



Bridging TBM and SPM with Clarity

Your Guides:
Doug Greer, Eric Chan & Jacob Cancelliere

Sponsored by
ValueOps
by Broadcom

Clarity
by Broadcom

Rally
by Broadcom

ConnectALL
by Broadcom

Insights
by Broadcom

Introductions

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



Quick Show of Hands

- ? How many of you are familiar with TBM?
- ? How many of you have a TBM office?
- ? What tools are you using to support TBM?



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.



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

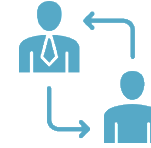
More About the TBM Council



Education &
Certifications



Standards &
Research



Communication &
Collaboration



20,000
Members



9 Vertical
Industries



Conference &
Workgroups

[Visit: https://www.tbmcouncil.org/](https://www.tbmcouncil.org/)

TBM Taxonomy

Technology Consumers



Business Functions
& Capabilities

Business
Value Streams

Partners & Internal
Consumers

External
Consumers

Technology Solutions



Business

Workplace

Shared & Corporate

Artificial
Intelligence

Infrastructure

Delivery

Technology Resource Towers



Infrastructure

Data
Center

Storage

Applications

Application

Data

Operations

Delivery

Security

Tech
Management

Risk &
Compliance

Field & Office

Smart
Devices

End User

Technology Cost Pools



Staffing

Outside
Services

Cloud
Services

Software
& SaaS

Hardware

Data Center
Facilities

Telecom

Misc Costs

Cross
Charges

Consumer View

Tech View

Finance View

Communicate & Manage IT Value with Cost Transparency

7



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

TBM Office (TBMO)

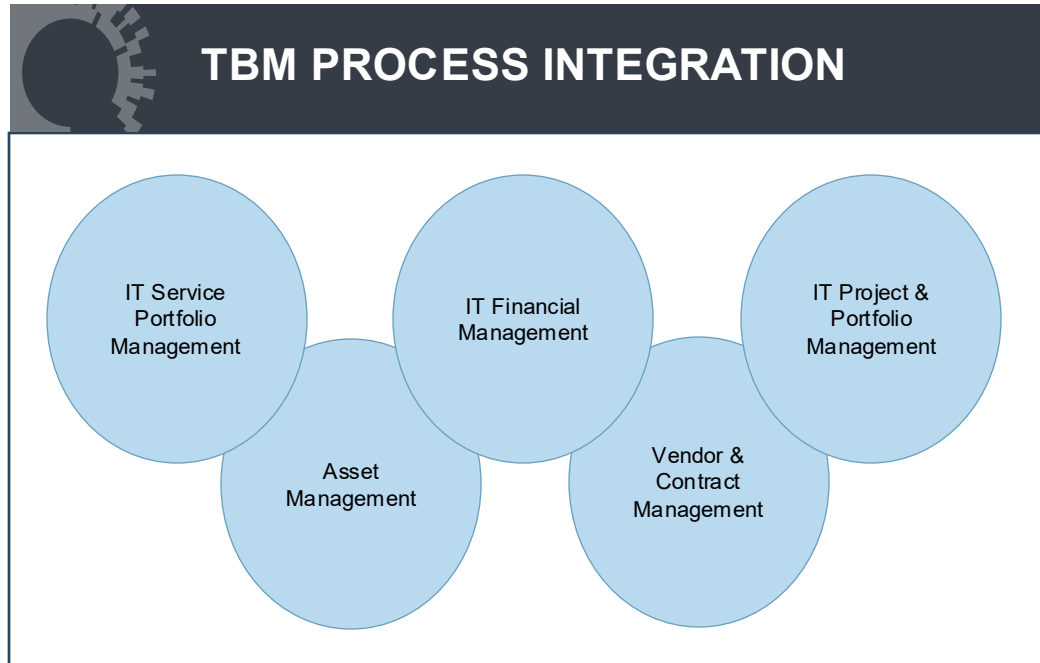
Coordinate Governance, Ensure Accountability, Drive Value Outcomes



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)



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

Discussion

For those who have a TBM Office:

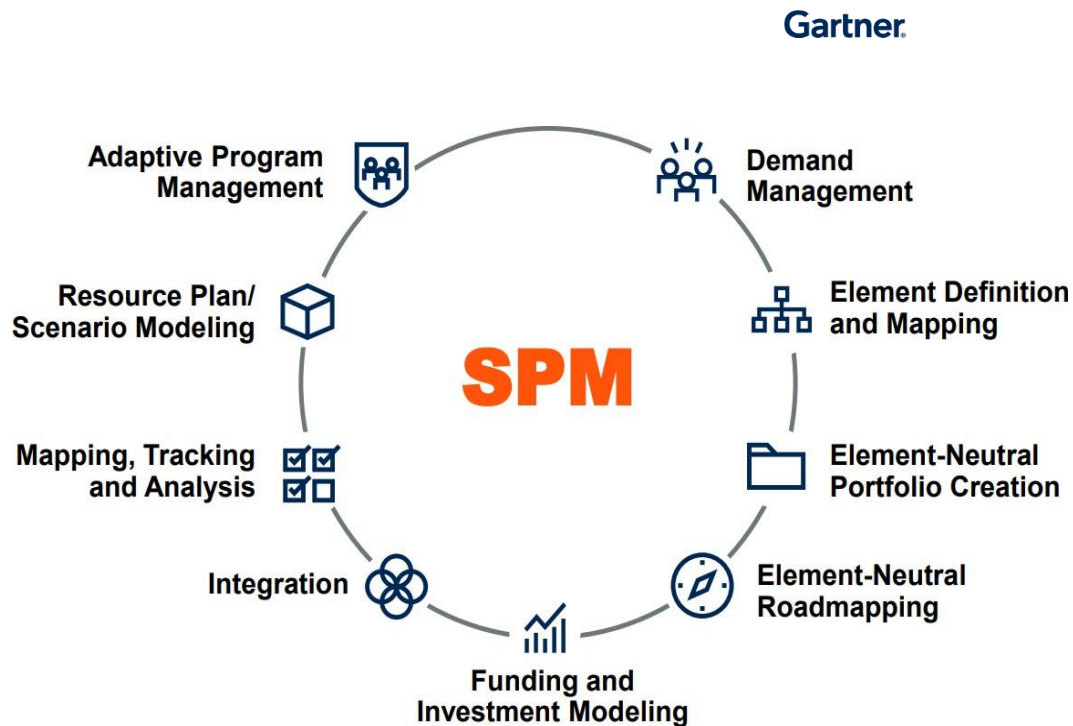
- ? Where does it sit in the organization?
- ? What are their responsibilities vs the PMO?



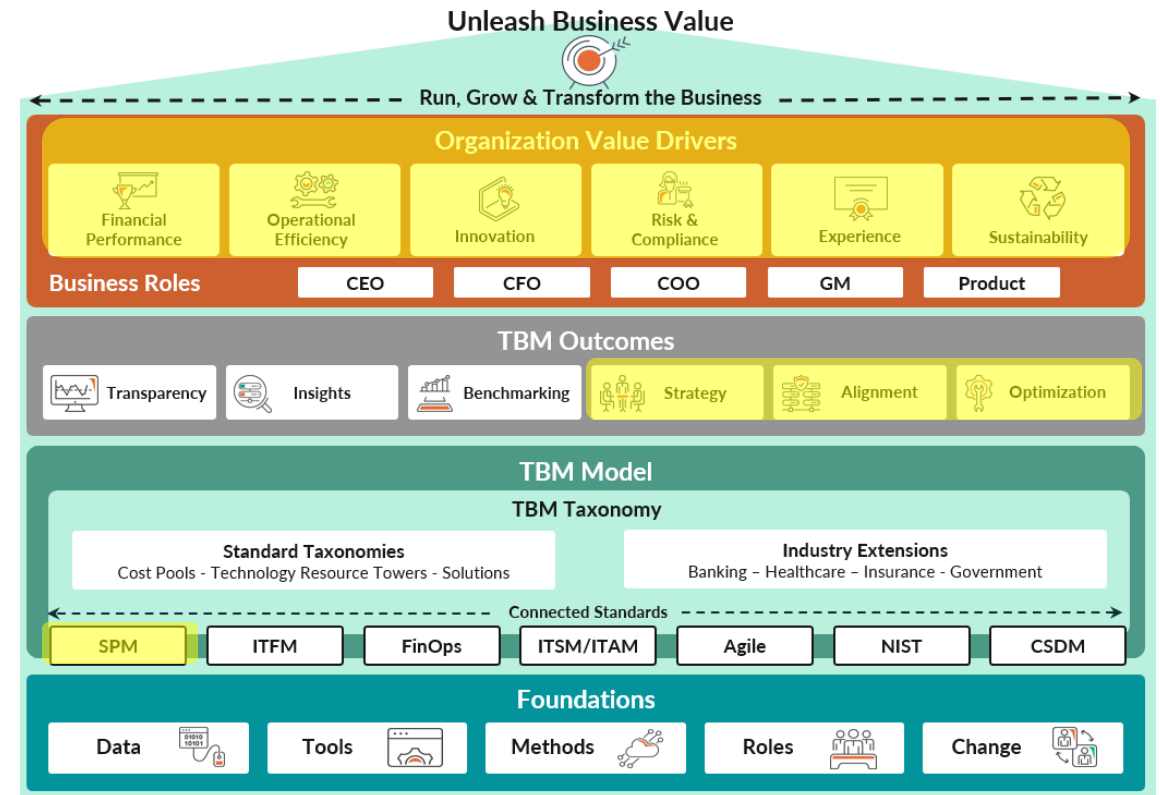
TBM & SPM

A Tale of Two Strategies to Achieve Business Value

Strategic Portfolio Management (SPM) is a set of business capabilities, processes and supporting technologies that can **focus an Organization's finite resources to execute enterprise- wide business strategy.**



Gartner: Magic Quadrant for Strategic Portfolio Management 2024

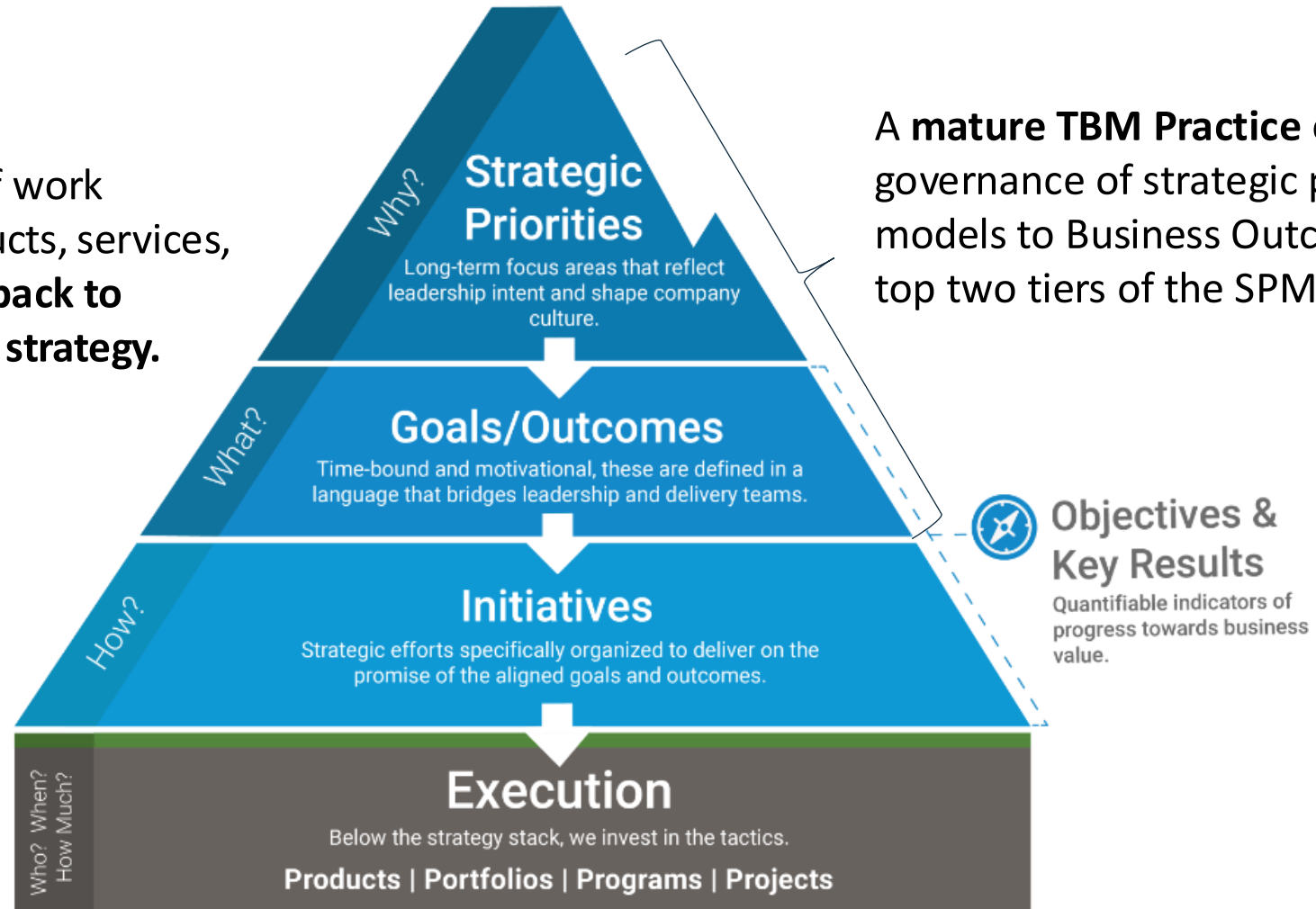


Technology Business Management (TBM) is a strategic discipline for managing the value of technology across the enterprise. It equips organizations with a **structured framework to connect technology resources to business outcomes**—enabling better decisions, greater transparency, and proactive value realization.

SPM Illustrative Framework

SPM shifts the conversation to “*Are we doing the RIGHT things*”?

SPM manages all types of work (projects, programs, products, services, etc.). Ensures **work links back to Organizational value and strategy.**



A **mature TBM Practice** engages with governance of strategic priorities and models to Business Outcomes. The top two tiers of the SPM hierarchy.

TBM and SPM distinctions

	Technology Business Management (TBM)	Strategic Portfolio Management (SPM)
Personas Involved:	Responsible: Office of the CIO and/or CFO, usually with a dedicated TBM Office . Involved: Engineering, Product, Finance, Procurement, and Leadership.	Responsible: C-suite, Portfolio managers, PMO or SRO Strategic planners . Involved: Business unit leaders, Technical Leadership (IT or other), Finance, and Strategy teams.
Spend Managed:	All Technology Financials. <i>Mature to include Finance, Tech & Business views.</i>	Portfolios of projects, programs, products. <i>Missing operational (run) costs and scope.</i>
Cadence:	Monthly, quarterly and multi-year views to match cadence of financial reporting & planning cycle requirements.	Long-term focus (years), with quarterly reviews to align with strategic shifts and portfolio performance evaluations.
Purpose:	Maximize business value via transparency of costs, consumption, and performance. Connect Technology Investments to Business Value to optimize supply and demand and enable fact-based tradeoff decisions.	Maximize business value by aligning portfolios with long-term strategic goals, prioritizing initiatives, and optimizing resource allocation for ROI and adaptability.

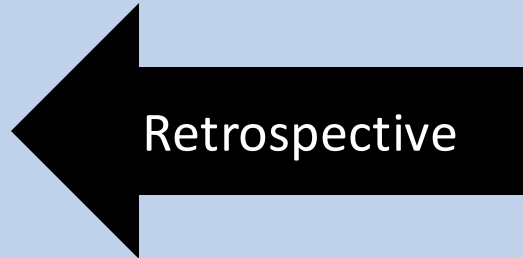
Technology Business Management (TBM)

“How are our finite resources being spent?”

Strategic Portfolio Management (SPM)

“How do we align future investments?”

**Cost
Transparency**



Retrospective

Vs.



Prospective

**Strategic
Priorities**



TCO & Transparency
Showback & Insights
Optimize Investments
Drive Accountability

Plan & Prioritize
Strategic Roadmaps
Resource Capacity Planning
Business Outcomes

Closed-loop system:

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

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

Harmonized TBM & SPM Process Wheel

What changes can I make to improve?

TBM Processes:

- Translates execution into financial visibility (TCO, Run vs. Grow, ROI)
- Continuous optimization

Am I aligned with business priorities?

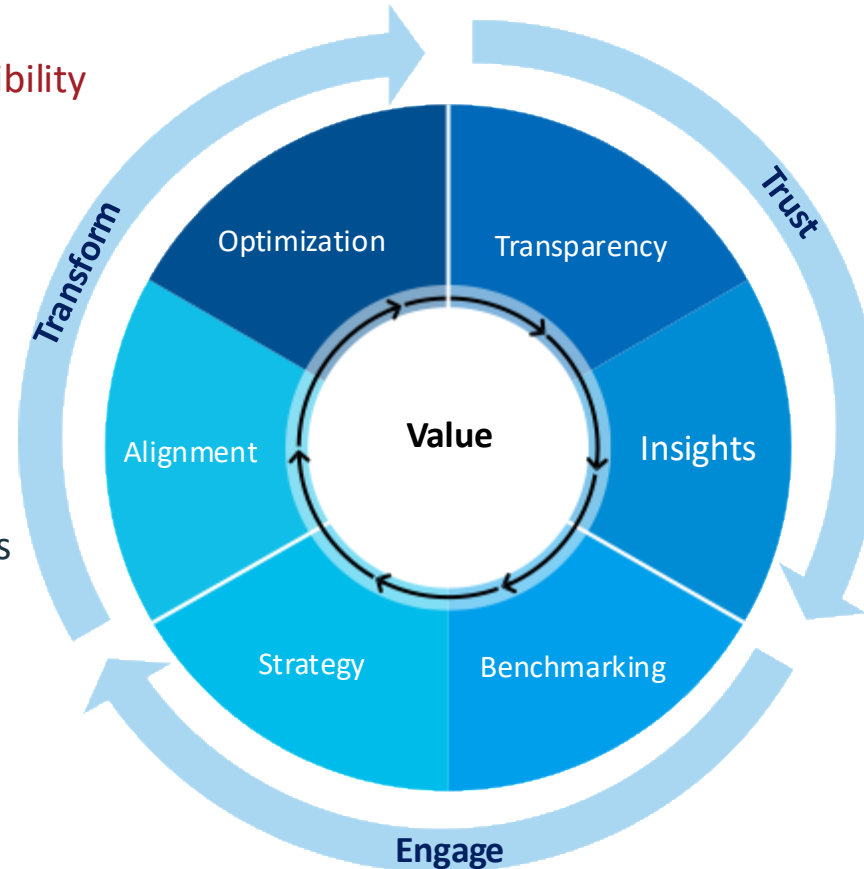
SPM Processes:

- Capture ideas, demand, and prioritization aligned to business goals
- Links projects and programs to business capabilities and outcomes

Am I on track with targets?

SPM Processes:

- Strategic roadmaps, OKRs
- Resource planning, capacity, and delivery governance



Do I have visibility into the data?

TBM Processes:

- TBM Taxonomy Modeling
- Tags investment to services, products, and business units

What is data showing me?

TBM Processes:

- Insight-sharing across stakeholders
- Showback to support funding conversations

Can I compare the data?

TBM Processes:

- Reviewing Trends over time
- Compare to peers and industry standards

TBM Illustrative Insights - Labor

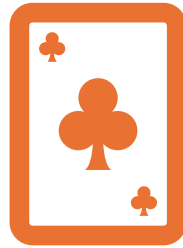
Labor transparency starts the conversation with *“how much we spend on people”...*

- Labor Cost as a % of Total Tech Spend
- Labor Variance (Budget vs. Actual)
- Total Labor Cost (by Role, Level, or Function)
- Internal Labor vs Staff Aug mix
- Run/Grow/Transform ratios
- Labor Cost per Application / Project / Solution / Business Outcomes

... and SPM matures to *“are we spending on the RIGHT things?”*



Example – AI Investment

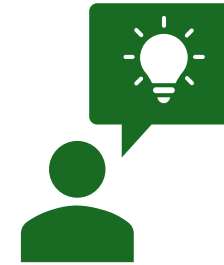


TBM

How much have we spent on AI?

Who spent the money?

What products, services, and business units did it support?



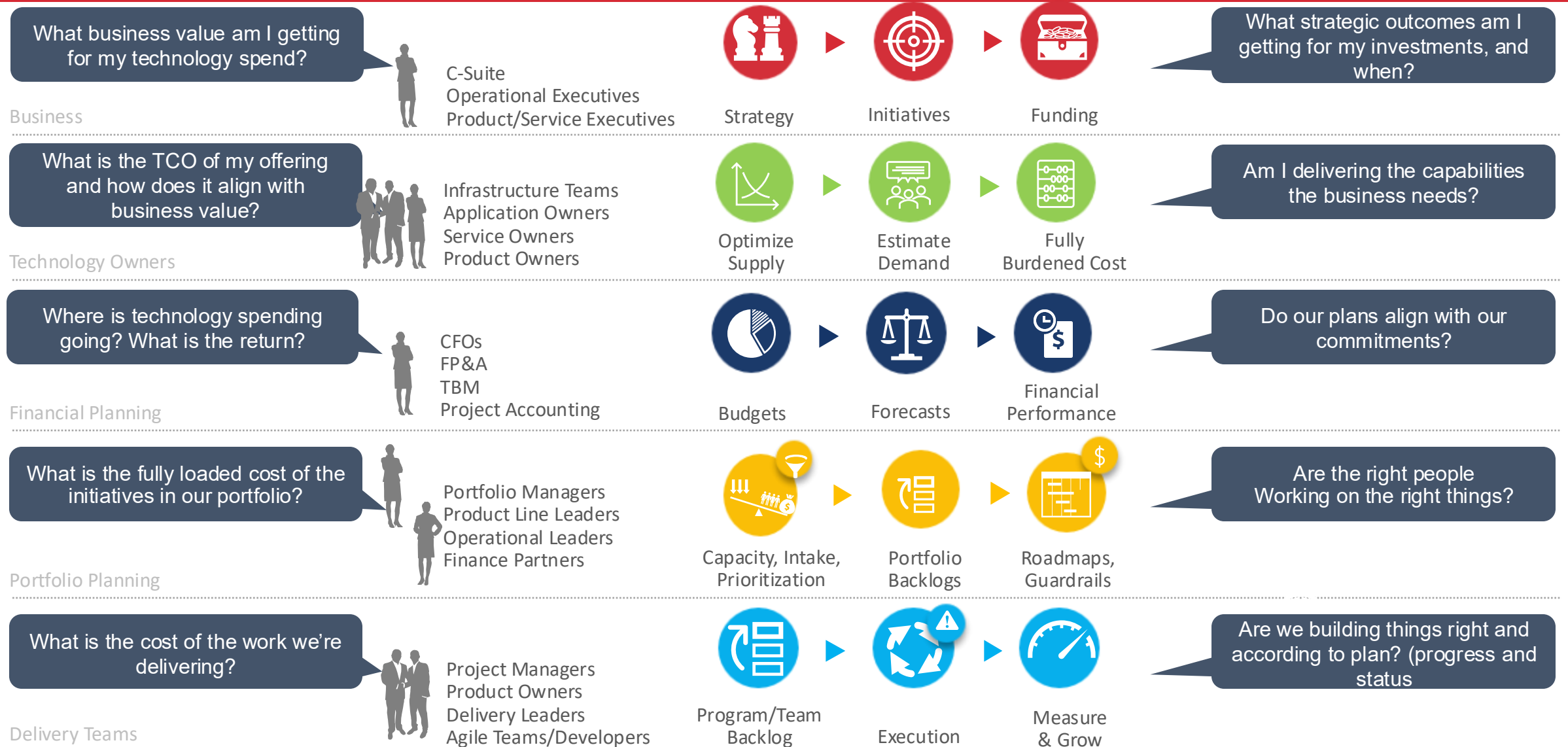
SPM

How much should we spend on AI?

Which AI initiatives should we invest in?

How do we ensure those initiatives are successful?

TBM & SPM Provide Value Across the Organization



Common Problems and Practical Recommendations²⁰



Silos

Redundant work between SPM & TBM teams.



Governance Interference

Existing or future governance models not built to support TBM and/or SPM.



Clunky hand-offs

Mis-match or misunderstanding of data between SPM & TBM systems causes frustration.



Poor Data Quality

Poor data quality up and down the chain result in incomplete or inaccurate data-driven decisions.



Overlooking the Funding Lifecycle

As new initiatives complete, you'll be adding to your prior run costs. Causes imbalanced run/grow.



Undefined Business Outcomes

Good intentions and great ideas are not always aligned with business outcomes.

Easy Next Steps. How can you get started today?

If this is where you are today...

We are still **exploring the benefits** of TBM & SPM. We're unclear exactly how they fit together.

We have an **informal or inconsistent process** to evaluate project/initiatives against strategic priorities.

We provide **data and analysis** to various stakeholders but we **don't know why they aren't using it**.

We have **disparate sources** that require **manual reconciliation** and/or **poor user experience** jumping between systems to find information.

We have siloed disciplines and tools that limit Project Teams, TBM office & Finance's ability for meaningful analysis due to the limited quality or absence of data and reporting.

Work on this tomorrow...

Find internal **champions** and **educate on the value proposition**.

Align a **pilot of investments** to strategy to show the Art of the Possible of a **formalize** process.

Conduct a **persona mapping** to understand your stakeholder's unique needs and what matters to them.

Work on a **simplified, optimized tooling ecosystem**. Use trusted, integrated and connected data sources to manage projects and provide visibility into project financial reporting.

Stand up a **cross-functional team** to evaluate gaps and opportunities. Build improvements into strategic roadmap.

Questions?



Survey



Please take a few moments to fill out the class survey.

Your feedback helps us improve future events.



Earn Rego University Certifications and Professional Specializations

Your participation in this class may count toward Rego University certification progress.

Certifications

Build recognized Clarity expertise.
Complete 10 eligible learning units
within a certification track.



**Best Practice
Clarity Administrator**



**Best Practice
Clarity Lead**

Professional Specializations

Deepen your skills in focused topic areas.
Complete 4 eligible learning units within a selected
specialization, with the option to earn multiple specializations.



**Artificial
Intelligence (AI)**



**Reporting &
Analytics**



Technical



Important: Complete the class survey in the app after each session so your credits can be tracked.

More info: <https://regouniversity.com/certificates>

Earn PMI credit

Eligible Rego University sessions qualify for Professional Development Units (PDUs)

- 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 = **Rego University**
- 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!
Remember to fill out the class survey.



Phone

888.813.0444



Email

info@regoconsulting.com



Website

<https://regouniversity.com/pmi-credits/>

Continue to Get Resources and Stay Connected

- 1 Use RegoXchange.com for instructions and how-to guides.
- 2 Talk with your account managers and your Rego consultants.
- 3 Sign up for webinars and join in-person Rego groups near you at RegoConsulting.com
- 4 Join us for the next [Rego University](#)!

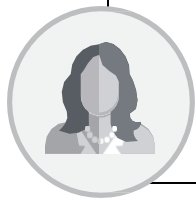


Apptio Introduction



Apptio: the Business System for Governing Technology

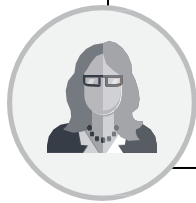
27



Sales *has* **CRM**



HR *has* **HRM**



Marketing *has* **RPM**



Finance *has* **ERP**



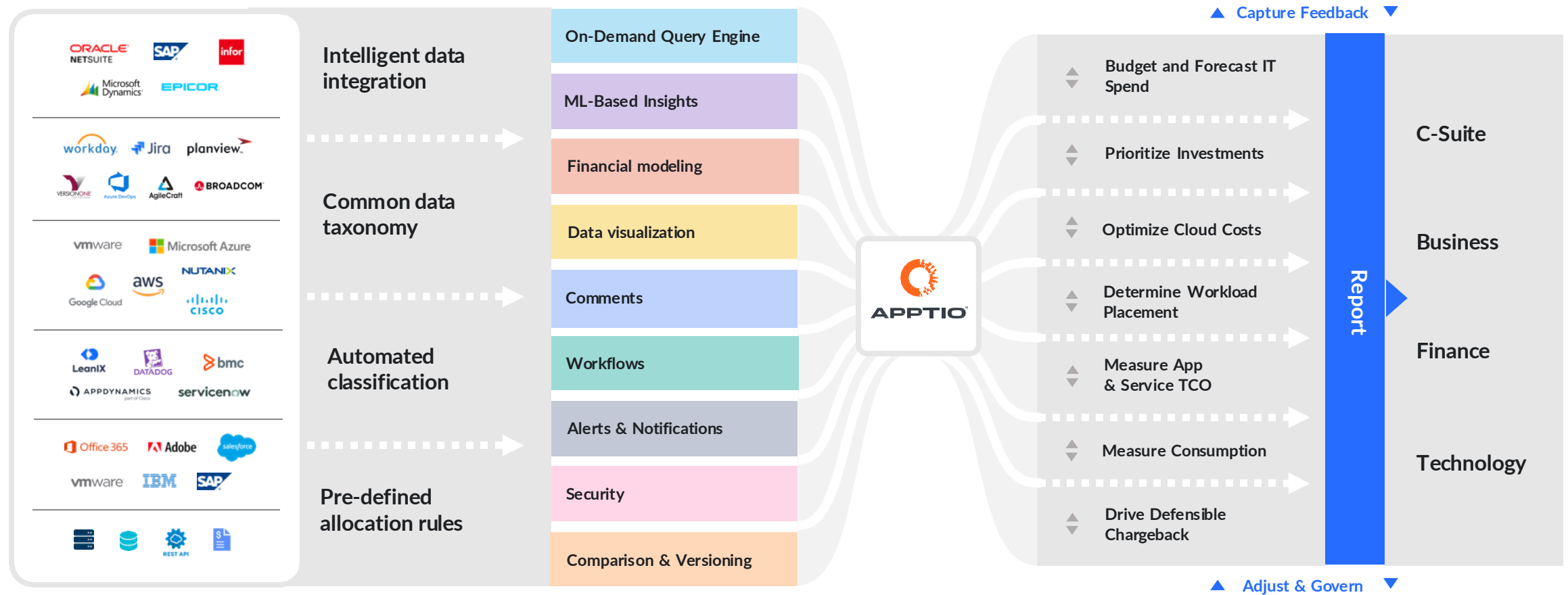
Technology Business Management

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

FORRESTER®

How Apptio Works

28



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

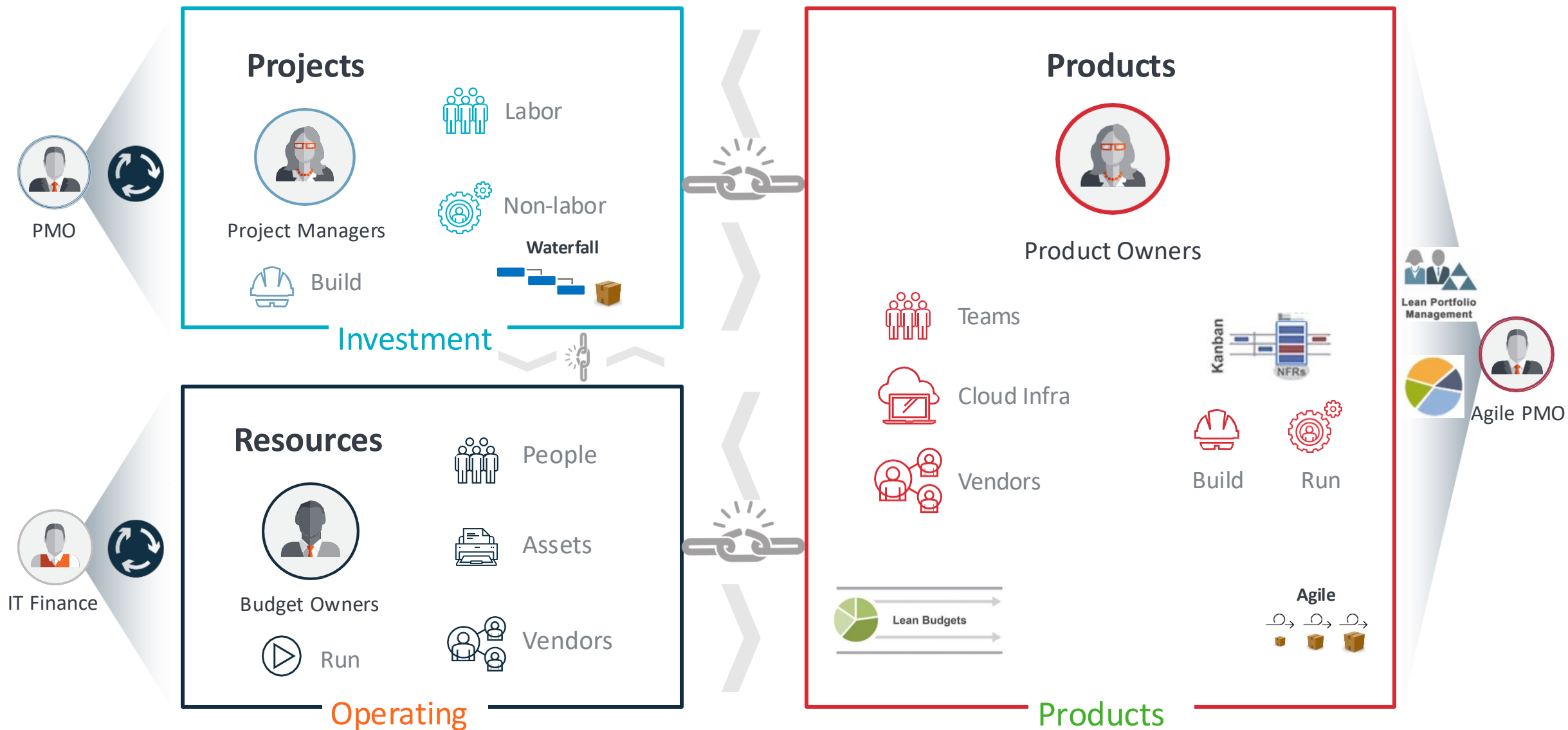


Planning

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



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



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



Integration Points

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

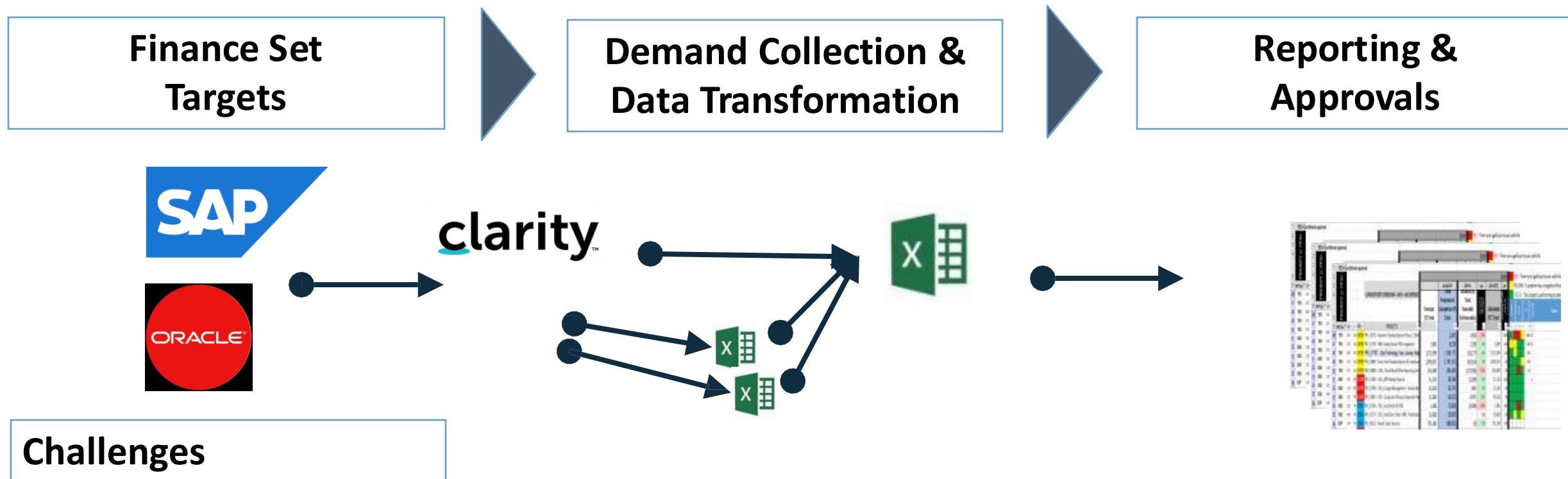
CIP

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

Budget Data

Required project budget/forecast data dimensions

Typical Planning Process



- 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

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 do 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 the 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



APPTIO
Data Studio

PPM Data	Apptio Data
Projects	Projects Master Data
Resources	Labor Master Data



Budgets

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

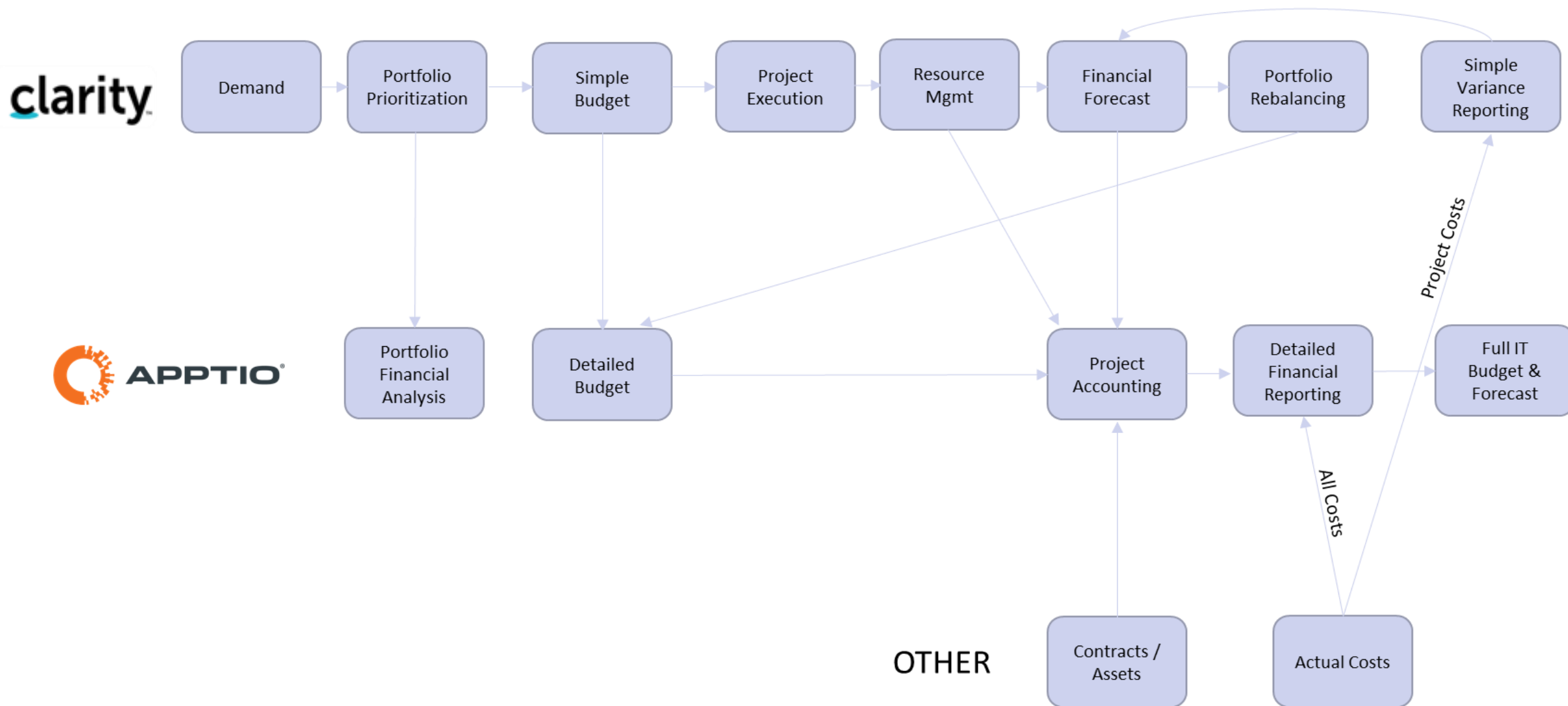
Jumping between
systems to find info,
resulting in
poor customer
experience

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

Typical Apptio / Clarity Data Flows

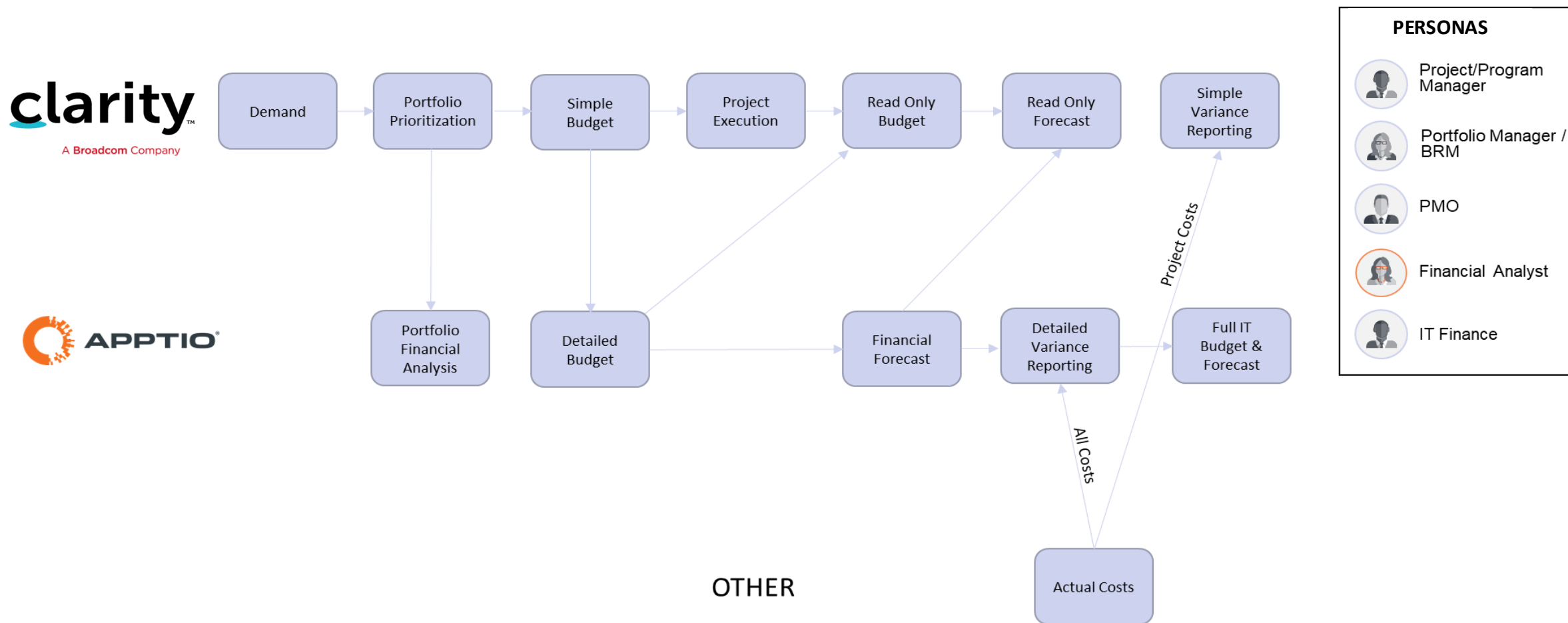


Typical Apptio / Clarity Data Flows

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

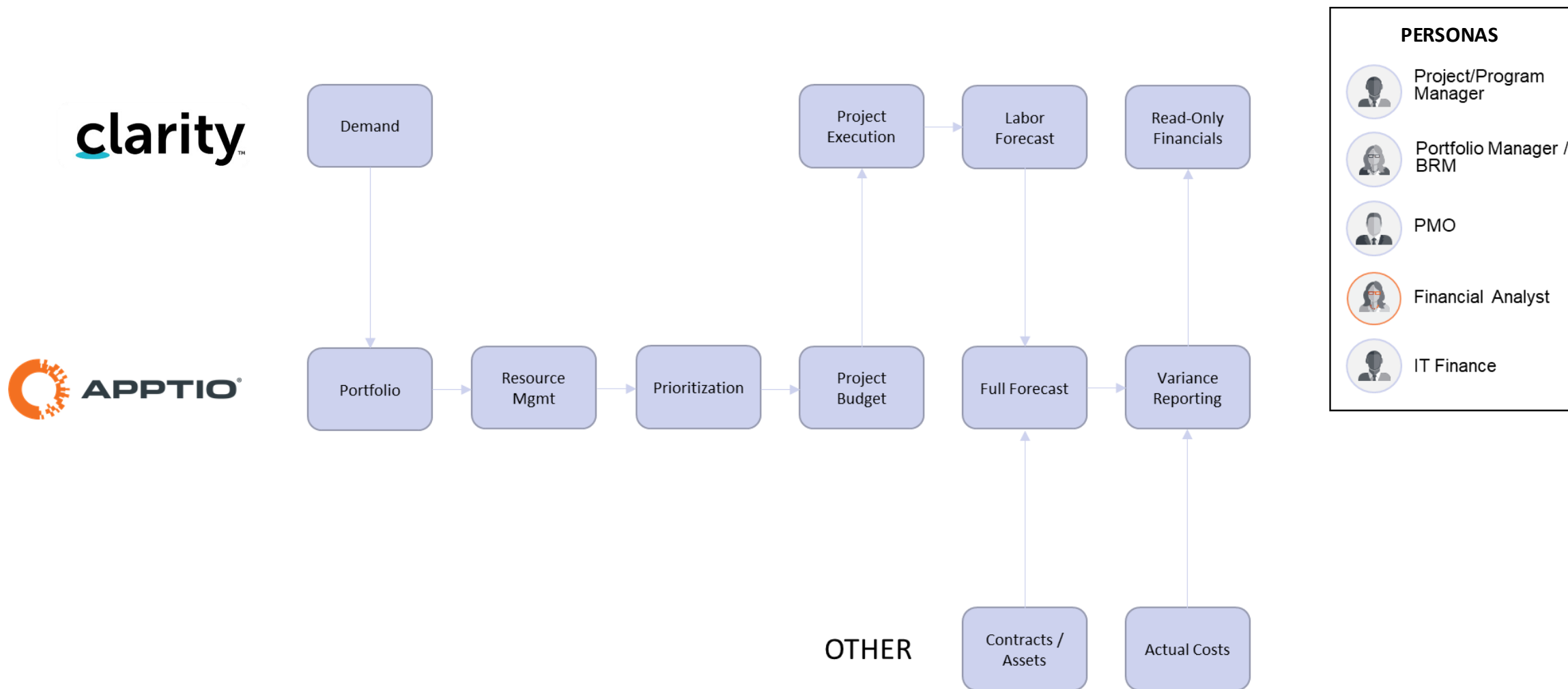


Typical Apptio / Clarity Data Flows

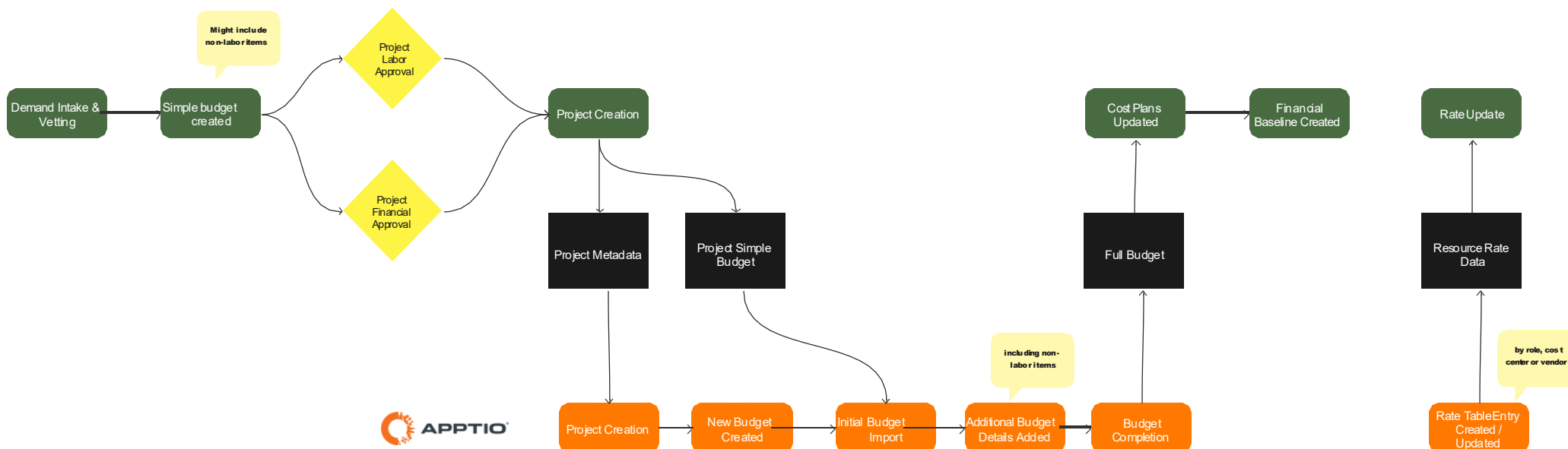
Scenario 3

-  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



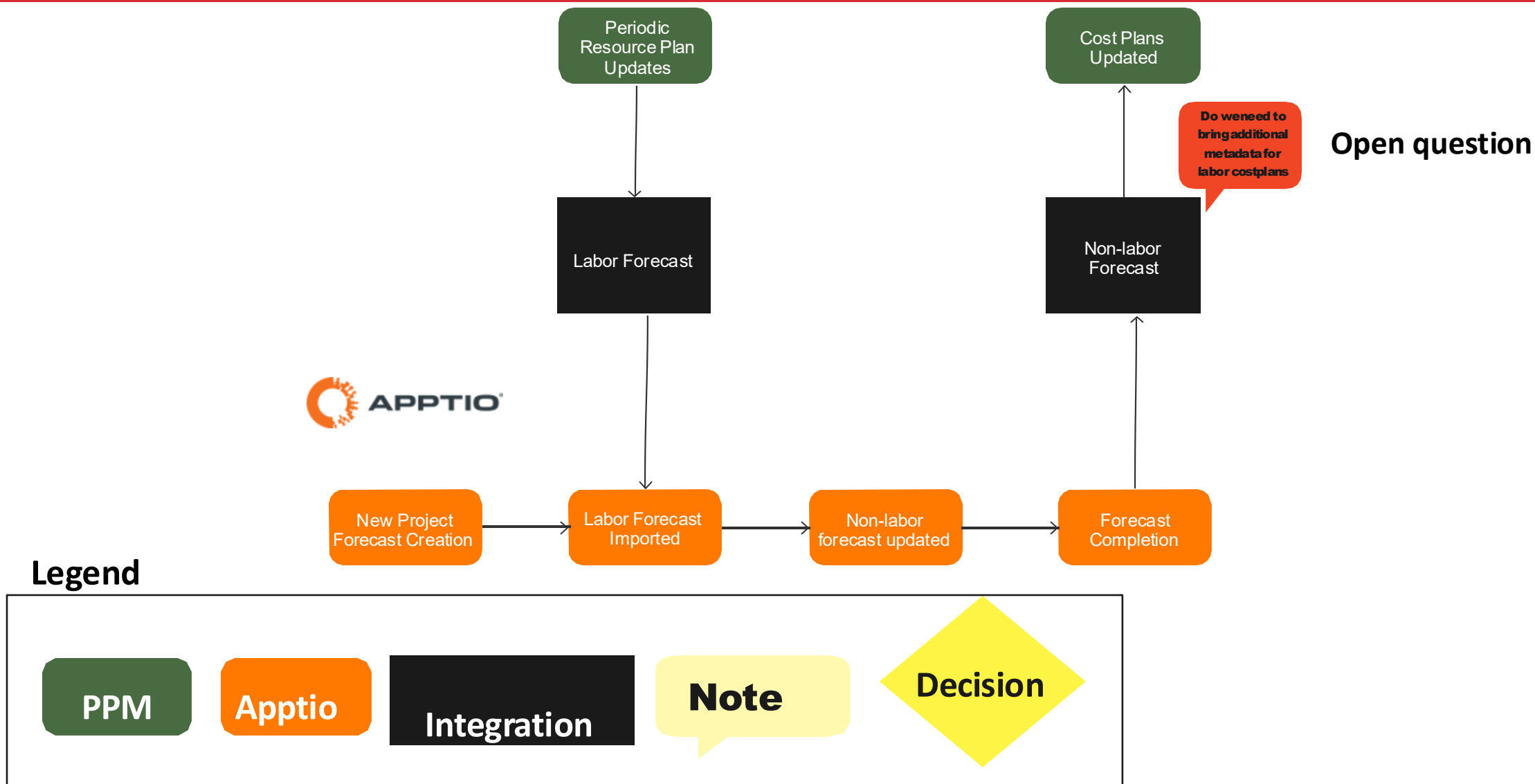
Labor, Budget, and Rate Sync



Legend



Labor and Non-Labor Forecast Sync



Labor and Non-Labor Actuals Sync

