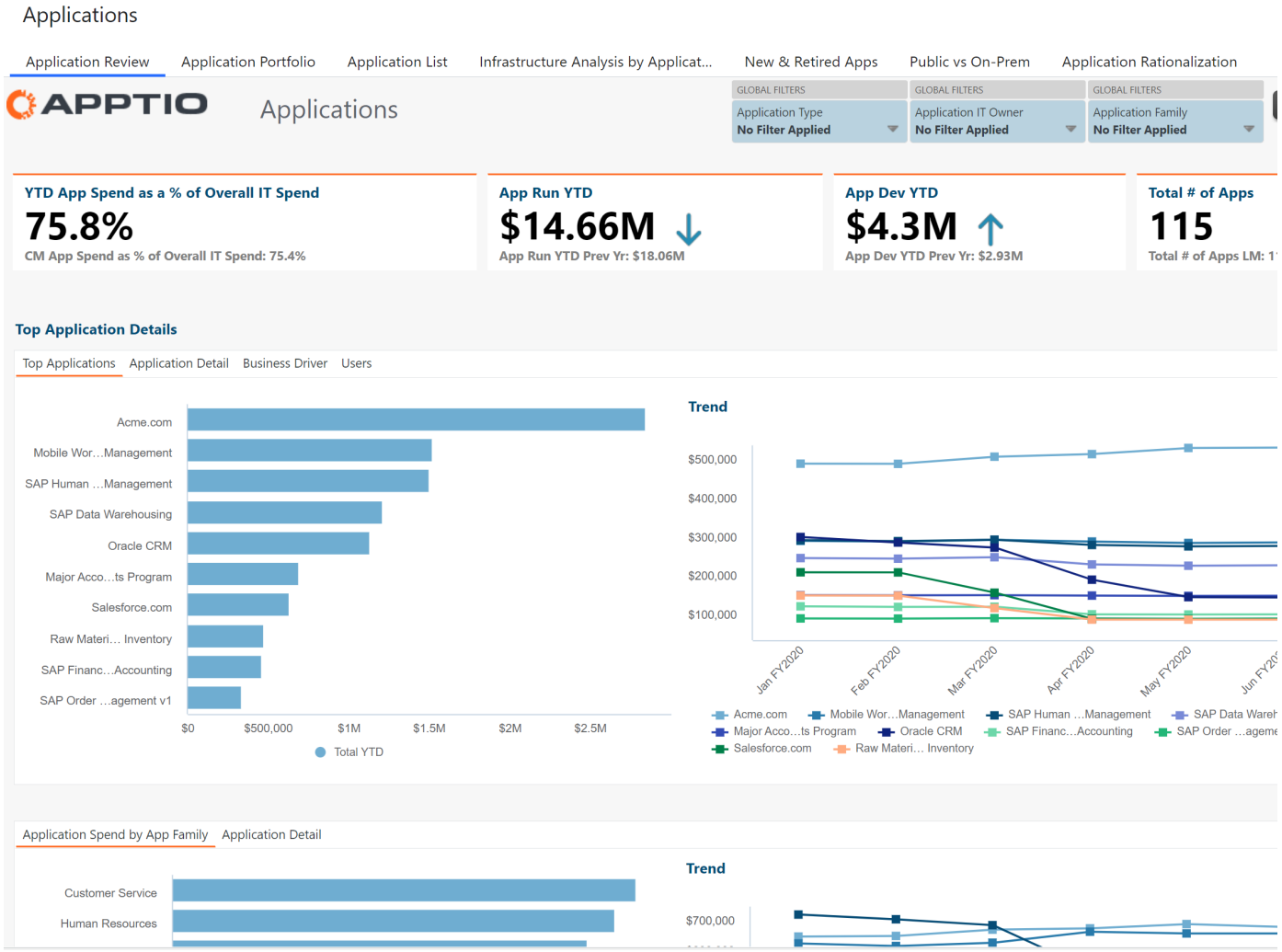
- What are we spending with preferred vs. commodity vendors?
- Where do we have variances in spend?
- What changes should we make to re-balance vendor spend?
- How fragmented/concentrated is spending across vendors?
- Do we have redundant vendors?
- How are we progressing against the vendor strategy? Does the spend reflect the vendor strategy?
- Which contracts are related to applications that are targeted for retirement?

Value in Practice: Infrastructure Insight



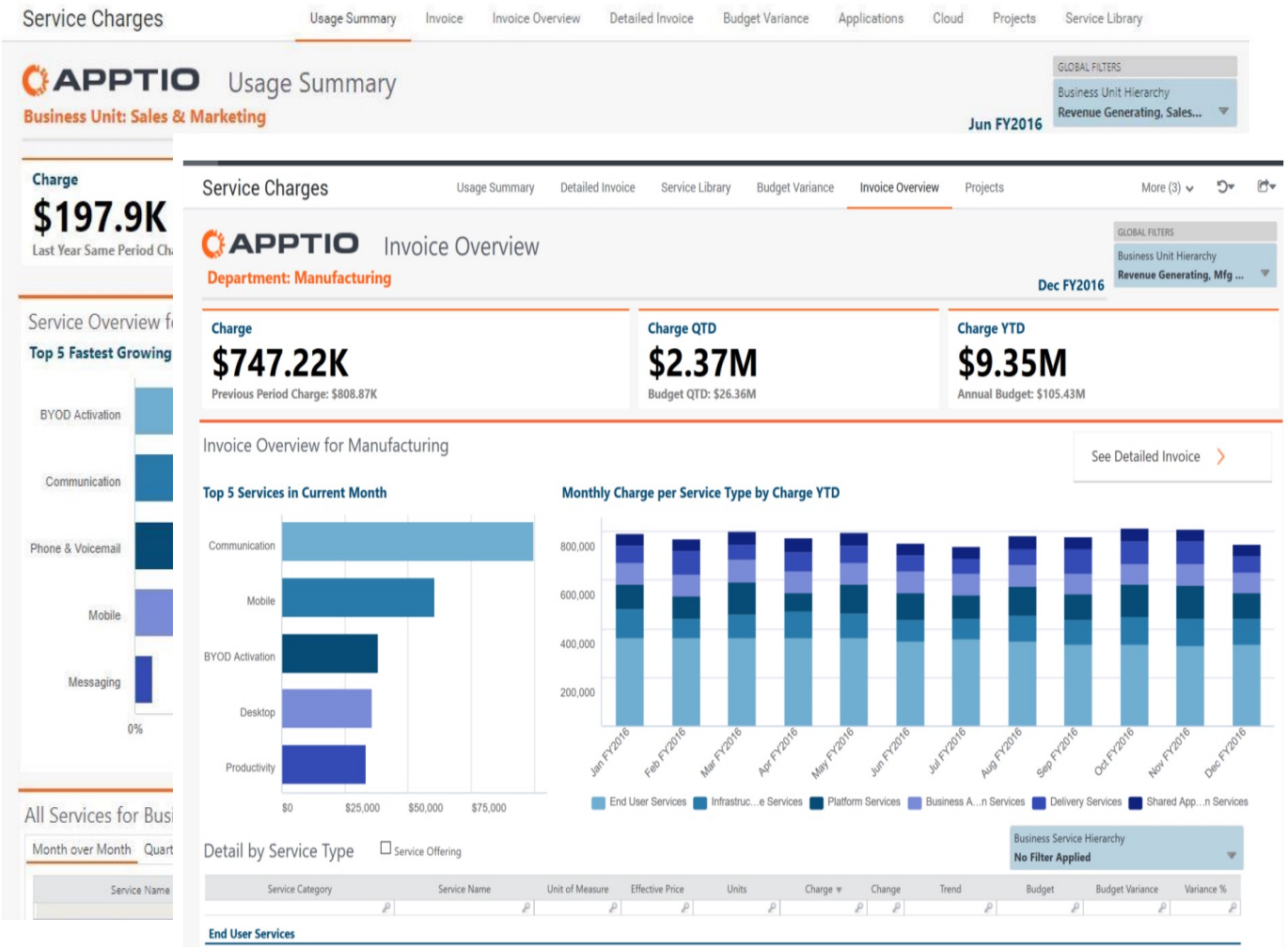
- What is the utilization of our infrastructure?
- Do we have excess capacity?
- Do we have enough capacity to address future demand?
- Is our unit cost competitive?
- Do we have infrastructure that are not mapped to any application?
- What is our percent virtualization? Are we on target?

Value in Practice: Application TCO



- How can we rationalize our application portfolio?
- Do we have redundant applications?
- Which applications are candidates for cloud migration?
- Are we still paying for retired applications?

Value in Practice: Bill of IT



- How can we provide demand levers and let business consumers dictate IT consumption?
- How can we drive adoption of IT services with variable pricing and subscription strategies?
- Is the cost of services comparable to the value?

Questions?

Introductions

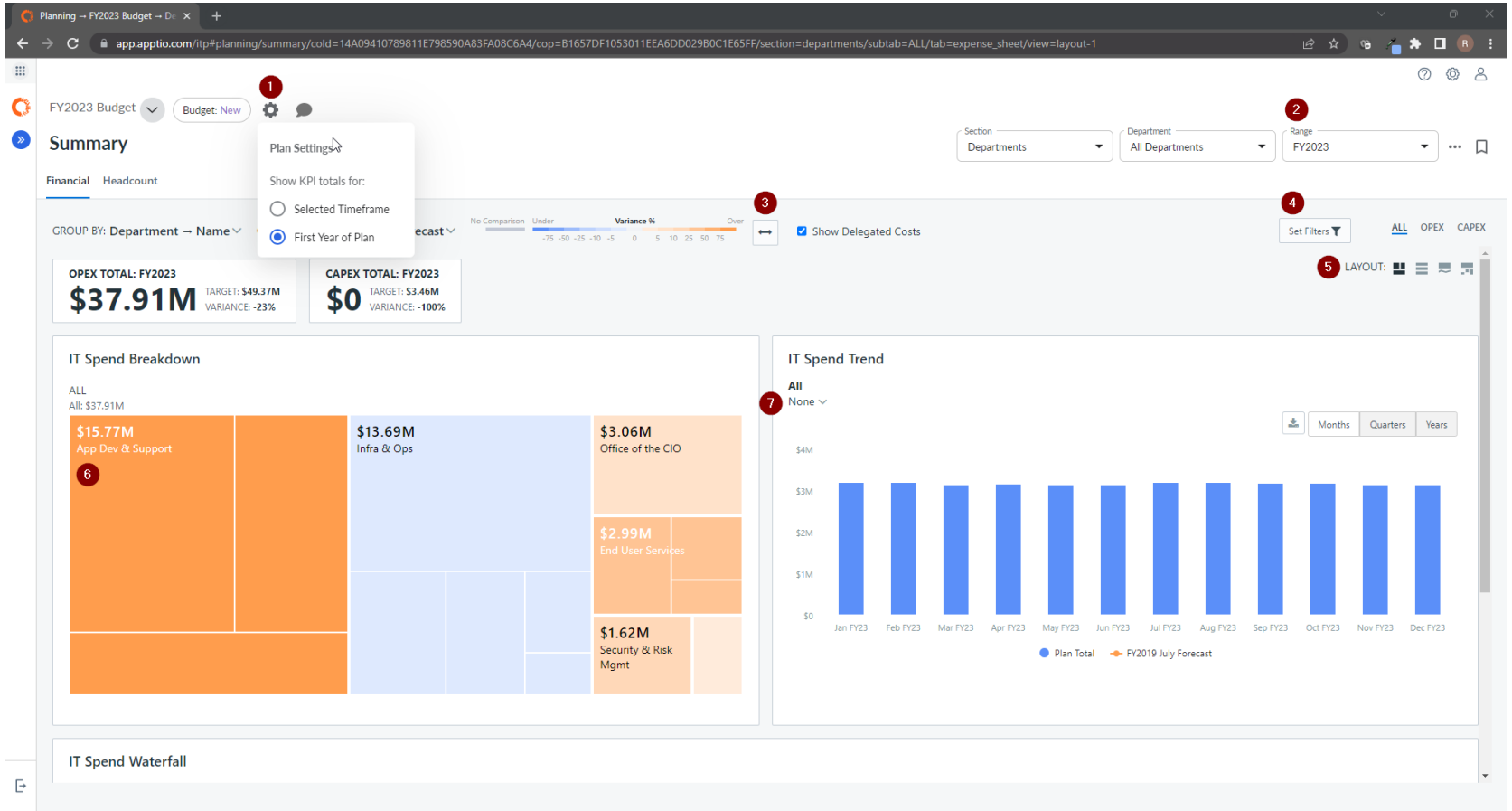
- Hello
- Use the Chat Box
- Tell us where you are located
- Tell us your industry

Agenda

- Summary Reports Pivots and Filters
- Expenses View Options
- When to use Custom Dimensions, Lists, Attributes and Columns
- Line Item Filters (Dependent Drop Downs)
- Company Profile Options
- Q&A session

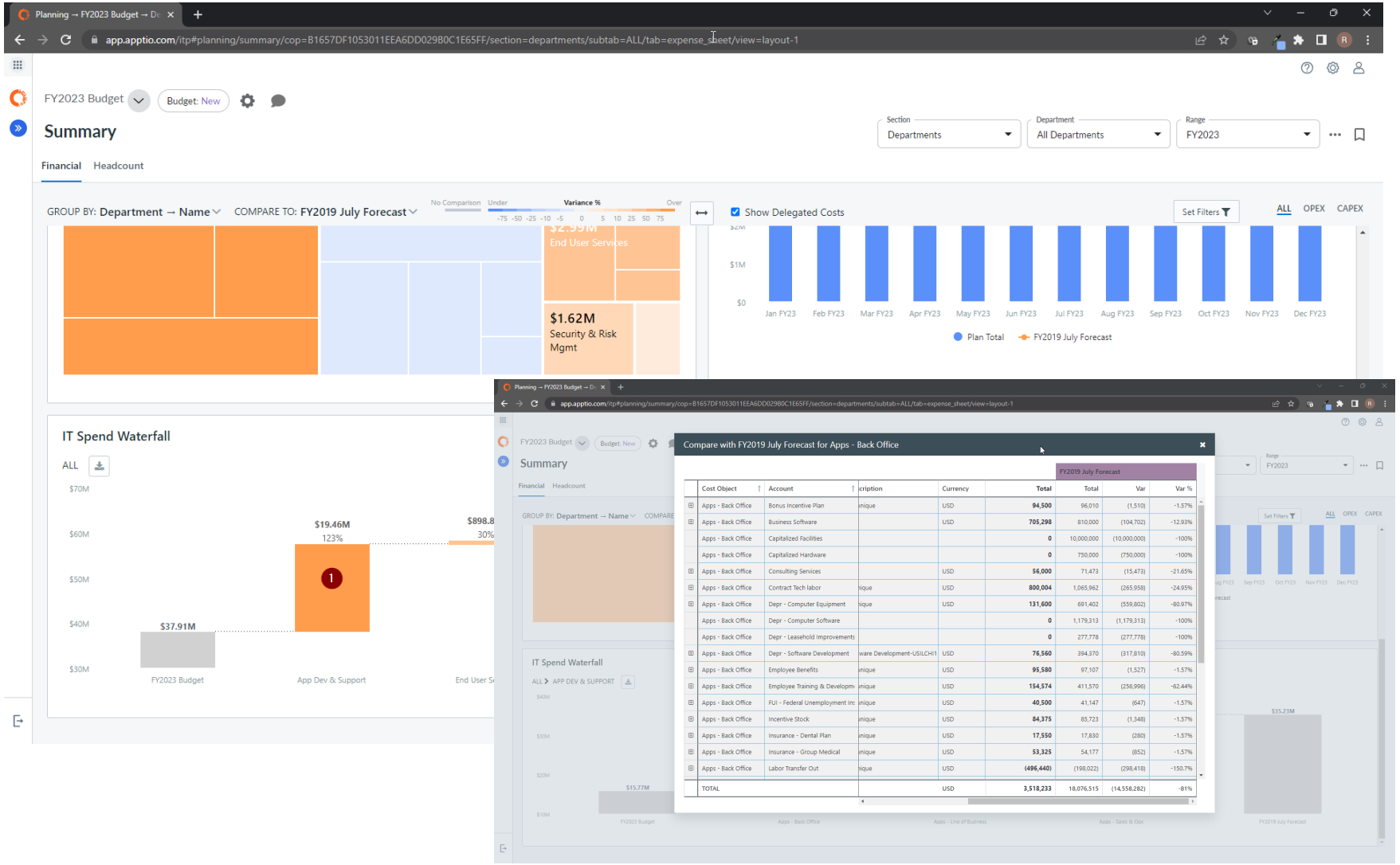
Summary Reports

1. KPI Settings
2. Adjust Date Range
3. Change Variance
4. Adjust Filters
5. Adjust View
6. Drill into Hierarchy
7. Break out by Dimension



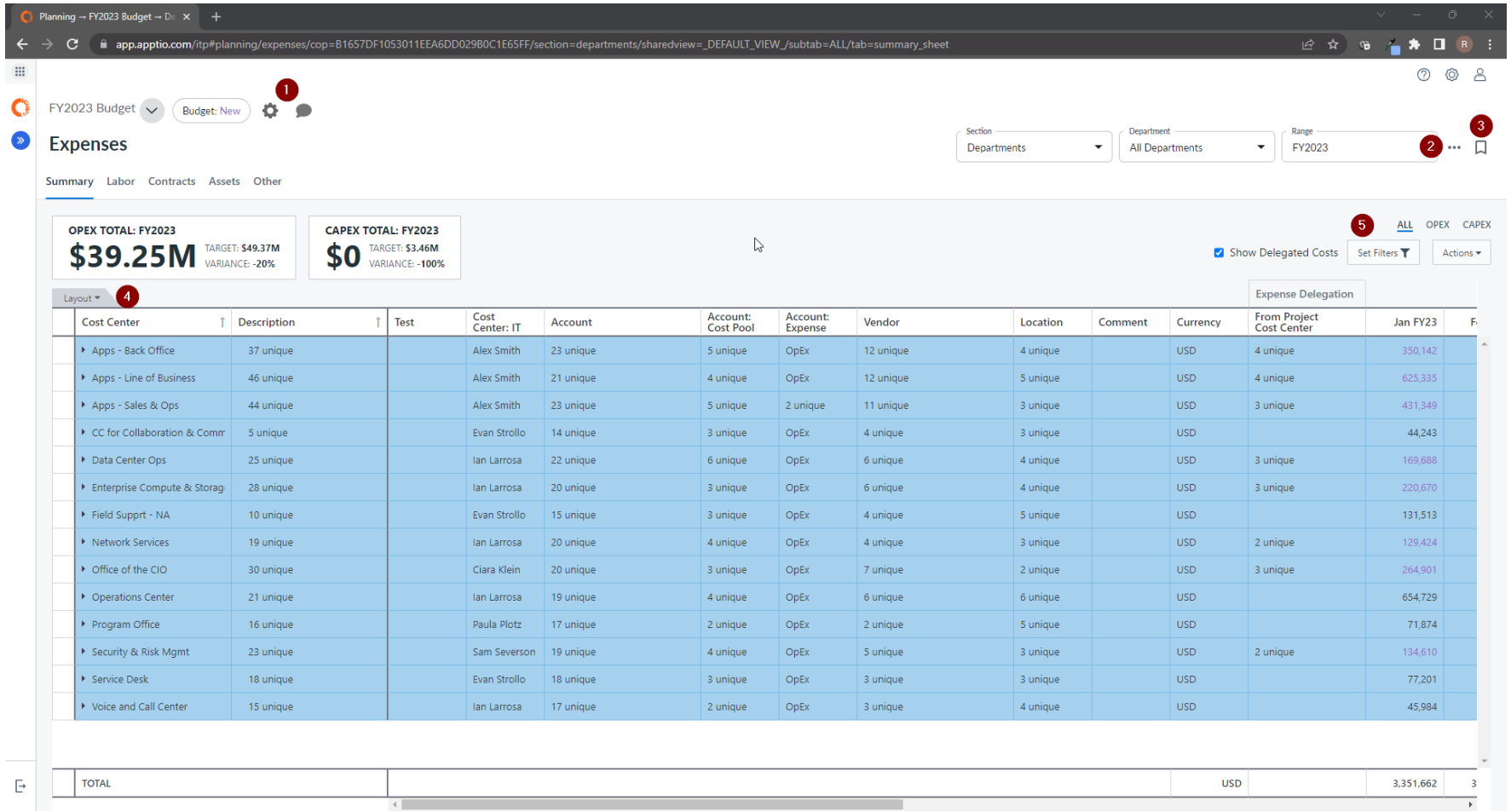
Summary Reports – Waterfall Chart

1. Drill into grouping
2. Variance Detail Pop-up



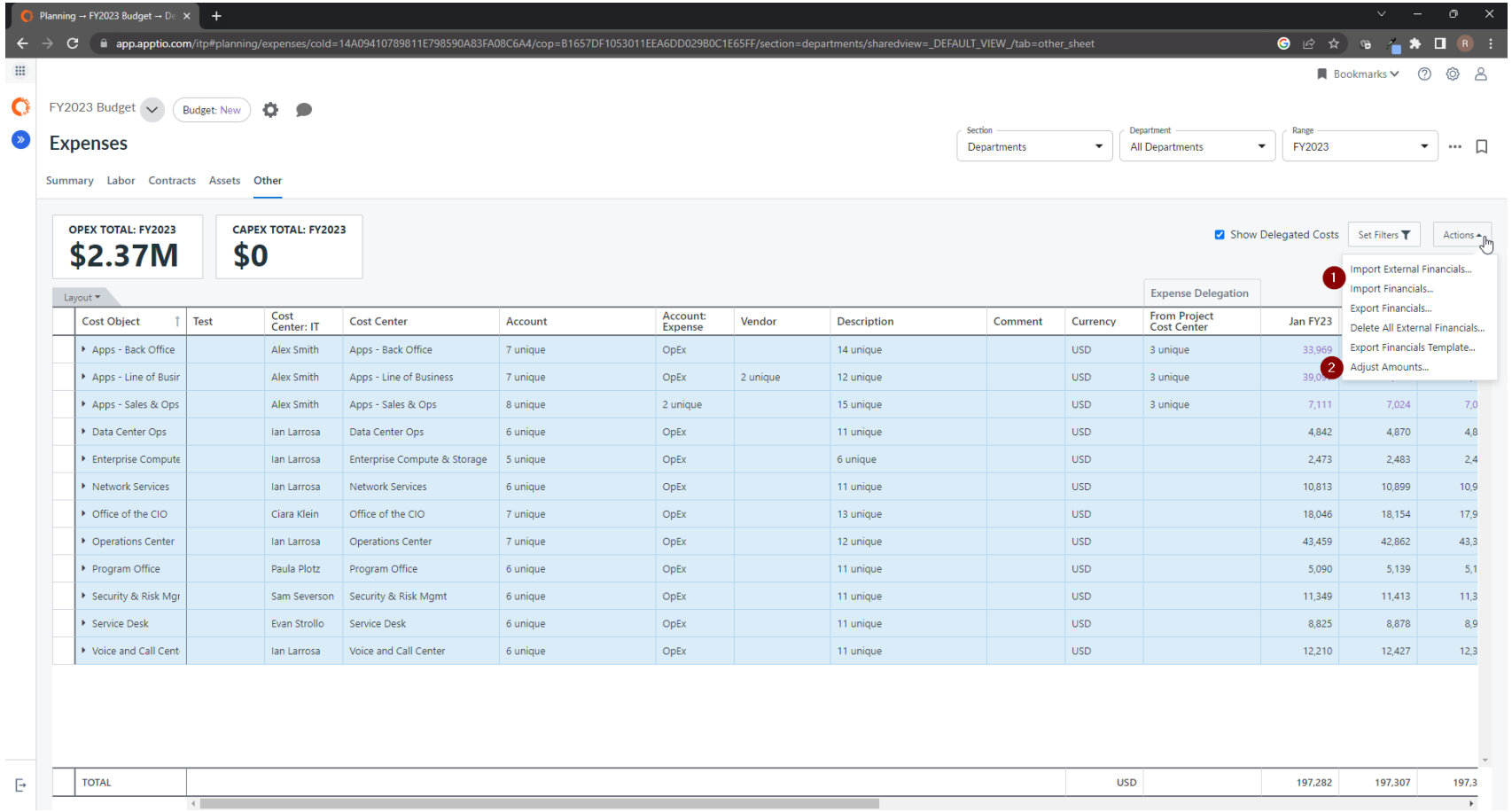
Expenses View

1. KPI Settings and Comments
2. Setup Compare Shortcuts
3. Bookmark Pages
4. Create Layouts
5. Adjust Filters



Expenses View

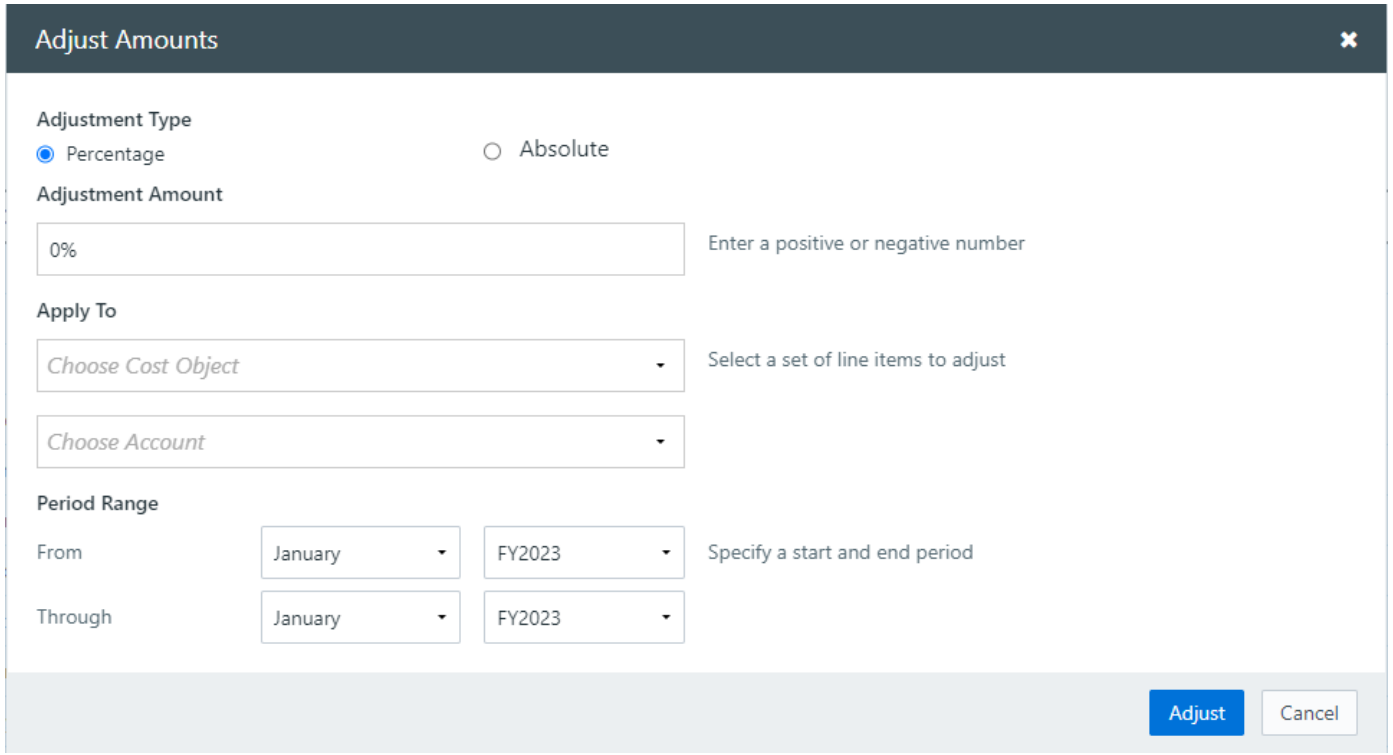
1. Import External Financials vs Import Financials
2. Adjust Amounts



Adjust Amounts

1. Make Adjustments in a New status
2. Only available on Other tab

[Help Section on Adjustment Amounts]



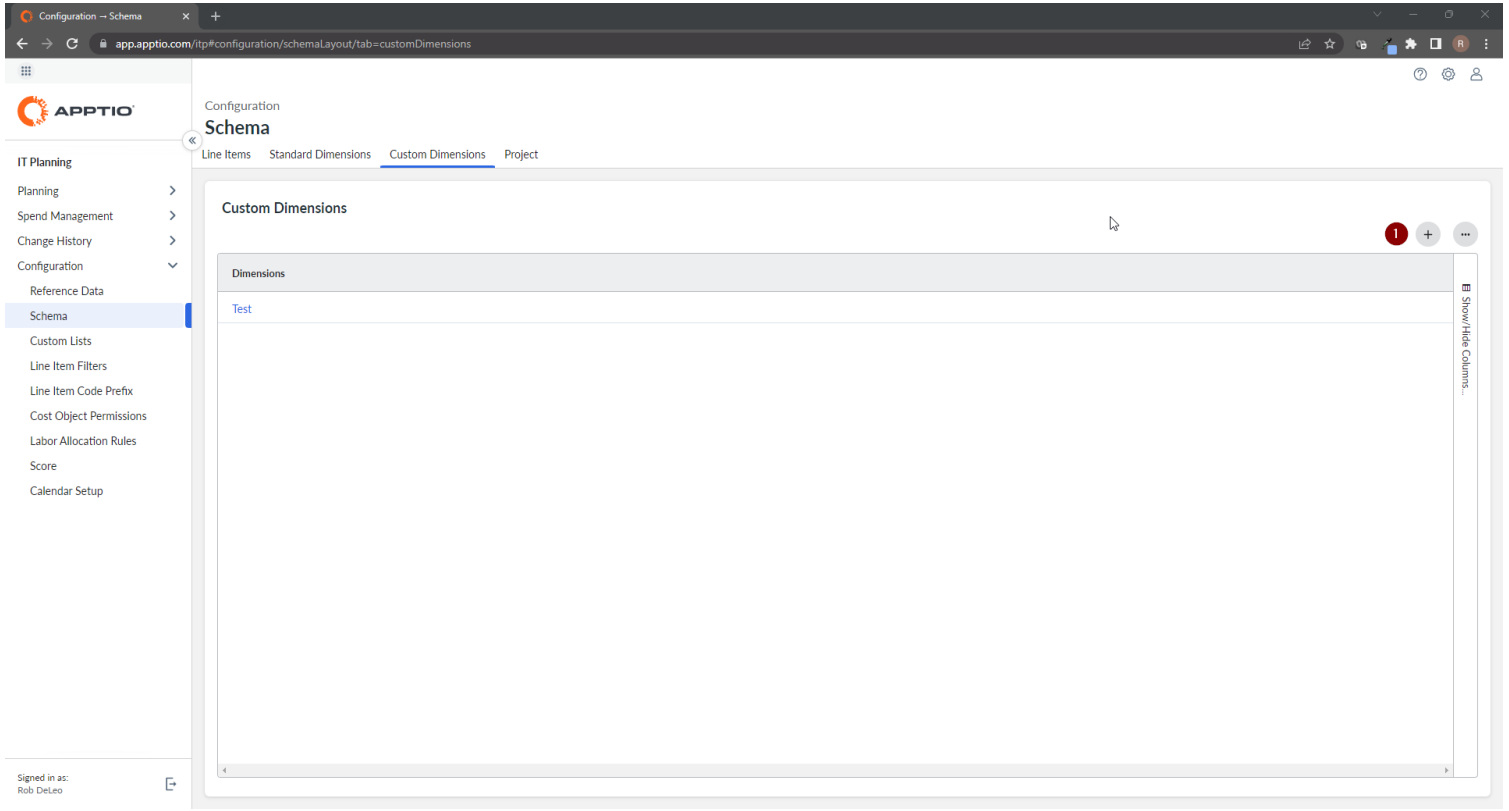
Customizations

1. Custom Dimensions
2. Custom Lists
3. Custom Columns
4. Custom Attributes

Help Section on Custom Dimensions and Lists

Custom Dimension

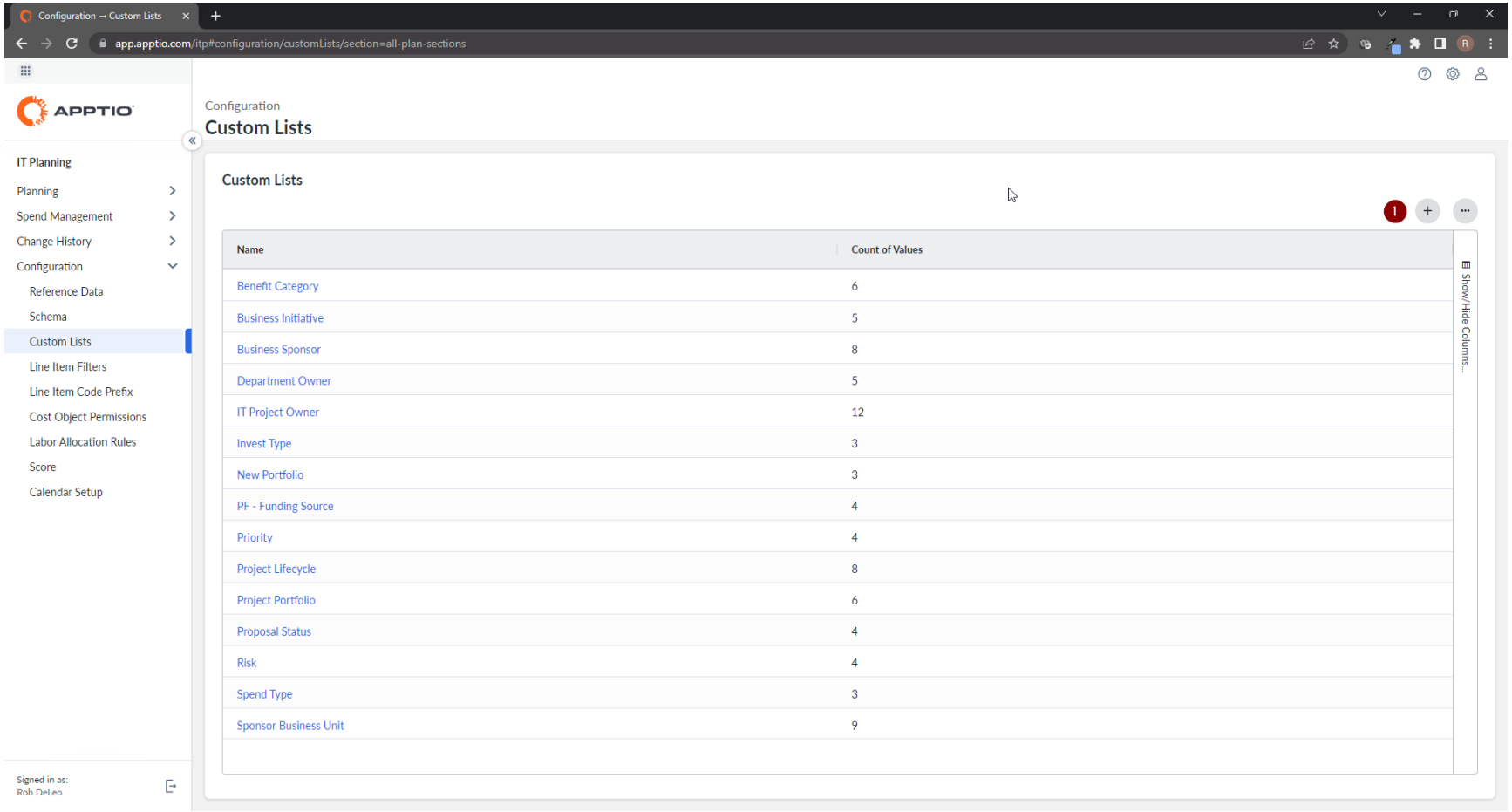
1. Configuration > Schema > Custom Dimension > Add



Custom List

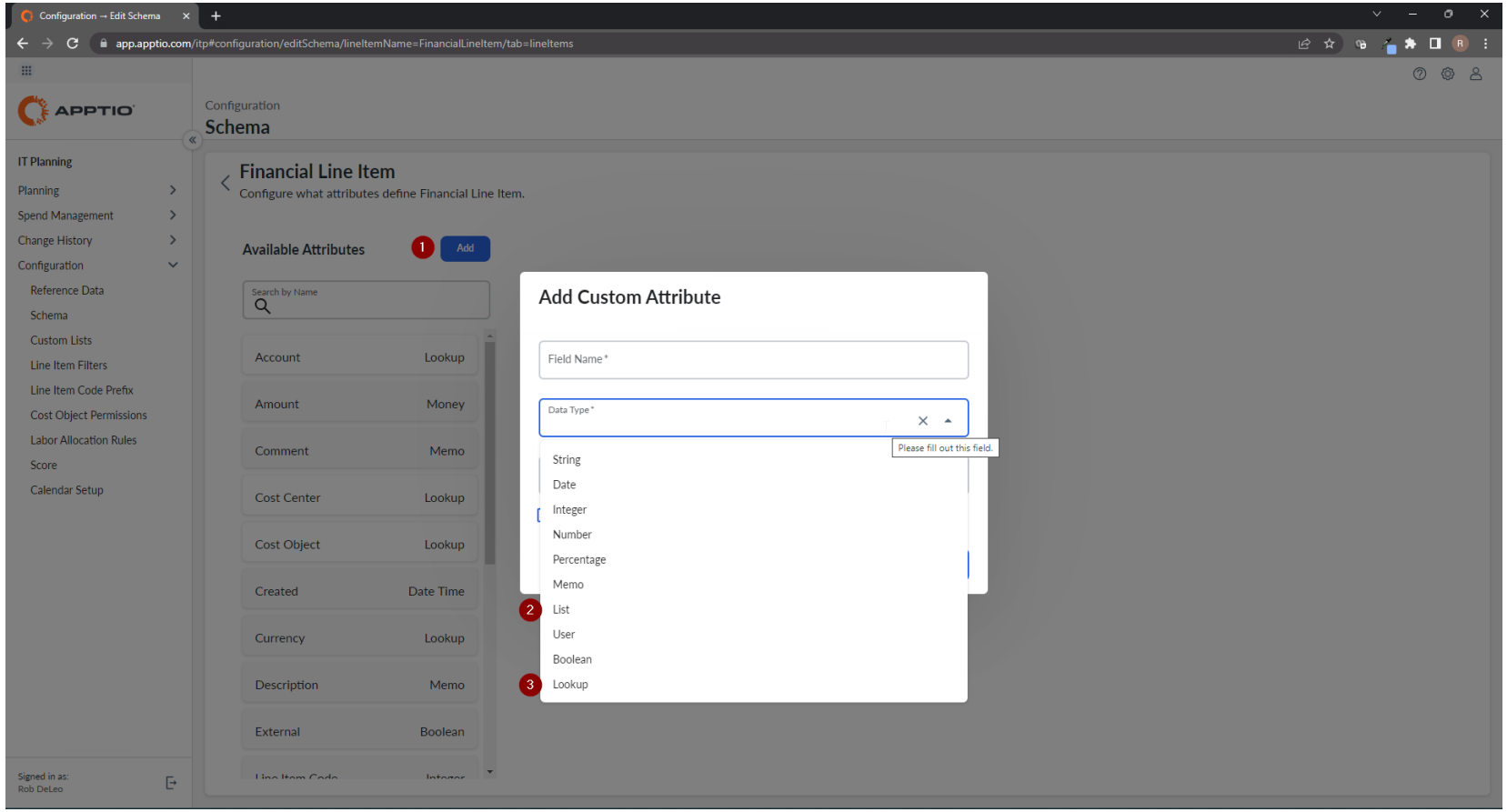
1. Configuration > Custom List > Add

   (Need to add at least one value, then can import a csv)



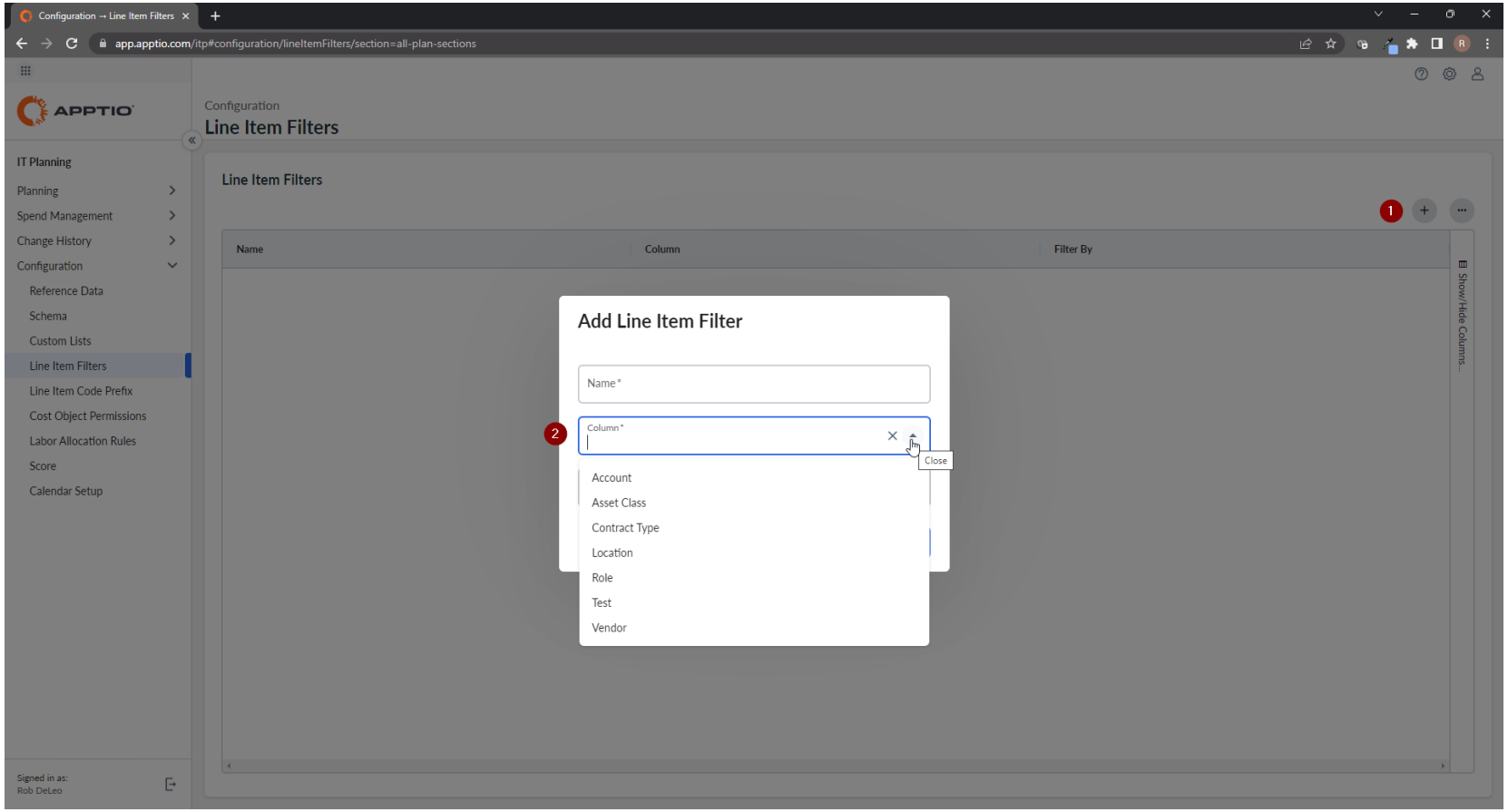
Custom Attributes & Columns

1. Configuration > Schema
    1. Add Column
    2. List is Custom List
    3. Lookup is Custom Dimension



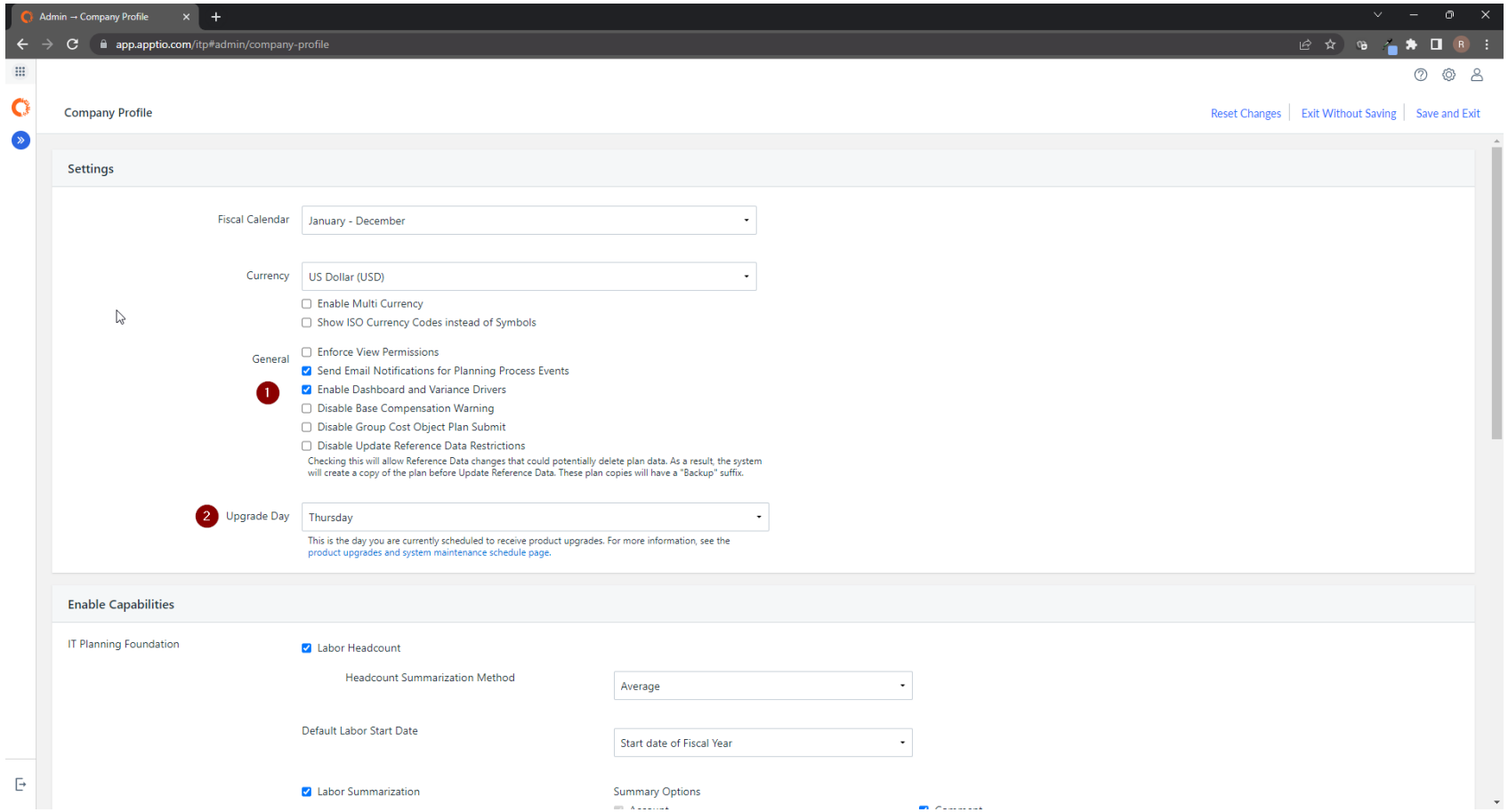
Line Item Filters (Dependent Drop Downs)

1. Configuration > Line Item Filters
    1. Add Line Item Filter
    2. Choose Dimension to filter
    3. Then filter down by Dimension or List



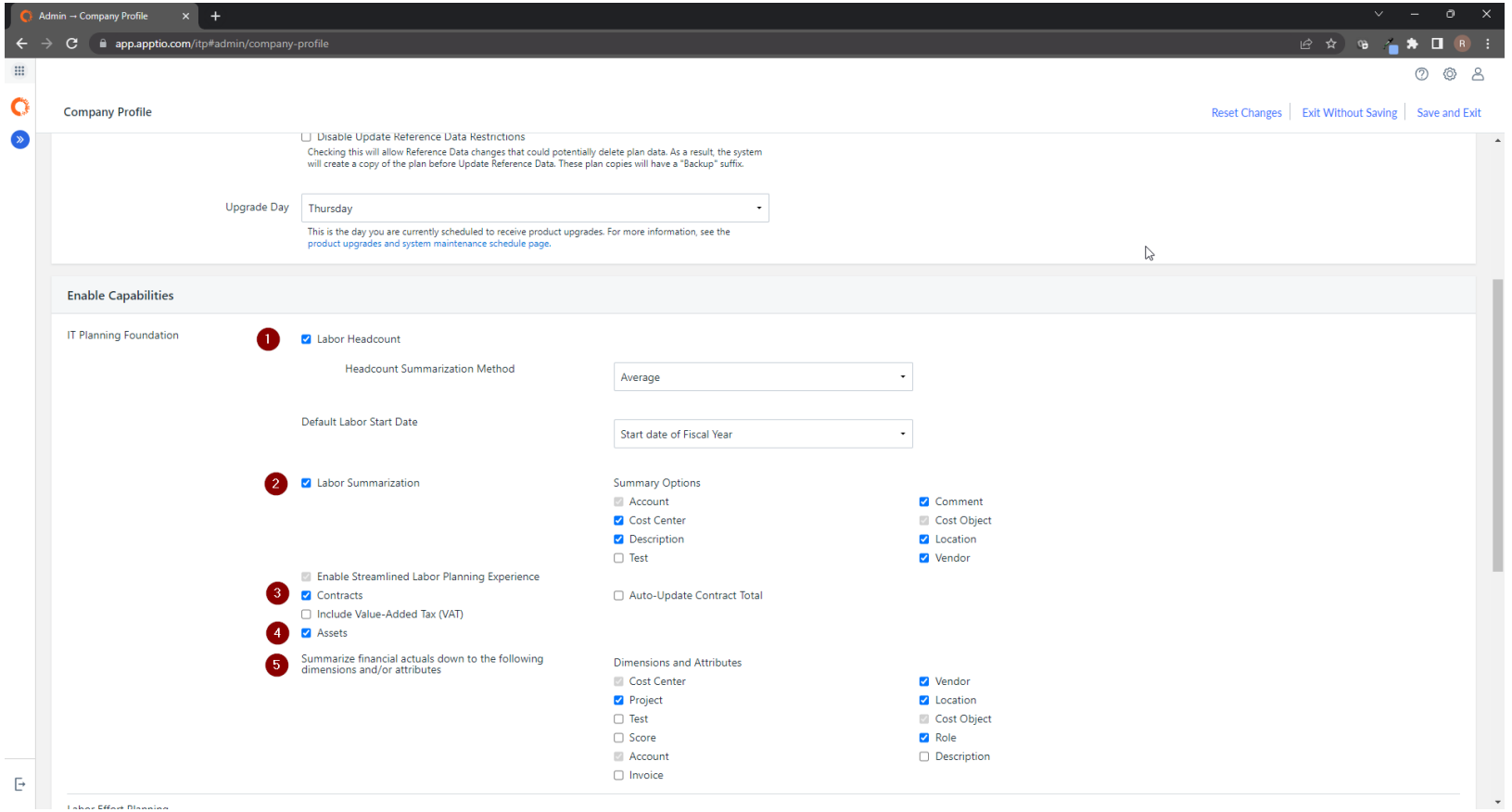
Company Profile

1. Gear Icon > Company Profile
    1. General Features
    2. Upgrade Schedule



Company Profile continued

1. Gear Icon > Company Profile
    1. Labor Tab
    2. Group Labor Financials
    3. Contract Tab
    4. Asset Tab
    5. Group Actuals in Forecast



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

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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Let Rego Be Your Guide