



*El placer de cautivar y crear nuevos mercados*

# **Tome Mejores Decisiones sobre sus Inversiones en TI Alineándose a las Prioridades Estratégicas**

Guadalupe Torres



# Agenda

- Tendencias y retos en la administración y gestión de un portafolio de productos.
- Mejores practicas en el manejo y administración de un portafolio de productos y proyectos.
- La solución de IBM: Rational Focal Point
- Historias de Éxito
- Demo

# Los negocios del hoy

Globales



Regulaciones



Valor de las inversiones

Reducción de costos



Agilidad

Predecibles

# Los retos

**El control de la complejidad**

**Manejo de cambios**

**Soporte de aplicaciones  
mobiles**

**Lograr  
compatibilidad**

**Tomar decisiones de on-  
shore o off-shore**

**Satisfacer las  
necesidades reales  
de los clientes**

**Mejorar la administración de  
nuestro portafolio**

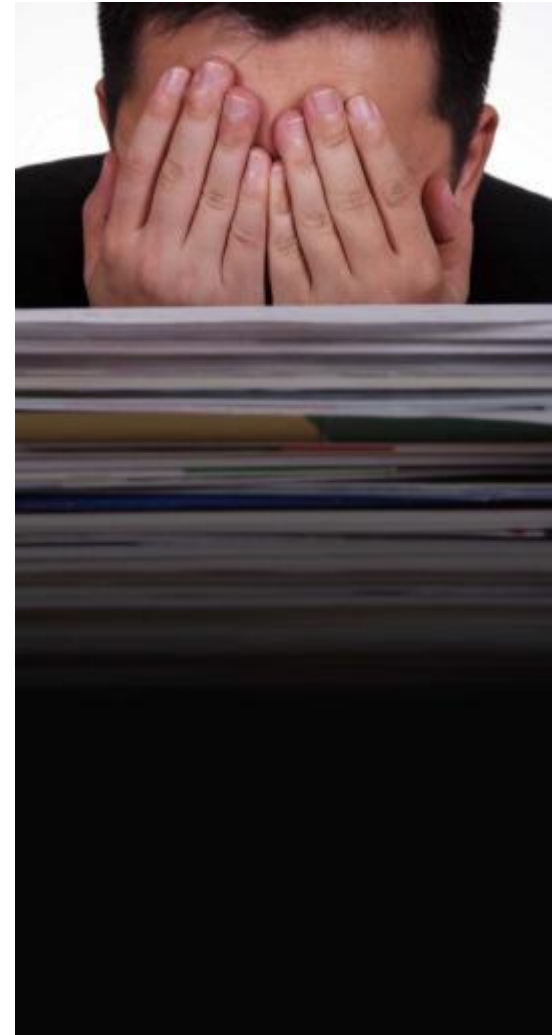
**Remover las barreras hacia la  
innovación**

**Mejorar la calidad de  
los productos  
liberados**



# 'Top five' errores en la administración del producto

1. El producto **no es estratégico** para la compañía
2. Falta de **visibilidad sobre las necesidades** reales del cliente
3. Factores de **mercado** y de la **competencia** desconocidos
4. **Posicionamiento incorrecto** de los productos
5. **Promoción, distribución y precio** inapropiados



# Las prioridades del proyecto cambian constantemente?



**Una de las principales razones del fracaso de un proyecto es debido a:**

**El cambio de prioridades**

-- The Product Portfolio Management

Benchmark Report,

Aberdeen Group

Los dueños de los proyectos requieren el inmediato comienzo y fechas comprometidas en cuando se da la aprobación?



**En ausencia de información realista los ejecutivos y dueños exigirán todo para Ayer!**

Los clientes se quejan de el largo tiempo que tienen que esperar por sus soluciones?



**En muchos casos  
somos grandiosos  
iniciando proyectos,  
porque fallamos al  
entregar?**



# Los líderes y gerentes de proyectos se pelean por los recursos?



**La mayoría de los conflictos en la administración de recursos durante la ejecución del proyecto se origina por liberar demasiados proyectos o por liberar proyectos con alcance u objetivos no claros**

Existen discrepancias entre los proyectos aprobados y el plan estratégico de negocios?



# Principales razones del fracaso



**La mayoría de los proyectos fracasan por problemas auto-ocasionados**

# 3 caminos por donde empezar

## Administración de Recursos (Resource Management)

- ✓ Pool
- ✓ Capacidad de planeación
- ✓ Perfiles de los recursos

## Administración del proyecto (Project Management)

- ✓ Calendario
- ✓ Riesgos
- ✓ Dependencias

## Administración de Portafolios (Portfolio Management)

- ✓ Proyectos
- ✓ Productos
- ✓ Aplicaciones

---

“El comenzar con la administración de portafolios provee el mas alto y rápido regreso de la inversión, así como también alivia los retos en el manejo de recursos”

# De la estrategia a la ejecución

Administración  
del portafolio  
de productos

Administración  
de los  
productos

Administración  
de los  
proyectos

**Estratégico** ←

→ **Táctico**

- Están los productos **ALINEADOS** a la estrategia?
- Se tiene el **BALANCE** adecuado entre los riesgos/beneficios?
- Los productos darán el **VALOR** esperado?

- Estamos invirtiendo en los productos **CORRECTOS**?
- Se esta invirtiendo en las áreas **CORRECTAS**?
- Los recursos disponibles son los **CORRECTOS**?

- Entender la capacidad de cumplimiento
- Llevar a cabo los proyectos de manera adecuada
- Entregar los proyectos en tiempo y dentro de presupuesto
- Mejorar la productividad

# La Solución de IBM: Focal Point

# IBM Rational Focal Point

Entrega de productos **Correctos**, al mercado **Correcto** y en el tiempo **Correcto**

Deliver the **Right Products**, for the **Right market**, at the **Right time**

## 🔑 Captura de ideas automatizada

- o Escuchando a los clientes de nuevas e innovativas ideas.
- o Automatización de actividades tácticas como la captura de ideas, proveyendo consistencia a la evaluación de las mismas así como el proceso de aprobación.

## 🔑 Selección basada en valor

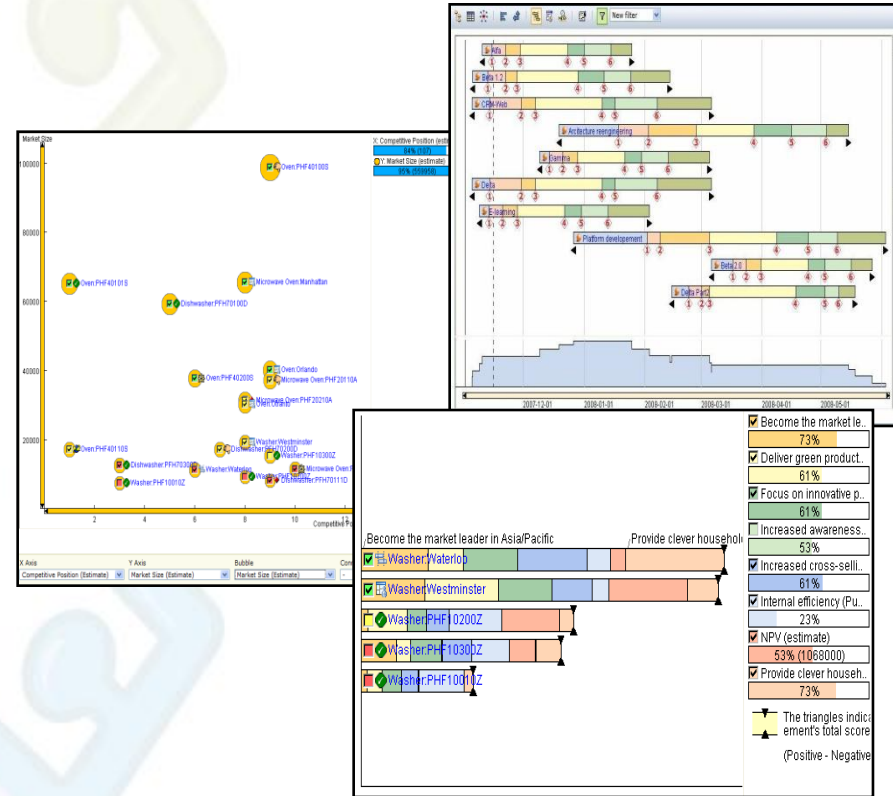
- o Mantener el foco en decisiones que den valor a los clientes y al negocio.
- o Apoyo a decisiones – Priorización y análisis equilibrado

## 🔑 Visibilidad en las inversiones a los productos

- o Administración y monitoreo en las inversiones al portafolio de productos
- o Planeación a nivel portafolio, producto, app

## 🔑 Colaboracion

- o Colaboración vía Web entre clientes y usuarios internos



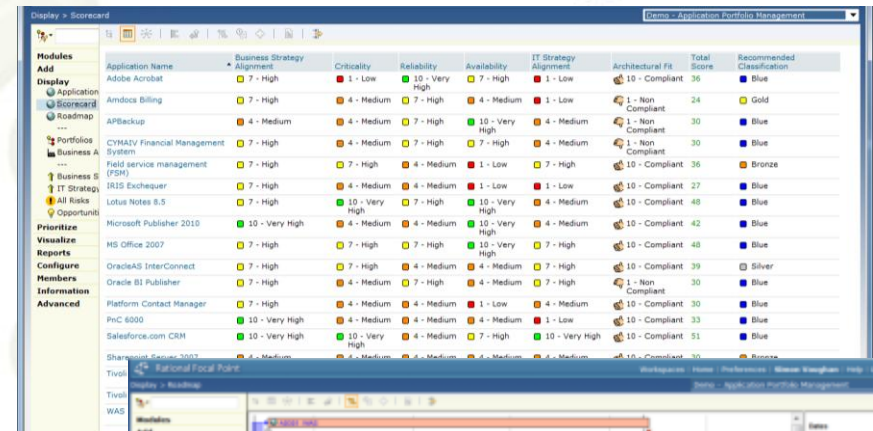
*“Rational Focal Point ayudara a descubrir el conjunto optimo de características que los clientes piden, pero a la vez balanceando estas con las necesidades del negocio, permitiendo ofrecer mejoras continuas a nuestras soluciones propuestas..” Daimler FleetBoard*

# “Que es” - Rational Focal Point

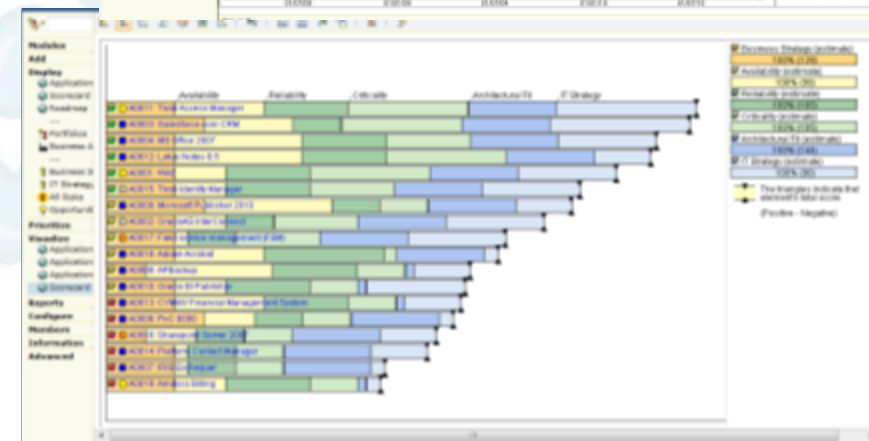
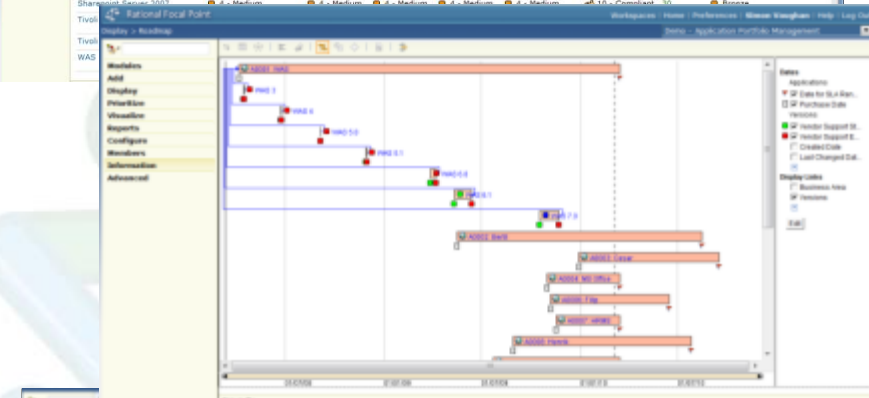
Rational Focal Point es una Web herramienta única, para la administración visual de la administración de datos que automatizara, mejorará y ayudará a:

- ▶ Administración de Productos
- ▶ Administración del portafolio de productos
- ▶ Administración de proyectos de IT
- ▶ Administración del portafolio o cartera de aplicaciones.

- Es una plataforma de colaboración donde todos los usuarios y las partes interesadas podrán ver una “verdad única”, y la empresa tiene una visibilidad clara de todo el camino.
- Incorpora un análisis integrado de toma de decisiones y apoyo para el análisis de diferentes escenarios.
- Se adapta a los procesos, métodos y flujos de trabajo existentes, y no al revés.
- Fácil de usar, 100% Web, con interfaz para ser usada en ambiente de negocios.



Application Name	Business Strategy	Criticality	Reliability	Availability	IT Strategy Alignment	Architectural Fit	Total Score	Recommended Classification
Adobe Acrobat	7 - High	1 - Low	10 - Very High	7 - High	1 - Low	10 - Compliant	36	Blue
Andocs Billing	7 - High	4 - Medium	7 - High	4 - Medium	1 - Low	1 - Non Compliant	24	Gold
APBackup	4 - Medium	4 - Medium	7 - High	10 - Very High	4 - Medium	1 - Non Compliant	30	Blue
CYRMIY Financial Management System	7 - High	4 - Medium	7 - High	7 - High	4 - Medium	1 - Non Compliant	30	Blue
Field service management (FSM)	7 - High	7 - High	4 - Medium	1 - Low	7 - High	10 - Compliant	36	Bronze
IRIS Exchequer	7 - High	4 - Medium	4 - Medium	1 - Low	1 - Low	10 - Compliant	27	Blue
Lotus Notes 8.5	7 - High	10 - Very High	7 - High	10 - Very High	4 - Medium	10 - Compliant	48	Blue
Microsoft Publisher 2010	10 - Very High	4 - Medium	4 - Medium	10 - Very High	4 - Medium	10 - Compliant	42	Blue
MS Office 2007	7 - High	7 - High	7 - High	10 - Very High	7 - High	10 - Compliant	48	Blue
OracleAS InterConnect	7 - High	7 - High	4 - Medium	4 - Medium	7 - High	10 - Compliant	39	Silver
Oracle BI Publisher	7 - High	4 - Medium	7 - High	4 - Medium	7 - High	1 - Non Compliant	30	Blue
Platform Contact Manager	7 - High	4 - Medium	4 - Medium	1 - Low	4 - Medium	10 - Compliant	30	Blue
PnC 6000	10 - Very High	4 - Medium	4 - Medium	4 - Medium	1 - Low	10 - Compliant	33	Blue
Salesforce.com CRM	10 - Very High	4 - Medium	4 - Medium	7 - High	10 - Very High	10 - Compliant	51	Blue
Sharepoint Server 2007	4 - Medium	4 - Medium	4 - Medium	4 - Medium	4 - Medium	10 - Compliant	30	Bronze





# Que tipo de información puede manejarse con Rational Focal Point™?

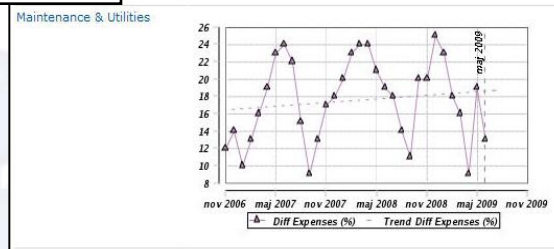
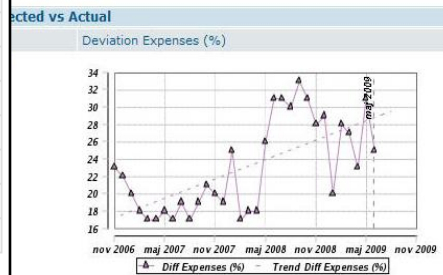
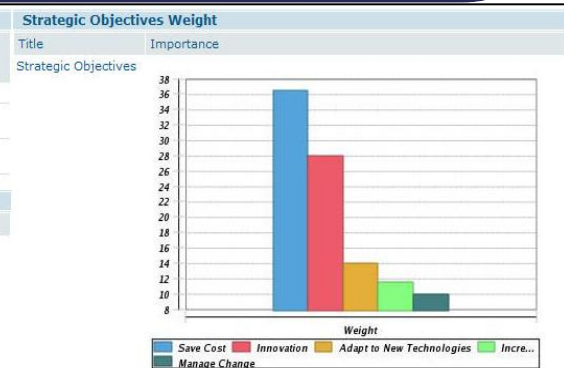
- Tendencias de mercados
  - **Peticiones de clientes**
  - Detalles de ingeniería
  - Business Intelligence
  - Análisis competitivo
  - Planes de lanzamiento de mercado
  - Requerimientos
  - Encuestas
  - **Win / Loss Data**
  - Voz del cliente
  - Análisis de FODA
  - **Documentos de especificación de productos**
- Casos de Uso
  - Estándares/Regulaciones
  - Manuales para usuario final
  - **Detalle de estimación de costos**
  - **Métricas de Performance**
  - Casos de prueba
  - Documentos de requerimientos de marketing (MRDs)
  - Documentos de requerimientos de productos (PRDs)
  - Roadmaps / Releases
  - Documentos de cumplimiento
  - ...

# Visibilidad de todos los productos

- Visibilidad de la cartera completa de productos, análisis específico de una línea de productos, o detalles de un producto en particular.
- Se pueden agregar productos competidores para facilitar el análisis y la comparación entre ellos

Status	Quantity	Share
<b>NEW</b> Product proposal	3	4.3%
Allocated to investigator	4	5.8%
Under investigation	3	4.3%
Ready for prioritization	4	5.8%
Approved for business case cre...	3	4.3%
Finalize business case	7	10.1%
Ready for review	8	11.6%
Approved for detailed planning	4	5.8%
Ready for funding decision	4	5.8%
Approved for development	4	5.8%
Under development	3	4.3%
Delivered	13	18.8%
Approved to be replaced	3	4.3%
Approved to be retired	3	4.3%
Taken off market	0	0.0%
End of maintenance	0	0.0%
Retired	2	2.9%
To be clarified	1	1.4%
Rejected	0	0.0%
-	0	0.0%
<b>Sum: 69</b>		

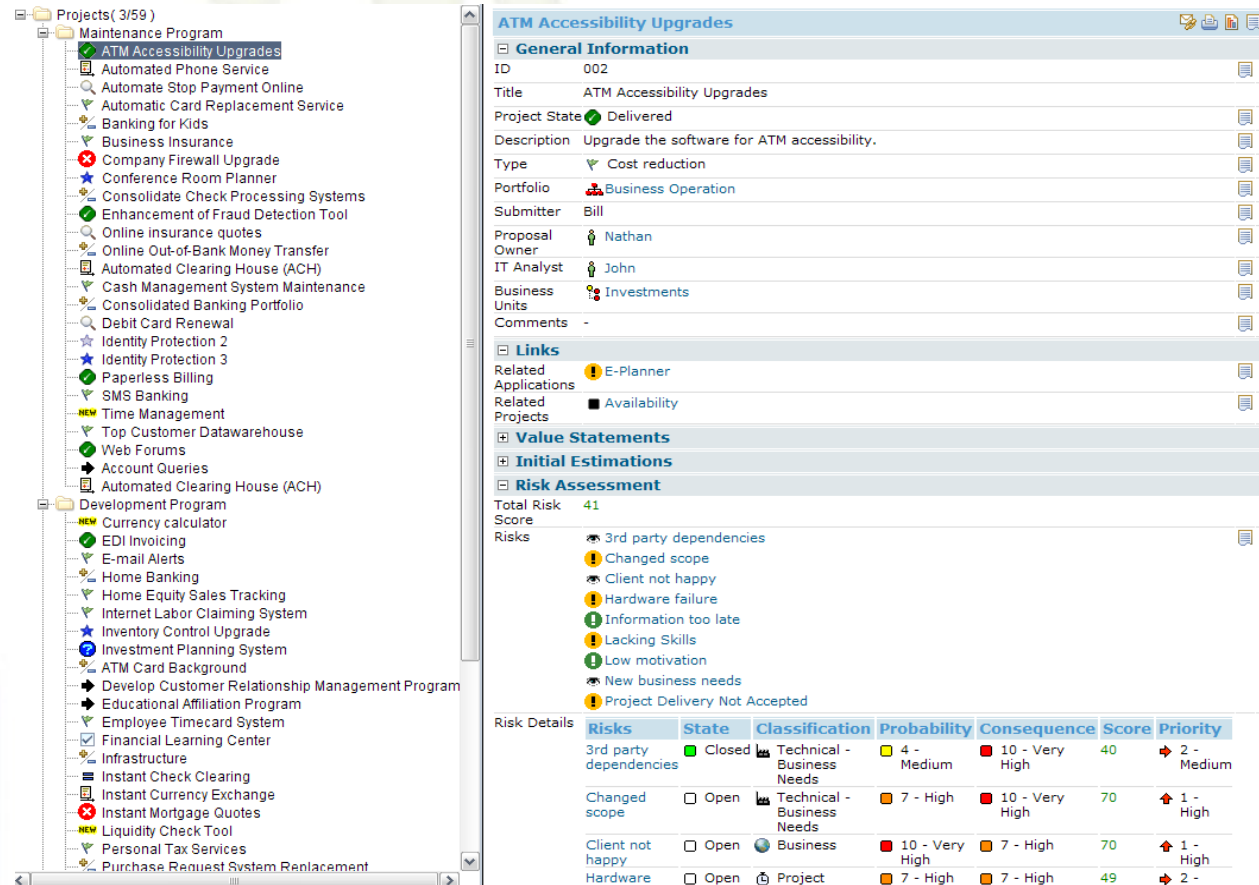
Portfolio Expected Benefits	Portfolio Actual Benefits	Portfolio Expected Expenses	Portfolio Actual Expenses	Total NPV	Portfolio Risk Score
16 875 000	426 000	16 875 000	1 997 000	\$1 759 000	21
16 316 000	2 254 000	16 316 000	2 659 000	\$1 417 000	21
4 433 300	130 000	4 433 300	144 000	\$634 000	26



Project State	Quantity	Share
<b>NEW</b> Proposed	7	8,6%
Accepted	22	27,2%
Assessed	3	3,7%
Finalize business case	7	8,6%
Ready for prio	7	8,6%
Approved for development	5	6,2%
Delivered	3	3,7%
Business Requirement	7	8,6%
Backlog	6	7,4%
Duplicate	6	7,4%
To be clarified	2	2,5%
Rejected	6	7,4%
<b>Sum: 81</b>		

# Visibilidad de Proyectos

- Mostrar proyectos
- Y sus relaciones y dependencias con:
  - Aplicaciones
  - Necesidades de negocio
  - Riesgos
  - Otros proyectos
  - Etc



The screenshot displays a project management application. On the left, a tree view shows a hierarchy of projects under 'Projects (3/59)'. The 'Maintenance Program' is expanded, showing 'ATM Accessibility Upgrades' as the selected project. Below it, various other projects are listed, including 'Automated Phone Service', 'Automate Stop Payment Online', and 'Automated Card Replacement Service'.

The main pane shows the details for 'ATM Accessibility Upgrades'. The 'General Information' section includes:
 

- ID: 002
- Title: ATM Accessibility Upgrades
- Project State: Delivered
- Description: Upgrade the software for ATM accessibility.
- Type: Cost reduction
- Portfolio: Business Operation
- Submitter: Bill
- Proposal Owner: Nathan
- IT Analyst: John
- Business Units: Investments

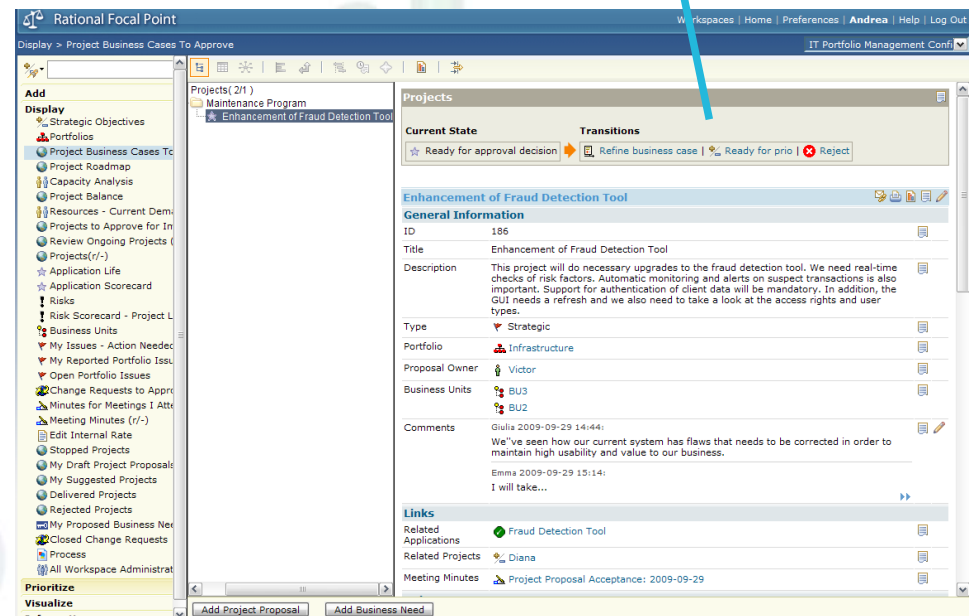
The 'Risk Assessment' section shows a 'Total Risk Score' of 41. A list of risks is provided, including '3rd party dependencies', 'Changed scope', 'Client not happy', 'Hardware failure', 'Information too late', 'Lacking Skills', 'Low motivation', 'New business needs', and 'Project Delivery Not Accepted'.

A 'Risk Details' table is shown at the bottom, listing specific risks with their state, classification, probability, consequence, score, and priority.

Risks	State	Classification	Probability	Consequence	Score	Priority
3rd party dependencies	Closed	Technical - Business Needs	4 - Medium	10 - Very High	40	2 - Medium
Changed scope	Open	Technical - Business Needs	7 - High	10 - Very High	70	1 - High
Client not happy	Open	Business	10 - Very High	7 - High	70	1 - High
Hardware	Open	Project	7 - High	7 - High	49	2 - ..

# Transferencia de Responsabilidades

- Asegurando el cumplimiento del proceso
- Colaboración entre los diferentes roles del proyecto
- Control de derechos de acceso para controlar quién puede hacer qué y cuándo
- Puntos de aprobación
- Ejemplo: Aprobación del caso de negocios para inicio del proyecto



# Alineación del portafolio – Viabilidad del proyecto

- Evaluación de riesgos
  - Impacto y probabilidad
  - Prioridad
  - Clasificación
  - Estrategia de mitigación
- Parte financiera
  - Beneficios y costos presupuestados
  - NPV, ROI, IRR
- Alcance de acuerdo a las necesidades de negocio
  - Costo estimado
  - Selección de las necesidades de negocio prioritarias sobre la aplicación que el proyecto persigue.

### Value Statements

Primary Strategic Objective: ↑ Adapt to New Technologies

Project Objectives: Update the fraud detection system to latest technologies available.

Business Value: New technologies have occurred over the years. We need to stay up to date in order to prevent frauds. That will in turn save cost for us.

Problem: We have on few occasions missed to detect some frauds that could easily have been detected if we had the new technology. This has caused us to lose approximately \$1500 000.

Solution: With the upgraded fraud detection tool that the project will provide, we will close up the holes and ensure that we don't lose money on the new type of frauds we've seen previously.

---

### Initial Estimations

#### Risk Assessment

Total Risk Score: 34

Risks:

- ! Lacking skills
- ! Missing Software
- ! Security

Risk Details	Risks	State	Classification	Probability	Consequence	Score	Priority
	Lacking skills	<input type="checkbox"/> Open	Technology	<span style="color: red;">!</span> 10 - Very High	<span style="color: orange;">!</span> 7 - High	70	<span style="color: red;">↑</span> 1 - High
	Missing Software	<input type="checkbox"/> Open	Technology	<span style="color: yellow;">!</span> 4 - Medium	<span style="color: orange;">!</span> 7 - High	28	<span style="color: red;">↑</span> 1 - High
	Security	<input type="checkbox"/> Open	-Select-	<span style="color: green;">!</span> 1 - Low	<span style="color: yellow;">!</span> 4 - Medium	4	<span style="color: red;">↑</span> 1 - High

---

### Financial Information

NPV: \$317,132

IRR: 14 %

ROI: 109 %

Financials

Sheets	Time Span	Time Interval
Budget	2009 Q1 - 2014	
Planned	2009 Q1 - 2014	
Actual	2009 Q1 - 2014	

Comparing (difference): Financials > Planned and Budget

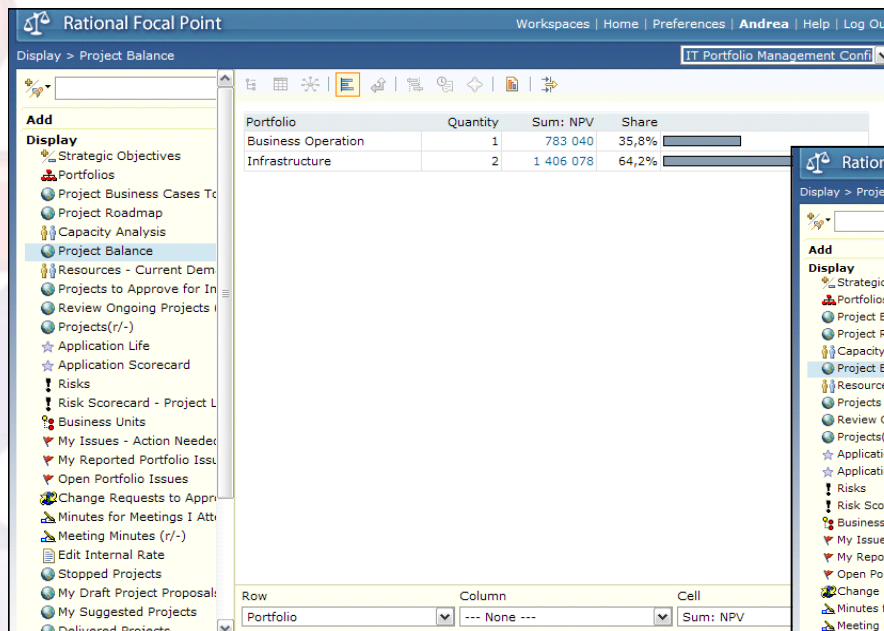
		A	B	C	D	E	Q
		2009 Q1	2009 Q1	2009 Q1	2009 Q1	2009 Q2	2009 Q2
<b>Enhancement of Fraud Detection Tool</b>							
Expenditures	1	465000	450000	15000		355000	50000
Capital Expenditures	2	295000	275000	20000		100000	10000
Development	3	260000	250000	10000		40000	5000
Investments	4	35000	25000	10000		60000	5000
Operational Expenditures	5	170000	175000	-5000		255000	40000
Resources	6	130000	150000	-20000.0		200000	25000
Supplies	7	15000	20000	-5000.0		10000	12000
R&D	8	25000	5000	20000		45000	3000
Benefits	9	0	0	0		310000	36000
Cost Savings	10					310000	36000
Cost Avoidance	11						
New Income	12						
Net Cash Flow	13	-465000	-450000	-15000.0		-45000	-14000

Total Estimated Man Hours: 3,050 hours

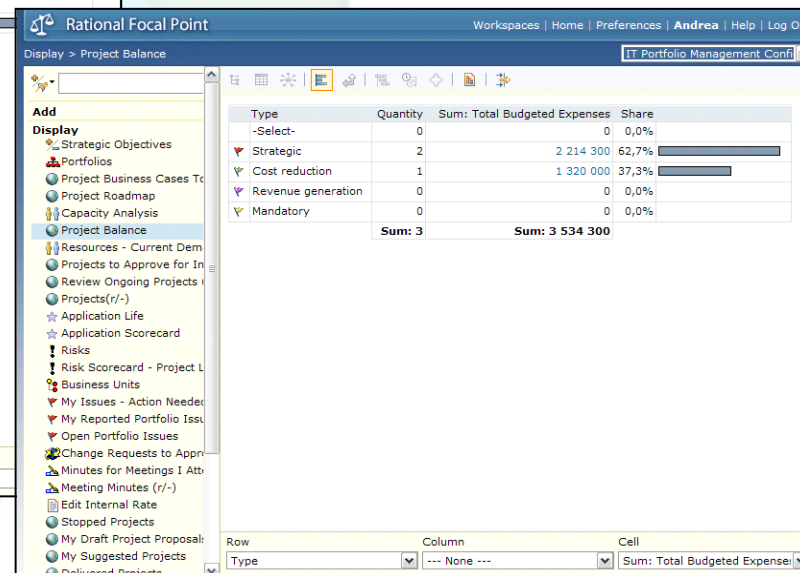
# Alineación del portafolio - Equilibrio del proyecto

- Analiza el impacto de los proyectos en los objetivos estratégicos, la cartera o portafolio, el tipo, etc

Primary Strategic Objective	Quantity	Sum: NPV	Share
Adapt to New Technologies	1	1 206 121	39,0%
Innovation	1	1 106 225	35,7%
Manage Change	1	783 040	25,3%
<b>Sum: 3</b>		<b>Sum: 3 095 386</b>	



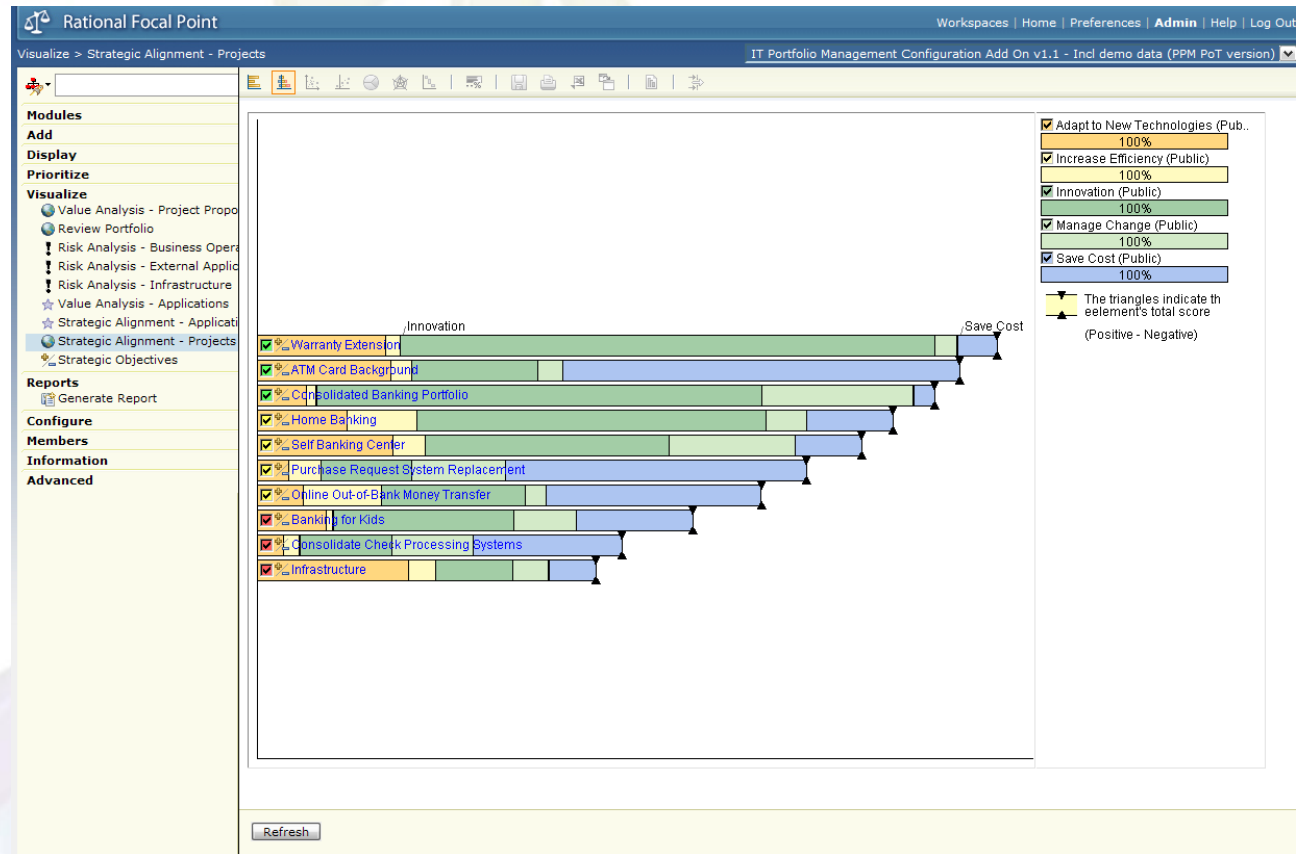
Portfolio	Quantity	Sum: NPV	Share
Business Operation	1	783 040	35,8%
Infrastructure	2	1 406 078	64,2%



Type	Quantity	Sum: Total Budgeted Expenses	Share
-Select-	0	0	0,0%
Strategic	2	2 214 300	62,7%
Cost reduction	1	1 320 000	37,3%
Revenue generation	0	0	0,0%
Mandatory	0	0	0,0%
<b>Sum: 3</b>		<b>Sum: 3 534 300</b>	

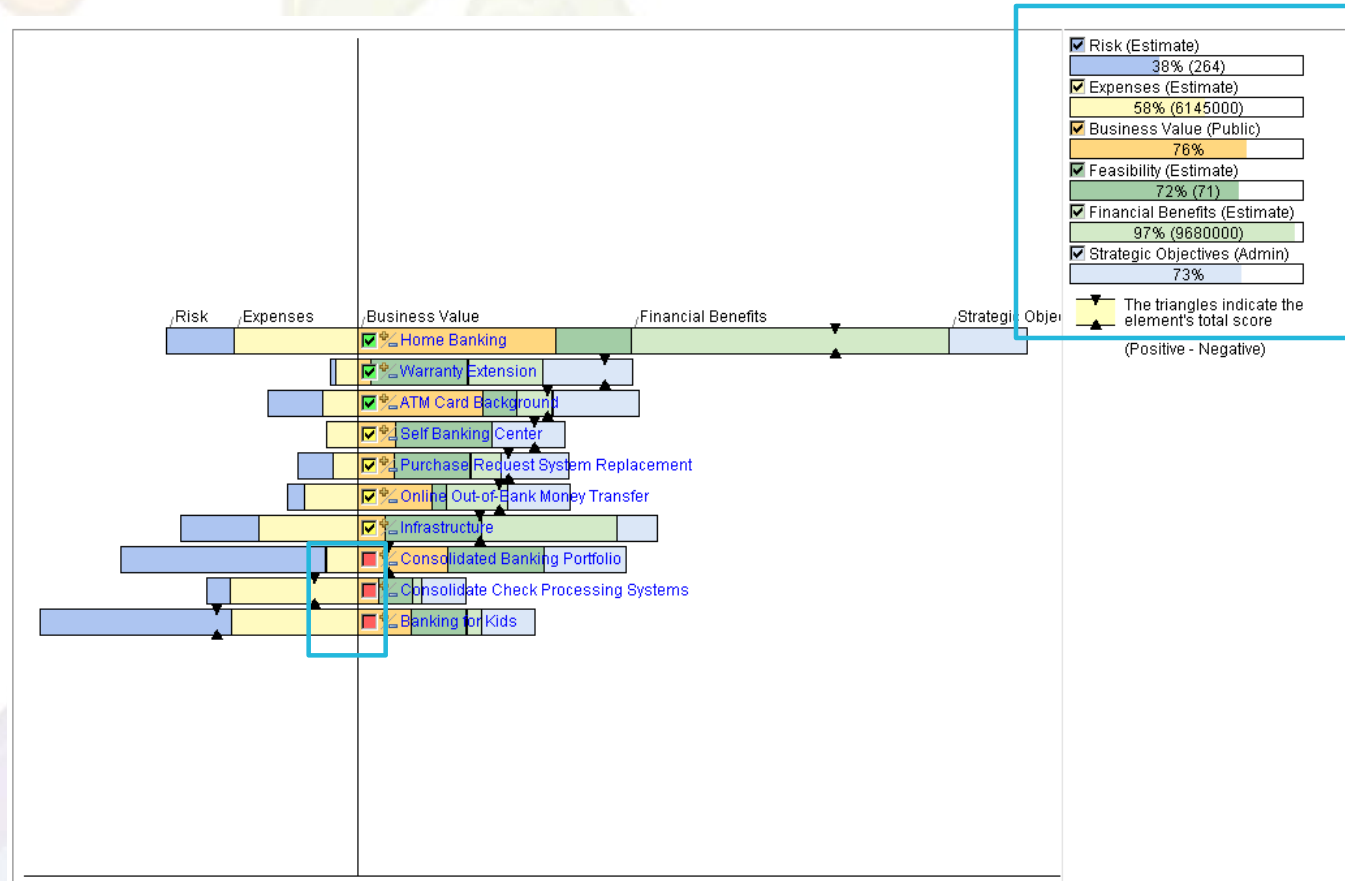
# Alineación del portafolio – Alineando los proyectos con la estrategia

- Compara las propuestas de proyecto contra los objetivos estratégicos.
- El resultado es una lista ordenada de proyectos de acuerdo a la estrategia
- Los primeros de la lista – serán los que mas se alinean a la estrategia



# Aumentar el valor de la cartera - Elegir a los ganadores

- Anular los proyectos del fondo.
- Reducción del riesgo y gastos
- Mantener el valor, la viabilidad, los beneficios y la alineación





# Monitoreo en el progreso durante la implementación de los proyectos

- Revisión de los proyectos en curso.
- Información general de:
  - Negocios
  - Financiero
  - Calendarios
- Semáforos

Title	Type	Portfolio	Primary Strategic Objective	Total Risk Score	NPV	Completeness (%)	Planned Expenses Overrun
Automatic Card Replacement Service	Strategic	Infrastructure	Manage Change	20	\$15 064	45 %	
Business Insurance	Revenue generation	Infrastructure	Save Cost	70	\$0	45 %	
Cash Management System Maintenance	Cost reduction	Infrastructure	Save Cost	22	\$8 733	100 %	
E-mail Alerts	Cost reduction	External Applications	Increase Efficiency	16	\$122 076	60 %	
Employee Timecard System	Cost reduction	Infrastructure	Innovation	44	\$3 637 919	3 %	
Home Equity Sales Tracking	Strategic	Business Operation	Save Cost	4	\$2 749 791	80 %	
Internet Labor Claiming System	Strategic	Business Operation	Adapt to New Technologies	40	\$3 575 412	2 %	
No Fee Savings Accounts	Strategic	Infrastructure	Manage Change	36	\$800 089	55 %	
Online Bill Payment	Cost reduction	Business Operation	Innovation	55	\$-44 261	0 %	
Online Shopping Security	Revenue generation	External Applications	Adapt to New Technologies	43	\$680 104	10 %	
Personal Tax Services	Strategic	External Applications	Innovation	0	\$2 572 630	75 %	
Retail Banking Upgrade	Revenue generation	External Applications	Increase Efficiency	28	\$1 466 657	15 %	
Rewards Program	Strategic	External Applications	Innovation	22	\$7 021 895	75 %	
SMS Banking	Revenue generation	External Applications	Manage Change	37	\$204 064	24 %	
ehouse	Revenue generation	External Applications	Save Cost	22	\$584 440	55 %	

Planned Expenses Overrun	
Used Budget vs Completeness %	
Number of Open High Priority Issues	
Project On Schedule	
Project Progress on Target	
Project Scope Delay	

# Monitoreo de la salud del portafolio

**Welcome to IT Portfolio Management in Focal Point**

IBM IBMers value...

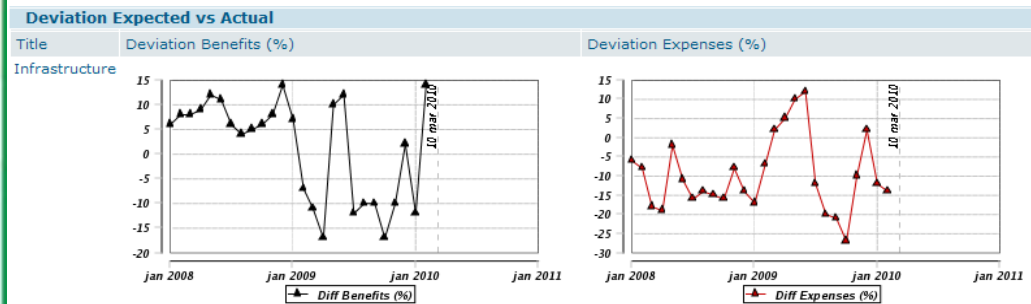
- Dedication to every client's success.
- Innovation that matters - for our company and for the world.
- Trust and personal responsibility in all relationships.

**Portfolio Financials**

Title	Accumulated Investments	Total NPV - Ongoing Projects	Projects - Budgeted Benefits	Projects - Planned Benefits	Projects - Actual Benefits	Projects - Budgeted Expenses	Projects - Planned Expenses	Projects - Actual Expenses
Infrastructure	\$14 416 254	\$4 461 805	\$26 072 480	\$21 820 460	\$474 850	\$15 077 920	\$18 598 725	\$7 526 275
Business Operation	\$38 378 691	\$6 280 942	\$22 518 000	\$18 768 000	\$2 740 000	\$11 966 900	\$12 016 500	\$5 248 000
External Applications	\$9 641 787	\$12 651 866	\$32 070 520	\$32 938 655	\$8 212 625	\$13 624 500	\$13 969 000	\$12 361 713

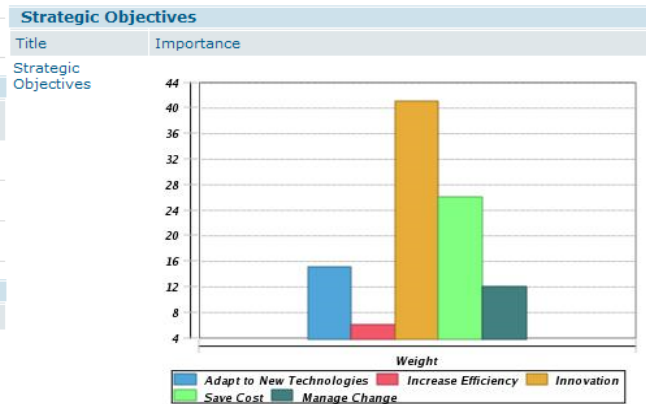
**Portfolio Health**

Title	Project Expenses Overrun	Red Lights in Ongoing Projects	Open High Priority Issues	Portfolio Level Risk Score	Project Level Risk Score
Infrastructure					
Business Operation					
External Applications					



**Projects with Overrun Planned Expenses**

Title	Project State	Portfolio	Implementation State	Planned Expenses Overrun
Develop Customer Relationship Management Program	On hold	Infrastructure	Stopped	
Rewards Program	Approved for implementation	External Applications	In Progress	
No Fee Savings Accounts	Approved for implementation	Infrastructure	In progress	



**Size of Ongoing Projects (Total NPV) for Strategic Objectives**

Title	Total NPV - Ongoing Projects
Adapt to New Technologies	4 255 516
Increase Efficiency	1 588 733
Innovation	13 188 183
Manage Change	1 019 217
Save Cost	3 342 964

**Open High Priority Portfolio Risks**

Title	Portfolios	Approach	Probability	Consequence
Budget overrun	Infrastructure	Mitigate	10 - Very High	7 - High
Errors from .....	Business	Mitigate	10 - Very High	7 - High

# Con focal point se tienen las siguientes ventajas



- **Completamente en Web**
- Extremadamente configurable y flexible
- Apoyo al flujo de trabajo
- Acceso de acuerdo a roles
- Historia completa, lista para auditorias
- Posibilidad de integraciones
- **Importación y exportación de Excel**
- Priorización
- Visualizaciones
- Cálculos incorporados
- Capacidades de filtrado
- Control de versiones y baseline
- **Reportes (Excel, PDF, RTF)**
- Pagina de inicio / tableros de control
- **Importes desde Word**

- Vistas y filtrados
- Base o cuadrícula de tiempo
- Analizador de Inversión
- Trazabilidad
- **Gráficos de Tendencia**
- **Gráficos de Gantt**
- **Notificaciones**
- Importación de correo
- Vistas Estadísticas
- Reléase planning
- Proceso de revisión
- **Plantación Financiera**
- Alta disponibilidad – redundancia de servidores
- Una entrada única (single sign-on)

## Algunas historias de éxito

## La necesidad de negocio y el desafío:

- ❖ Después de la recesión económica mundial del 2008, una importante institución financiera de Canadá decidió que era más importante que nunca mejorar su eficiencia y agilidad, junto con su capacidad para analizar datos y hacer pronósticos precisos.
- ❖ Para lograr estos objetivos, el banco lo primero necesitaba era una visión global de su ruta tecnológica.
- ❖ Se dio cuenta de que aunque su objetivo principal debería permanecer en la política monetaria, el análisis financiero y los sistemas financieros, se debería poner la misma atención en su entorno de TI para mejorar la alineación entre la TI y las necesidades del negocio.
- ❖ El banco puso en marcha una iniciativa estratégica para la administración de su cartera de aplicaciones.

## La Solución implementada:

- ❖ Esta importante institución financiera en Canadá decidió implementar IBM Rational Focal Point para tener una imagen completa de la ruta de tecnología existente. Así mismo integró focal point al IBM Rational Software Architect.
- ❖ Esta implementación se hizo en poco tiempo. El banco comenzó el proyecto en diciembre de 2010. En unas semanas se importaron los datos existentes a focal point.
- ❖ En febrero, el equipo de administración del portafolio tenía resultados tangibles para las líneas de negocio que se usarían en su planificación anual.
- ❖ El banco se dio cuenta que tenía alrededor de 600 aplicaciones soportadas, incluyendo servicios de tecnología, así como miles de aplicaciones no soportadas. Con esta identificación de aplicaciones, el banco decidió mas estratégicamente que aplicaciones continuar soportando y cuales descartar.

## Los resultados:

- ❖ El banco redujo sus niveles de servicio dramáticamente incrementando la productividad de su personal del TI. La solución también permitió a este banco identificar las aplicaciones redundantes y retirarlas, reduciendo el número de aplicaciones soportadas a 147 aplicaciones.
- ❖ El IBM Rational Focal Point se convirtió en el repositorio oficial de datos (anteriormente dispersos). Centralizando la información.
- ❖ La identificación de sus aplicaciones existentes ayudó al banco a mejorar la calidad de las aplicaciones que mantienen. Por ejemplo, el banco tenía aproximadamente 10 aplicaciones CRM que se ejecutaban por separado y que requieran soporte individual. Después de descubrir la redundancia, el banco les consolidó en una sola herramienta incrementando capacidades y mejorando la calidad.

# Bebiendo nuestra propia champagne

- ❖ IBM como cualquier otra compañía tiene multiples proyectos internos, y quería mejorar la eficiencia y la calidad en el mantenimiento interno de desarrollo de aplicaciones internas. A través de estas mejoras, la compañía trataba de aumentar la satisfacción de los usuarios internos y la productividad.



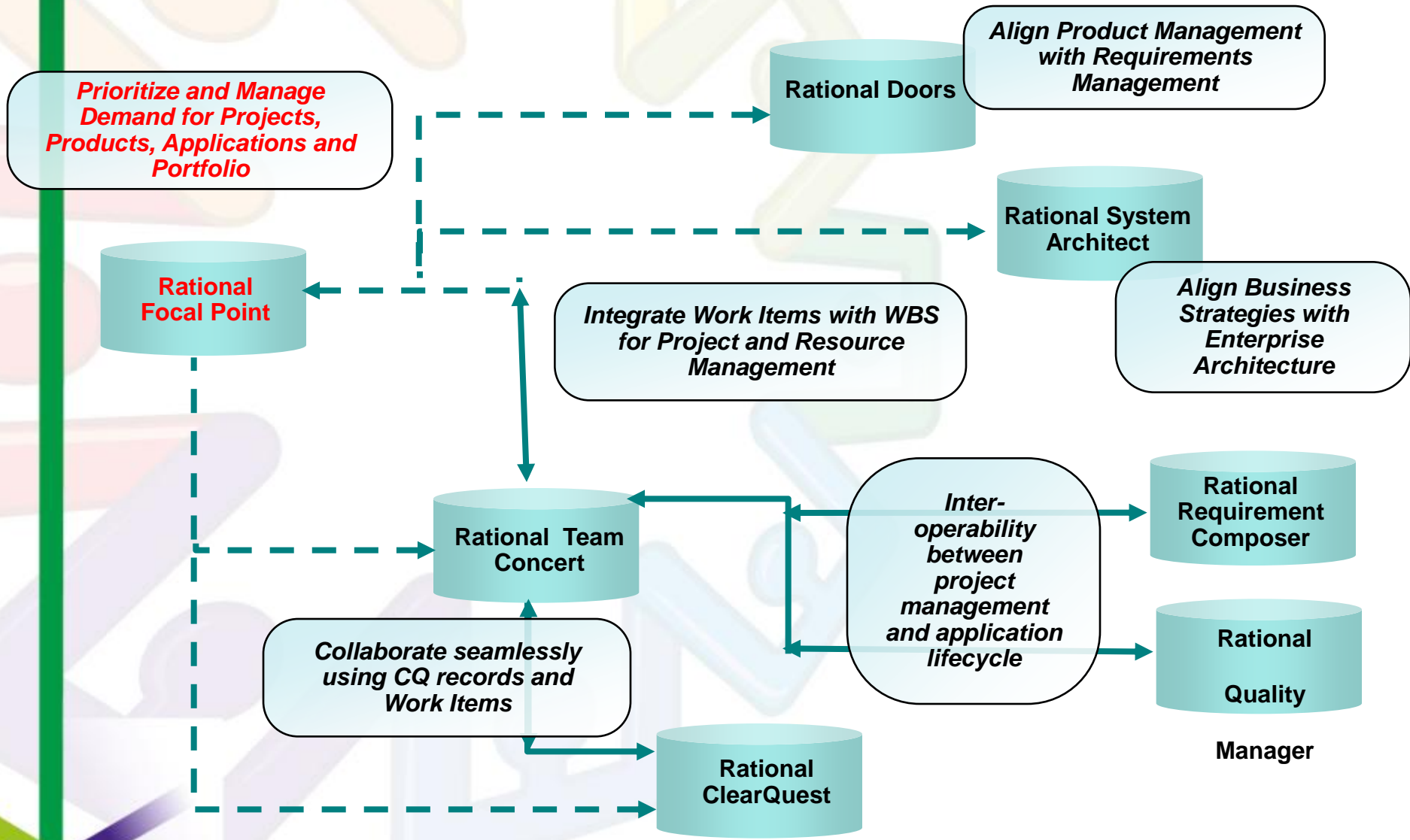
# Bebiendo nuestra propia champagne

- ❖ La implementación del IBM Rational Focal Point dentro del área encargada de implementar aplicaciones y proyectos internos así como numerosas iniciativas de la empresa está siendo usada internamente, IBM espera ahorrar 30 millones de dólares durante los próximos cinco años. La compañía también utiliza la solución para:
  - Mejorar la satisfacción y productividad del usuario
  - Acelerar el tiempo de de requerimientos de cambios solicitados por el usuario
  - Disminuir los costos de IT interno, desarrollo de aplicaciones y mantenimiento
  - Proporcionar oportunidades de desarrollo de habilidades mediante la exposición del personal a un mayor número de soluciones
  - Generar una mayor información y de mejor calidad para los desarrolladores, impulsando mejoras en los productos y una mayor satisfacción de los cliente y usuarios internos

# DEMO

## Backup charts

# Focal Point drives many solutions



# Import Legacy Projects

ID	Title	Project State	Description	Type	Portfolio	Target Due	Total Project Cost	Business Feasibility	Technical Feasibility	Time of Project
002	ATM Accessibility Upgrades	Delivered	Upgrade the software for ATM card reduction	Business Operation	Bill	10/2000	\$500,000	10 - Excellent	Manageable	2011 March
003	ATM Card Background	Ready for prio	Background check on ATM card reduction	Business Operation	Peter	10/2000	\$2,000,000	10 - Less suitable	Difficult	2012
004	Automated Clearing House (ACH)	Finalize business case	Automate how we clear checks	Cost reduction	External Applications	Bill	< \$100,000	10 - Excellent	Manageable	2011
005	Automated Phone Service	Finalize business case	Review selected data for cost reduction	Infrastructure	Victor	0	< \$100,000	10 - Excellent	Manageable	2011
006	Automate Stop Payment Online	Under investigation	Online Maintenance for the check reduction	External Applications	Bill	0	< \$100,000	10 - Excellent	Manageable	2011
007	Automatic Card Replacement Service	Approved for implementation	Card replacement requests on the Strategic	Infrastructure	Victor	10/2000	\$2,000,000	10 - Excellent	Difficult	2011
008	Banking for Kids	Ready for prio	Insurance request option for new Revenue generation	Business Operation	Emma	18/2000	\$2,000,000	10 - Excellent	Manageable	18/2000
009	Business Insurance	Approved for implementation	Upgrade the way we handle the cost reduction	Infrastructure	Isaac	18/2000	\$2,000,000	10 - Excellent	Difficult	18/2000
010	Cash Management System Maintenance	Approved for implementation	Upgrade the way we handle the cost reduction	Infrastructure	Isaac	18/2000	\$2,000,000	10 - Excellent	Manageable	18/2000
011	Company Antivirus Upgrade	Stopped	Antivirus 3rd party system for App Revenue generation	Infrastructure	Emma	0	> \$2,000,000	10 - Excellent	Manageable	7/2000
012	Company Firewall Upgrade	Rejected	Firewall upgrade	Infrastructure	Pamela	0	-Select-	-Select-	-Select-	7/2000
013	Conference Room Planner	Ready for implementation approval	Online conference room planner	Cost reduction	Infrastructure	Peter	\$500,000	\$2,000,000	10 - Excellent	2011
014	Consolidate Check Processing Systems	Ready for prio	Take the multiple check processing	Business Operation	Amir	13/2000	\$2,000,000	10 - Less suitable	Difficult	2011
015	Consolidated Banking Portfolio	Ready for prio	Combine the multiple systems in Strategic	Business Operation	Miguel	4	\$500,000	\$2,000,000	10 - Reasonable	19/2000
016	Currency calculator	Proposed	Currency calculation online via the Revenue generation	External Applications	Giulia	0	-Select-	-Select-	-Select-	19/2000
017	Currency calculator	Proposed	Combine the multiple systems in Strategic	Business Operation	Miguel	4	\$500,000	\$2,000,000	10 - Reasonable	19/2000
018	Debit Card Renewal	Under investigation	Provide online system where you Strategic	Infrastructure	Emma	0	-Select-	-Select-	-Select-	19/2000
019	Debit Card Renewal	Under investigation	Online program where customers Revenue generation	Infrastructure	Amir	22/2000	\$2,000,000	10 - Excellent	Manageable	19/2000
020	Develop Customer Relationship Management Program	On hold	Basic internal learning system on Cost reduction	Infrastructure	Bill	30/2000	\$2,000,000	10 - Excellent	Difficult	2010 October
021	EDI Invoicing	Delivered	Provide EDI invoicing to third party Cost reduction	Business Operation	Bill	18/2000	\$2,000,000	10 - Excellent	Difficult	2012 January
022	Educational Affiliation Program	On hold	Integrate to Lotus Notes for am Cost reduction	External Applications	Bill	20/2000	\$2,000,000	10 - Excellent	Manageable	2012 February
023	E-mail Alerts	Approved for implementation	Work schedule system for am Cost reduction	Infrastructure	Bill	17/2000	\$2,000,000	10 - Excellent	Manageable	2011 March
024	Employee Timecard	Approved for implementation	Weekly time card tracking system Cost reduction	Infrastructure	Bill	18/2000	\$500,000	10 - Excellent	Manageable	2011 August
025	Employee Timecard	Approved for implementation	Weekly time card tracking system Cost reduction	Infrastructure	Bill	18/2000	\$500,000	10 - Excellent	Manageable	2011 August
026	Financial Learning	Accepted	Basic internal learning system on Cost reduction	Infrastructure	Bill	30/2000	\$2,000,000	10 - Excellent	Difficult	2011 August
027	Financial Learning	Accepted	Basic internal learning system on Cost reduction	Infrastructure	Bill	30/2000	\$2,000,000	10 - Excellent	Difficult	2011 August
028	Home Equity Sales	Approved for implementation	Tracking system to monitor from Strategic	Business Operation	Pamela	14/2000	\$2,000,000	10 - Excellent	Manageable	7/2000
029	Home Equity Sales	Approved for implementation	Tracking system to monitor from Strategic	Business Operation	Pamela	14/2000	\$2,000,000	10 - Excellent	Manageable	7/2000
030	Identity Protection	Ready for implementation approval	Identity Protection 2	External Applications	Pamela	10/2000	\$2,000,000	10 - Excellent	Difficult	4/2000
031	Identity Protection	Ready for implementation approval	Identity Protection 2	External Applications	Pamela	10/2000	\$2,000,000	10 - Excellent	Difficult	4/2000
032	Infrastructure	Ready for prio	Infrastructure upgrade to UPS at Cost reduction	Business Operation	Victor	24/2000	\$500,000	10 - Excellent	Difficult	2011
033	Interest Check	Ready for prio	Check clearing capability for the Revenue generation	Business Operation	Bill	24/2000	\$500,000	10 - Excellent	Difficult	2011
034	Interest Check	Ready for prio	Check clearing capability for the Revenue generation	Business Operation	Bill	24/2000	\$500,000	10 - Excellent	Difficult	2011
035	Interest Check	Ready for prio	Check clearing capability for the Revenue generation	Business Operation	Bill	24/2000	\$500,000	10 - Excellent	Difficult	2011
036	Interest Check	Ready for prio	Check clearing capability for the Revenue generation	Business Operation	Bill	24/2000	\$500,000	10 - Excellent	Difficult	2011
037	Interest Check	Ready for prio	Check clearing capability for the Revenue generation	Business Operation	Bill	24/2000	\$500,000	10 - Excellent	Difficult	2011
038	Interest Check	Ready for prio	Check clearing capability for the Revenue generation	Business Operation	Bill	24/2000	\$500,000	10 - Excellent	Difficult	2011
039	Interest Check	Ready for prio	Check clearing capability for the Revenue generation	Business Operation	Bill	24/2000	\$500,000	10 - Excellent	Difficult	2011
040	Interest Check	Ready for prio	Check clearing capability for the Revenue generation	Business Operation	Bill	24/2000	\$500,000	10 - Excellent	Difficult	2011
041	Interest Check	Ready for prio	Check clearing capability for the Revenue generation	Business Operation	Bill	24/2000	\$500,000	10 - Excellent	Difficult	2011
042	Interest Check	Ready for prio	Check clearing capability for the Revenue generation	Business Operation	Bill	24/2000	\$500,000	10 - Excellent	Difficult	2011
043	Interest Check	Ready for prio	Check clearing capability for the Revenue generation	Business Operation	Bill	24/2000	\$500,000	10 - Excellent	Difficult	2011
044	Interest Check	Ready for prio	Check clearing capability for the Revenue generation	Business Operation	Bill	24/2000	\$500,000	10 - Excellent	Difficult	2011
045	Interest Check	Ready for prio	Check clearing capability for the Revenue generation	Business Operation	Bill	24/2000	\$500,000	10 - Excellent	Difficult	2011
046	Interest Check	Ready for prio	Check clearing capability for the Revenue generation	Business Operation	Bill	24/2000	\$500,000	10 - Excellent	Difficult	2011
047	Interest Check	Ready for prio	Check clearing capability for the Revenue generation	Business Operation	Bill	24/2000	\$500,000	10 - Excellent	Difficult	2011
048	Interest Check	Ready for prio	Check clearing capability for the Revenue generation	Business Operation	Bill	24/2000	\$500,000	10 - Excellent	Difficult	2011
049	Interest Check	Ready for prio	Check clearing capability for the Revenue generation	Business Operation	Bill	24/2000	\$500,000	10 - Excellent	Difficult	2011
050	Interest Check	Ready for prio	Check clearing capability for the Revenue generation	Business Operation	Bill	24/2000	\$500,000	10 - Excellent	Difficult	2011

Rational Focal Point

Workspaces | Home | Preferences | Admin | Help | Log Out

IT Portfolio Management Configuration Add On v1.1 - Incl demo data (PPM PoT version)

Display > Projects(-)

New Filter

ID#	Title	Project State	Type	Portfolio	Submitter	Business Units	Target Duration	Total Project Cost	Business Feasibility
002	ATM Accessibility Upgrades	Delivered	Cost reduction	Business Operation	Bill	Investments	10 months	\$100,000 - \$500,000	10 - Excellent
003	ATM Card Background	Ready for prio	Cost reduction	Business Operation	Peter	Commerce	10 months	\$500,000 - \$2,000,000	1 - Less suitable
004	Automated Clearing House (ACH)	Finalize business case	Cost reduction	External Applications	Bill	Investments	120 months	< \$100,000	10 - Excellent
005	Automated Phone Service	Finalize business case	Cost reduction	Infrastructure	Victor	Systems	0 months	< \$100,000	10 - Excellent
006	Automate Stop Payment Online	Under investigation	Cost reduction	External Applications	Bill	Systems	0 months	< \$100,000	10 - Excellent
007	Automatic Card Replacement Service	Approved for implementation	Strategic	Infrastructure	Victor	Investments	12 months	\$500,000 - \$2,000,000	10 - Excellent
008	Banking for Kids	Ready for prio	Cost reduction	Business Operation	Peter	Systems	19 months	\$500,000 - \$2,000,000	10 - Excellent
010	Business Insurance	Approved for implementation	Revenue generation	Infrastructure	Emma	Systems	12 months	\$500,000 - \$2,000,000	7 - Good
011	Cash Management System Maintenance	Approved for implementation	Cost reduction	Infrastructure	Isaac	Investments	18 months	\$500,000 - \$2,000,000	7 - Good
012	Company Antivirus Upgrade	Stopped	Revenue generation	Infrastructure	Emma	Systems	0 months	> \$2,000,000	10 - Excellent
013	Company Firewall Upgrade	Rejected	Revenue generation	Infrastructure	Pamela	Systems	0 months	-Select-	-Select-
014	Conference Room Planner	Ready for implementation approval	Cost reduction	Infrastructure	Peter	Investments	0 months	\$500,000 - \$2,000,000	10 - Excellent
015	Consolidate Check Processing Systems	Ready for prio	Cost reduction	Business Operation	Amir	Investments	13 months	\$500,000 - \$2,000,000	1 - Less suitable
016	Consolidated Banking Portfolio	Ready for prio	Strategic	Business Operation	Miguel	Systems	4 months	\$500,000 - \$2,000,000	4 - Reasonable
018	Currency calculator	Proposed	Revenue generation	External Applications	Giulia	Investments	0 months	-Select-	-Select-
019	Debit Card Renewal	Under investigation	Strategic	Infrastructure	Emma	Investments	0 months	-Select-	-Select-
020	Develop Customer Relationship Management Program	On hold	Revenue generation	Infrastructure	Amir	Systems	22 months	> \$2,000,000	10 - Excellent
021	EDI Invoicing	Delivered	Cost reduction	Business Operation	Bill	Operations	16 months	< \$100,000	10 - Excellent
022	Educational Affiliation Program	On hold	Cost reduction	External Applications	Bill	Systems	10 months	\$100,000 - \$500,000	7 - Good
023	E-mail Alerts	Approved for implementation	Cost reduction	External Applications	Miguel	Systems	20 months	> \$2,000,000	10 - Excellent

Maximum number of elements per page: 50

1 2 >>

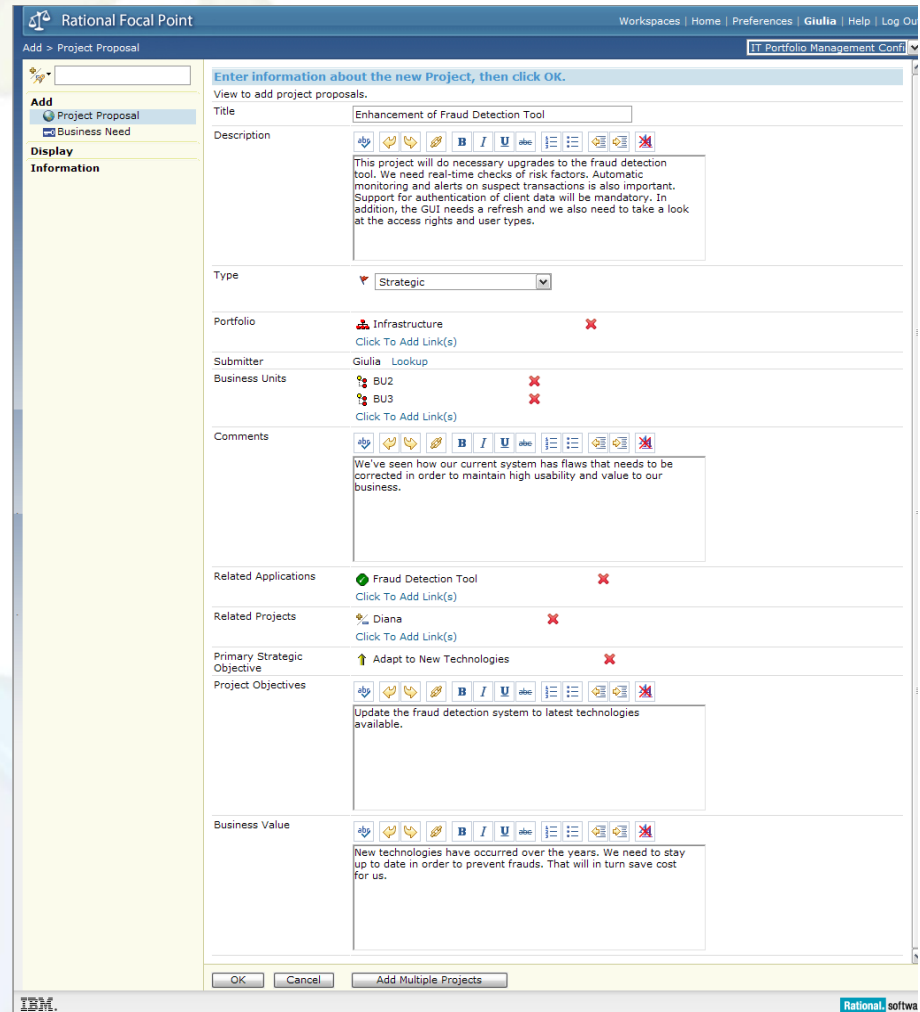
Export Projects(-) Update Projects

Tree View Sorting

# Capture Project Proposals

- All users can propose new projects
- Standardized form gives consistent information about the proposal
- Support for creating multiple projects and creating projects from Rational System Architect

- *Title*
- *Primary strategic objective to enter:*
- *Description*
- *Type*
- *Portfolio*
- *Business unit*
- *Related applications*
- *Related projects*
- *Project objectives*
- *Business value*



The screenshot shows the 'Add Project Proposal' form in Rational Focal Point. The form is titled 'Enter information about the new Project, then click OK.' and contains the following fields:

- Title:** Enhancement of Fraud Detection Tool
- Description:** This project will do necessary upgrades to the fraud detection tool. We need real-time checks of risk factors. Automatic monitoring and alerts on suspect transactions is also important. Support for authentication of client data will be mandatory. In addition, the GUI needs a refresh and we also need to take a look at the access rights and user types.
- Type:** Strategic
- Portfolio:** Infrastructure
- Submitter:** Giulia Lookup
- Business Units:** BU2, BU3
- Comments:** We've seen how our current system has flaws that needs to be corrected in order to maintain high usability and value to our business.
- Related Applications:** Fraud Detection Tool
- Related Projects:** Diana
- Primary Strategic Objective:** Adapt to New Technologies
- Project Objectives:** Update the fraud detection system to latest technologies available.
- Business Value:** New technologies have occurred over the years. We need to stay up to date in order to prevent frauds. That will in turn save cost for us.

Buttons at the bottom include 'OK', 'Cancel', and 'Add Multiple Projects'.

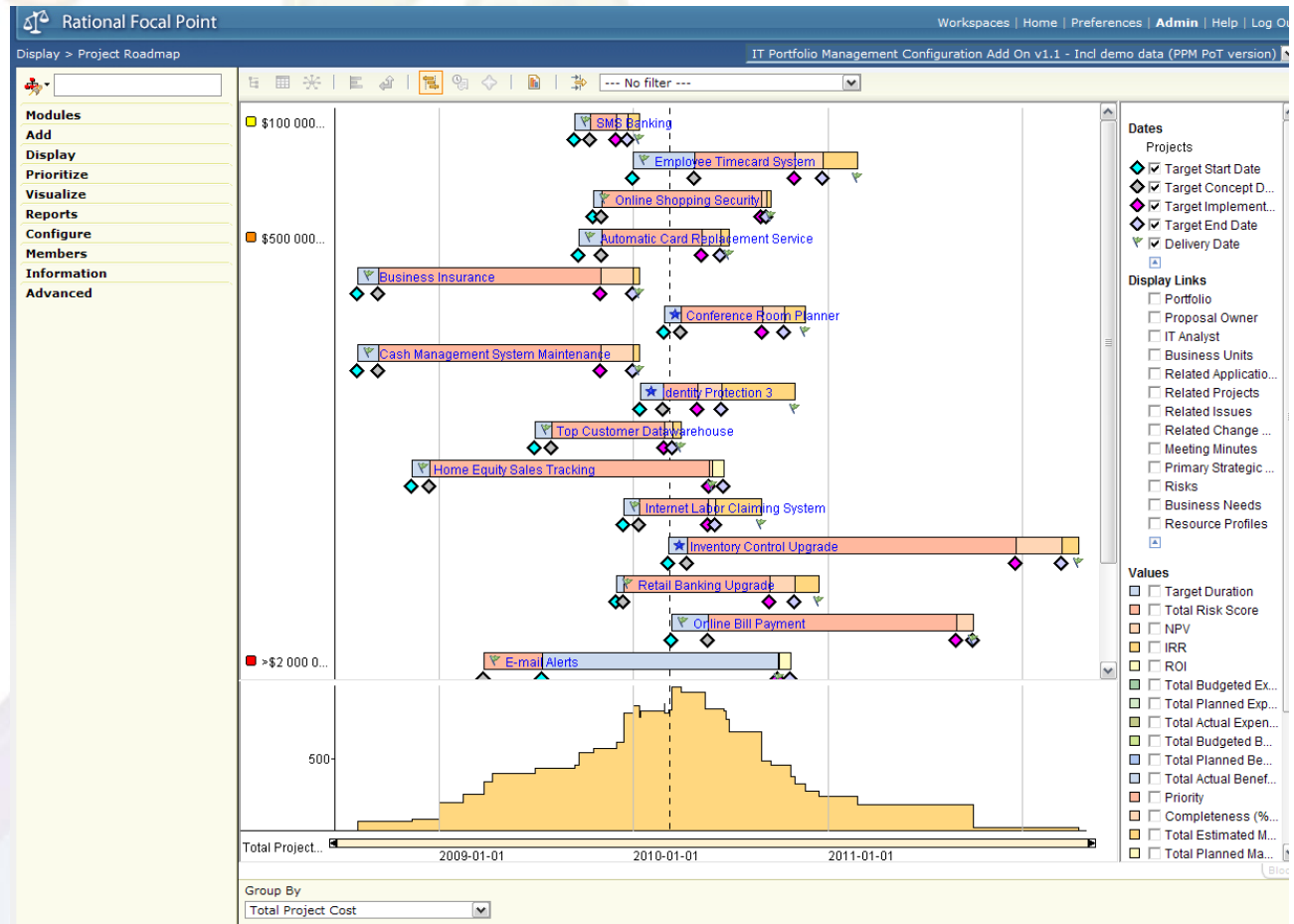
# Increase Portfolio Value - Supply/Demand Analysis

- Resource profiles associated with project
- *Demanded* man hours per month for a project compared to *available* man hours per month

16 Developers - Automatic Card Replacement Service						
<b>General Information</b>						
ID	019					
Title	16 Developers - Automatic Card Replacement Service					
Description						
Project	Automatic Card Replacement Service					
Resource Profile	Developers					
State	Booked					
<b>Estimations</b>						
Number of Resources	16					
Resource Start Date	2009-10-05					
Resource End Date	2010-05-10					
Days Per Week	5					
Hours Per Day	8					
Estimated Duration	149 work days					
Resource Rate	\$160					
Resource Cost	\$381 440					
Man Hours	13 623					
<b>Resource Need Per Month</b>						
Project Target Start Date	2009-09-21					
Project Delivery Date	2010-06-29					
Project Duration	9 Months					
Distributed Share	95 %					
Resource Distribution	2 009	2 010	2 011	2 012	2 013	2 014
January			2 000			
February			1 000			
March			1 000			
April			1 000			
May			1 000			
June						
July						
August						
September		1 000				
October		2 000				
November		2 000				
December		2 000				
Sum	0	7 000	6 000	0	0	0

# Increase Portfolio Value - Project Roadmap

- Display relationships and dependencies
- Move projects in time to align with capacity
- Save to update the project schedule





# Collaboration – Hand Over to Project Planning and Management

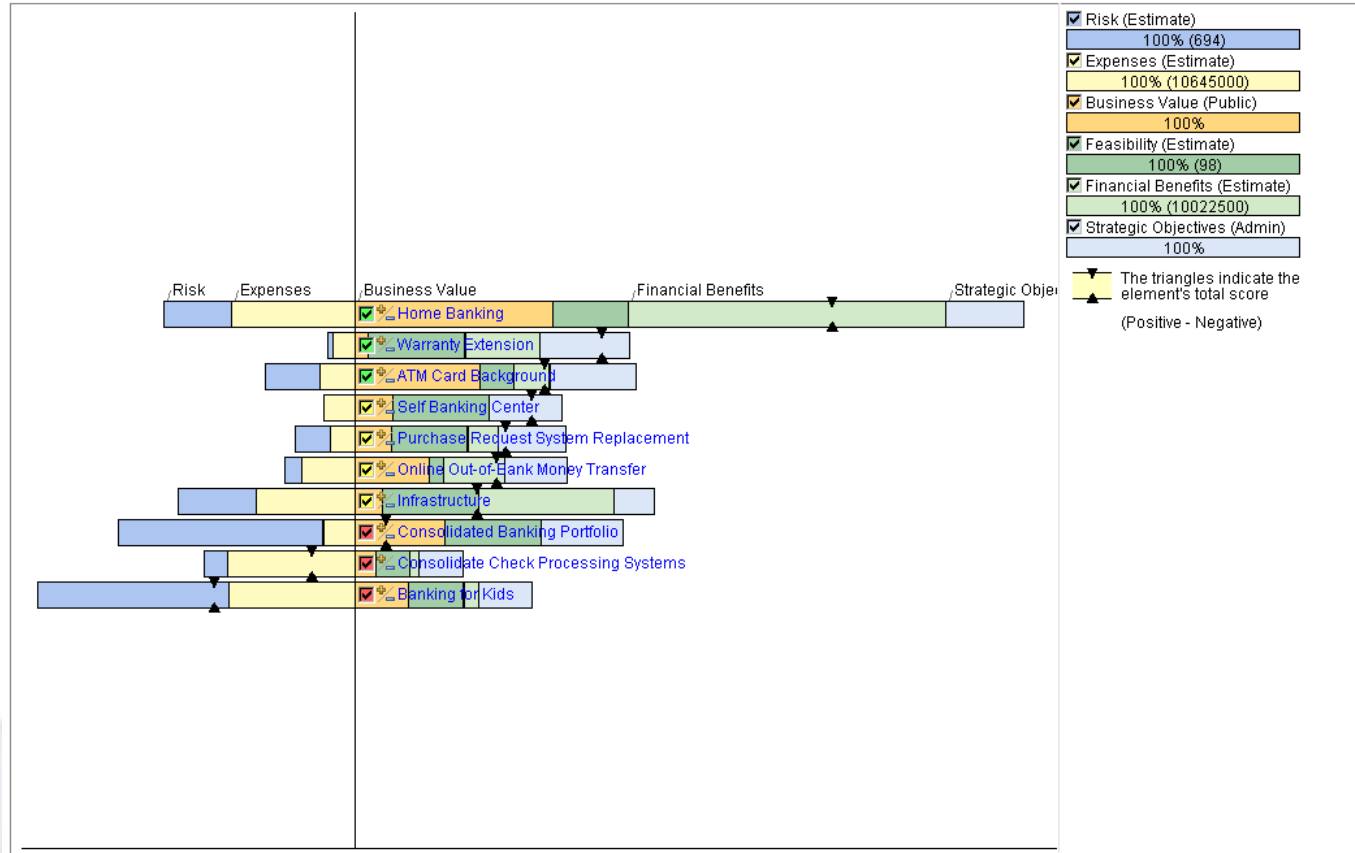


- 1 Select approved project
- 2 Login to Rational Project Conductor
- 3 Select program, owner and calendar
- 4 Create project
  - Title & description
  - Target dates
  - Business needs
  - Effort
- 5 Retrieve updates from Rational Project Conductor to monitor progress

The screenshot displays the Rational Focal Point interface. The main window shows a tree view of projects under 'Projects (317)'. The 'Top Customer Datawarehouse' project is selected. A 'Log In' dialog box is open, prompting for 'User Name' (eric) and 'Password'. A 'Specify Program, Owner and Calendar' dialog box is also open, showing 'Program' set to 'Financials', 'Owner' as 'Kathy', and 'Calendar' as 'Default'. The 'Log In' button is highlighted with a red box, and the 'Specify Program, Owner and Calendar' dialog is also highlighted with a red box. The interface includes a navigation pane on the left, a main content area, and a top toolbar.

# Increase Portfolio Value - Project Value Analysis

- Other factors than strategic alignment affect approval decision:
  - Risk
  - Expenses
  - Business value
  - Feasibility
  - Financial benefits
- New ranking of the projects
- Weighting considered



# Example Dashboard

Rational Focal Point Workspaces | Home | Preferences | Annie | Help | Log Out

IT Portfolio Management Demo

### Portfolio Health

Title	Project Expenses Overrun	Red Lights in Ongoing Projects	Portfolio Level Risk Score	Project Level Risk Score	Net Cash Flow for Delivered Projects	Accumulated Investments	Total Mean NPV - Ongoing Projects
Business Operation	<span style="color: green;">■</span>	<span style="color: green;">■</span>	<span style="color: yellow;">■</span>	<span style="color: yellow;">■</span>	\$5,609,900	\$12,312,100	\$21,828,985
External Applications	<span style="color: green;">■</span>	<span style="color: green;">■</span>	<span style="color: green;">■</span>	<span style="color: green;">■</span>	\$12,308,300	\$53,664,900	\$11,819,839
Infrastructure	<span style="color: green;">■</span>	<span style="color: green;">■</span>	<span style="color: green;">■</span>	<span style="color: green;">■</span>	\$2,680,900	\$4,645,700	\$34,492,386

### Business Unit Financials

Title: Financials - Existing Projects

Systems

### Strategic Objectives

Title	Importance
-------	------------

### Balance Ongoing Projects

Title	Total Mean NPV	Total Cost	Weight
Adapt to new technologies	\$33,009,213	\$23,824,433	15 %
Increase efficiency	\$10,428,405	\$11,270,545	6 %
Innovation	\$14,790,834	\$23,907,906	41 %
Manage change	\$1,483,173	\$1,895,000	12 %
Save cost	\$8,429,585	\$9,912,717	26 %

### Pipeline Analysis

Primary Strategic Objective	Quantity	Share
-	12	9.4%
Adapt to new technologies	31	24.4%
Increase efficiency	35	27.6%
Innovation	29	22.8%
Manage change	11	8.7%
Save cost	9	7.1%
<b>Sum:</b>	<b>127</b>	

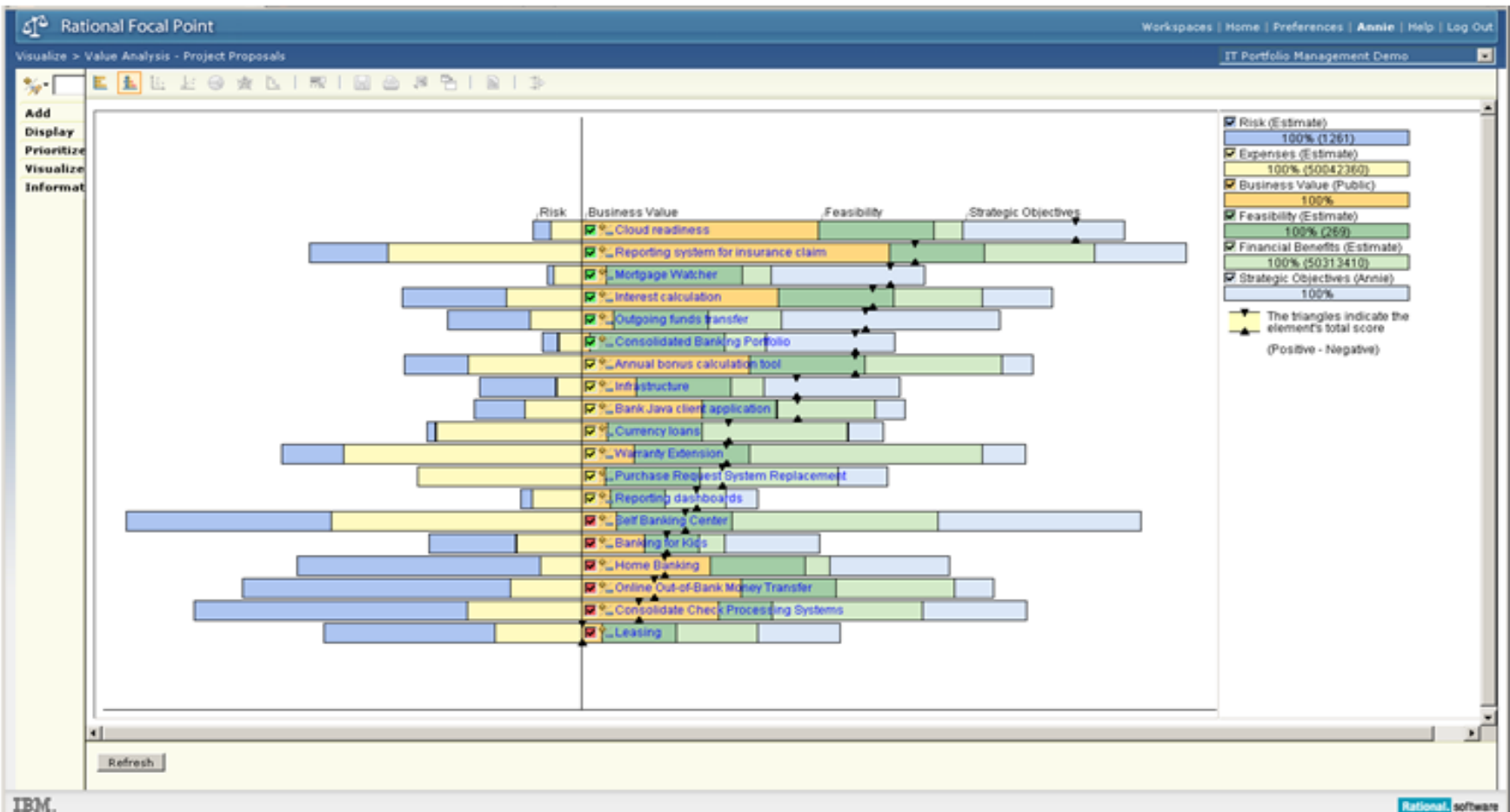
### Project State Distribution

Project State	Quantity	Share
Draft	11	8.7%
Proposed	21	16.5%
Accepted	10	7.9%
Under investigation	5	3.9%
Finalize business case	4	3.1%
Ready for approval decision	1	0.8%
Ready for prio	19	15.0%
Pre-plan project	3	2.4%
Ready for implementation approval	3	2.4%
Approved for implementation	20	15.7%
Delivered	11	8.7%
Business Need	4	3.1%
Backlog	0	0.0%
Duplicate	3	2.4%
To be clarified	3	2.4%
On hold	5	3.9%
Stopped	2	1.6%
Rejected	2	1.6%
Delete	0	0.0%
<b>Sum:</b>	<b>127</b>	

### Business Needs State Distribution

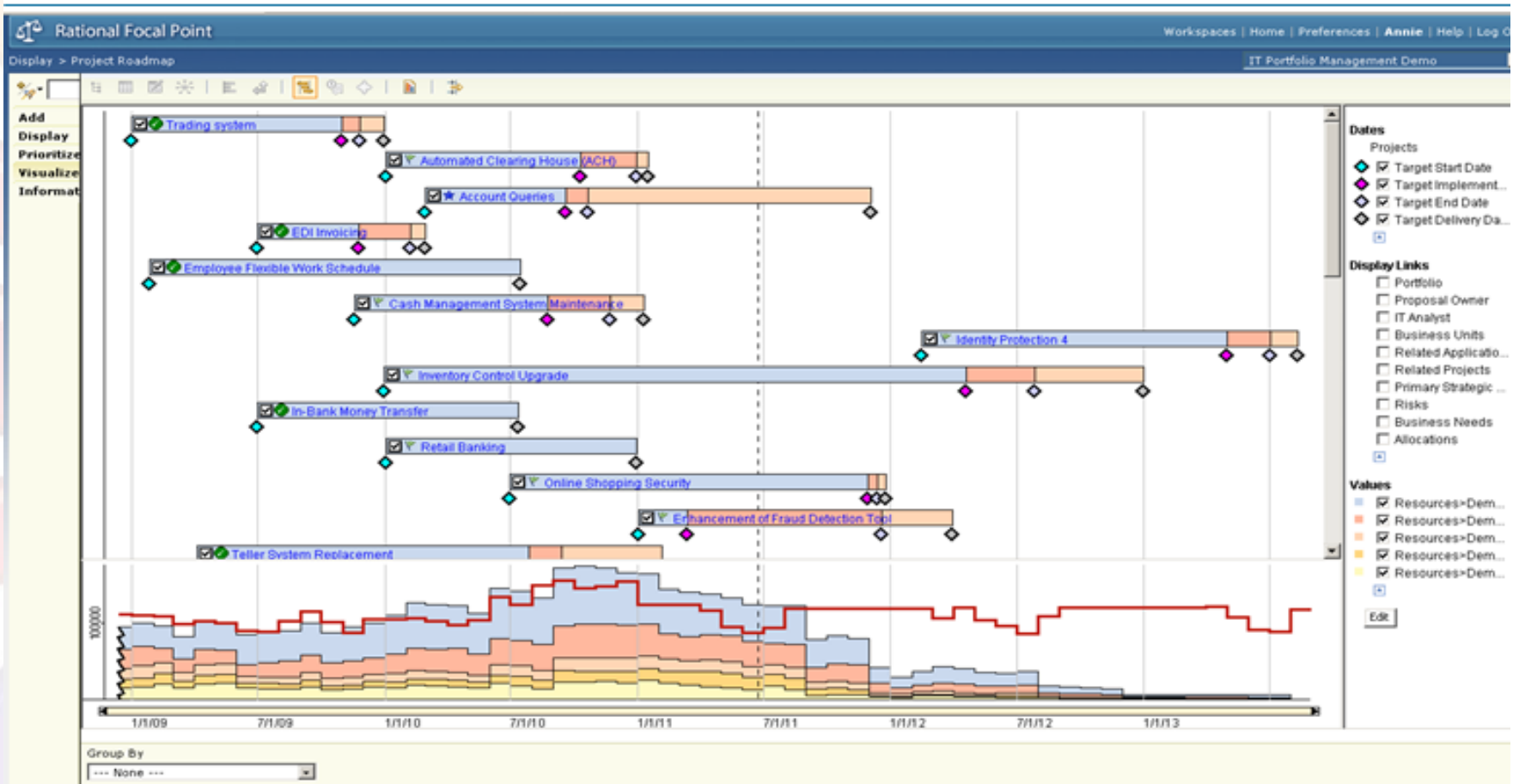
State	Quantity	Share
New	6	4.4%
Accepted	1	0.7%
Ready to be planned	10	13.2%
Planned	51	37.5%
Under Implementation	34	25.0%
Completed	26	19.1%
To be clarified	0	0.0%

# Example Prioritization



- Prioritize using a combination of quantitative and qualitative criteria such as cost / value / risk / alignment to strategy
- Weight the importance of your assessment criteria
- Use scorecards, pair wise comparisons and data from the business case to prioritise
- Visualize the value of each project and evaluate trade-offs when new projects arrive

# Example Visualization



## IBM. ■ Plan scope, resources and financials

- Capture dependencies between related projects
- Visualise proposed schedule based on constraints
- Sequence and approve projects based on available resources, scheduling dependencies and costs constraints
- Model demand against resource supply and current commitments

# Internal implementation (success story)

## Before

- Capturing pipeline opportunities was done through a spreadsheet. The project pipeline prioritization was done using a lean six sigma tool called a Cause & Effect Matrix (spreadsheet).
- The project tracker was also managed using a spreadsheet.

## Challenges

- Pipeline re-prioritization was a manual effort requiring conducting workshops with process SMEs and process owners on a regular basis.
- Tracking active projects was simple with only a few projects launched
- Communication issues – these documents were being sent via file attachments in email to process SMEs and process owners.

## Result of challenges

- The manual analysis and formatting was labor intensive; Difficult to capture additional pipeline opportunities due to limited visibility and appropriate review; Pipeline re-prioritization was a manual effort requiring conducting workshops with process SMEs and process owners on a regular basis.
- As the number of active projects increased, it required multiple updates and chasing down the data. The complexity and accuracy concerns of the spreadsheet was a growing problem
- No way to ensure or validate if the files were receiving the appropriate level of review resulting in missed pipeline opportunities being captured and sharing of current project status – potentially resulting in missed replication opportunities and / or redundant improvement efforts

## With Rational Focal Point

- Better prioritizations of project opportunities
- More automated capability to capture pipeline opportunities
- Accurate tracking of project status.
- Ownership of project updates has been transferred to the appropriate source – the black belts, green belts, and project leads for maintaining accurate project status.
- Improved ability to share project information between black belts and with executives (who also have access to the space), and ability to track project benefits

## “Measurable” Savings

Rough estimate of time savings are between 6-8 hours a month for each Master Black Belt, Reduced need for monthly working meetings for prioritization of pipeline (1 hour / month for 10-15 process SMEs)

Big cost avoidance related to minimizing redundant activities and increased ability to target correct projects.