

# Building Effective Business Scorecards With Rational Portfolio Manager (RPM)

*Derren Bibby  
Chief Technologist, UK at Noblestar  
dbibby@noblestar.com*

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▶ What keeps me **Rational**?



# Agenda

- Introductions and Agenda Review
- Scorecard Primer
- Overview of Scorecards in RPM
- Demo of Scorecards Across Project Lifecycle
- Question / Answer





# Scorecard Primer



## Scorecards Defined

- Management system for gaining insight/perspective into actions/activities deemed most critical to achievement of strategic plan
- Can be driven by quantitative data (whether automated or manually capture) or qualitative data (in form of a questionnaire) or some combination of the two
- “Balanced Scorecard” vernacular introduced by Kaplan and Norton in ‘90s
- Scorecards are used for any number of purposes:
  - ▶ Monitor performance against objectives
  - ▶ Align activities with corporate/enterprise strategies
  - ▶ Provide commonality at point of evaluation
  - ▶ Consolidation of performance reporting



## Why Scorecards?

- Business Scorecards allow collection and reporting of quantitative data in situations where:
  - ▶ Applications/systems are in place to collect data in an automated manner
  - ▶ Expectations of performance to be measured is known and agreed upon
  - ▶ Dedicated group in place to monitor and analyze metrics
- Business Scorecards allow collection and reporting of qualitative/subjective data in situations where:
  - ▶ Performance Management/measurement is just beginning
  - ▶ Agreement on appropriate measures haven't/can't be made
  - ▶ Qualitative data points are unattainable, cost prohibitive or undetermined
  - ▶ Desire to augment quantitative data with qualitative data



## Scorecards Challenges

- Agreement on what to measure
- Agreement on the standards for measurement
- Ability to get automated, quantifiable data in cost effective manner
- Consolidation of KPIs into single report
- Making performance metrics and reports relevant to individual consumers

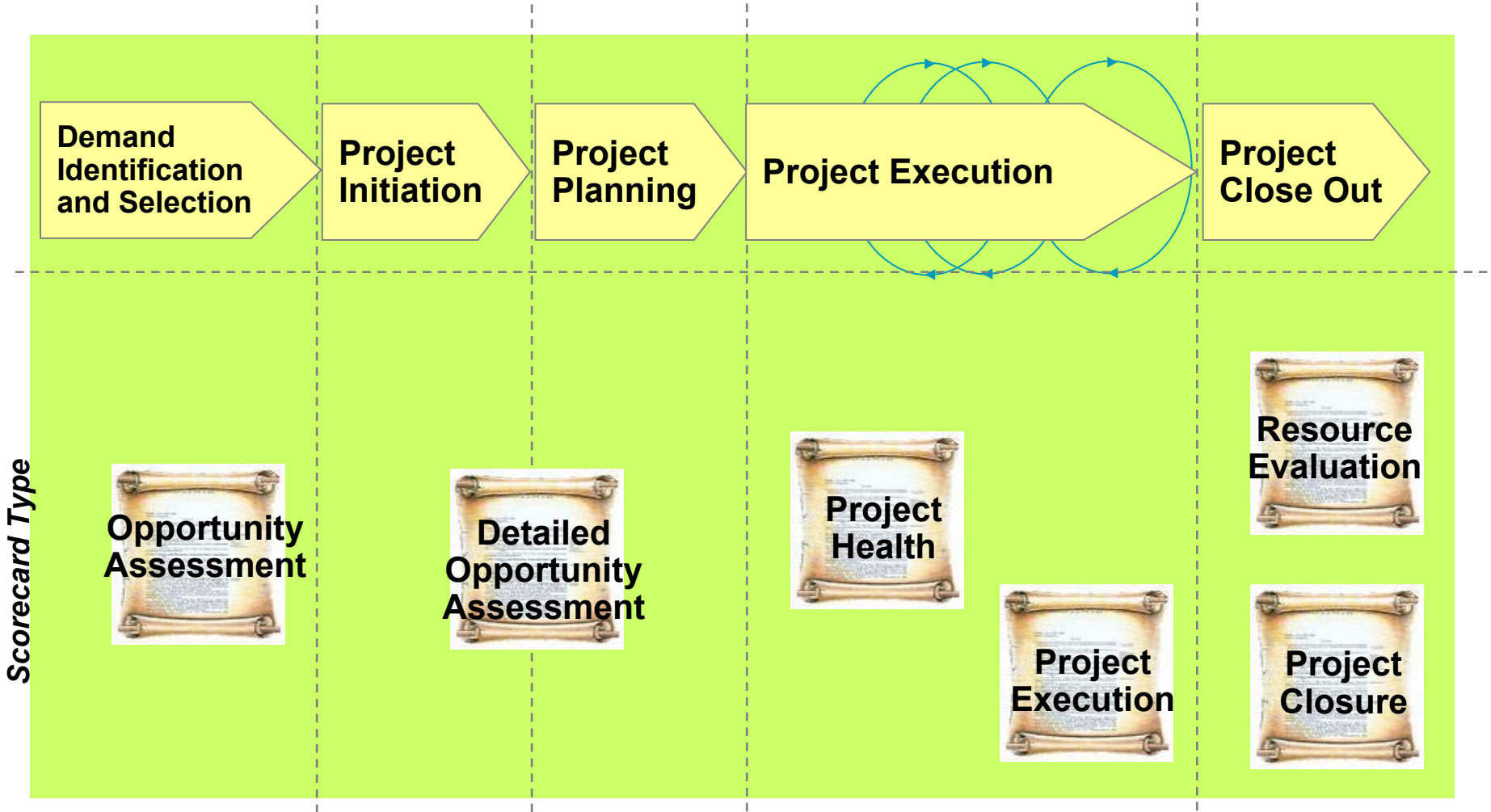


# Scorecard Creation and Updating

- Scorecards are typically created with input from personnel around the organization
  - ▶ Program Managers
  - ▶ Project Managers
  - ▶ Business Unit Owners
  - ▶ “C Level”/ Executive Management Team (CIO, CFO, COO, etc.)

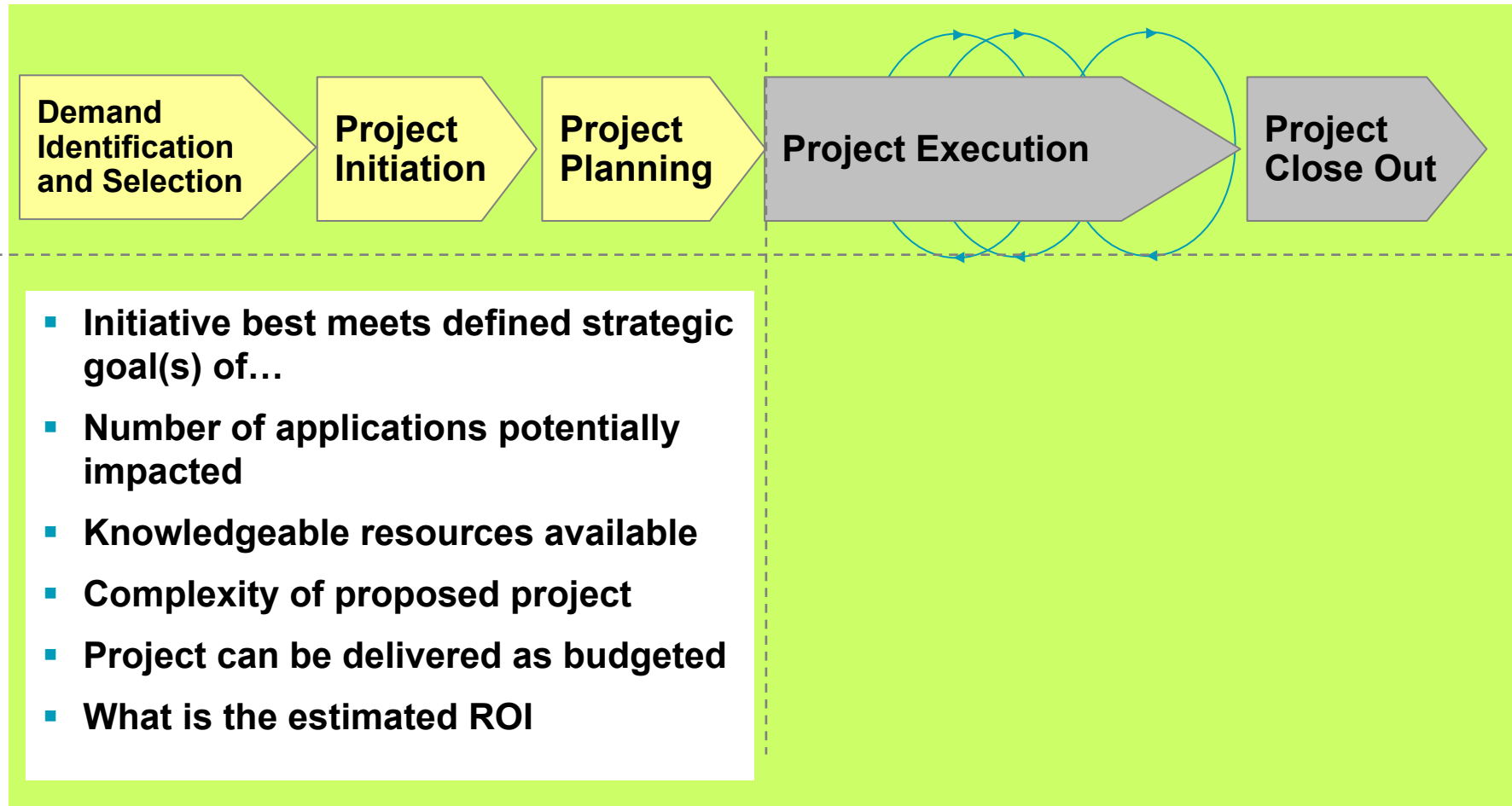


# Scorecard Use Within the Project Lifecycle

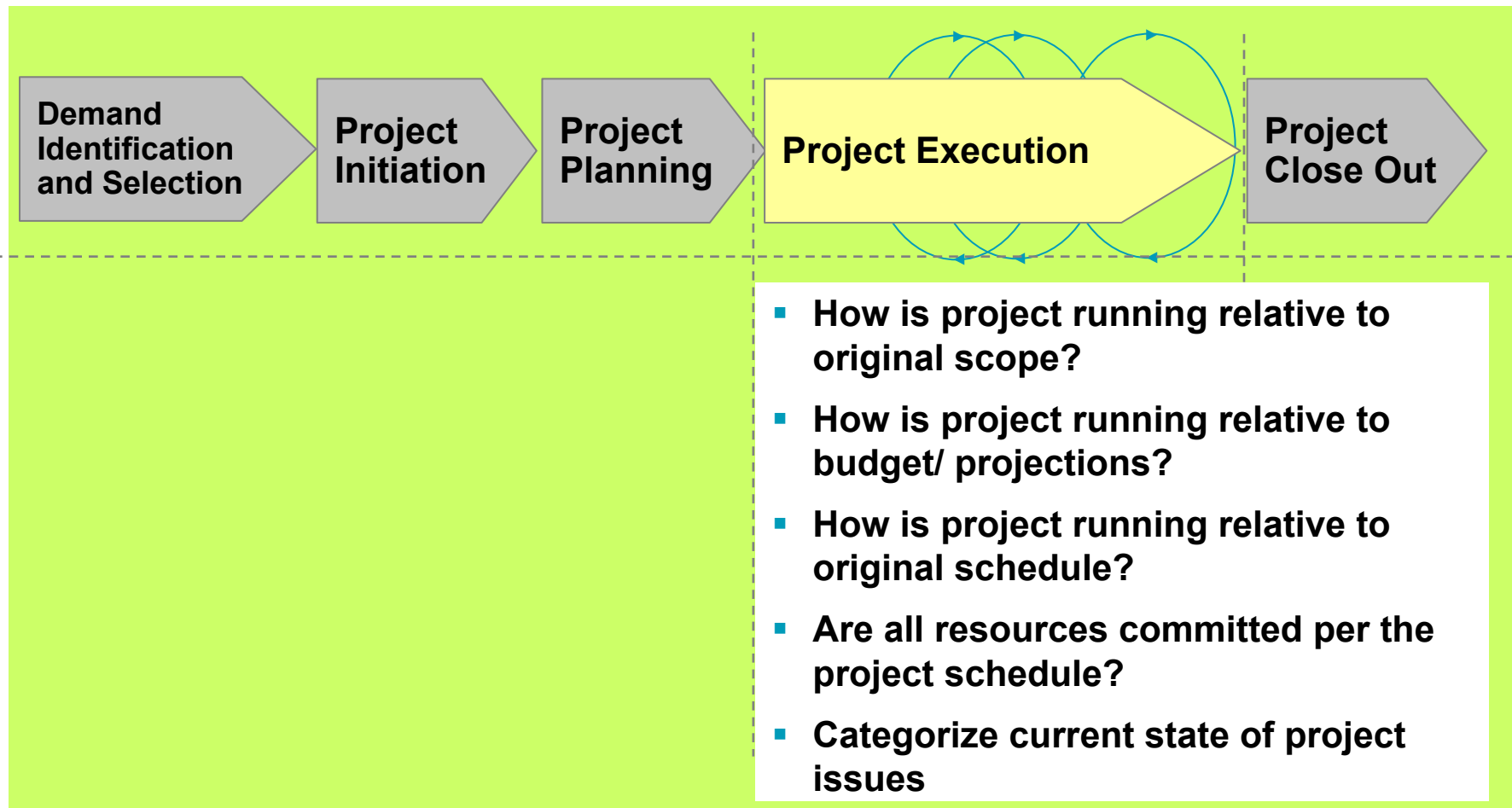




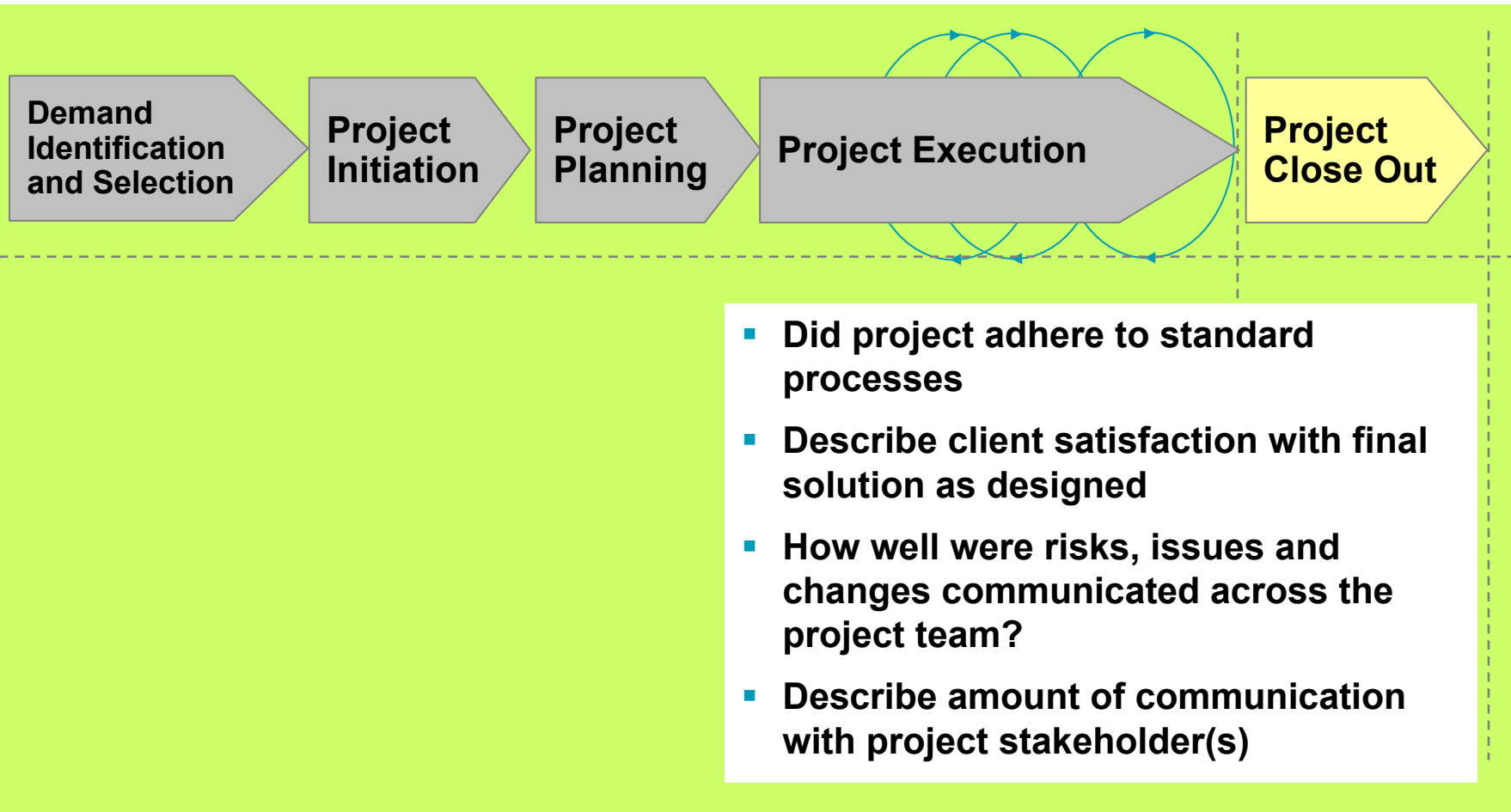
# Sample Questions by Lifecycle Phase



## Sample Questions by Lifecycle Phase (cont.)



## Sample Questions by Lifecycle Phase (cont.)





# Overview of Scorecards in RPM



## WBS and Scope Scorecards in RPM



### Example Usage:

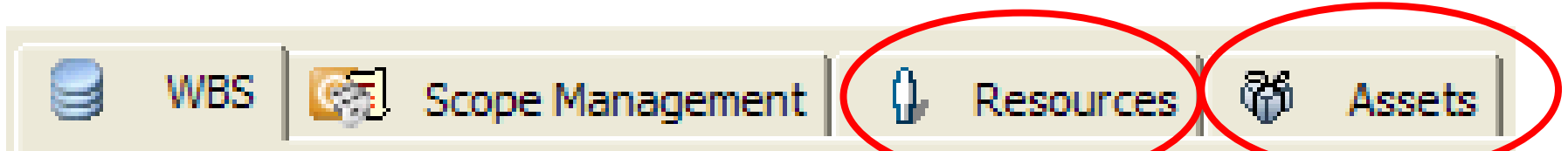
- Proposal Assessment
- Project Health Assessment
- Project Close-Out

### Example Usage:

- To ensure consistency in the evaluation/ ranking/ prioritization of issue/ risk/ defect



# Resource and Asset Scorecards in RPM



## Example Usage:

- Post project evaluation of:
  - Team Members
  - Project Manager

## Example Usage:

- Evaluation of applications in enterprise
  - Number of other systems application integrated with?
  - Number of employees accessing application?





# Demo



## Demo Points to Cover

- Using RPM to design good business scorecards is end goal
- Viewing scorecard data
  - ▶ My Portal > Scorecard Map
  - ▶ My Portal > OLAP Pivot
  - ▶ My Portal > Report > Quick Dash
- Discuss importance of weighting
- Discuss importance of identifying Probability Type
- Scorecard functional enhancements in v7.0.3.3, v7.1
- Discuss evolution of scorecard maturity over time







# Questions



## Who is Noblestar?

- IT Management consultancy
- Founded in 1987
- Headquartered in US (Reston, VA), European HQ in London
- U.S. and European presence
- Global 1000 client base
- First Rational Gold Partner, currently IBM Premier Partner





# Thank You

***Derren Bibby***

*[dbibby@noblestar.com](mailto:dbibby@noblestar.com)*

*+44 (0) 20 7153 6840 (O), +44 (0) 7946 355 238 (M)*

*[www.noblestar.com](http://www.noblestar.com)*

