



Unified Annual Planning: Bridging Targetprocess and Apptio Planning

Your Guides:



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Agenda

- Financial Planning Overview
- Why Apptio Planning for Non-Labor
- Why Targetprocess for Labor
- Integration Between Apptio Planning and Targetprocess

Introductions

- Take 5 minutes
- Turn to a person near you
- Introduce yourself
- Business cards

Why Apptio Planning

From fragmented spreadsheets to a unified, continuously updated financial picture

75%

Faster planning cycles

Reduce planning cycle time by 75% and cut budget variance to under 1% — in as little as 4 weeks

AI

AI-powered forecasting

Auto-generate IT spend forecasts from historical data and trends — no spreadsheet assumptions

3–5%

Budget savings and redirection

Organizations typically achieve 3–5% savings or redirection of their total tech budget

~1mo

Continuous forecasting

Shift from annual or quarterly planning to rolling monthly forecasts based on current data

Scenario

Scenario and what-if analysis

Model cloud migrations, vendor negotiations, or headcount changes before committing budgets

360°

Unified cost visibility

One view of app, labor, vendor, and project costs tied directly to business outcomes

Apptio Planning replaces fragmented, spreadsheet-driven IT budgeting with a single collaborative workspace — connecting IT spend directly to business outcomes.

Why Targetprocess for Labor Planning

Without Targetprocess Allocations

Source of labor data

Headcount spreadsheets
Static, updated manually

Allocation granularity

By org or cost center
Team A = 10 FTEs on "platform"

Accuracy over time

Degrades quickly
Priorities shift; sheet stays stale

What Apptio receives

Blunt cost buckets
Hard to trace to business value

Planning conversation

"We have 10 FTEs on platform"
No link to what they're building

With Targetprocess Allocations

Work item assignments
Live, updated as work changes

By initiative or epic
Person X = 60% checkout, 40% search

Stays current
Replanning updates allocations

Initiative-level labor cost
Cost tied directly to outcomes

"Initiative Y costs \$2.4M"
Traceable to scope and teams

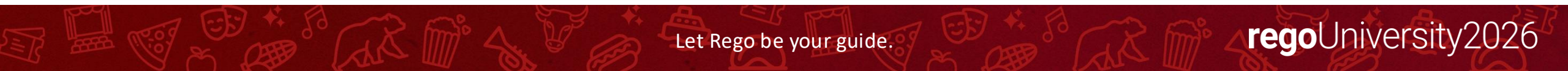
Better Together...

Targetprocess
<i>Delivery and portfolio management</i>
Portfolio and programs Epics, features, teams
Team capacity Sprints, velocity, headcount
Resource allocation Planned vs. actual effort
Investment tracking Initiative spend, status
Roadmap and prioritization OKR alignment, backlog
Delivery metrics Throughput, cycle time

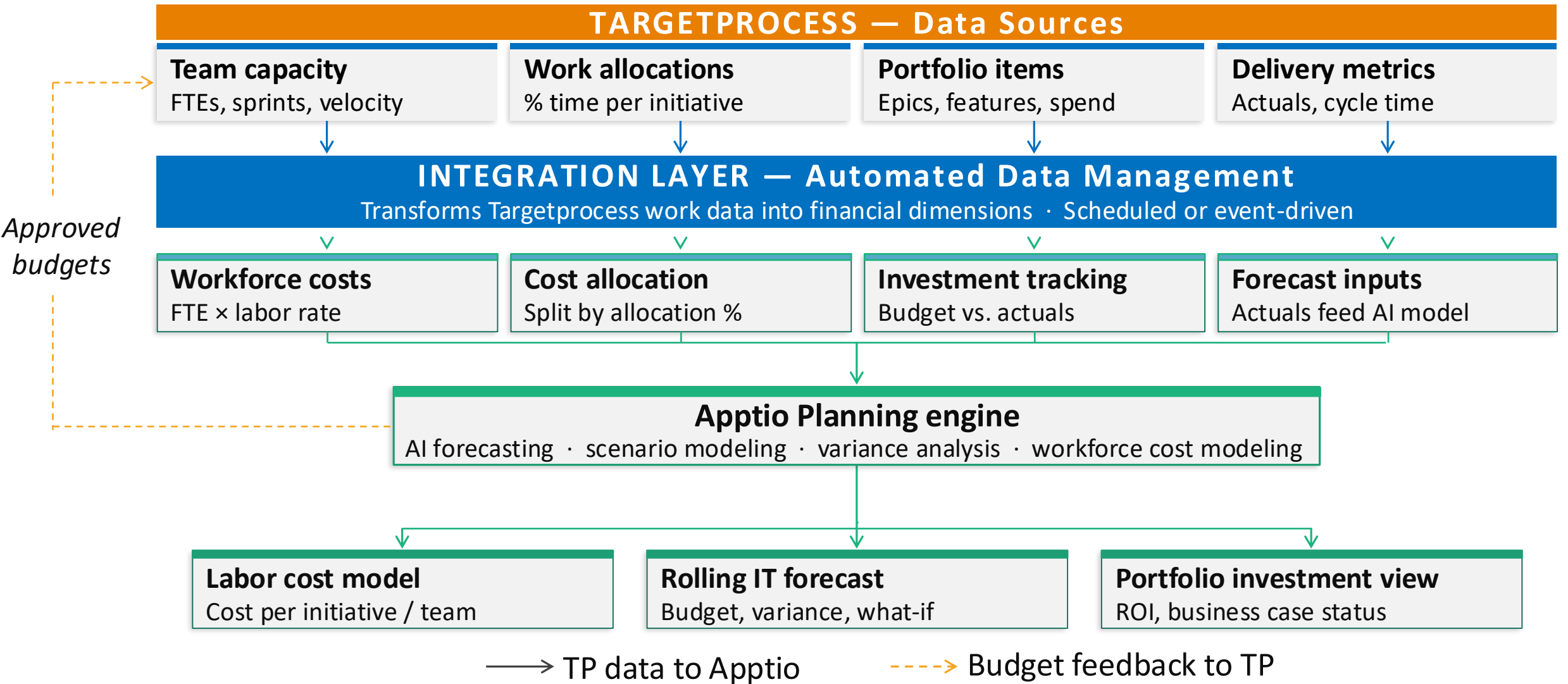
Automated Data Management (ADM)
Capacity → budget
Effort actuals →
Investment status →
← Approved budgets
← Cost allocations
← Spend actuals

Apptio Planning
<i>Financial and technology spend</i>
IT budget and forecasts Annual plans, rolling forecasts
Workforce costs Labor rates, FTE costs
Cost allocation Product, team, project
Scenario planning What-if investment models
Business case management ROI, benefit realization
Spend actuals GL, variance analysis

- Shared outcomes:**
- Capacity-informed budgets
 - Cost-per-feature visibility
 - Portfolio investment decisions
 - Delivery vs. plan reporting
 - Resource demand vs. supply



Targetprocess → Apptio Planning: Data Flow



Targetprocess Configuration



Budgeting Solution Installed (a partner or IBM will need to do this)

- How often is budgeting performed (annually, six months, quarterly)
- Determine the budget periods (fiscal / month start, other)
- What level of work to budget (portfolio epic / initiative, epic, etc.)
- Determine how many years in the past / future you need
- Decide what staff entities to track budgets (User, Teams, ARTs, etc.)
- Budget years created



Portfolio epics / initiatives created

Planning Configuration



Updates to make in Planning to improve integration:

- In Configuration > Schema > Standard Dimensions
 - Rename Projects
 - Note: column header will update, but Projects drop down and Projects page will not
 - Rename Project Labor Role
- Import Labor Activity as external line items
 - Labor Activity will be coming from ATP through TBM Studio
 - Importing as external will make the rows read-only, so they cannot be updated in Planning by mistake

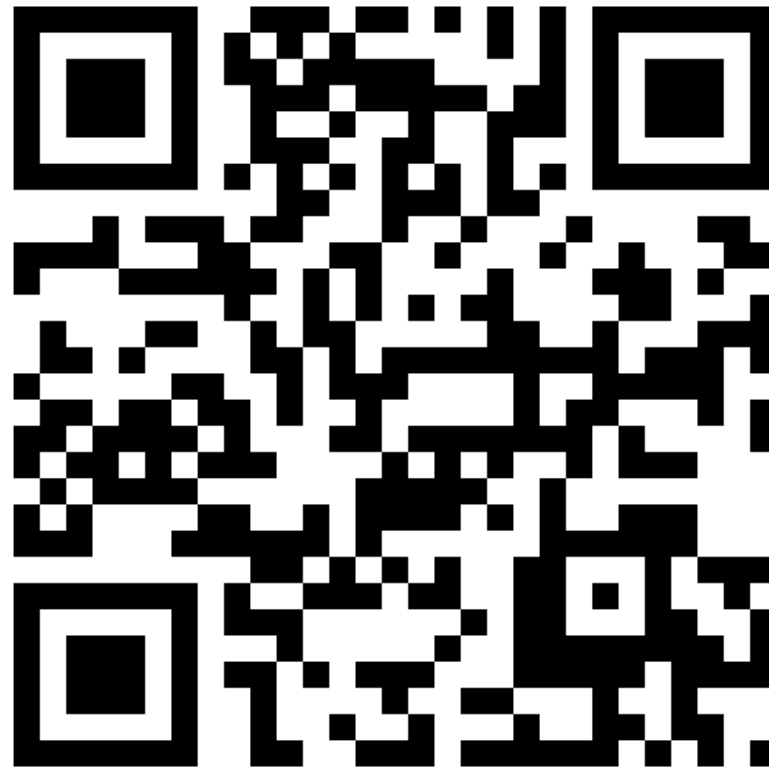
TBM Studio Configuration

- Configure labor roster to be ingested into ATP and Planning
- Calculate team rates for ATP and Planning
- Format ATP Labor into Labor Activity for Planning

Targetprocess Demonstration

Surveys

Please take a few moments to fill out the class survey.
Your feedback is extremely important for future events.



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Let us know how we can improve!
Don't forget to fill out the class survey.



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