



IBM Cognos Forum

Ignite knowledge, ideas, connections

Creating a Performance Management (PM) Vision and Roadmap

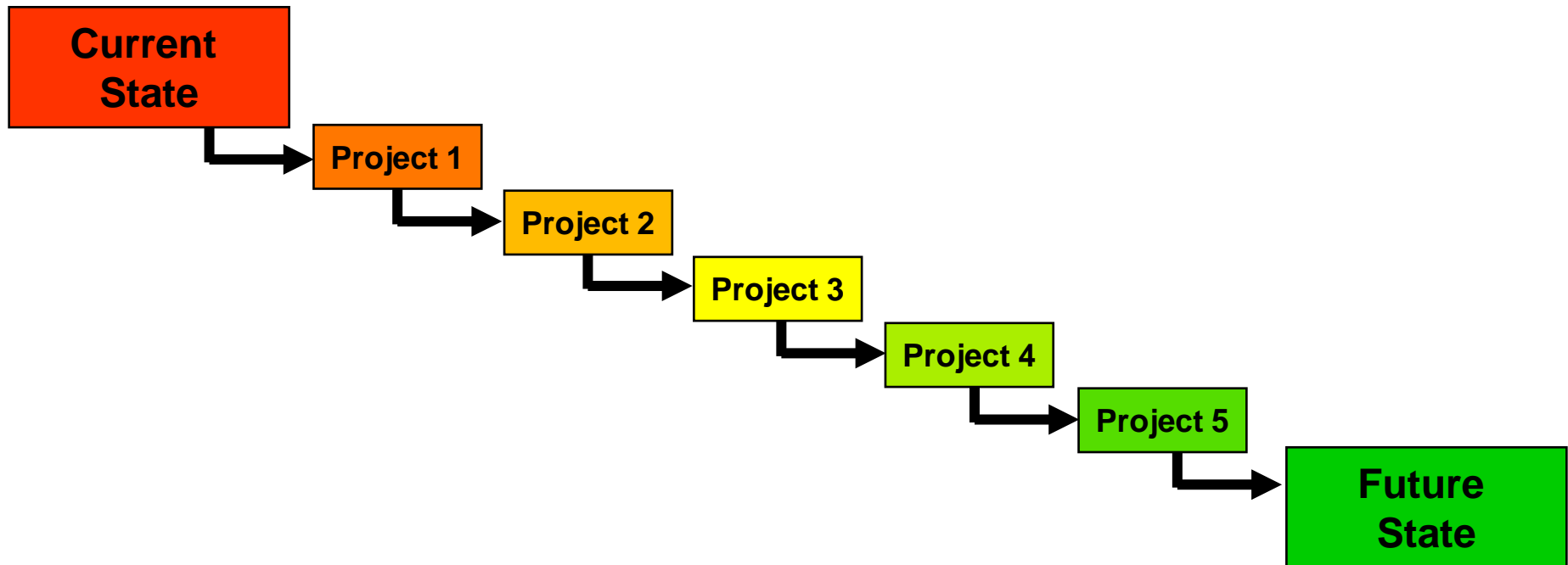
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What is a PM Strategy

- > **A Living Document**
- > **It outlines the combination of distinct areas that will take an enterprise from its current situation to an agreed PM vision that will see improvements in an organisation's value proposition to its customers, shareholders or employees.**

What is a PM Roadmap

- > A process that will deliver a set of defined smaller projects that will enable your organisation to go from its current situation to a defined future state that will deliver on your performance management vision



Why a PM Roadmap?

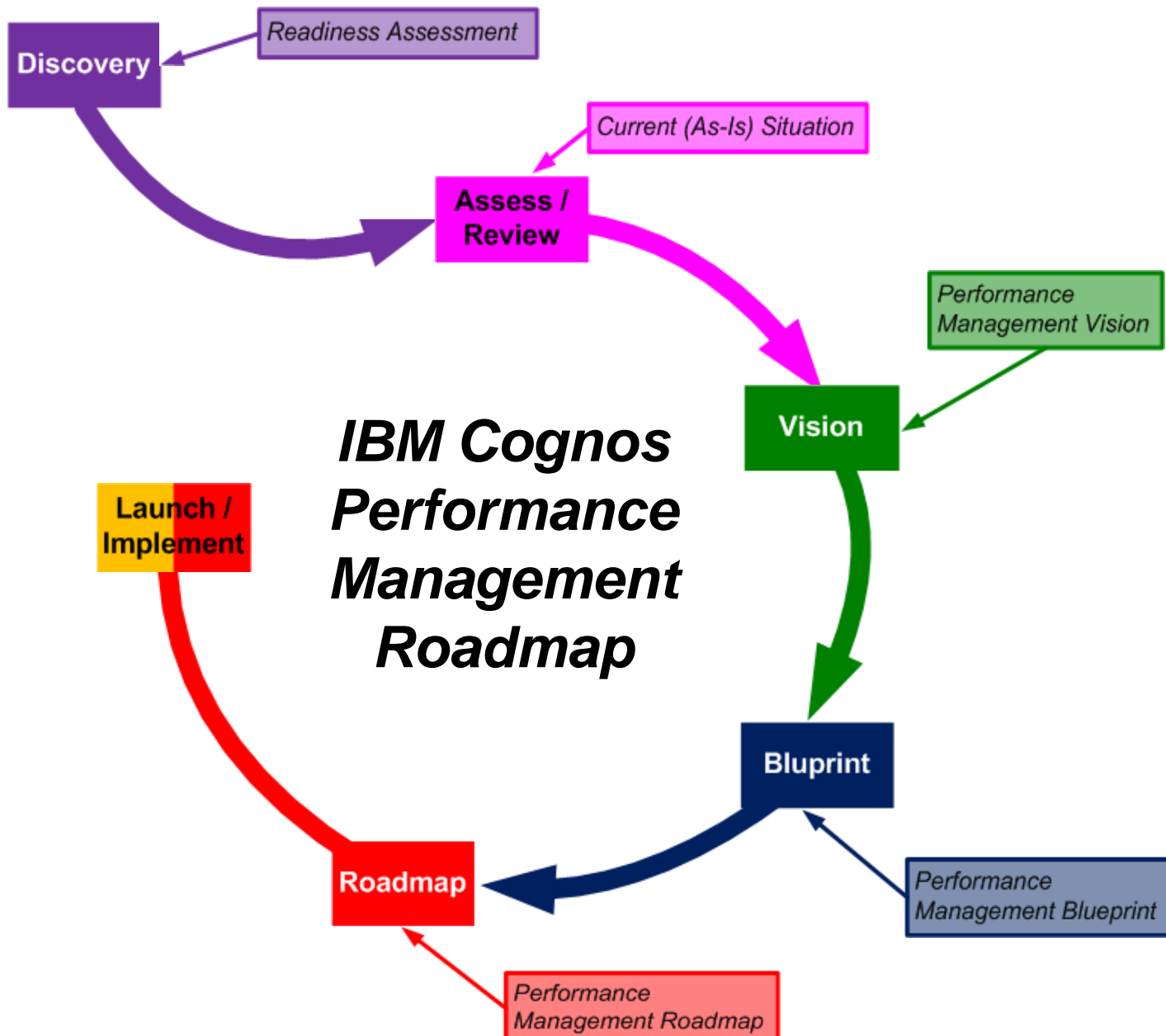
- > **Transparency and visualisation of the PM journey**
- > **Early business contribution**
- > **Delivery of critical areas**
- > **Helps set expectations**
- > **Identify quick wins**
- > **Business buy-in**
- > **Aligns projects**



Benefits

- > Alignment
- > Optimise
- > Reduce Risk
- > Common Framework
- > Business & IT Collaboration
- > Quicker and Quality Deliverables
- > React faster to business changes
- > Performance Management “Journey”
- > Effective, Focused & Sustained Governance





7 Scores of Success For A PM Strategy



Discovery

- > Executive Sponsorship
- > Communication Plan
- > Documentation Review
 - Corporate Strategy & Objectives
- > Project Plan
- > Risk Mitigation
- > Project & Decision Making Process
- > Readiness Assessment



Assess / Review

- > **Assess Current Non-Technical Situation**
 - **PM Governance & Standards**
 - **PM Processes & Support**
 - **PM People & Culture**
- > **Assess Current Technical Situation**
 - **PM Information & Integration**
 - **PM Tools & Capabilities**
 - **PM Infrastructure & Environment**
- > **Assess Business Problems, Issues & Obstacles (Business Benefits & Value)**
- > **Assess Current & Planned Projects**
- > **Assess Industry Best Practices**



Vision

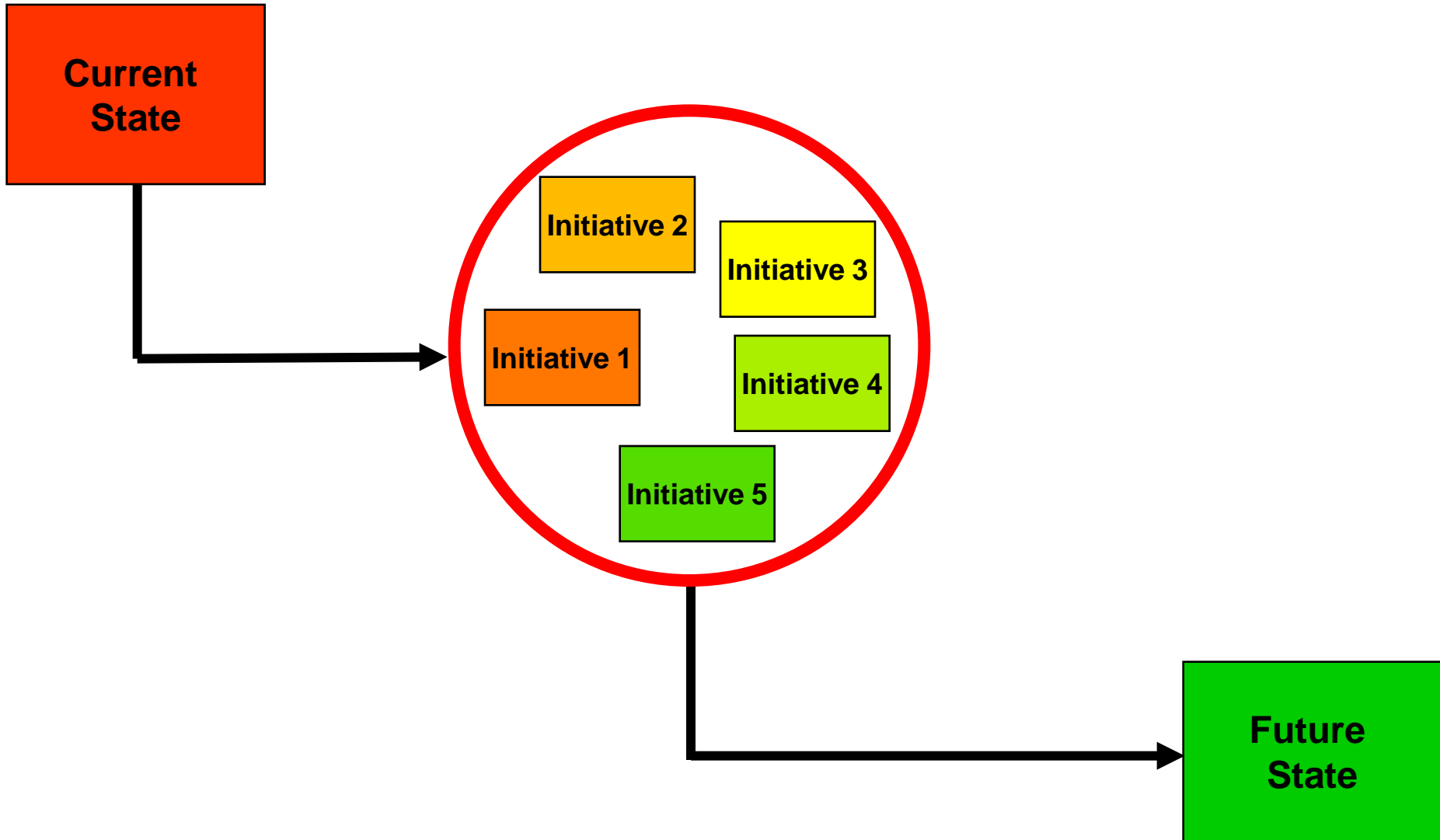
- > Overall PM Strategic Direction
- > Assess Future Non-Technical Situation
 - PM Governance & Standards
 - PM Processes & Support
 - PM People & Culture
- > Assess Future Technical Situation
 - PM Information & Integration
 - PM Tools & Capabilities
 - PM Infrastructure & Environment
- > Determine Business Value Criteria, Value Map & Benefits (Business Benefits & Value)
- > Performance Management Strategy & Workshop



Blueprint

- > **Non-Technical Gap Analysis & Initiatives**
 - **PM Governance & Standards**
 - **PM Processes & Support**
 - **PM People & Culture**
- > **Technical Gap Analysis & Initiatives**
 - **PM Information & Integration**
 - **PM Tools & Capabilities**
 - **PM Infrastructure & Environment**
- > **Determine Prioritisation Criteria (Business Benefits & Value)**
- > **Alignment with Business Units, Industry & PM Best Practices**
- > **Creation of PM Guiding Principles**



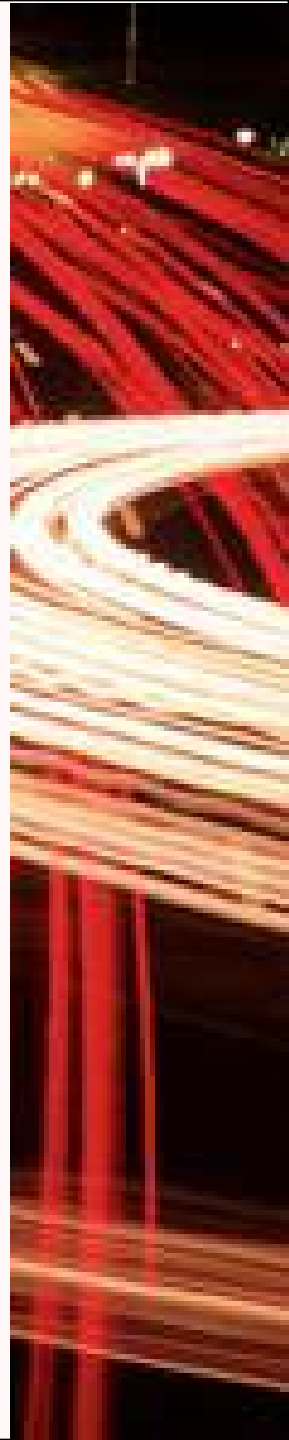


Example: Blueprint

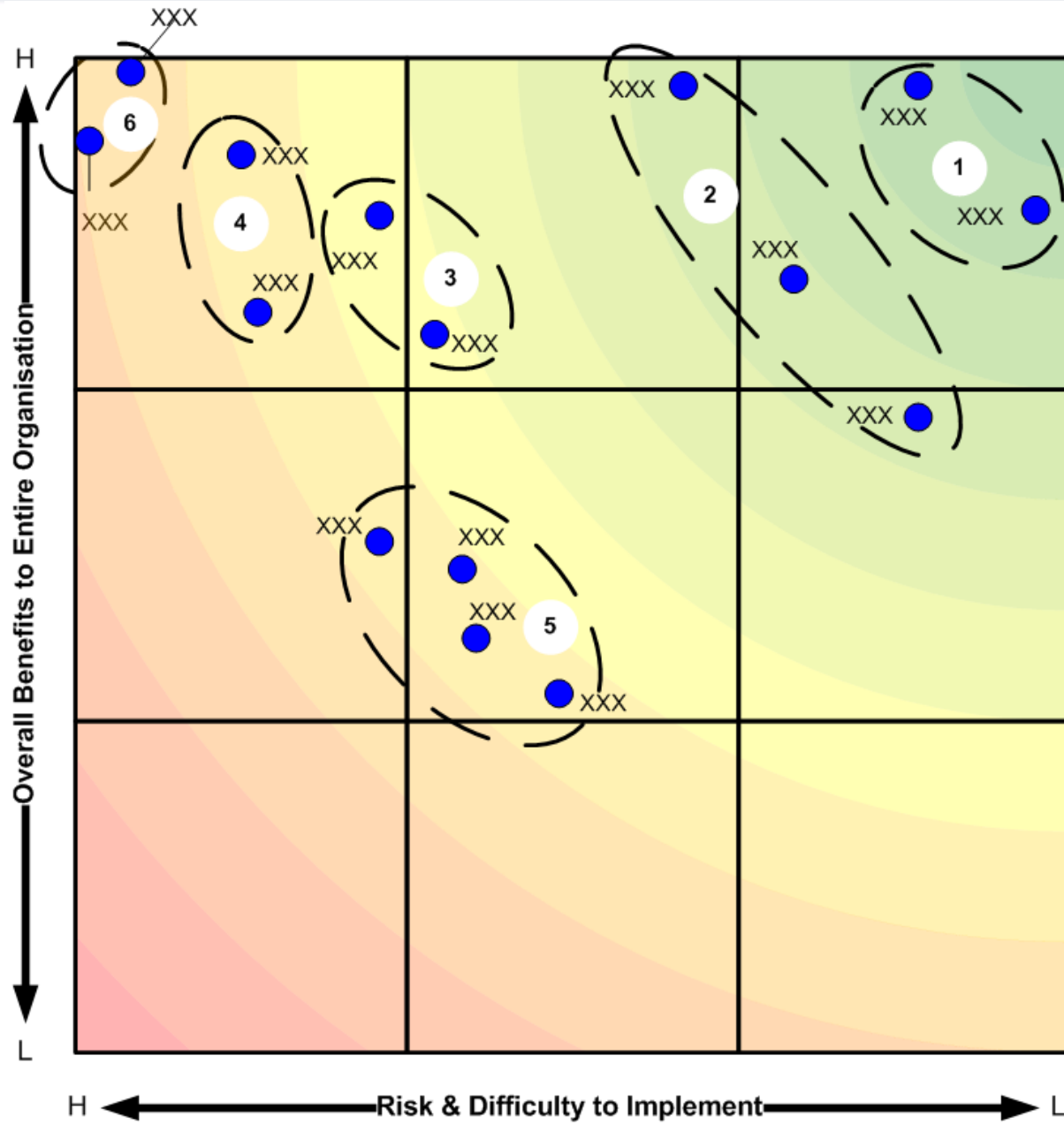
Project	Description	Benefit	Risk	Cost (\$)	Type	User Base	Data Available
pm2 KPIs	- Present the pm2 KPIs in Cognos Metrics Studio	H	L	\$xxK	Business/ Technology	Exec	Yes
Existing KPI Data Foundation	-Remodel the existing KPI data in a Strategic Data Architecture	H	M	\$xxk	Technology	Exec	Yes
Develop a Strategic Data Architecture	-Develop a Data Architecture Strategy	H	L	\$xxk	Business/ System	All	Not Applic.
Remodel Budget/ Forecasting	- Build Financial forecasting model on existing Budget Model	H	M	\$xxk	Business/ System	Financial	Most
Other Projects	-Etc.						

Roadmap

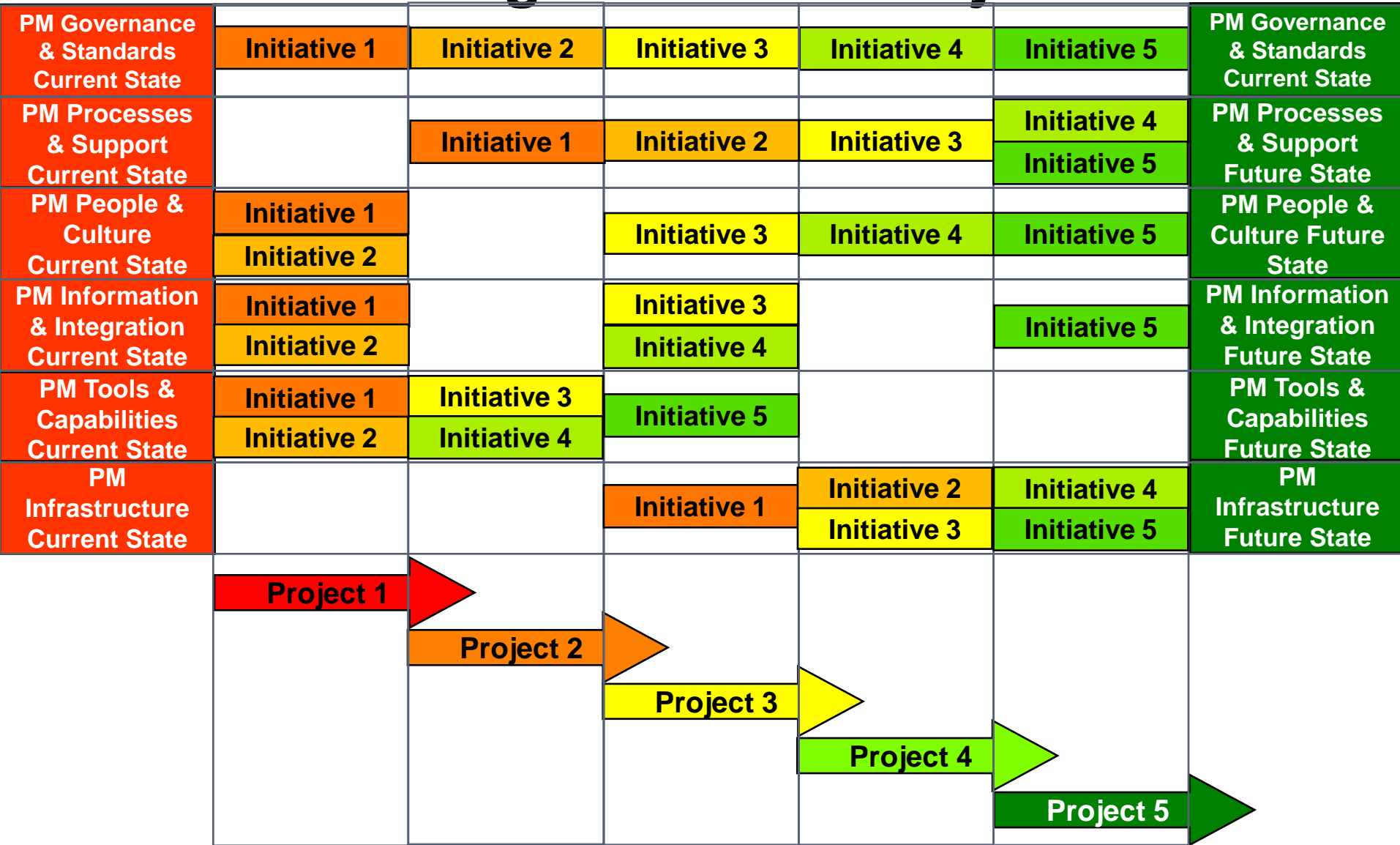
- > **Prioritise Non-Technical Initiatives**
 - **PM Governance & Standards**
 - **PM Processes & Support**
 - **PM People & Culture**
- > **Prioritise Technical Initiatives**
 - **PM Information & Integration**
 - **PM Tools & Capabilities**
 - **PM Infrastructure & Environment**
- > **Critical Success Factors Review**
- > **Project Creation & Roadmap Design**
- > **Business Benefits & Value Analysis**
- > **Create & Present Roadmap**



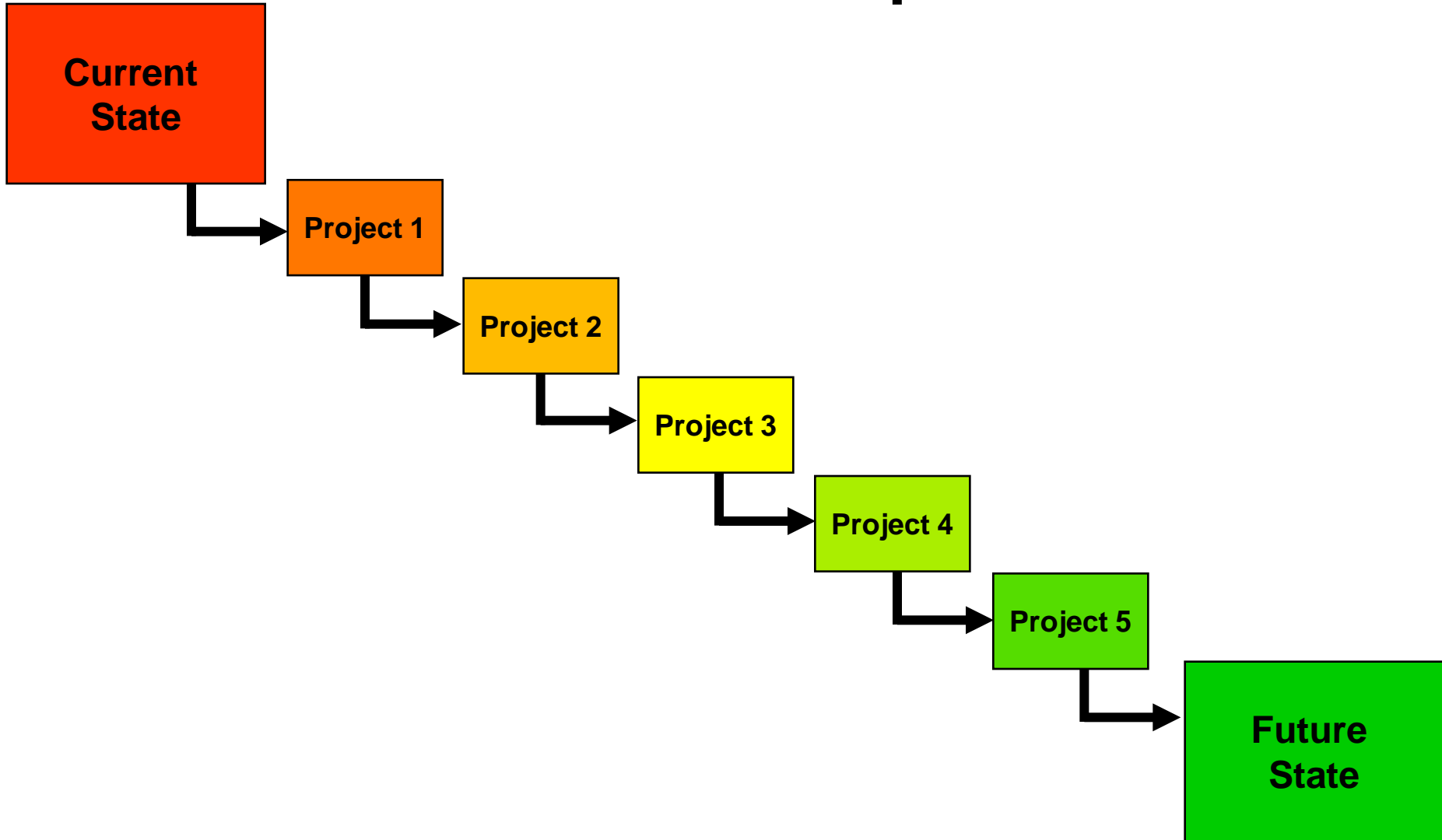
Example: Initiative Prioritisation



Creating Individual Projects



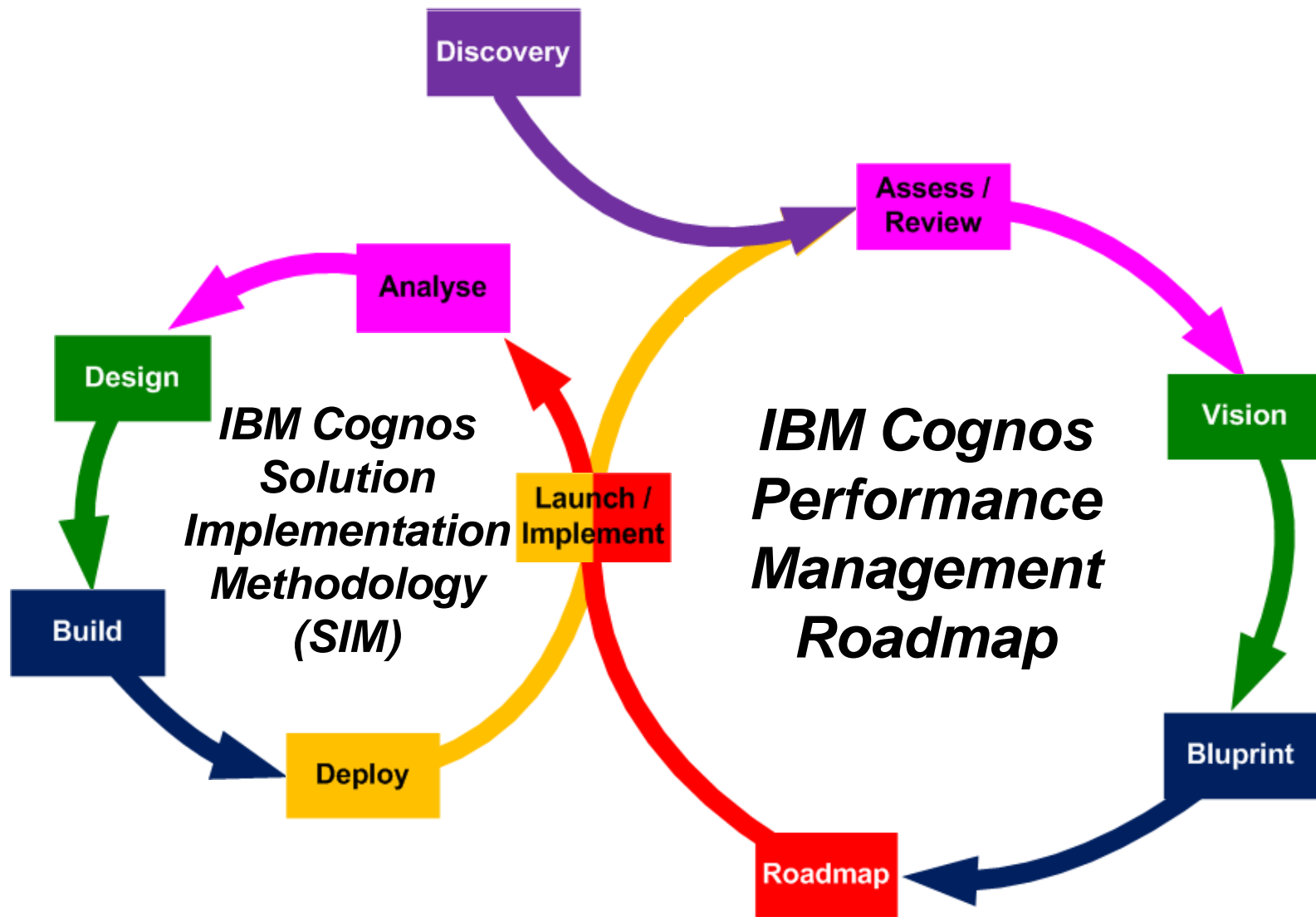
PM Roadmap



Launch / Implement

- > Performance Management Strategy & Roadmap Launch**
- > Roadmap Roadshow**
- > Solution Scope Definition for Project 1**
- > Project Success Plan for Project 1**
- > Final Report & Go Forward Plan**





Cognos Professional Services – The Enablers

