Track 4 - Enterprise Architecture and Portfolio Management Kick-off

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Agenda

- **Stream & Track Overview**

- Our strategy

- What is demand or delivery management?

- And the products?

- Summary

Enterprise Architecture & Portfolio Management Track

- **Portfolio Strategy and Management for strategic business transformation**
  - Includes portfolio management (e.g. APM), business-focused EA, and session with both

- **Product Portfolio Management**

- **Enterprise Architecture for Large Scale Systems**
  - Primary focus is on EA

PSM
IT Portfolio Strategy and Management

Product Portfolio Management

EAS
Enterprise Architecture for Large Scale Systems

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Track 4 Overview

Other Highlights
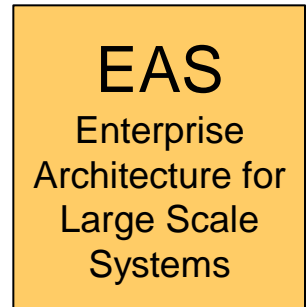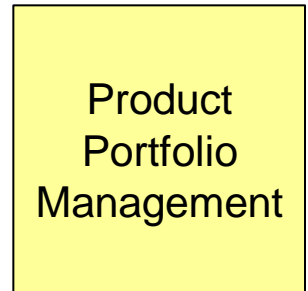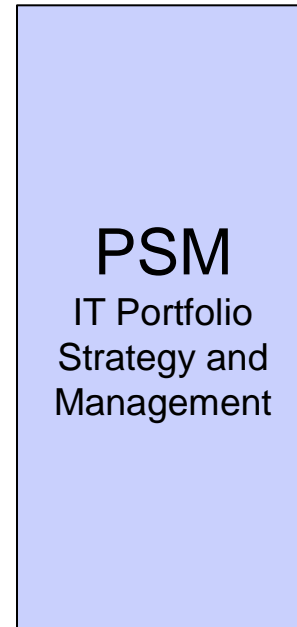
Kick Off
10:15 to 11:05
Victoria Bunyard, IBM

Strategic Planning for IT creating a framework for

embracing organizational change
11:35 to 12:25
Jamie Knowles, Corso

Delivery Management (Focal Point plus RTC plus RQM)
12:25 to 13:15
Marc Loos, IBM

CIO Cockpit for Integrated Planning, Controlling and

Analysis
14:15 to 15:05
Shane Hoey & Oliver Lucht, IBM

Product Portfolio Management – How companies most
effectively invest
14:15 to 15:05
Victoria Bunyard, IBM

Track 3

Tough choices: how to improve the objective decision
making process
15:05 to 15:55
Marlie Vermazeren, Finext with Marc Loos, IBM

Lower Cost and Increase Business Agility with
Application Portfolio Management
16:25 to 17:15
Victoria Bunyard, IBM

Paradigm Shift from project-based to product-based
requirements
16:25 to 17:15
Katarzyna Kot, Devoteam

Track 2

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The Rational Enterprise Architecture Strategy

Deliver market-leading Enterprise Architecture tools and practices

- *Relevant for all types of cultures, including business / engineering / compliance and market-driven*

Foster an Enterprise Architecture ecosystem

- *Enable partners and customers to provide value-add capabilities on the Enterprise Architecture platform*

Innovate while protecting customer investments

- *Deliver next-gen capabilities in a common product family*
  - *Enable adoption by supporting backward compatibility and providing smooth migration paths*
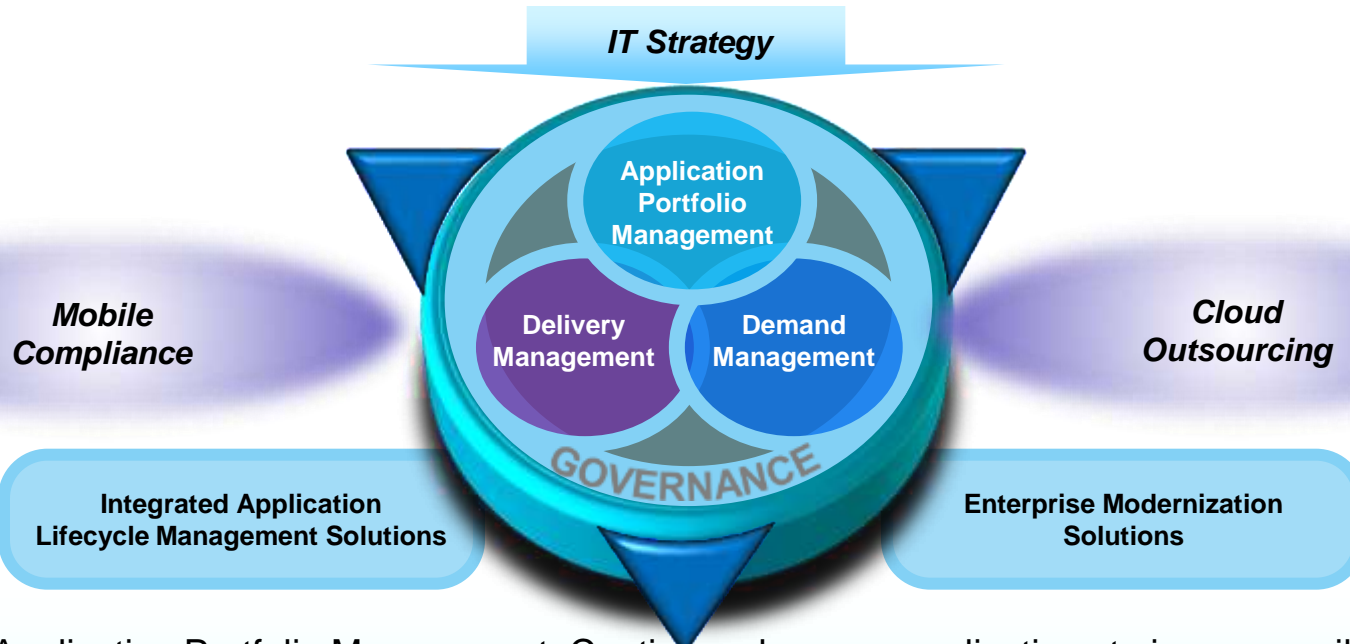
Do all this using *Jazz* **services and philosophy**

- Jazz is a platform for transforming software and systems delivery
- Service-oriented tools with loosely-coupled integrations making mashups and cross-product workflows more productive and flexible than ever

Jazz provides a foundation for the planning and development Lifecycle

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Portfolio Strategy and Management
Make better and collaborative decisions related to Applications, Business Needs, and Projects

IT Strategy

Application Portfolio Management

Delivery Management

Demand Management

GOVERNANCE

Mobile Compliance

Cloud Outsourcing

Integrated Application Lifecycle Management Solutions

Enterprise Modernization Solutions

- ✓ <u>Application Portfolio Management:</u> Continuously asses applications to improve agility and identify savings that can be targeted towards innovation
- ✓ <u>Demand Management:</u> Prioritize business needs and project proposals, align with strategy to maximize value
- ✓ <u>Delivery Management:</u> Improve delivery efficiency via end to end collaboration, project governance and managed change

"Making IT resource consumption transparent and understandable to business leaders enables healthy business discussions around how to shift resources to where they will do the most good for the whole business."

– *Define "Application" Based On Your Content To Avoid False Starts In Your Rationalization Efforts,* Forrester Research, Inc., January 26, 2011

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Extend the ALM with Portfolio Strategy & Management
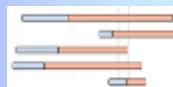## *Enable a collaborative approach to support the end-to-end IT lifecycle*

ENHANCED

Collaborative end to end lifecycle support

Governance & Compliance (PSM)

Strategy/Business goal

Business **IT**

Application Portfolio

Business Needs

Project Portfolio

CLM

Delivery Options
Consolidation
Modernization
Outsourcing
….

Deployment Options
Mobile
Cloud
…

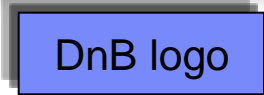**Open platform for integrated development lifecycle**
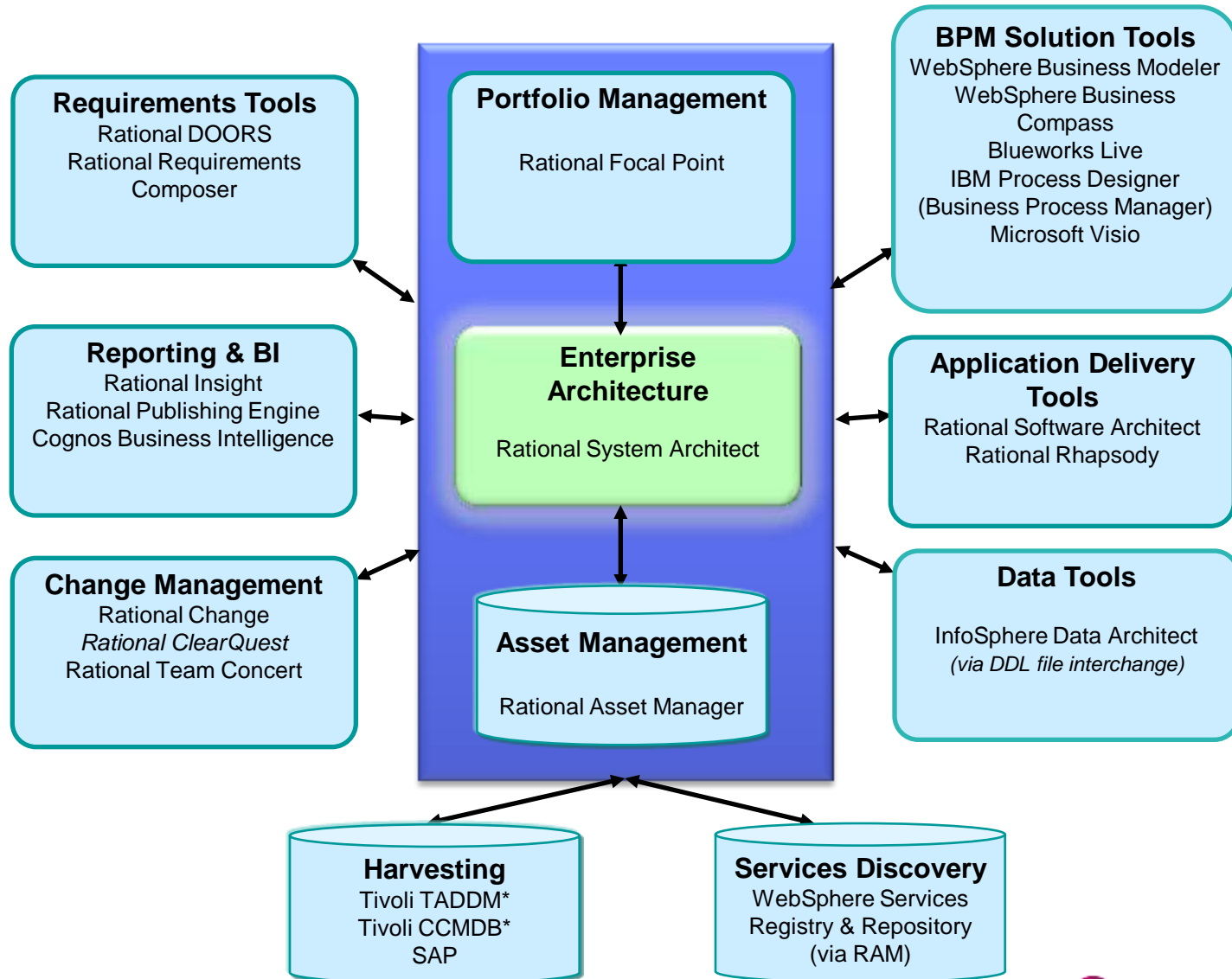
Decide

Deliver

Deploy

Portfolio Strategy & Management
Collaborative decision making that can be executed upon

Application Portfolio Management

Rational System Architect

Impact analysis, architectural roadmaps, future visioning

Delivery Management

Architectural Context

Execution roadmap

Rational Focal Point

Analysis, decisions, execution roadmaps

Rational Team Concert

Iteration planning, team collaboration, status tracking

Status, Change Request

Demand Management

Architectural Context

Rational Requirements Composer

Requirements elaboration, reviews approvals

- Rational Focal Point 6.5.1
- Rational System Architect 11.4.1
- Rational Requirements Composer 4.0
- Rational Team Concert 4.0

IBM raises the level of management information and control within our organization, and this has already made a significant contribution to the successful management of our core banking replacement program." – Jan Kühnel, CIO, Bank DnB NORD

DnB logo

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Wider Enterprise Architecture Integrations

Requirements Tools
Rational DOORS
Rational Requirements Composer

Portfolio Management

Rational Focal Point

BPM Solution Tools
WebSphere Business Modeler
WebSphere Business Compass
Blueworks Live
IBM Process Designer
(Business Process Manager)
Microsoft Visio

Reporting & BI
Rational Insight
Rational Publishing Engine
Cognos Business Intelligence

Enterprise Architecture

Rational System Architect

Application Delivery Tools
Rational Software Architect
Rational Rhapsody

Change Management
Rational Change
Rational ClearQuest
Rational Team Concert

Asset Management

Rational Asset Manager

Data Tools

InfoSphere Data Architect
(via DDL file interchange)

Harvesting
Tivoli TADDM*
Tivoli CCMDB*
SAP

Services Discovery
WebSphere Services
Registry & Repository
(via RAM)

* Services

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Challenges related to Demand Management

- **Missed Revenue Opportunities**

  – Poor visibility into the complete needs of the business

  – Innovative ideas arriving too late to market

- **Ineffective use of Limited Budgets**

  – Ensure budget support for the most value initiatives

  – Project investments are not based on objective information; decisions are made by 'the loudest voice in the room'

  – How to best involve the right stakeholders from the business and IT

- **Inability to meet Market and Customer Needs**

  – Unable to properly identify and invest in projects that meet customer or market demands

  – How do we best distribute capabilities across multiple releases to deliver an optimal roadmap within the provided resource constraints

Demand Management

- Need stronger governance to drive selection/prioritization process of investments

- Require traceability between needs of the business and application requirements to manage hand-over to development/practitioners

- Work within ever growing constraints to establish realistic plans

- Need real-time, transparent monitoring and reporting across multiple investments

IBM
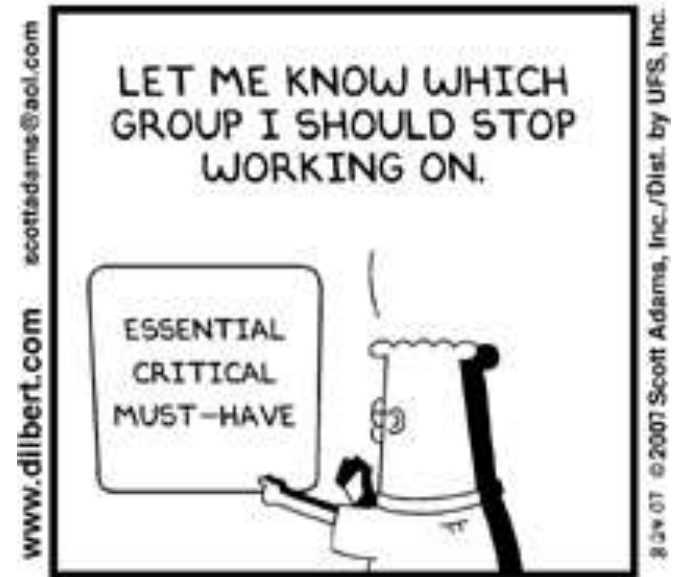
Demand Management

Rational Focal Point

- Capture, evaluate, and prioritise customer needs
- High-level financial budgeting and planning
- Project proposal and approvals
- Road-mapping and high-level release planning

Rational Requirements Composer

- Elaborate customer needs with process flows, story boards or user interface sketches
- Review and approval of requirements
- Manage change and impact

Key capabilities

- Easy to set up and customize to specific information models, roles, workflows
- Ability to prioritize (pair-wise comparison, trade-off analysis, tie-in to strategy)
- Workflows to manage demand mgmt process, involving the right people
- Integration with leading requirements elicitation tool integrated with the rest of CLM
- Business case analysis and business case realization
- Ability to do release planning
- Seamless integration with Delivery Management

Challenges related to Delivery Management

- What projects do I have, and what is their status.

- Which projects are behind or in trouble?

- Am I working on the projects that will deliver the highest business value?

- Are my projects focusing on the right capabilities?

- Do I have the right Business and IT visibility into and governance of my projects?

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Shifting from managing projects to managing value and change
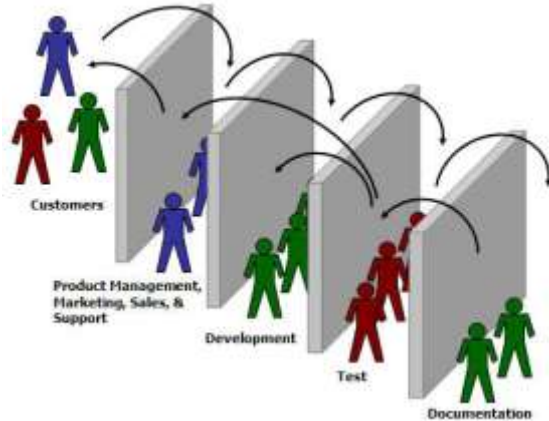
Engineering Governance ➡ Economic Governance

Many project management approaches support the "happy path" from a proposal to requirements, onto project scope and delivery, but:

- What happens when the delivery team encounters problems or delays?

- How do you quickly identify delivery issues, and understand their business impact?

- What happens to delivery when customer priorities change?

- How do you adjust to enable successful delivery and also address your customer's priorities?

In addition to these basic hygiene factors, there is an increasing interest in "continuous delivery" - by providing a regular product or application releases, it is possible to make them more reliable, reduce delivery risk and get earlier feedback from customers.

- How do you capture your customer's input?

- How can you use it to inform future development cycles?

- How can you update your customer on progress and roadmaps?

Delivery Management

Rational. Focal Point

- Stage gate reviews
- Commitment mgmt (BOCA and changes to BOCA)
- High-level status, cost and benefit tracking
- Project change requests
  (imitated from business or RTC/Dev)

Rational. Team Concert

- Development iteration planning
- Task management and work item tracking
- Team collaboration
- Tracking status
- Initiate Project Change (approval in FP)

Key capabilities

- Seamless integration with solution for Demand Management

- Easy to set up FP to capture status and do stage gate reviews

- Workflows to support stage gate reviews

- Ability to track true development status related to commitments made

- Ability to move information between a business / project control environment (FP) to CLM (RTC

  – Push down Business Needs for execution

  – Raise execution issues for business approval

  – Linkage between the two environments

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Which Products?

- Focus:
  - System Architect, enterprise archictecture
  - Focal Point, portfoli management

- Touch on
  - Insight

- Other Tracks
  - Requirements Composer
  - Team Concert

Enterprise Architecture Enhancements Delivered in 2011

2011

System Architect 11.4.0.2 – Mar 25
- Service Pack
- Oracle 11g as host
- Merge/Ext deletions
- Quick Compare

System Architect 11.4.0.3 – Apr 29
- Service Pack
- Gradients, icons
- Smoother lines
- Reports w/o internal data

System Architect V11.4.1.1 – Dec 16
- NAF 3 improvements

IntelliCorp LiveCapture for SAP Solution Manager 1.0 – Apr 15
- Ability to import SAP processes into Enterprise Architecture for further planning and analysis

System Architect V11.4.1 – Oct. 28
- Jazz/OSLC Support for:
  - Architecture Management (e.g. SA, RDM)
  - Requirements Management (e.g. DOORS)
  - Change Management (e.g. RTC, Change)
- Frameworks & Standards
  - DoDAF 2 metamodel usability enhancements
  - New DoDAF 2 hierarchy diagram
  - New DoDAF 2 reports
  - DoDAF Migration Toolkit
- Integrations
  - BPMN 2 interchange
- Usability Improvements
  - Diagram styles, improved line routing
- Team Development & Collaboration
  - Improved workspace merge

Legend
Likely content
Stretch content

Q1	Q2	Q3	Q4

STATUS: ▬ *Released* ▬ *Planned* ▬ *Conceptual*

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System Architect 11.4.2: New Features

System Architect V11.4.2

2012 Q2

- Additional DoDAF views
- TOGAF 9 automated model consistency, framework & UI optimization
- Updated Business Motivation Modeling
- Improved OSLC workflows & rich hovers
- Usability enhancements
- Installer consolidation

- **Integration Additions**
  - OSLC support for ClearQuest 8.0.0.3+

- **Integration Updates**
  - OSLC support for DOORS 9.4, DWA 1.5, DM 3.0, RRC 4.0, RTC 4.0
  - Presentation Integration support for PowerPoint 2010
  - Insight 1.1 and RPE 1.1.2.2

- **Platform Additions**
  - Firefox 10 ESR
  - Citrix XenApp 6.5
  - VMware Workstation 8.0, ESX 5.0

- **New Translations**
  - Portuguese (Brazilian), Czech

- **New Content**
  - Improved DoDAF 2 and TOGAF sample encyclopedias, in the box

New DoDAF Views

- New views: CV-3, CV-4, PV-1, PV-2, SV-10b, SV-10c, AV-2, SvcV-5, and SvcV-6

- Unique symbol depictions instead of previous rectangles—show each symbol as rectangle or as new depiction

- Representational consistency for following box-in-box relationships:
  - OV-2 alternative
  - SV-1, SV-1 alternative
  - SV-2, SV-2 alternative
  - SvcV-1
  - SvcV-2

TOGAF 9 Improvements

- Representationally consistent diagrams have been added:
  - Business Architecture
  - Business Footprint
  - Business Service Information
  - Event
  - Goal/Objective/Service
  - Data Dissemination
  - Data Entity/Data Component
  - Application Communication
  - Application and User Location
  - Platform Decomposition
  - Software Distribution
  - Technical Architecture

- Old Business Architecture and Technical Architecture marked as *deprecated* but available by default

- Numerous non-TOGAF diagrams disabled by default for uncluttered TOGAF experience

New Business Motivation Model

- A more elaborate implementation of Enterprise Direction diagram in SA, based on OMG standard "Business Motivation Model – Version 1.1" dated May 2010.

- System Architect's implementation includes two representationally consistent diagrams:
  – BMM Business Motivation
  – BMM Hierarchy

- See BMM metamodel to the right

At top: BMM Motivational Element

1. BMM Classifier
2. BMM Assessment
3. BMM End
   3.1 BMM Desired Result
      3.1.1 BMM Goal
      3.1.2 BMM Objective
   3.2 BMM Vision
4. BMM Potential Impact
   4.1 BMM Risk
   4.2 BMM Potential Reward
5. BMM Means
   5.1 BMM Course Of Action
      5.1.1 BMM Strategy
      5.1.2 BMM Tactic
   5.2 BMM Mission
6. BMM Influencer
   6.1 BMM Regulation
7. BMM Directive
   7.1 BMM Business Policy
   7.2 BMM Business Rule

Improved OSLC Workflows and Rich Hovers

- Reuse recently-created links:
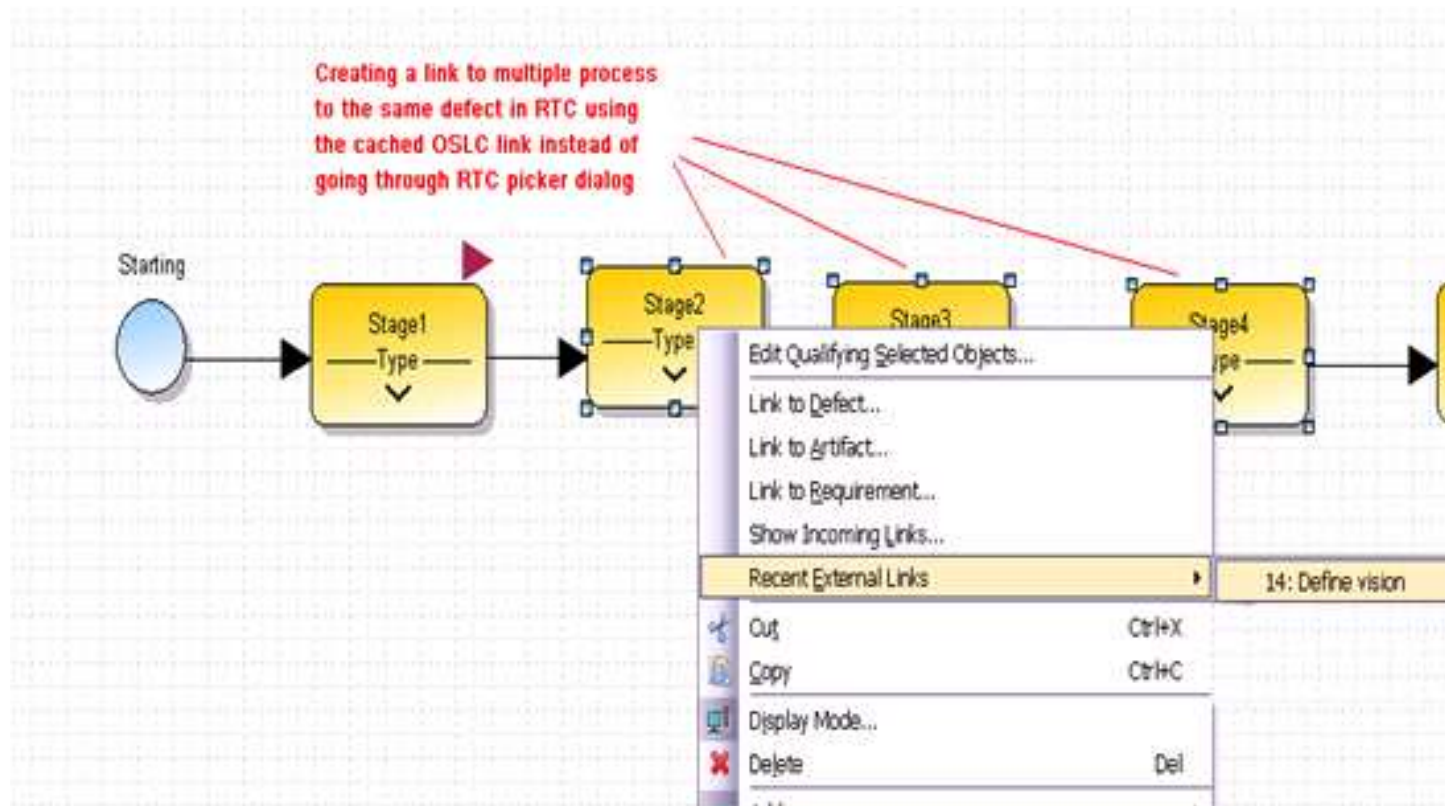
Usability Enhancements

- With SA 11.4.2, multi-select items in references window, report result window, or search result window, then drag those items onto a diagram

- Can now merge directly into source and target workspaces without intermediate or staging workspaces

- Copy and paste symbol styles: Copy styles, paste all styles, symbol width, symbol height, both width and height, fill color, pen style and color, or font style and color

- Previously, analytics could affect fill color or apply an analytic depiction icon. Now, can apply any combination of font color, font style, pen color, pen style, fill color, analytic depiction icon

- Symbol selection tool:
  - Symbol + Next
  - Symbol + Next + Next
  - Related Symbols
  - Unrelated Symbols
  - Related Connectors
  - Embedded Symbols

Analytic Builder Wizard - Step 3 of 4

Specify depiction to be applied for symbols

- ☐ Fill Color   [ ]   Select...
- ☐ Font color and style   [A]   Select...
- ☑ Pen color and style ——   Select...
- ☑ Icon   [icon]   Select...
- ☐ Select symbol

< Back | Next > | Cancel | Help
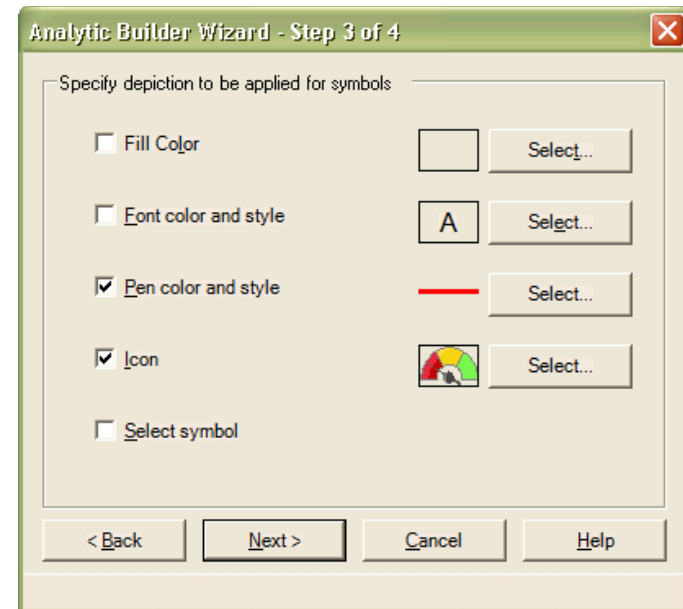
Usability Enhancements: Line Routing Improvements

- There are now two modes of auto line routing: retain and assign connections.

  – Auto line routing with **Assign Connections:** Lines will be re-routed through the shortest path while assigning new connections

  – Auto line routing with **Retain Connections:** Lines will re–routed while keeping the existing connection points

- To set line routing mode for current diagram go to Format > Diagram Auto Routing menu.

Center-to-Center Routing	
Diagram Auto Routing ▶	Off
Stylesheet ▶	Retain Connections
	✓ Assign Connections
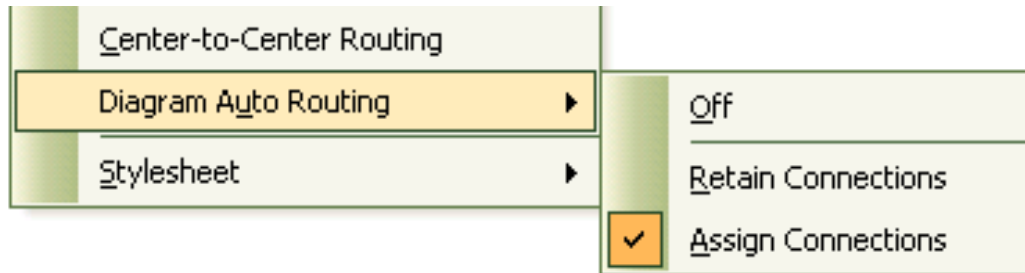
- The auto routing setting is saved on per diagram basis. The default setting for all diagram types is off.

Usability Enhancements (cont'd)

- **Property Window Groups**
  - Now property groups are now reflected in the Property Window

- **Multi-Property Driven Chapters**
  - It is now possible to hide chapters based on the values of multiple properties.

- **Installer Consolidation**
  - Main installer now incorporates installers for Process Integrator and SOA addons
  - Both enabled by default, but Process Integrator option presented only if Visio 2007 is installed

2011 - Rational Focal Point 6.5.1

- Released Dec 2011 - Highlights
  - Quality, Quality, Quality
    - Improve quality and performance
  - User Interface
    - Roadmap view updated
    - XY Chart (bubble)
  - Application Portfolio Management
    - Entry level APM offering
  - Delivery Management
    - CLM Integrations
      - RRC Integration - OSLC based integration

2012 - Rational Focal Point 6.5.2

- Expected release – Q3 2012
  - *Investment analysis improvements*
  - *Integrations*
    - Enable Integrations to be invoked from Focal Point
    - *OSLC Core V2 provider*
      - *Exposing FP resources in RDF format*
  - *Usability*
    - *Homepage Improvements: organize data into tabs*
    - *Enhancements to dynamic table*
  - *Reporting*
    - *Implement Tracked Resource Set spec*

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Investment Analysis

- *Support for creation and instantiation of templates*
  - *Leverage best practices*
  - *Faster ramp-up time*

- *Ability to document financial assumptions*
  - *Document and communicate thoughts and assumptions made for costs and benefits*
  - *Ability to revisit assumptions made for more accurate assumptions for future investments*

- *Enable taking snap shots of investment data*
  - *Visualize the progression of investments*
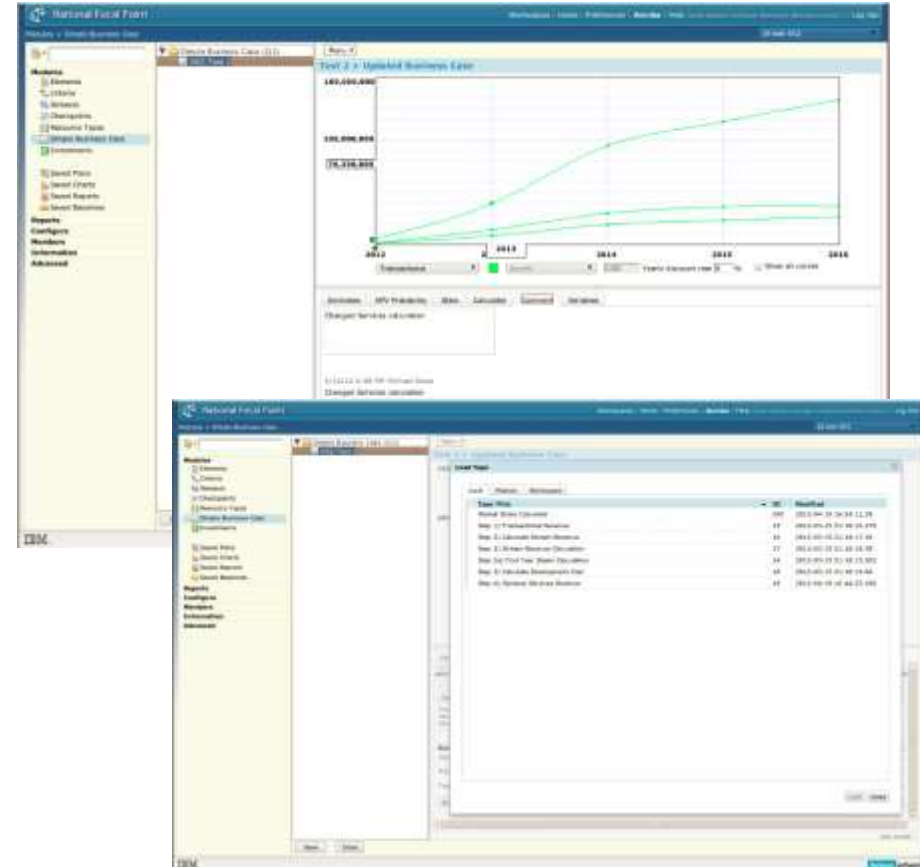
Integrations

- *Calling-out feature*
  - Enable Integrations to be invoked from Focal Point
  - *Retrieve data from external applications*
  - *Synchronize/update data from external applications*

- *OSLC*
  - *Exposing FP resources in RDF format*
    - *Enable rich hover of Focal Point data from external applications*
    - *Enable querying of FP data from external systems*

Usability

- *Homepage*
  - *Reduce clutter*
  - *Simplify the amount of information in a single view*
  - *Organize the information in the way you want to see it*
- *Dynamic Tables*
  - *Improved accessibility & configurability*
- *XY Chart & Gantt*

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Roadmap Summary

- Product Family comprised of scalable, Enterprise Planning, Architecture, and Management solutions

- Address multiple stakeholders in an organization with user interfaces that suit their own needs
  - Decision makers
  - Architects
  - Governance teams
  - Domain experts

- Provides platform using Jazz OSLC (and other) integrations to Rational and IBM Software Group products
  - Rational Change, Rational ClearQuest, Rational Team Concert, Rational DOORS, Rational Requirements Composer, Rational Design Manager, and more

- Maintain currency with standards and architecture frameworks

- Improve usability experience for heritage and new users

Emerging Concepts – Portfolio Strategy & Management
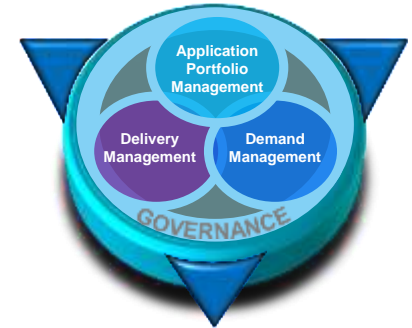
•**Improving visibility:**

Manage the portfolio of projects

- Consolidating project plans
- Managing exceptions
- Managing resources
- Tracking time

•**Alignment with business objectives**

- Doing the right projects
- Manage the impact of agile

•**Reducing waste and increasing business value**

- assess the value of new investments, deployed applications and delivery projects
- Making informed decisions

More templated solutions for...

- Application Portfolio Management

- Demand Management

- Delivery Management

- Global Outsourcing

- Etc.

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