IBM Rational project and portfolio management solution

Rational. software

Executing on your corporate strategy.

Align technology processes and portfolios to business goals

IT management is now at the core of most organizations' ability to execute corporate strategy and ensure compliance with a growing body of regulatory requirements.

With increased focus on the role of technology systems in defining the business, chief information officers (CIOs) and IT managers face intense pressure to more effectively govern all aspects of their IT processes, including software and systems delivery. They need to demonstrate how strategic initiatives translate into IT investments that deliver results. They're expected to provide immediate, informed answers to such questions as:

- How are we currently allocating our resources?
- How do planned initiatives impact existing portfolios and projects?
- How can we more easily identify opportunities we should and should not pursue?
- Are we making the best use of available skills and assets?
- How is the return on our investment decisions measured?
- Who is held accountable?

IBM Rational® software helps you answer these questions by enabling and automating best practices for improved governance and clear visibility into portfolio and project performance across the entire IT project lifecycle—from opportunity identification and prioritization through project execution and closure. An integral part of the IBM Rational solution for business driven development, project and portfolio management software helps you prioritize, plan, manage and measure projects as a comprehensive portfolio.

An integral part of the IBM Rational solution for business driven development, the project and portfolio management product family helps you deliver business value by prioritizing, planning, managing and measuring projects as a comprehensive portfolio.

With transparent and disciplined processes, you're able to operationally act upon organizational strategy more quickly and bring greater efficiency to the organization by:

- Aligning IT projects and capital investments to business goals.
- Balancing risk and return at the program and portfolio level.
- Providing role clarity and accountability at every stage of the delivery process.
- Efficiently executing processes within the context of a project, program or portfolio.
- Helping teams quickly identify project goals; determine the types of resources needed to complete a project; and pinpoint critical project milestones.

IBM Rational software delivers an enterprise project and portfolio management solution that can be implemented as needed and integrated into virtually any environment. This solution uniquely combines portfolio dashboards, project management best practices and asset lifecycle management capabilities that bridge the gap between development and operations. They're designed to support model-driven, iterative development with proven, built-in methodologies for consistent, repeatable development approaches, within the context of industry standards, such as the Project Management Institute's Body of Knowledge (PMBOK) structure. IBM has the proven expertise to help facilitate the organizational transformation for governance to align IT with business objectives and establish best practices for project and portfolio management.

Integrate capabilities as needed into your existing environment

The IBM Rational project and portfolio management solution is not a single offering, but a comprehensive set of products that can be adapted to the unique needs of your organization and technology environment at any given time. It spans Microsoft® Windows®, UNIX® and Linux® operating systems and mainframe platforms, supporting a wide spectrum of programming languages and integrated development environments (IDEs). You're able to achieve better governance one step at a time by incrementally integrating the platform products into your existing infrastructure. You can select from the following full range of functions with integrated capabilities:

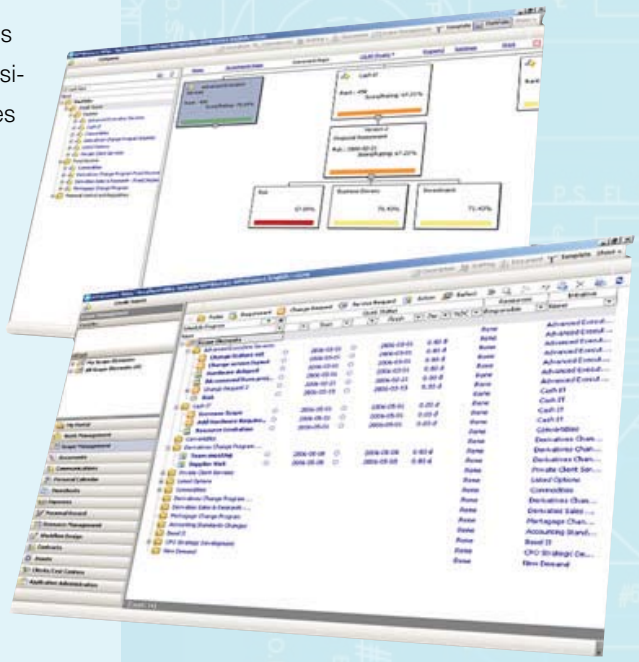
- IBM Rational Portfolio Manager software
  - Portfolio management
  - Scope management
  - Project management
  - Resource management
  - Financial management
  - Risk management
  - Software lifecycle analytics
  - Time and expense
  - Integrated workflow
- IBM Rational Method Composer software
  - Process management and automation
  - Reusable project methods and processes (including IBM Rational Unified Process® [IBM RUP®] and IBM Rational Summit® Ascendant™)
- IBM Rational ClearQuest® software
  - Visibility of defects and changes at the portfolio level
  - Greater visibility and insight into development activities
- IBM Rational RequisitePro® software
  - Visibility of requirements at the portfolio level
  - Resource management across portfolio requirements
- IBM Rational ProjectConsole™ software
  - Analytics and metrics tracking, including online dashboard and project console reporting

You choose the scope of the solution to meet your current project and portfolio management challenges. No matter how you design your solution, you can gain measurable results quickly, without sacrificing the flexibility you need to scale as your environment changes.

Align software application development to business goals with transparent, integrated processes

The traditional project approach to software delivery is often focused on individual areas of the business in isolation. With the IBM Rational solution, you operate from an organizational perspective. From asset discovery through solution deployment and delivery, the IBM project and portfolio solution provides a holistic view of your evolving technology to all stakeholders in the software delivery process. These stakeholders include the line-of-business organization that drives business strategy, the software development teams that enable that strategy, and the systems team that's accountable for day-to-day operations.

Complete top-down and bottom-up visibility into your software portfolio and projects helps you tighten the alignment of your development and delivery efforts with strategic organizational goals. The top-down view enables you to monitor performance against financial objectives, resource commitments and skills inventories across programs and projects. The bottom-up view enables you to track project-level activities and results. With the IBM solution, you gain a 360-degree view into your software development capacity and capabilities. You're better able to manage risk and return with reliable information to guide go/no-go decisions. You know whether programs and projects are delivering desired business results and how planned initiatives impact existing portfolios.



Translate your business strategy into execution.

Ramp up projects more quickly with reusable methods and processes

Just as reusable objects speed application development, reusable methods and processes streamline project startup and build confidence in estimating consistency. Both help you deliver high-quality software solutions more rapidly.

The IBM Rational solution uniquely separates reusable core method content from process definitions. This separation maximizes your flexibility to rapidly tailor processes as organizational and individual project needs dictate—at project inception or at any time during project execution.

IBM Rational methodologies are a set of repeatable processes based on best practices surrounding portfolio management, program management, project management and software development. This framework for asset-based planning can help you guide your process engineers, program managers and project leads in quickly assembling and deploying optimized engagement models, project plans and work products. Published methodologies can include skill alignments through the assignment of resource profiles, risk mitigations and all necessary documentation to help create more consistent, higher-quality plans—and avoid reinventing the wheel.

A leading distributor of industrial products needed a better way to demonstrate IT efforts on behalf of the business. With the IBM Rational solution, the IT organization was able to show that the company was spending 70 percent of its technology investment on maintenance and only 30 percent on new project work. With a clear understanding of the scope of IT operations, the organization was able to better align IT with business, and address resource inefficiencies to realize annual savings of hundreds of hours of IT and director-level time.

Integrate governance and management across the solution delivery lifecycle

Companies face challenges in managing distributed development teams, ensuring consistent processes and allowing for local flexibility while still enforcing a global process framework that's right for each element of the organization. The IBM Rational project and portfolio management solution enables IT executives, as well as program and project managers, to drive consistent, predictable performance with a worldwide methodology that can be applied to all divisions of an enterprise—no matter where they're located.

Simplify prioritization of investments

It's critical to capture everything that's going on within and across your IT environment at any given time. The IBM solution provides transparency across your organization that helps you prioritize investments to support business goals. You can see what you are spending on maintenance compared to new investments. You see how existing projects are performing against established metrics to measure business results. Through the use of graphical displays and pivot tables, key decision makers can visualize and achieve the desired balance of projects and people and make sure the entire organization remains in sync with strategic objectives. They can also perform detailed return-on-investment, payback or break-even analyses using a wide selection of financial models to determine which opportunities are most profitable.

Streamline capacity and resource management

Scenario-planning capabilities help you create new project proposals that are aligned with your organization's true capacity and available resources. You're able to gather business requirements and simulate what-if scenarios to determine the best portfolio mix for achieving desired business outcomes within existing capacity constraints. The IBM Rational solution maintains a complete model of the organization's capacity, affected resources, skills inventory, total workload and resource demand. You can optimize skills usage and ensure that all mission-critical resources are working on high-priority projects.

Automate best-practice development processes

With the IBM solution, you have maximum flexibility to fit the process to the project. By easily creating automated best-practice structures and process guidance specific to your different development approaches, you're assured that every type of work request—ranging from a small task assignment to a major program—is tracked with the appropriate level of detail. You have optimal and traceable work processes throughout the project lifecycle. Each work request includes all the latest information required for completion. This ability to communicate from the work breakdown structure means that project managers and team members have immediate access to the most current project content for any project element referenced—including project schedules, budgets, documents, scorecards, deliverables, tasks, issues, changes and risk assessments.

Help ensure availability of the right skills

The robust IBM Rational resource management capability offers multiple calendar types and a skills inventory that enables availability searches based on resource skills, skill levels, organizations, regions, proficiencies and performance history. Individuals are able to access and update their own profiles. Each record modification triggers alerts to the appropriate manager for review and approval. By integrating personal calendars into one central resource database and empowering individual team members to document the knowledge, skills and

A regional logistics and transportation company that wants to expand into new territories is hampered by an aging software system. It is using the IBM Rational solution to accelerate the development of a new, Web-based logistics management system based on a service-oriented architecture. With central access to requirements, resources, tasks, assets and schedules, managers are able to keep the project on track. There is minimal risk associated with key personnel being reassigned during the project lifecycle, because everyone is working with the same documented process.

experience gained from each project assignment, the IBM solution provides managers with the most up-to-date information for accurately assessing workload supply and demand.

Keep approved projects synchronized

In a matrix organization that shares common resource pools, task interdependencies among projects are common. Often, a scheduled task lagging in one project will affect another. The IBM Rational solution enables program managers to create task dependencies across multiple projects. The system analyzes bottlenecks, available slack, overallocated resources and due-date constraints automatically and interactively across the multiproject environment. You can balance risk and return with real-time views of demand pipeline, resource capacity and financial status. Team members are immediately informed of project changes via a collaboration workflow engine with common access to development assets, communication alerts and affected processes.

Manage risk effectively

Using development analytics tied to business goals and priorities, managers can better evaluate risks and manage variances across their portfolios of projects. And project leads can quickly use the project's expected risk profile to assess a project's vulnerabilities and manage the project to avoid those vulnerabilities. As potential risk events occur, they are automatically cataloged in a central repository and alerts are triggered based on established criteria. Each event is described and measured based on its impact, probability and precision rankings, as well as its effect on each of the project areas and related projects. Risk owners can decide what must happen in order for the risk to be considered closed, and can initiate the required corrective actions or tasks.

Make compliance easier

You automate best practices and process compliance with templates that provide process documentation as work is performed. All workflows and related outcomes are recorded for complete process and artifact traceability to simplify reviews and audits. In addition, the IBM Rational solution provides project document control functions for document lifecycle management, including document creation, review, approval and distribution through a collaborative workflow system.

The regional office of a multinational bank is using the IBM Rational project and portfolio management solution to standardize compliant processes and improve accuracy of IT chargebacks to the business. It can now better gauge project durations and efforts and effectively budget future IT cost allocations.

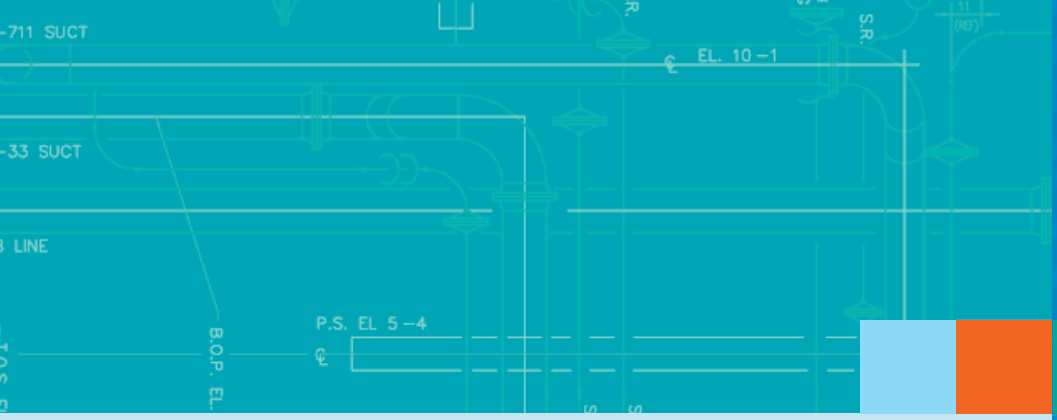
Measure project performance and evaluate business value accurately

The IBM Rational solution offers a customizable dynamic dashboard that combines all critical dimensions of project portfolio data in a single visual model. Executives and managers have a clearer view into the health and status of their portfolios and projects. Using real-time multidimensional views, graphs and reports, they can easily identify which projects have the greatest potential to contribute to the business; they can also distinguish which projects justify the commitment of limited resources.

Integrated accounting functionality provides project managers with the ability to estimate capital costs and consumable budgets and then phase them across the time line of the project. Team members enter their time and expense information directly against appropriate accounting charge codes using a straightforward and intuitive expense entry and reporting interface. As project costs are incurred, the IBM solution calculates the remaining expense budget for each charge code and displays the associated budget variance, so you're able to proactively mitigate cost overruns.

Respond rapidly to project and portfolio changes

To prevent uncontrolled changes from taking place over the life of a project, IBM Rational software documents all exceptions in a centralized issues repository. Changes and issues pertaining to the project are logged and identified with their assigned owners, priorities and statuses. The responsible project lead or manager can define proposed actions, identify the impacted areas and quantify the impact.



Achieve successful IT project deployments

IBM Rational tools are supported by an extensive worldwide staff of professional services consultants who bring years of experience to help you lay a solid foundation for successful IT projects. You can engage IBM Rational professional services for a variety of scenarios from large-scale, customized consulting projects to short-term assistance with a single challenge. Several types of services are available, including offerings that provide an objective assessment of your project and portfolio management capabilities; services that help you deploy a new tool or methodology; or services that help you produce tangible assets through a facilitated workshop. IBM services are designed to help you build team skills, reduce the time to productivity when implementing a new solution, and optimize return on your investment in the IBM Rational project and portfolio management solution.

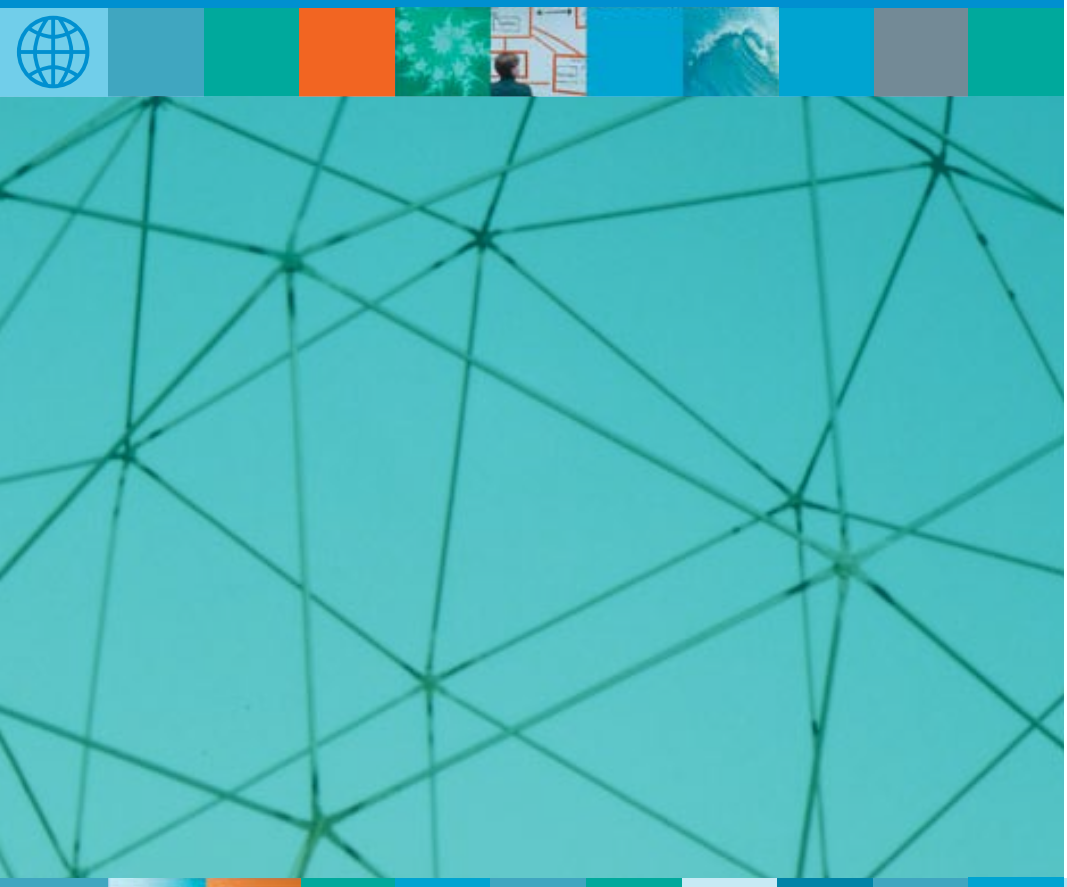
For more information

To learn more about IBM Rational project and portfolio management solutions, contact your IBM representative or visit:

ibm.com/software/rational/offerings/lifecycle.html

To learn more about IBM Rational services, visit:

ibm.com/rational/services



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