



CA PPM Product Roadmap

CA Clarity User Group D-A-CH bei Hugo Boss

15. Mai 2018

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Agenda

1 BUSINESS UPDATE

2 PRODUCT UPDATE

3 FUTURE PLANS

4 MODERN SOFTWARE FACTORY

5 QUESTIONS

Business Update



Market leadership

Consistently leading year over year

- ✓ Leader in IDC 2017 Marketscape for Agile PPM (2017 – inaugural year)
- ✓ Leader in the Gartner Magic Quadrant for Integrated IT Portfolio Analysis applications (2016, 2015, 2014).
- ✓ Leader in the Gartner PPM Worldwide Magic Quadrant (2017, 2016, 2015 and similar MQ reports in previous years)
- ✓ Leader in OVUM Decision Matrix: Agile Project Management 2016-2017
- ✓ Leader in IDC MarketScape for Worldwide Enterprise IT PPM Vendor Assessment (2016)



“Consider CA if you are looking for best-of-breed agile project, program and portfolio management.”

- 2017 Gartner



Best Project Portfolio Management Vendor

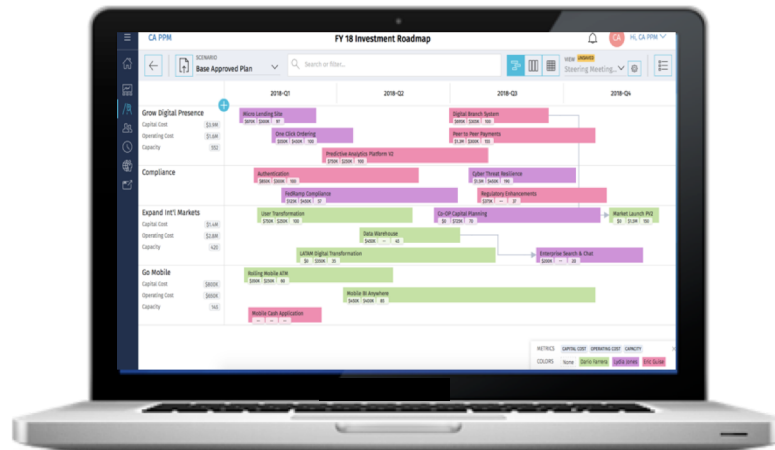
-IT Central Station Peer Reviews (Unbiased reviews from the tech community)

Consumer technology impacts the workplace

Transforming the work experience

New ways to visualize and plan the work

- For the first time, the technology people have at home is better than in the workplace.
- People will download their own tools if the enterprise solution doesn't meet their expectations.



A shared solution across the enterprise



The days of mandating use of a tool are gone. We need to provide solutions that people **want to use** and **gain value**.

The nature of work is changing

Keeping pace with user expectations

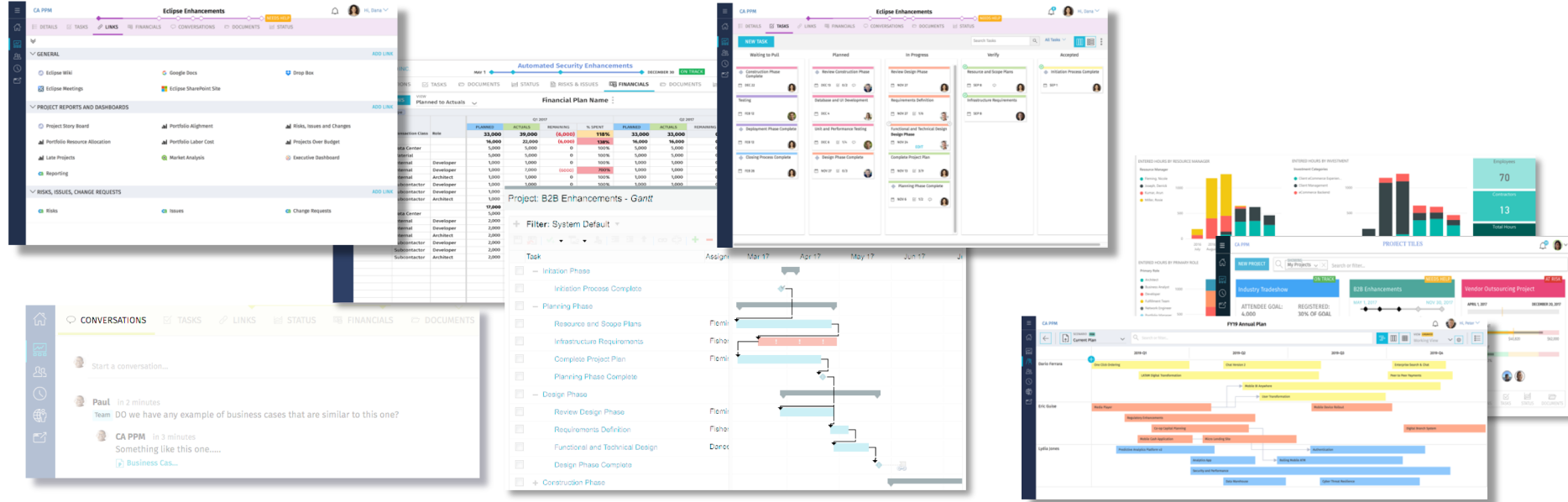
- 1 More social:** Social is the new workflow. How do people organize a dinner - social is how people work together today.
- 2 Team centric:** Solutions that enable teams to work together and eliminate meetings and conference calls win out.
- 3 Friendly and simple:** No one wants a training class. People need to adopt tools with limited or no training.



The solution to ensure confidence.

Introducing 15.4: configurable, powerful & social

Unique ability to enable “business light” and “PM power” in one solution.



✓ Project Management

✓ Task Board

✓ Blueprinting

✓ Document Management

✓ Living Status Report

✓ Collaboration

✓ Staffing

✓ Financial Plans

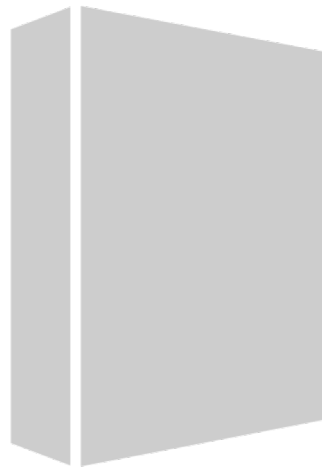
✓ Project Links

✓ Time Entry & Approval

✓ Enter & Approve Time for Others

✓ Roadmapping

Product Update



Shift in Focus

Support Top Down Strategy Planning While
Maintaining Bottom Up Run & Operate





New paradigms require a new understanding

- ✓ Why is traditional investment planning so painful?
- ✓ What has everyone missed in demand management?
- ✓ What is the hidden trap in prioritization?
- ✓ Why are we the answer?

Pressures. The **business** wants **everything** now:



- Everything is a number one priority
- How do you keep yourself from over committing?
- How does everyone understand the big picture?

What our customers told us...



THE PAIN OF TRADITIONAL INVESTMENT PLANNING

“Bottom up” approach for defining projects, ideas, budgets and team allocations requires too much detail for planning to begin.

**Where details are known, use them.
Where they are not, create a high level item and work out the details later.**



WHAT'S MISSING FROM DEMAND MANAGEMENT?

Does innovation come from the help desk engineer or the business leader?

Innovation comes from engagement with executives responsible for steering the business.



WHY DOES PRIORITIZATION FAIL?

“When we ask an executive to prioritize, they state everything is a number one priority. And, the expectation is that it all will be delivered—because it’s number one.”

Executives must understand the whole picture in order to rank work.



WHY ARE WE THE ANSWER?

We're bringing roadmaps to investment planning and a visual tool that enables stakeholders to gain common consensus.

Easily sort, pivot and view investment information as needed to gain investment insights.

Strategy & Roadmap

Plan the Initiatives that map to your Business Outcomes

Business Case Demand Management

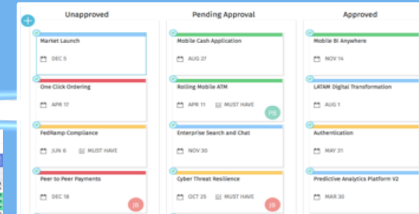
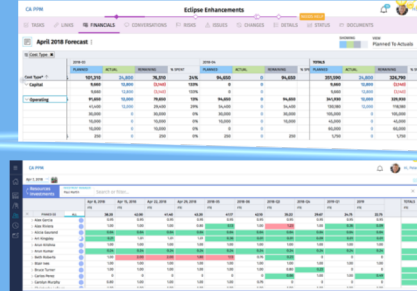
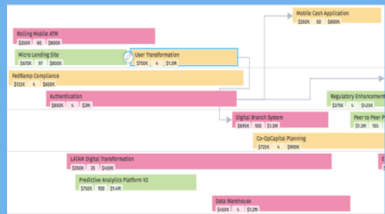
Request funding for initiatives ready to launch near term

Financial and Headcount Planning

- Ensure you have the right people
- Funding forecasts

Execution

- Task Management
- Risk / Issue / Change Mgt
- Document Mgt
- Collaboration
- Scheduling & Tracking



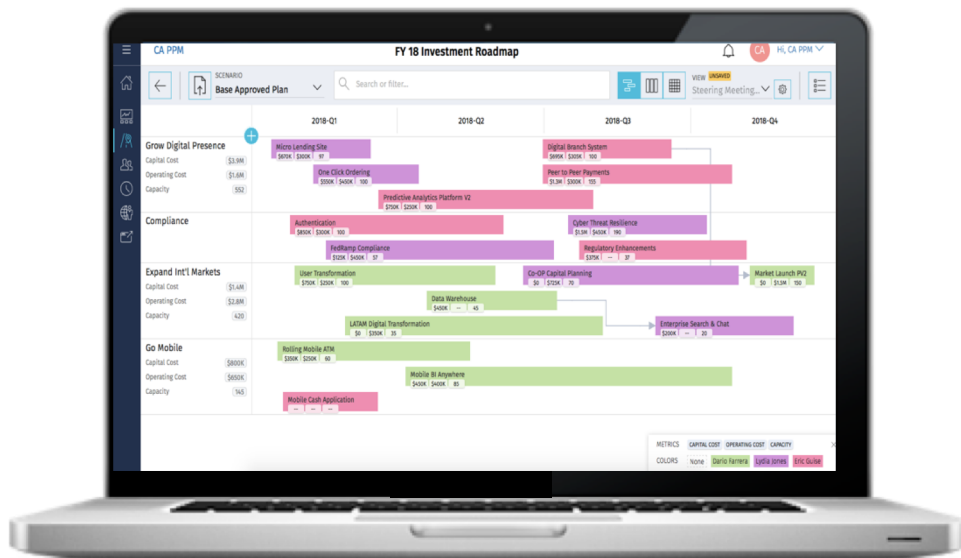
Full Cost Management

Budgeting & Forecast

Resource & Staffing

Roadmaps enable top-down planning

Create roadmaps to enable top-down investment planning that communicate strategy and inform better decisions.



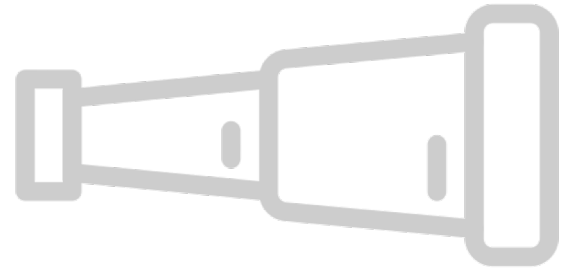
Roadmaps, when appropriately tailored for audience and purpose, can be **invaluable tools for building consensus and support for future business capabilities and outcomes.**

“These roadmaps must have the right granularity and planning horizon **and must connect strategy with implementation to ensure that desired outcomes are achieved.**” ¹

Gartner Report: [“Create Roadmaps That support Decision Making and Communicates Strategy Effectively”](#) James McGovern. July 26, 2017. ID: G00336402

Future Plans

Under Development



Roadmap constraint-based planning

- ✓ Sort items based on any combination of columns (ROI, Total Cost, etc.)
- ✓ Items are colorized based on the constraints they consume
- ✓ Standard Group By options
 - Group by Exec Sponsor
 - Manually move items in and out of plan
- ✓ Baseline & Communicate Plan

CA PPM FY18 Annual Plan

VIEW UNSAVED

Benefit		Capital Cost		Operating Cost	
TARGET	15,000,000	TARGET	9,000,000	TARGET	2,500,000
IN PLAN	16,075,000	IN PLAN	9,015,000	IN PLAN	2,050,300
VARIANCE	(1,075,000)	VARIANCE	(15,000)	VARIANCE	449,700

In Plan	Rank	Roadmap Item*	Must Have	Start	Finish	Business O...	Owner	Spend Cate...	Capital Cost	Operating C...
<input checked="" type="checkbox"/>	2	Data Warehouse		Apr 18 2018	Jul 15 2018	International	Lydia Jones	Grow	450,000	225,000
<input checked="" type="checkbox"/>	3	LATAM Digital Transformation		Feb 15 2018	Aug 01 2018	International	Lydia Jones	Run	350,000	0
<input checked="" type="checkbox"/>	4	Mobile BI Anywhere		May 15 2018	Nov 14 2018	Go Mobile	Dario Ferrera	Transform	450,000	0
<input checked="" type="checkbox"/>	5	Mobile Cash Application		Jul 07 2018	Aug 27 2018	Go Mobile	Eric Guise	Transform	350,000	250,000
<input checked="" type="checkbox"/>	6	Enterprise Search and Chat		Sep 01 2018	Nov 30 2018	International	Eric Guise	Grow	200,000	0
<input checked="" type="checkbox"/>	7	Predictive Analytics Platform...		Feb 20 2018	Mar 30 2018	International	Lydia Jones	Run	750,000	0
<input checked="" type="checkbox"/>	8	Digital Branch System		Jul 06 2018	Sep 06 2018	WOW Our Cus...	Lydia Jones	Grow	695,000	305,000
<input checked="" type="checkbox"/>	9	One Click Ordering		Feb 02 2018	Apr 17 2018	WOW Our Cus...	Dario Ferrera	Transform	550,000	100,000
<input checked="" type="checkbox"/>	10	Authentication	Top Choice	Feb 01 2018	May 31 2018	Security & Re...	Lydia Jones	Run	850,000	220,000
<input checked="" type="checkbox"/>	11	Cyber Threat Resilience	Required	Sep 04 2018	Dec 04 2018	Security & Re...	Eric Guise	Run	1,500,000	450,000
<input type="checkbox"/>	12	FedRamp Compliance	Required	Jan 10 2018	Jun 06 2018	Security & Re...	Eric Guise	Run	125,000	450,000
<input checked="" type="checkbox"/>	13	Regulatory Enhancements	Required	May 27 2018	Sep 08 2018	Security & Re...	Dario Ferrera	Run	375,000	0
<input checked="" type="checkbox"/>	15	Co-Op Capital Planning	Carryover, Re...	Jun 12 2018	Oct 02 2018	WOW Our Cus...	Eric Guise	Transform	725,000	0
<input checked="" type="checkbox"/>	17	Rolling Mobile ATM	Carryover	Jan 13 2018	Apr 11 2018	Go Mobile	Lydia Jones	Grow	350,000	250,000
<input checked="" type="checkbox"/>	19	Micro Lending Site	Carryover	Jan 14 2018	Mar 24 2018	Go Mobile	Dario Ferrera	Transform	670,000	300
<input type="checkbox"/>	16	Market Launch		Nov 04 2018	Dec 03 2018	International	Eric Guise	Grow	100,000	0
<input type="checkbox"/>	18	Peer to Peer Payments		Jul 04 2018	Dec 18 2018	WOW Our Cus...	Dario Ferrera	Grow	1,300,000	300,000

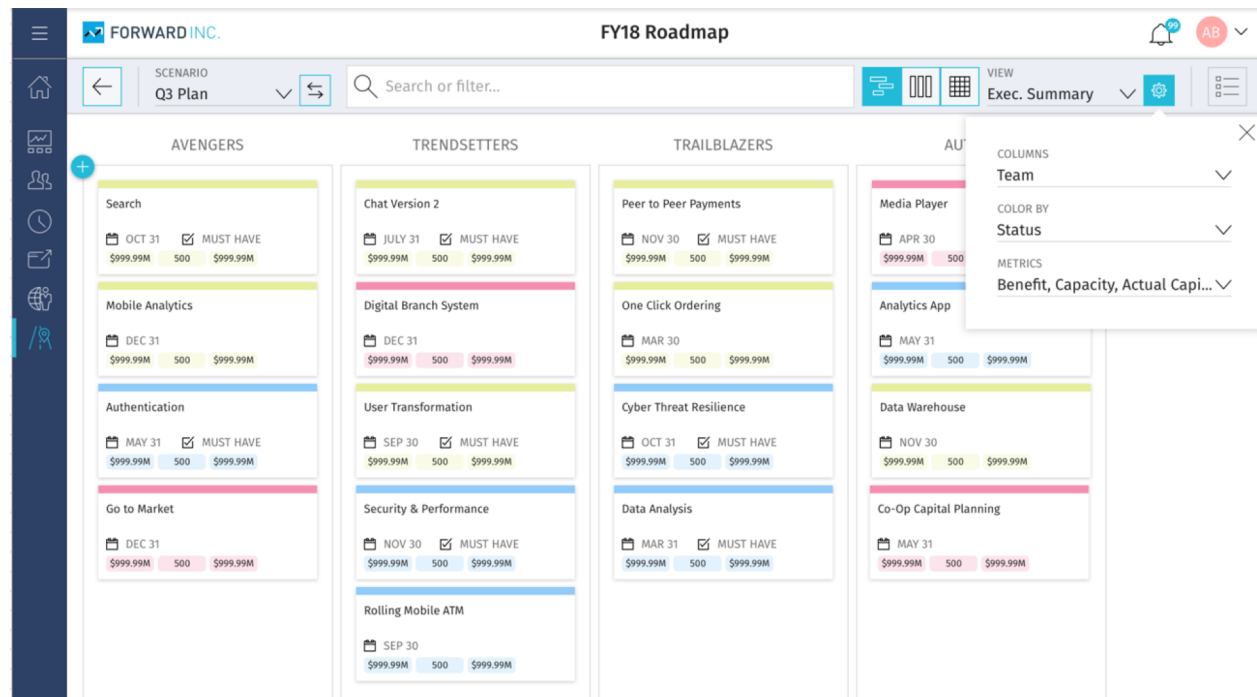
Plan



Apply multiple constraints in an iterative manner

Roadmap board view metrics

- Independently control which metrics are displayed across the Roadmap Timeline and Board views



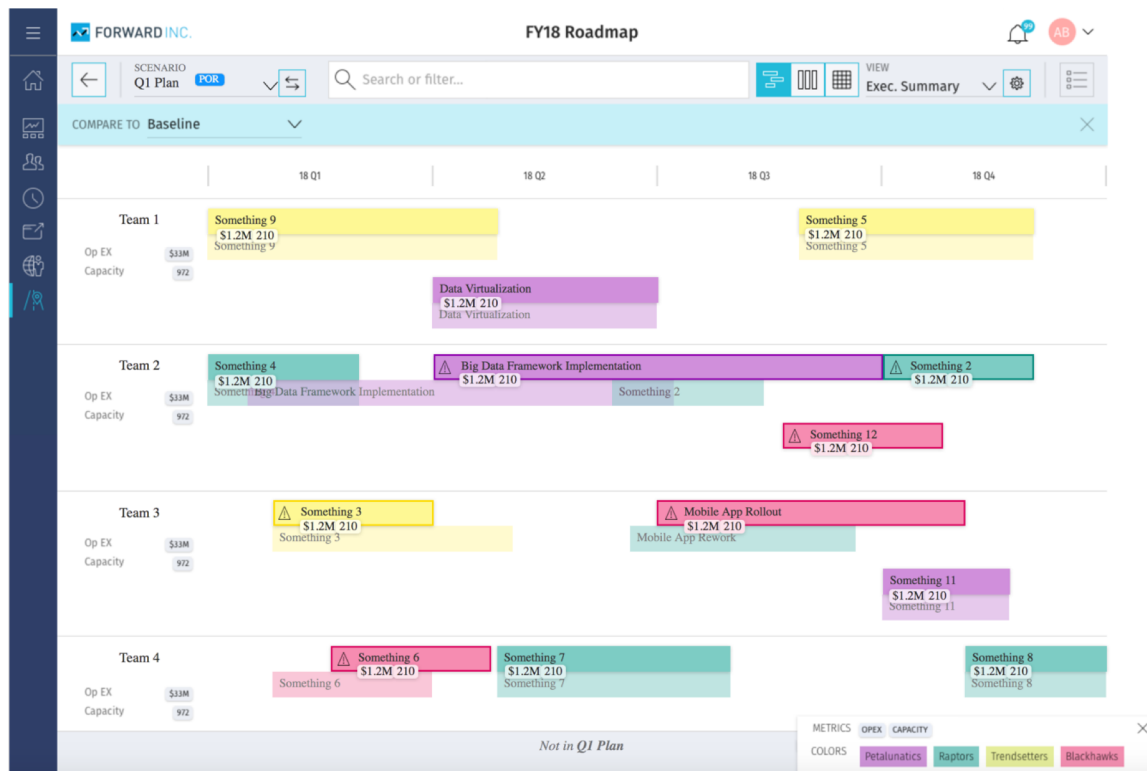
Control



Present the right information at the right time.

Roadmap scenario comparisons

- ✓ Compare plans / Scenarios
- ✓ Baseline (original annual plan) to current
- ✓ Visually determine changes since we all agreed on a plan

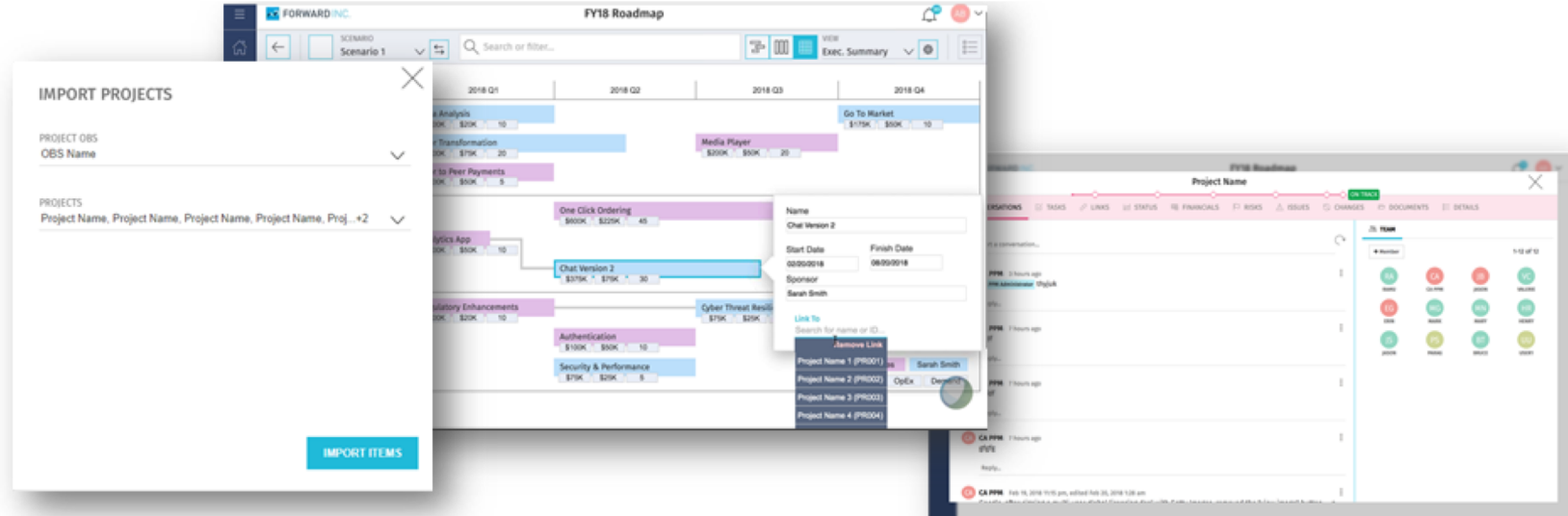


Power



Compare scenarios with the help of visualization

Roadmap linking to PPM projects



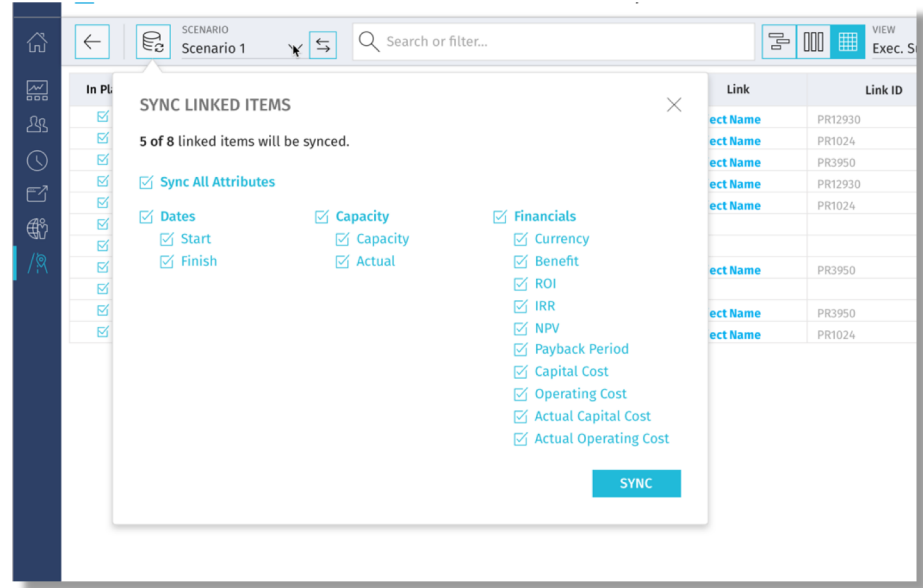
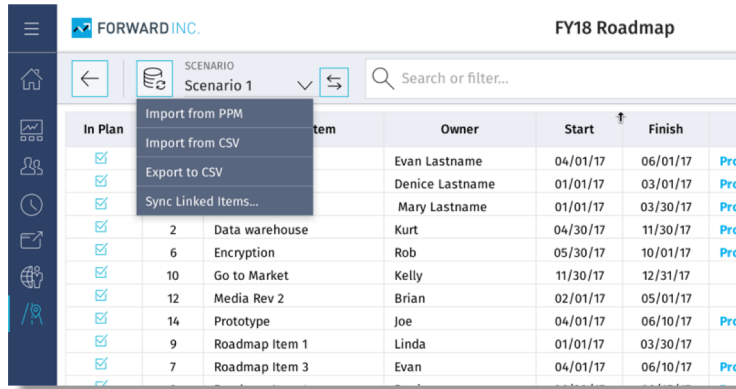
- ✓ Link roadmap items to projects
- ✓ Drill into a PPM project
- ✓ Available from grid, board and timeline views

Power



Determine which PPM projects are linked to the roadmap

Roadmap syncing to PPM projects



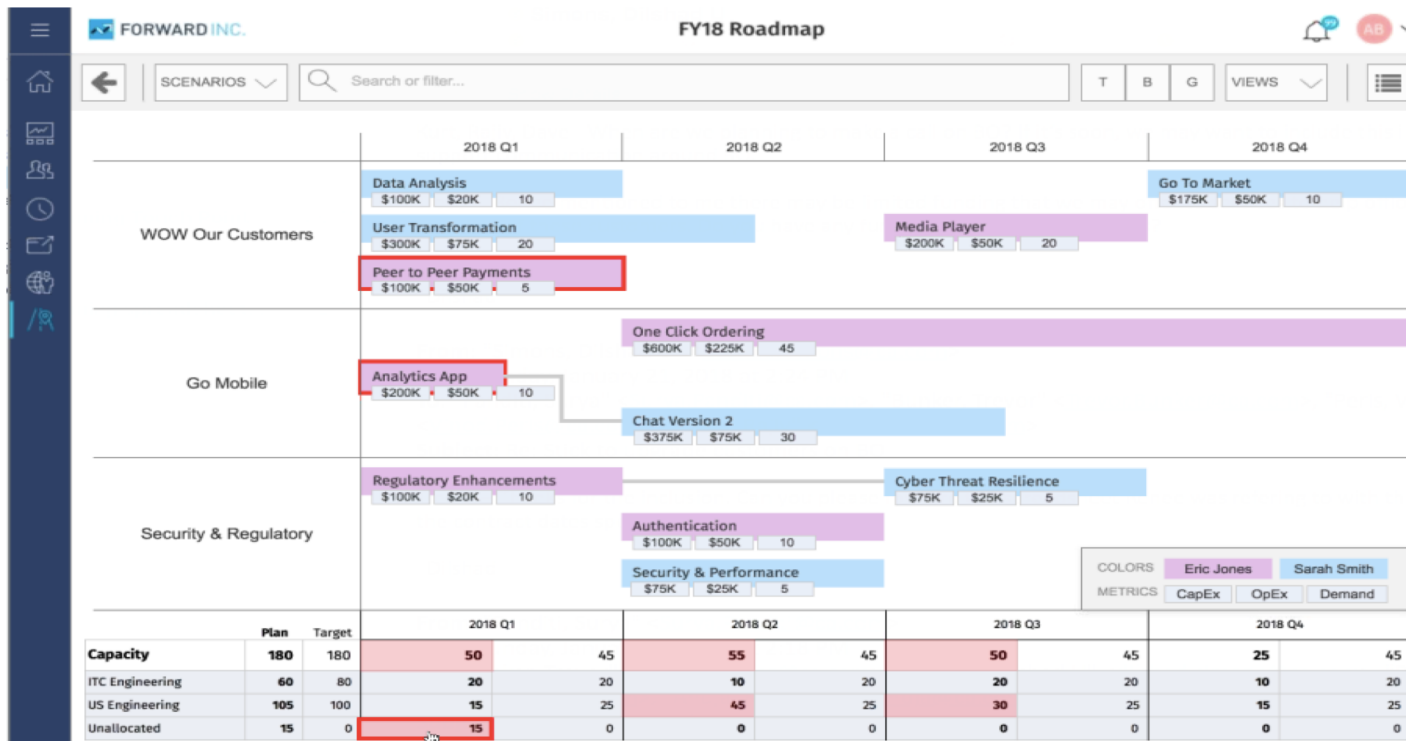
☒ Control WHAT and WHEN you SYNC Roadmap Items and Attributes

Control



Put the control on what to sync in the hands of the user – per scenario

Roadmap capacity planning



Power



Manage the impact of work on your People and Money. The most powerful PPM planning tool on the market

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Powerful excel like capabilities

CA PPM FY19 Annual Plan

SCENARIO **POR** Hi, Peter

Current Plan VIEW UNSAVED Working View

Search or filter...

In Plan	Rank	Roadmap IT...	Must Have	Owner	Start	Finish	Capacity	Total Cost	Capital Cost	Operating C...	Benefit	ROI	Outcome
<input checked="" type="checkbox"/>	1	Peer to Peer ...	Top Choice	Bhatt, Rakesh	Oct 01 2019	Nov 30 2019	25	125,000	0	125,000	800,000	540%	WOW Our Cus...
<input checked="" type="checkbox"/>	1	Predictive An...		Madden, Tina	Jan 24 2019	Apr 23 2019	2	550,000	0	550,000	900,000	63%	International
<input checked="" type="checkbox"/>	2	Co-op Capital...		Chasen, Nicole	Feb 24 2019	May 25 2019	20	3,000,000	1,500,000	1,500,000	3,000,000	0%	WOW Our Cus...
<input checked="" type="checkbox"/>	2	Micro Lendin...		Berks, Paul	Apr 12 2019	Jul 08 2019	20	1,750,000	1,500,000	250,000	6,120,000	249%	WOW Our Cus...
<input checked="" type="checkbox"/>	3	Rolling Mobil...		Bauer, Joyce	Jun 20 2019	Oct 15 2019	40	1,500,000	1,250,000	250,000	4,500,000	200%	WOW Our Cus...
<input checked="" type="checkbox"/>	3	User Transfor...		Amos, Cheryl	Jun 04 2019	Sep 29 2019	25	1,500,000	1,250,000	250,000	0	0%	WOW Our Cus...
<input checked="" type="checkbox"/>	4	Digital Branc...		Carmen, Ed	Oct 16 2019	Dec 31 2019	30	1,750,000	1,500,000	250,000	10,000,000	471%	WOW Our Cus...
<input checked="" type="checkbox"/>	5	Media Player	Carryover	Martin, Paul	Jan 01 2019	Apr 20 2019	8	2,000,000	1,400,000	600,000	3,500,000	75%	Go Mobile
<input checked="" type="checkbox"/>	5	Regulatory E...	Required	Martin, Paul	Feb 01 2019	May 31 2019	120	3,000,000	1,500,000	1,500,000	3,000,000	0%	Security & Re...
<input checked="" type="checkbox"/>	8	One Click Ord...	Carryover	Malone, Paula	Jan 01 2019	Mar 31 2019	4	750,000	0	750,000	1,000,000	33%	Go Mobile
<input checked="" type="checkbox"/>	10	Data Wareho...	Top Choice	Malone, Paula	May 01 2019	Jun 28 2019	2	550,000	0	550,000	950,000	72%	International

- ☒ Additional excel like capabilities
- ☒ Sort up to 4 columns simultaneously

Power



Refine your data with multi-level column sorting capabilities

Advanced data filtering



✓ Create your common filters from stock or custom attributes

The screenshot shows the CA PPM interface. On the left, there's a sidebar with a navigation menu. The main area is divided into two sections. The top section is titled 'April 2018 Forecast' and shows a table with columns for 'Transaction Class', 'Cost Type', and 'Planned'. The bottom section is titled 'Jazz and Kenton Features' and shows a roadmap grid with columns for 'In Plan', 'Rank', 'Roadmap Item', 'Feature ID', 'Initiative', 'Team', 'Functional', 'Product Ma...', 'UX Designer', 'PI', 'Start', 'Finish', and 'Note'.

Transaction Class	Cost Type	Planned
Internal Labor	Capital	0
License Costs	Operating	0
Maintenance	Operating	0
Software	Operating	0

In Plan	Rank	Roadmap Item	Feature ID	Initiative	Team	Functional	Product Ma...	UX Designer	PI	Start	Finish	Note
✓	1	Build filter component to include data types of lookups, dates, and numbers	F17723	Generic Comp...	Trailblazers	Grids/Filters...	Linda	Kelly	Kenton	Jun 04 2018	Jul 26 2018	
✓	2	Build private API capability to consume the filter component (timeline)	F18224	Generic Comp...	Trendsetters	Grids/Filters...	Linda	N/A	Kenton	Jun 04 2018	Jul 22 2018	We need to b...
✓	3	Build generic component for time-varying data in grids (fiscal)	F18216	Generic Comp...	Raptors	Time Phased ...	Dave	Rob	Kenton	Jun 04 2018	Jul 16 2018	The initial co...
✓	4	Build generic component for CSV export	F18020	Generic Comp...	Trailblazers	Import/Export	Kelly	Kenton	Kenton	Jun 04 2018	Jul 07 2018	We want to ex...
✓	10	Consume filter component in roadmap items (timeline, board, grid)	F18223	Roadmapping	Trailblazers	Grids/Filters...	Linda	Rob	Kenton	Jul 31 2018	Sep 14 2018	
✓	13	Consume time-varying data component in roadmap items grid (fiscal)	F18200	Roadmapping	Raptors	Time Phased ...	Dave	Kelly	Kenton	Aug 07 2018	Sep 16 2018	
✓	15	Consume saving views component in RICs grids	F18037	Project Mgmt...	Blackhats	Grids/Filters...	Linda	Rob	Kenton	Jun 04 2018	Jul 07 2018	
✓	16	Consume CSV Export component in roadmap items grid	F18021	Roadmapping	Trailblazers	Import/Export	Linda	Kelly	Kenton	Aug 07 2018	Sep 07 2018	Bharat: A lot ...
✓	20	New UX support in FedRAMP	F17672	Project Mgmt...	None	Other	Vib	N/A	Kenton	Jun 04 2018	Jul 10 2018	Kurt's commit...
✓	21	Agile Central investment integration (presales commit Jul 31)	F18643	Modern Busin...	Data Buzz	PPM/Agile Int...	Vib	N/A	Kenton	Jun 04 2018	Sep 07 2018	Commit to de...
✓	22	Custom HTML module in project blueprint	F18672	Customer Voice	Blackhats	Other	Vib	Evan	Kenton	Jun 04 2018	Sep 07 2018	

✓ 'Group by' added to roadmap grids, display metric sub totals and grand totals

Control



You determine how to refine your data.

Project staffing

FORWARD INC.

Automated Security Enhancements

ON TRACK

CONVERSATIONS TASKS STATUS DOCUMENTS DETAILS **STAFF**

	PERIODS Monthly			DISPLAY CAPACITY AS Hours			START PERIOD Current Period					
	Total			Jan-18			Feb-18			Mar-18		
	Allocation	Actuals	ETC	Allocation	Actuals	ETC	Allocation	Actuals	ETC	Allocation	Actuals	ETC
Total	28,880	7,140	21,740	4,760	4,760	0	4,760	2,380	2,380	4,840	0	0
Robert Jones	960	240	720	160	160	0	160	80	80	160	0	160
Petalunatics	9,600	2,400	7,200	1,600	1,600	0	1,600	800	800	1,600	0	1,600
Blackhawks	10,800	2,700	8,100	1,800	1,800	0	1,800	900	900	1,800	0	1,800
Raptors	7,200	1,800	5,400	1,200	1,200	0	1,200	600	600	1,200	0	1,200
Architect	320	--	320	0	--	0	0	--	0	80	--	80

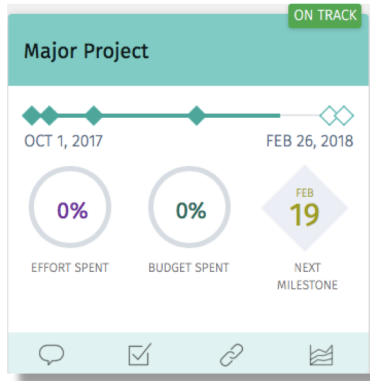
Simplify



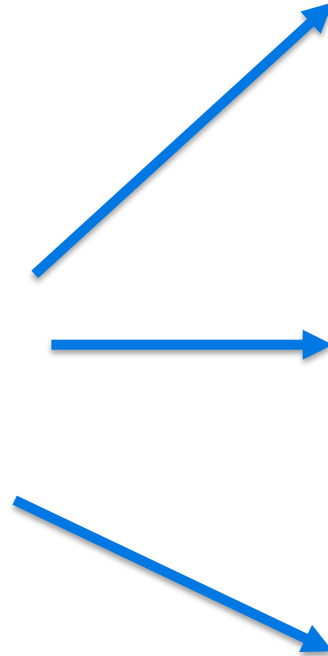
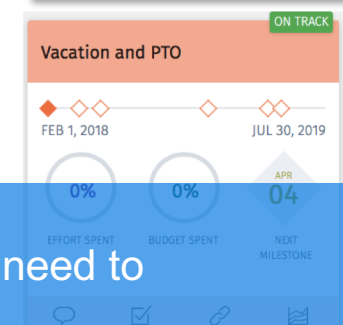
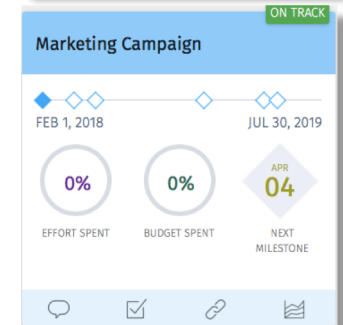
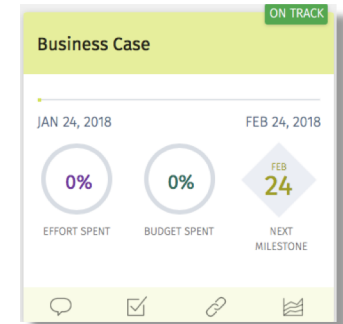
Simplify Resource Planning. Improve support for Agile. Support Modern and simpler ways of working

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Custom investment types



»	BLUEPRINT
>	Business Case
>	Major Project
>	Marketing Campaign
>	Minor Enhancement
>	Standard Project
>	Vacation & PTO



Usable
Unique



Why call your work what we name it? Why do you need to train people on a new vocabulary?

Blueprinting – relabel project fields

- ✓ Introduce in projects first
- ✓ Apply to new investment types next

MARKETING BLUEPRINT - EDIT MODE

DETAILS

EXIT REVERT PUBLISH

AVAILABLE FIELDS

ADD SECTION

% COMPLETE

% COMPLETE CALCULATION METHOD

ACTIVE

SECTION

BUDGETED COST BUSINESS ALIGNMENT COST VARIANCE

PROJECT MANAGER * PROJECT MANAGER

START DATE FINISH DATE OPEN FOR TIME ENTRY

MARKETING BLUEPRINT - EDIT MODE

EXIT DISCARD CHANGES PUBLISH

LANGUAGE English

In Use	Field	ID	Section Label API ID	Description	Blueprint La Field Default	Blueprint D Field Type	Database Ty	Database Cc	Required	Read Only	Data Wareh	Virtual	Active
✓	Business Alignment		Section Name			User Defined							
✓	Business Owner		Section Name			User Defined							
✓	Fast Track		Section Name			User Defined							
✓	Idea Type		Section Name		Applicatio	User Defined							
✓	Department OBS		Section Name		Corporate	User Defined							
	Objective		Section Name			User Defined							
	Work Status		Section Name		Requested	User Defined							
	Active		Section 2		✓	✓	Stock						
	Subject		Section 2				Stock						
	Manager		Section 2				Stock						
	Originating Requestor		Section 2		Current Use Paul Martin	Stock							
	Start Date		Section 2		Current Date	Stock							
	Finish Date		Section 2			Stock							
	Stakeholders		Section 2		Paul	✓	User Defined						

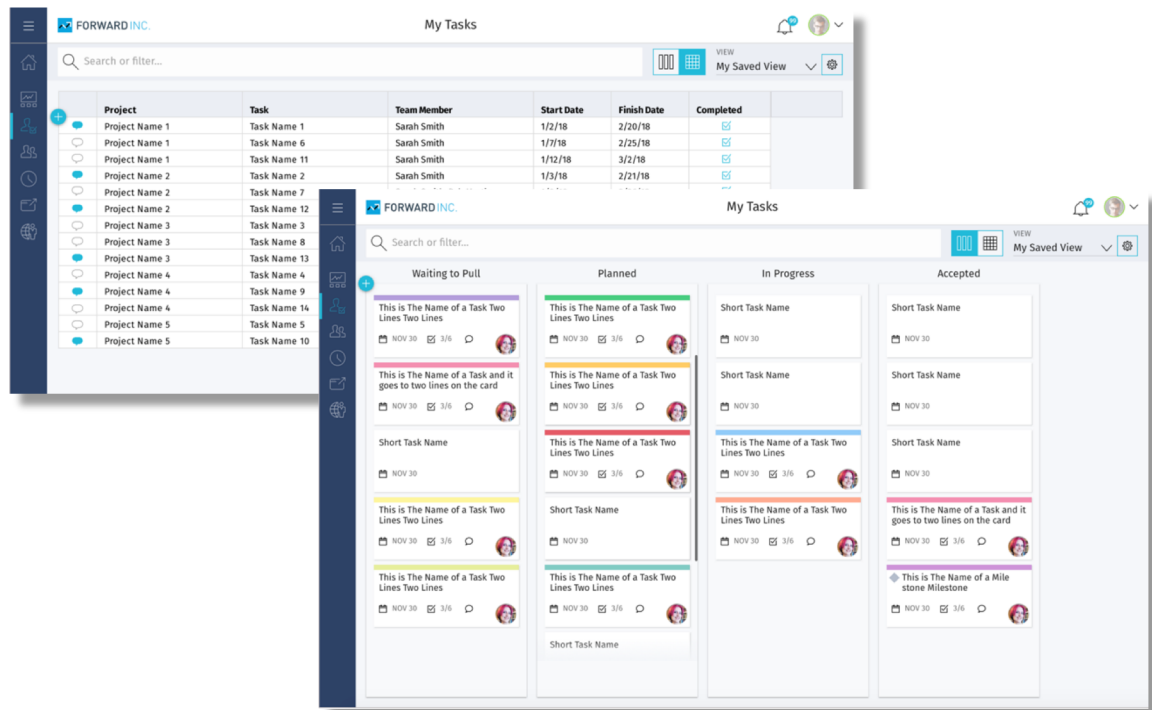
Usable
Unique



Why call your data fields what we name it? Why do you need to train people on a new vocabulary?

My personal portal

- ✓ Consolidated view of my tasks across projects
- ✓ Board and grid views
- ✓ Editable & configurable grid
- ✓ Conversations
- ✓ Save your filters, search criteria, column grid format as a view



Visible



My cross project personal portal provides me with a consolidated view of all of my tasks. Update your status as you go.

Modern Software Factory

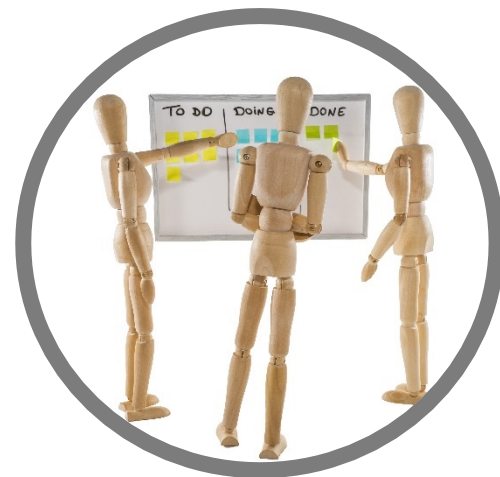


PPM & Agile Central

TRANSFORMING MARKET STRATEGY INTO MARKETABLE INNOVATION DELIVERS MORE **VALUE** TO CUSTOMERS

Balance agility and governance by

**CONNECTING
THE WORK OF
AGILE TEAMS** **TO THE
ENTERPRISE
PORTFOLIO**



How do you create an agile business?

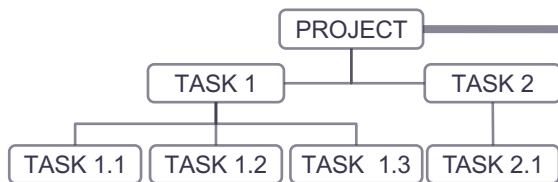
Plan, prioritize and track

How do you create an agile business?

Plan, prioritize and track

STRATEGY

BUSINESS
STAKEHOLDERS



FUNDING
HEADCOUNT
VALUE DELIVERED



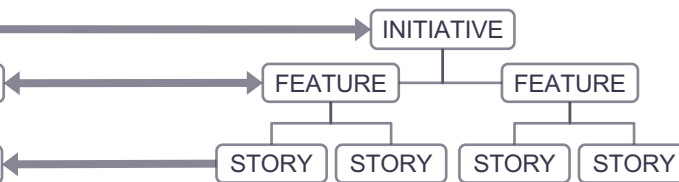
CA Project and Portfolio Management

Manage your entire innovation lifecycle and make more informed strategic investments

EXECUTION



AGILE TEAMS



CA Agile Central

Coordinate agile development work across teams and programs; handle users and artifacts



Customer roadmap sessions

You can register for upcoming roadmap sessions here:

<https://www.ca.com/us/product-roadmaps.html>

Future customer facing PPM roadmap sessions:

- May 16, 2018 10 PM EDT
- June 13, 2018 10 AM EDT
- June 21, 2018 10 AM EDT
- July 11, 2018 10 AM EDT
- July 19, 2018 10 AM EDT



Questions

WE VALUE YOUR FEEDBACK ON THIS SESSION : [COMPLETE THE SURVEY IN YOUR EMAIL](#)



Thank you.





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