

An abstract graphic on the left side of the slide, composed of overlapping, semi-transparent geometric shapes in shades of blue, green, and light blue, creating a sense of depth and movement.

Continuous Business Planning

Connecting the dots between strategy and execution

Innovate2013
The IBM Technical Summit

Objectives

- Understand current trends / markets
- Overview of Continuous Business Planning within IBM DevOps
- Primary challenges / stakeholders related to Continuous Business Planning
- IBM Continuous Business Planning solutions / tools

Software delivery

At the heart of today's top technology trends

Big Data

Insights on new products by more efficiently interpreting massive quantities of data



Cloud

Demand for apps requires fast, scalable environments for dev and test, as well as production



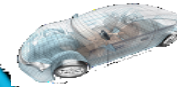
Social Business

Broader set of stakeholders collaborates to deliver continuous innovation and value



Instrumented Products

Industry requirements demand faster response to regulations and standards, with traceability and quality



Mobile

Modern workforce expects constantly updated software to connect to enterprise systems



Software delivery

Intelligent/ Connected Systems

Software component in smart products driving increased value and differentiation



Challenges

Line-of-business

Takes too long to introduce or make changes to mobile apps and services

Operations

Rapid app releases impact system stability and compliance

>70%

of budgets devoted to maintenance and operations

4-6 weeks

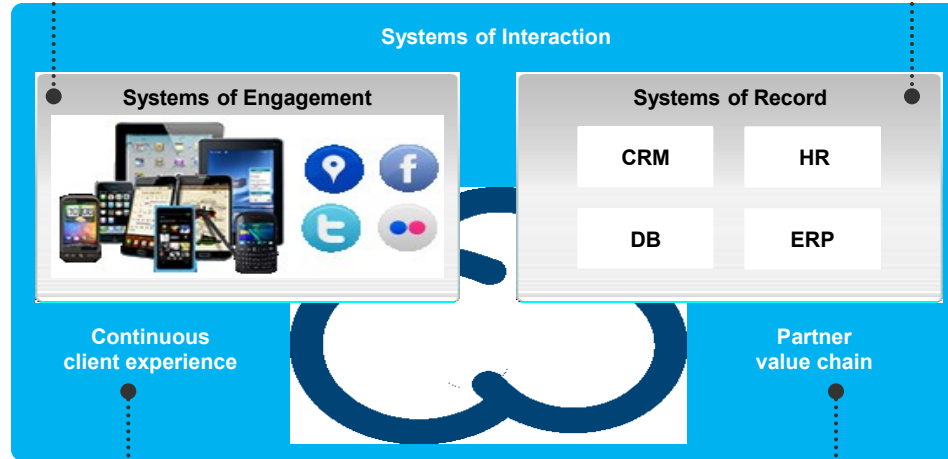
to deliver even minor application changes to customers

>45%

of customers experience production delays

>50%

of outsourced projects fail to meet objectives



Development/Test

Speed mismatch between faster moving front office and slower moving back office systems, delaying time to obtain feedback

Suppliers

Difficult to gain visibility
Delivery in the context of agile

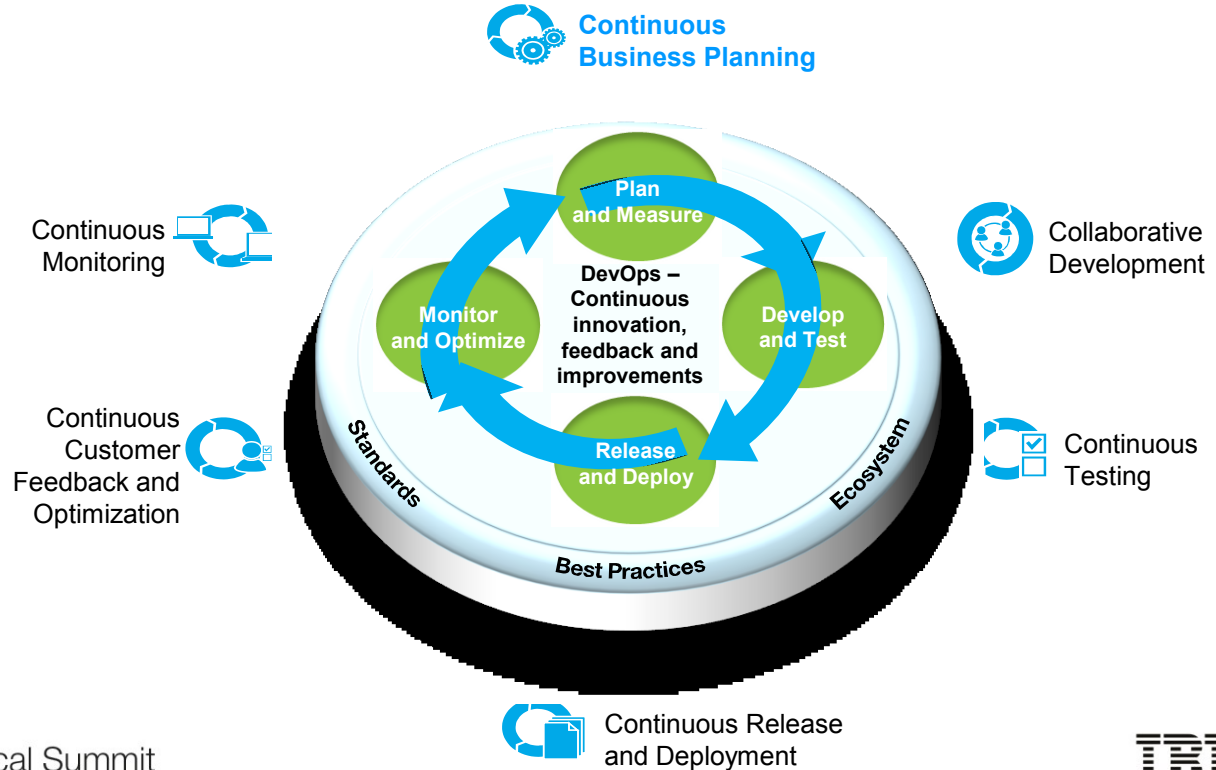
IBM DevOps – Continuous Software Delivery

Enterprise capability for continuous software delivery that enables clients to seize market opportunities and reduce time to customer feedback

Accelerate software delivery – for faster time to value

Balance speed, cost, quality and risk – for increased capacity to innovate

Reduce time to customer feedback – for improved customer experience



Quiet revolution

Portfolio driven Application Lifecycle Management will deliver a continuous stream of value

- **The voice of the customer will be that of the actual customer.**
- **Continuous delivery will change demand management.**
- **Product focus will replace project focus.**

A previously quiet revolution in ALM called **DevOps is now noisily elbowing its way into the mainstream.**

If Agile software development was the opening act to a great performance, continuous delivery is the headliner. The **pace at which consumers expect change is causing a crisis** in application development and delivery (AD&D), but it's exactly what's essential to create a sense of urgency. **Agile was a good start, but it wasn't sufficient to drive better business results**; continuous delivery forges the broken link in the value chain, connecting business strategy with business results.

Source: Continuous Delivery Is Reshaping The Future Of ALM by Kurt Bittner, July 22, 2013, Forrester Research, Inc.

The changing landscape of business planning

Lean Portfolio Management

In a world of scarce resources, the key question is:

Are we working on the most valuable things?

- Requires a Business and IT dialog
- Translation of those priorities to a release roadmap
- Account for the inherent uncertainty of software development through risk / reward analysis
- Demand / supply of financial and people resources, based on a value-based discussion
- Monitor execution and take corrective actions

Strategy Alignment



Fullfill business demands



Right Cost



Well Balanced



Continuous Business Planning

Maximize business outcomes and value through an open collaborative, standards-based platform and strong governance framework.

Execute on a strategic vision

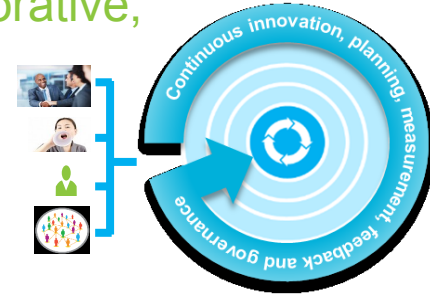
- Make desired outcomes a reality
- Manage business concepts, business requests and business releases

Stay constantly aligned

- Working on the right things at the right time, keeping strategy aligned with execution
- Make informed decisions to better align products and portfolio investments
- Improve visibility and transparency of development initiatives
- Learn what customers really want and steer with agility

Plan perpetually

- Take a pulse on progress perpetually, adjusting strategies when warranted and staying on top of market opportunities
- Provide input, gain clarity, better achieve consensus, and adapt to changes more quickly



Plan and Measure

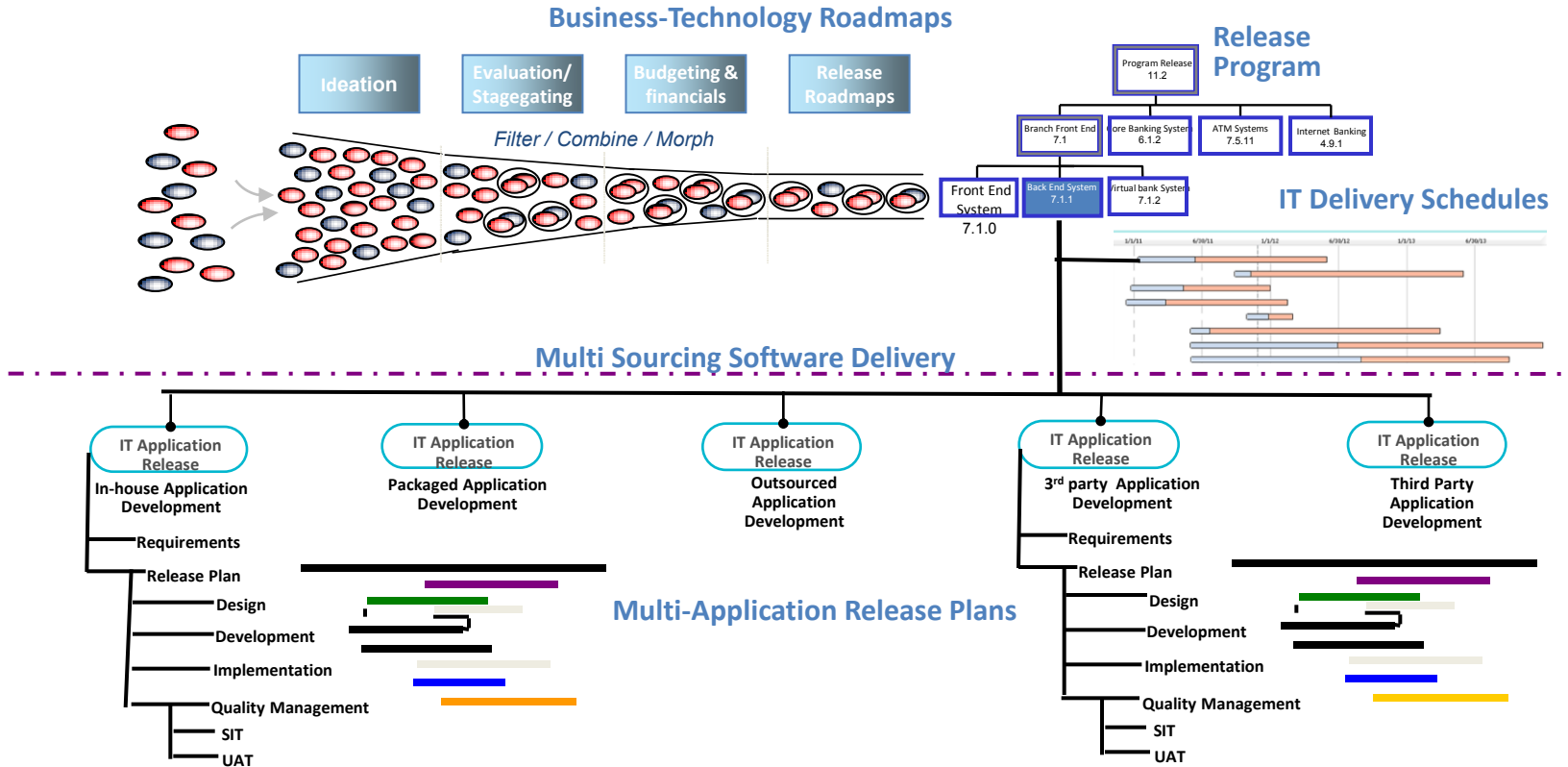


- Collaborative decision making
- Produce release roadmap
- Understand capacity
- Track status of each business release
- Track status of each business need / feature
- Shorter delivery cycles through end-to-end integration

- Define operational releases for each business release
- Allocate deployment environments to releases
- Orchestrate changes across multiple applications
- Track quality milestones and deployment status

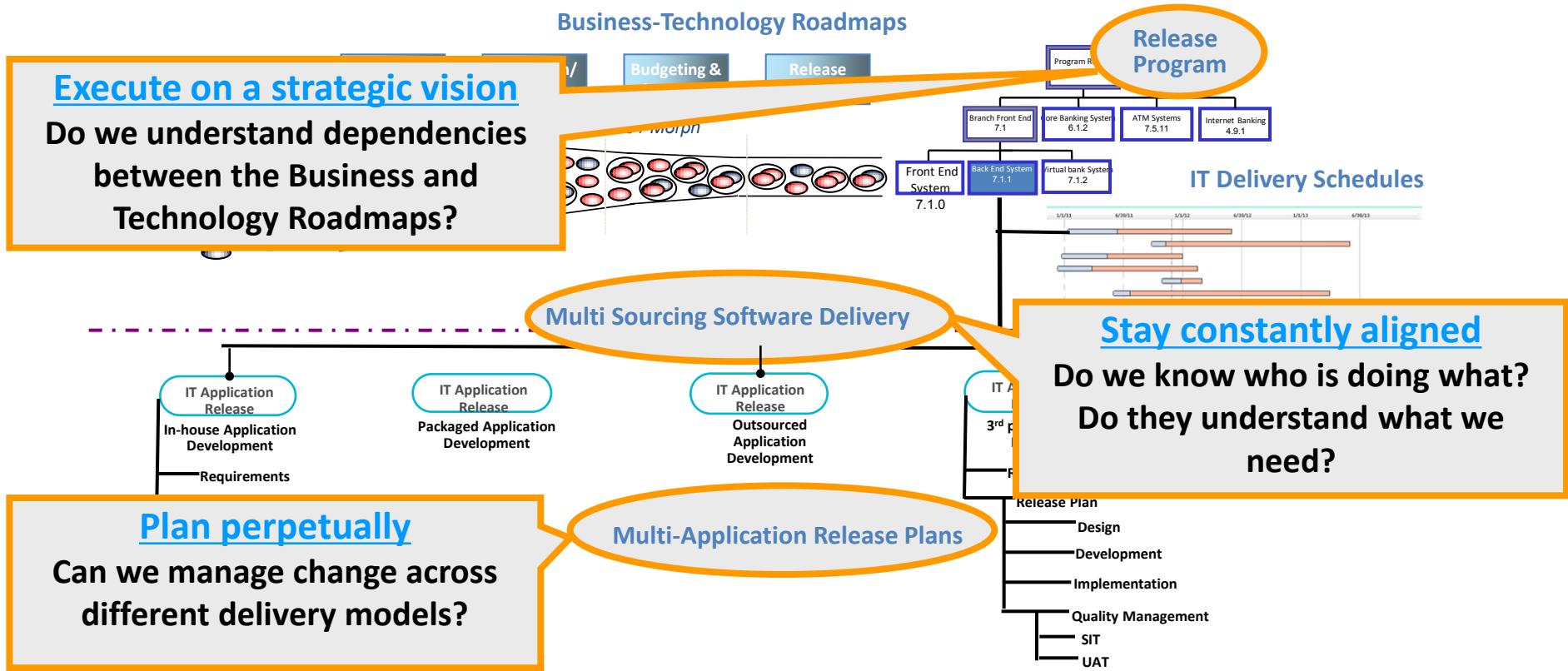
Align Business Roadmaps and Release Plans

...It all gets really complicated, real fast!



Continuous Business Planning

...A simplified view across the development and delivery lifecycles



Know your External and Internal Stakeholder Expectations

- Are my active **projects at risk** of timely delivery?
- What is the **delivery state and quality** of my services requests?
- Which **change requests** requires my attention?

- How do we plan what should be **delivered when**?
- How do we **track and present status**?
- How do we **collaborate** with the business to manage variation? (trade-off)

- Do we have a **complete** list of projects?
- What is the **trend** of project completion?
- How do we manage **change requests**?

- What is in the **pipeline**?
- Is **response time** improving?
- Are we reaching our **on-time delivery** targets?



Customers
Social Media



Line of Business
Executive



PMO



Exec



CIO



Development Teams



Captive Dev
Center



Vendor Teams

Line of Business Executive



Project Status							
Name	State	Implementation Complete	Overall Status	Schedule	Quality	Risk	Planned Delivery Date
AccountOpening R3.5	In progress	16.67%	🚩	<1 wk delay	2 - Poor	🚩	3/7/14
AccountOpening R4.0	Approved	0%	🟢	<1 wk delay	0 - High	🟢	12/1/13
AskMe R 1.7	In progress	83.33%	🟡	1-3 wks delay	0 - High	🟡	11/1/13
AskMe R 2.0	In progress	72.73%	🟡	<1 wk delay	1 - Moderate	🟡	1/2/14
eBilling R 1.5	In progress	90%	🟡	<1 wk delay	1 - Moderate	🟡	11/20/13
eBilling R 1.6	In progress	44.44%	🚩	> 3 wks delay	2 - Poor	🚩	12/1/13
MyAdvisor R 1.5	In progress	59.32%	🚩	<1 wk delay	0 - High	🚩	1/1/14
Search R 1.1	Approved	0%	🟢	<1 wk delay	0 - High	🟡	1/19/14
SSO/IDM Management Central R 2.0	In progress	62.5%	🟡	1-3 wks delay	0 - High	🟡	12/30/13



Are my active projects at risk of timely delivery?

Project Scope Status				
eBilling R 1.6	Linked Features	State	Priority	% Complete
	F002:Mobile interface for bill payment	🟢 Approved	🚩 1 - Mandatory	47.27
	F039:Billing partner self-registration	🚩 In Progress	🚩 1 - Mandatory	0
	F041:Pre-authorized bill payments	🟢 In Progress	🚩 1 - Mandatory	42.86
	F034:Process payment to charity based on info provided	🟢 In Progress	🚩 1 - Mandatory	55.56

What is the delivery state of my services requests?

Outstanding Change Requests					
Title	State	Project	Priority	Decision Date	Response Time
CR 011:Roadmap removal	🟢 Ready	🟢 MtM R1.0	🚩 5 - Mandatory	10/29/12	15
CR 016:Movement of AskMe Online R2.0 Global Build	🟢 Ready	🟢 AskMe R 2.0	🚩 5 - Mandatory	9/6/13	7
CR 028:AskMeOnline - WM Integration	🟢 Ready	🟢 AskMe R 1.7	🚩 5 - Mandatory	8/28/13	17
CR 030:CR to change Milestone dates	🟡 Submitted	🟢 MyAdvisor R 1.5	🟡 3 - Moderate	-	0
CR 035:myCare cost increases	🟢 Ready	🟢 myCare Self-serve R 1.25	🚩 4 - Critical	11/27/12	15
CR 048:Change in scope to MyAdvisor	🟡 Submitted	🟢 MyAdvisor R 1.5	🚩 4 - Critical	-	0
CR 054:myCare Feasibility amendment	🟢 Ready	🟢 myCare Self-serve R 1.25	🚩 4 - Critical	10/22/12	16
CR 057:MtM test milestone changes	🟢 Ready	🟢 MtM R1.0	🚩 4 - Critical	10/29/12	15

Which change requests requires my attention?

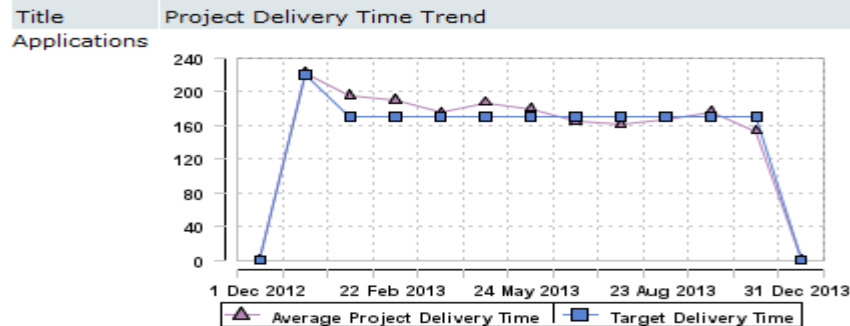


Project Management Office (PMO)



Application Overview						
Title	Releases					
AskMe	Releases Link	Release Number	State	Target Delivery Date	Total Estimated Cost	Total Estimated Effort
	AskMe R 1.0	R 1.0	Delivered		9,000	200 days
	AskMe R 1.0 + CR	R 1.0 + CR	Delivered		0	0 days
	AskMe R 1.5	R 1.5	Delivered		18,300	320 days
	AskMe R 1.6	R 1.6	Delivered		0	0 days
	AskMe R 1.7	R 1.7	Implementing		2,000	89 days
	AskMe R 2.0	R 2.0	Implementing		18,000	10 days
	AskMe R 3.0	R 3.0	Proposed		0	0 days
eBilling	Releases Link	Release Number	State	Target Delivery Date	Total Estimated Cost	Total Estimated Effort
	eBilling R 1.0	R 1.0	Delivered		15,000	6 days
	eBilling R 1.5	R 1.5	Implementing		420,000	85 days
	eBilling R 1.6	R 1.6	Approved		67,000	67 days
	eBilling R 2.0	R 2.0	Proposed		0	0 days
	eBilling R 2.1	R 2.1	Proposed		0	0 days
	eBilling R 3.0	R 3.0	Proposed		0	0 days

Delivery trends



Do we have a complete list of projects?

Change Request by Status			
State	Quantity	Share	
Draft	4	9.8%	<div style="width: 9.8%;"></div>
Submitted	8	19.5%	<div style="width: 19.5%;"></div>
Assess	3	7.3%	<div style="width: 7.3%;"></div>
Ready	5	12.2%	<div style="width: 12.2%;"></div>
Approved	4	9.8%	<div style="width: 9.8%;"></div>
Authorized	1	2.4%	<div style="width: 2.4%;"></div>
Implementing	3	7.3%	<div style="width: 7.3%;"></div>
Closed	11	26.8%	<div style="width: 26.8%;"></div>
Rejected	0	0.0%	
Cancelled	2	4.9%	<div style="width: 4.9%;"></div>
Archived	0	0.0%	
		Sum: 41	

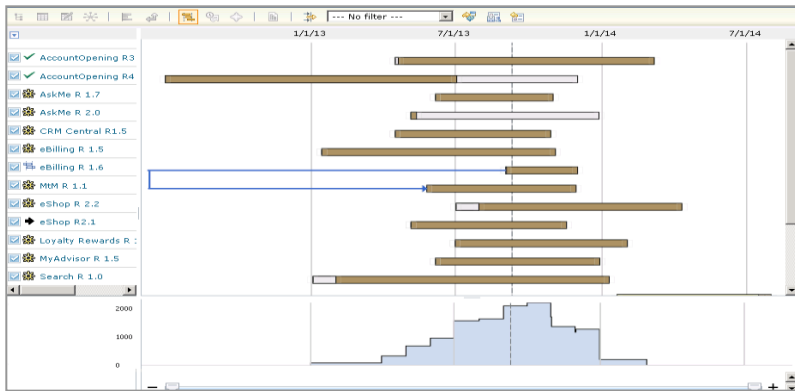
What is the trend of project completion?

CR Response Time by Application		
Title	Average CR Response Time	Open CRs
AskMe	3.2	5
myCare Self-Serve	22	1
eBilling	15.78	3
eShop	0	2
Portal	15	1
Search Central	0	1
Social Media	0	0
SSO/ID Management Central	14	2
MyAdvisor	0	3
CRM Central	0	2
Loyalty Rewards	0	1
MtM	15	1
AccountOpening	6	3
SubscribeMe	0	2

How do we manage change requests?



Development / QA Executive



Define what will be delivered when while balancing resource supply and demand

Which business need is more critical to implement NOW?

Enable charity donations from mobile devices		Make account opening sleeker and streamlined	
ID: 010	Title: Enable charity donations from mobile devices	ID: 004	Title: Make account opening sleeker and streamlined
Description: Provide mobile interface to enable users to donate the money from their registered mobile devices.		Description: make it more sexy	
State: <input checked="" type="checkbox"/> Approved		State: <input checked="" type="checkbox"/> Approved	
Priority: <input checked="" type="checkbox"/> 2 - Important		Priority: <input checked="" type="checkbox"/> 2 - Important	
Date Raised: 5/1/13		Date Raised: 4/1/13	
Desired Delivery Date: 11/29/13		Desired Delivery Date: 1/10/14	
Age: 112.0416666666667		Age: 142.0416666666667	
Justification: -		Justification: -	
Ranking: -		Ranking: -	
Relationships: <input type="checkbox"/> Assessment		Relationships: <input type="checkbox"/> Assessment	
Impact: Requires mobile UI. Need to support multiple		Impact: -	

Completed: 10. Required: 4. Recommended: 8. Number of elements: 5. Comparison: 10.

Collaborate with the business to manage variation and understand priorities?

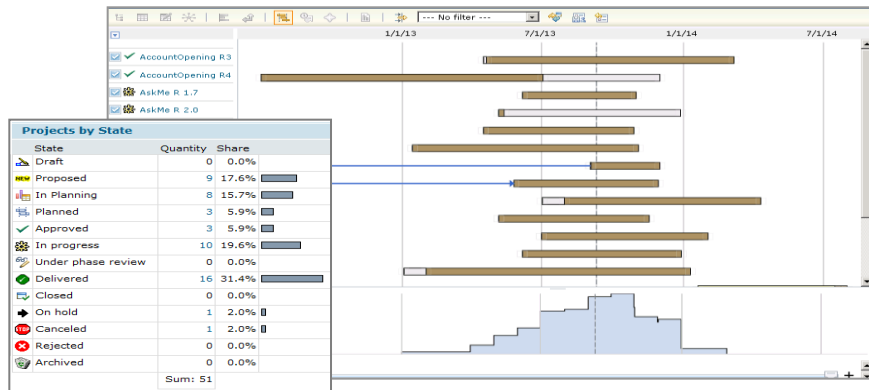
Release Business Needs to User Story Traces

Business Need	Plan Item State	Requirement Coll	User Story	Story State	Story Planned	Story Pts
Pre-authorized bill payments		Pre-authorized bill payment				
Billing partner self-registration	Implementing	Billing partner self-registration	MBM Story: Bank partners enter the account information for bill payment	Done	Sprint 1 (1.6)	5
			MBM Story: Bank partners register with JKE Mobile through web-based to allow users nav their bill via registered	Implemented	Sprint 2 (1.6)	8

Release Business Needs Test Result

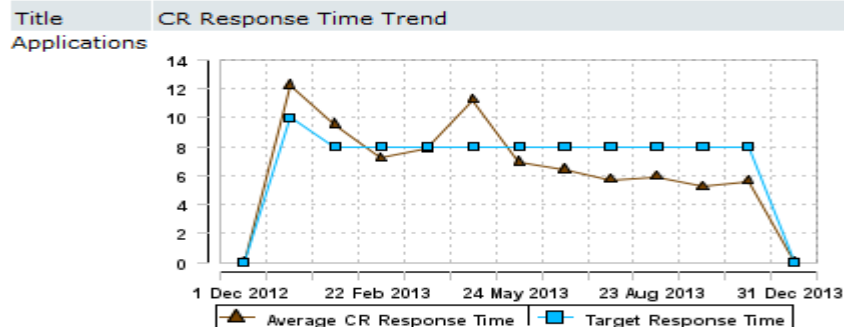
Business Need	Test Iteration	Attempted	Not Attempted	Passed	Failed	Inconclusive	Blocked	Defect
Billing partner self-registration	Sprint 2 Development Test (R1.6)	2	2	2	0	0	0	0
Mobile interface for bill payment	Sprint 1 Acceptance Test (R1.6)	12	4	7	4	1	0	0
	Sprint 1 Development Test(R1.6)	12	3	12	0	0	0	0

For a project, analyze requirements, development and test status for each committed business need (*Requires Focal Point Dashboards for Planning & Execution Add On)



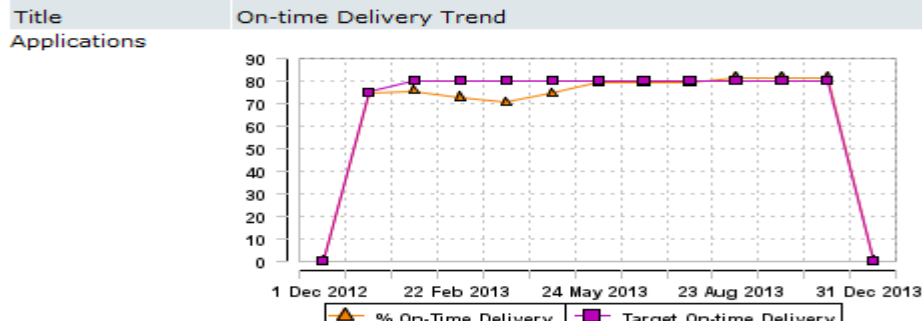
What is in the pipeline?

CR Response Time Trend



Is response time improving?

Delivery trends



Are we reaching our on-time delivery targets?



Leverage the flexibility of IBM solutions

Process / Capability Focus

Prioritize and Manage

Rationalize improvements to technology assets with Application Portfolio Management



Gain Visibility

Balance your Enterprise Portfolio across your business in alignment with goals

Govern

Achieve IT Governance to optimize technology investments with critical business requirements

Open platform for data and tools integration and automation

Application Portfolio Management

Increase strategic spend and improve business agility

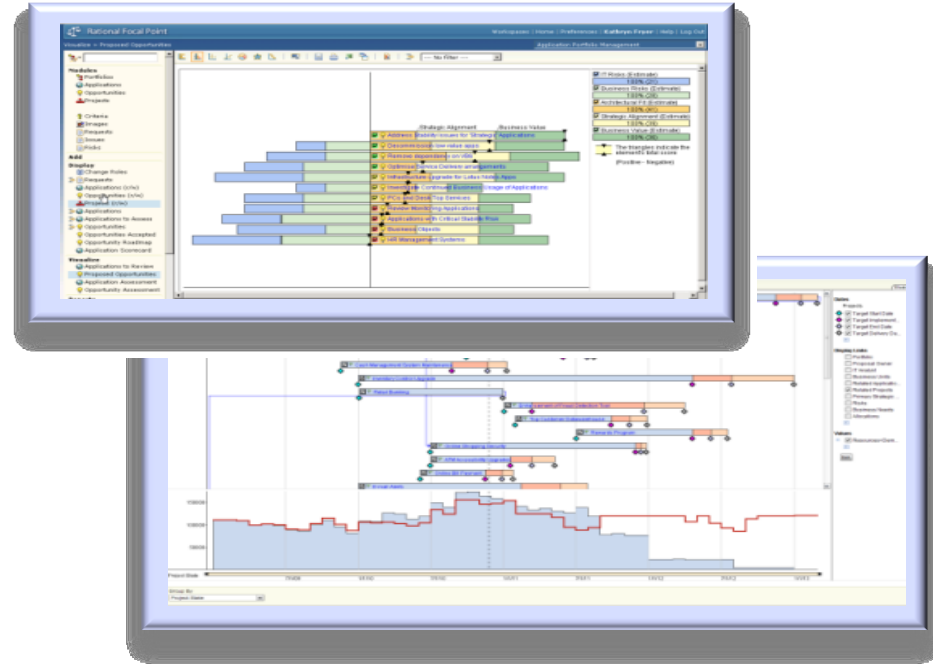
- Enable a shift in application investments towards **business innovation** by **reducing cost** of maintenance and operations and improving business agility
- Better **align** application **investment decisions** with **organizational strategies** and priorities through an effective dialog between business and IT
- Improve efficiency in the governance of application portfolio rationalization efforts, leading to **optimized allocation of capital** and resources with reduced time to decisions
- Enable realization of application decisions through road mapping and **integration with cross-platform ALM**



Demand Management

Prioritize, evaluate, compare, visualize and plan for optimized portfolios supporting business needs

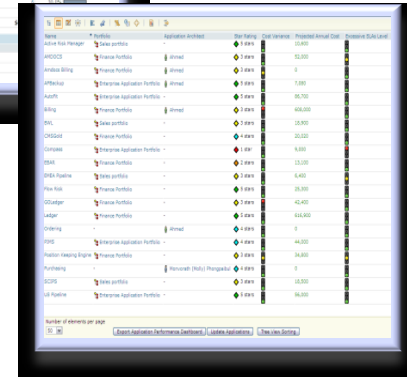
- **Capture** new investment ideas from a large community of stakeholders
- **Prioritize** business needs, ideas, project proposals for an optimized portfolio
- Model the project's **Net Present Value** (NPV) and understand the impact of **risk and uncertainty** surrounding these values
- Understand value and perform the **tradeoffs** such that projects are set up for success, and operate within resource, finance and time constraints



Delivery Management

Manage value and change in delivery via increased transparency, collaboration and communication across teams

- Focus on **managing value and change** to create true business value
- Drive efficiencies and control through **collaboration, communication and transparency** around project information
- Inform decision making at all levels with **improved traceability**
- Create “**self directed teams**” and enable **agility** on a wider scale with increased transparency and governance
- Respond quickly to **business and project changes** to ensure that risk is mitigated early and priorities are adjusted as appropriate



Governance Application Development Outsourcing

Maximizing Business Outcomes and Value, when developing across multiple suppliers

- **Facilitate collaboration across software development suppliers**

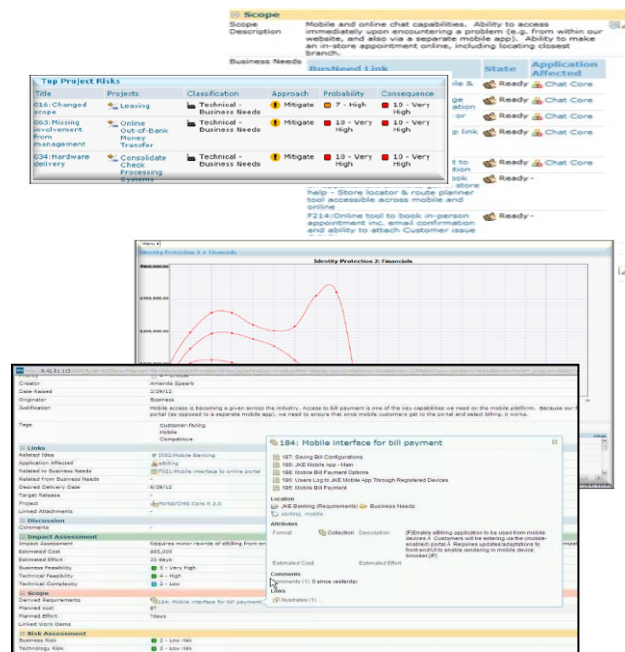
- Leverage the eco-system of value-add providers and facilitate on/off boarding of sw suppliers based on performance and contributions.

- **Collaborate to understand value**

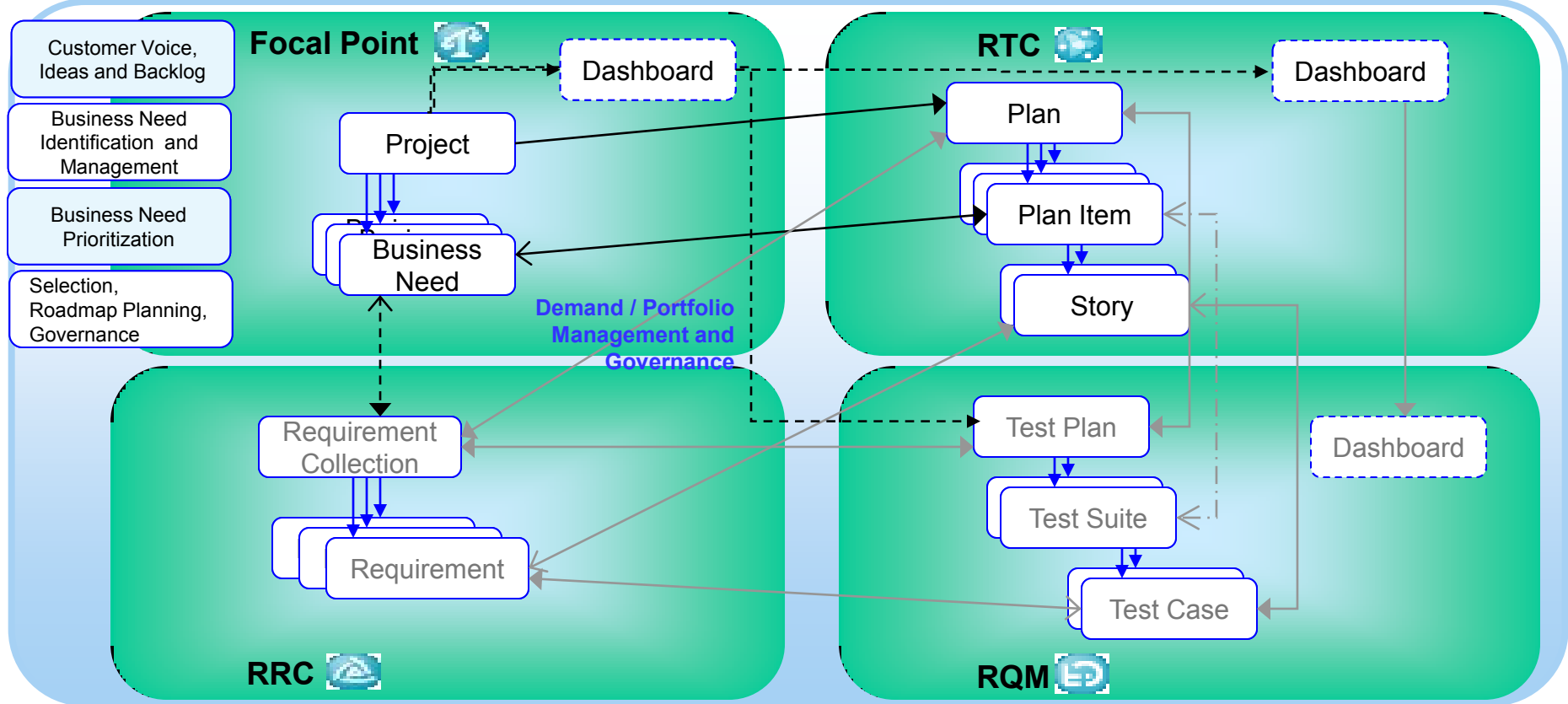
- Capture/maintain business value of all software requirements across the application development lifecycle and perform joint (Business/IT/suppliers) cost/benefit and trade-off analysis to make informed investment decisions

- **Focus software requirements on business value.**

- Continuously demonstrate the business value of all software requirement across all application development suppliers and increase software value of business outcomes with effective change management practices and methods



Typical tool workflow



Potential capability / tool adoption



Stronger governance	Effective traceability across teams	Increase transparency across teams	Reduce deployment risks	Effective collaboration, continuous delivery
<ul style="list-style-type: none"> • Consolidate demand • Prioritize and balance release roadmaps • Optimize capacity and workloads across development and delivery teams 	<ul style="list-style-type: none"> • Ensure requirements and needs are understood • Ensure continuous traceability of business needs and software requirements 	<ul style="list-style-type: none"> • Manage work assigned to distributed teams incrementally • Monitor real-time measurement of performance and delivery metrics and KPIs 	<ul style="list-style-type: none"> • Develop testing strategy earlier in lifecycle (as requirements are defined) • Elaborate Acceptance Testing Plans in collaboration with distributed teams (internal and external) 	<ul style="list-style-type: none"> • Promote enterprise-wide stakeholder collaboration • Fully leverage existing development and operations teams
<p>Focal Point (FP)</p> <ul style="list-style-type: none"> • Governance software delivery outsourcing workspace • APM workspace and practice • Demand and Delivery workspace 	<p>Focal Point, Rational Requirements Composer (RRC)</p> <ul style="list-style-type: none"> • Focal Point to RRC integration 	<p>Focal Point, Rational Team Concert (RTC)</p> <ul style="list-style-type: none"> • FP to RTC integration • RRC-RTC inter-operability 	<p>Focal Point, Rational Quality Manager (RQM), GreenHat</p> <ul style="list-style-type: none"> • RRC to RQM integration 	<p>Focal Point, RRC, RTC, RQM</p> <ul style="list-style-type: none"> • FP to RRC,RTC,RQM integrations • RRC-RTC inter-operability • Built-in FP-CLM dashboards • FP Dashboards for Planning & Execution Add-on (Beta)

CareCore National speeds release delivery by strengthening requirements with DevOps approach

50% reduction in defects expected

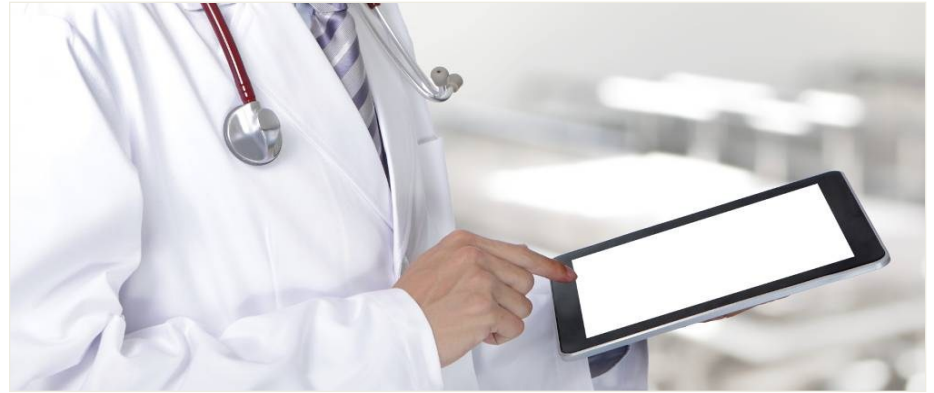
based on results to date with improving requirements

Better insight

into requirements, how they fit in the bigger picture and impact each other

New projects take less time

by using requirements to build test cases and plans



“Because of the success with Rational Quality Manager, we said well, we want to be integrated, we want to move in that space. And IBM has a tremendous reputation.”

— **Mark Thomas**, Vice President of Strategic Development, CareCore.



IBM Systems and Technology Group aligns its business needs with available skills, resources and expenses

Gained a flexible and **continuous decision-making** process

Maximized value and minimized waste, churn and false starts

IBM Systems and Technology Group (STG)



“The solution for IT Lifecycle Management with Focal Point supports our DevOps approach, allowing us a flexible and continuous decision making process with better integration of the thought process of Brand and Development planning and prioritization.”

— **Steve Stupca**, Project Management Tools Deployment Solution Lead, IBM Systems and Technology Group



IBM Rational Development team speeds release delivery with continuous planning and collaborative development

4x more releases annually

Increased transparency to the backlog and **prioritized** based on **team assessment of value**

Better alignment

between development and business

Continuous planning and a new level of visibility for stakeholders



“A focus on continuous improvement combined with adopting CLM and Focal Point to support our DevOps approach to agile development has allowed us to release more often with improved planning, alignment with business, transparency and traceability.”

— **Adrian Cho**, Program Director,
Rational Development Team



Questions



Thank You

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