

CA PPM v14.x  
CA PPM v15.x

Strategic Planning and Execution Demo Guide  
Release 5.x

# Version History

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| --- | --- | --- | --- |
| Author | Date | Version | Comments |
| Alexandre Assis | 15/Sep/2008 | 1.0 | * Initial Draft |
| Alexandre Assis | 16/12/2010 | 2.7 | * Finally started updating the document |
| Alexandre Assis | 13/05/2011 | 2.8 | * Bugs fixed * Timeslice Tables fixed |
| Alexandre Assis | 23/11/2011 | 2.9 | * Ported to v13 * Adapted to new Project Properties Page * New Project Dashboard Tab * Updated Doc with a brief of new Functionality * Partially updated Screenshots with v13 |
| Alexandre Assis | 23/12/2011 | 3.0 | * Customer-defined levels from 2 to N * Multi-level Strategic Items * Multi-scope, Multi-dimensional Strategic Plans * Simplified Data Model with no “Grandchild” Objects * Separated KPIs from Metrics * Eliminated direct table inserts and upates – all XOG now * Brand new Demo Data inspired on examples from Balanced Scorecard books |
| Alexandre Assis | 11/07/2012 | 3.1 | * Re-packaged for new v13.0.1 dataset including Idea, Project and Program "Business Alignment" subpages |
| Alexandre Assis | 24/09/2012 | 3.2 | * Updated Demo Data until 2012-09-30; verified installation on v13.1 with PMO Accelerator v3.1 |
| Alexandre Assis | 27/09/2012 | 3.3 | * Revised Translation to Portuguese * New feature on Strategic Cycles to consider pre-defined Supported Goals as a filter to the Distributed Evaluation Questionnaire |
| Alexandre Assis | 15/01/2015 | 4.0 | * Top-Down Planning (FTEs, Benefits, Funds) * KPIs are now called Indicators * Indicators Hierarchy with Roll-Up * Indicator Status defined by both Children Roll-up and Target x Measurement * Strategic Hierarchy Graphical Views * Normalized Item Status scale * Item Status defined by both Children Roll-up and Direct Indicators Roll-up |
| Alexandre Assis | 22/01/2015 | 4.0.1 | * New Demo Use Cases * Minor navigation adjustments |
| Alexandre Assis | 30/03/2015 | 4.1 | * Added a few Hierarchical Portlets using Word Trees and Sankey Diagrams (Package: Hierarchical Views 2.0) |
| Alexandre Assis | 01/05/2015 | 4.1.1 | * Fixed Commitment Rollup issues (now in sync with Portfolio date range) * Added two Timeslices to allow for Commitment tracking. |
| Alexandre Assis | 04/05/2015 | 4.1.1 | * Separated Demo Guide and Configuration Guide |
| Alexandre Assis | 25/06/2015 | 4.1.2 | * New Measurement Period Control * Standardized naming as “Item Status” and “Item % Status” for Items and “Indicator Status” and “Indicator % Status” for Indicators * Added Last Measurement Status to Indicator Filter, List and to the Item Hierarchy and Indicator Hierarchy Portlets |
| Alexandre Assis | 01/02/2015 | 5 | * Scopes have been replaced with Related Plans * UI reorganization in Tabs * New PPM SaaS compatible Charts * Customer custom-picture Strategic Map * New Auto-measurement |
| Alexandre Assis | 10/03/2017 | 5.2/5.3 | * Plan Copy and Snapshots * Indicator Issues * Strategy Risks * Strategic IT Investment page and Portlets |

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# Strategic Alignment - Demo Script

## Background

Strategic Alignment was born from several different opportunities in the Latin American market for relating Project & Portfolio Management to Balance Scorecard.

Very often customers asked “What is Business Alignment? How is it calculated? Can it be derived from how well my projects are aligned to my Strategic Goals? Can it be related to the metrics and goals in my Balance Scorecard?”

From those questions the first requirements for a Top-Down Strategic Map for Investment Selection were born. First version of Strategic Alignment was all about calculating Alignment Scores – Investment were assessed against metrics and given an Alignment Score. Metrics were part of a rigid 3-level Strategic Tree with “Strategy, Strategic Goals and Strategic Items”.

Soon enough more questions came: “Now how do I know that my projects are actually delivering results? How can I be know if by executing the right projects my goals are being met?” Strategic Alignment v2 started to answer those questions by capturing Targets and Measurements for those metrics.

But the questions never end and now customers want to know “Can I have a Corporate Strategy and a Department Strategy? Can those different Strategic Views be linked? Can they be Independent?” and that was the foundation for Strategic Alignment v3.

Strategic Alignment v4 came with a more flexible model for Implementation, including a hierarchical view built using Google Charts and an Indicator Hierarchy.

Strategic Planning v5 has a simplified UI with less attributes; properties reorganized in Tabs and OBS-enabled objects for Security; Google Charts Strategic Maps compatible with CA PPM SaaS; Customer-specific Custom-Picture Strategic Maps; simplified data model (Out with Strategic Scopes, In with Related Plans!!)

Strategic Planning v5.2 adds the ability to Copy and Snapshot a plan, Strategy Risks and Indicator Issues

Strategic Planning v5.3 adds Strategic IT Investments page and Portlets (for Applications and Services)

## Introduction

Strategic Planning and Execution is intended to help our customers connect the world of Strategic Planning to the world of Investments Execution.

There are direct links between Strategic Planning and Initiatives Execution:

* Your Strategic Plan contains Goals that are achieved through the execution of Initiatives or Investments;
* Your Strategic Plan likeliness of success is directly connected to the health of those Initiatives and Investments;
* Your Strategic Plan success is measured by Key Indicators;
* Your Strategic Plan also contains Metrics that will guide your Initiative and Investment selection;
* Your Strategic Plan contains guidelines that drive your Top-Down Portfolio Planning, establishing Headcount, CAPEX and OPEX budget limits and the expected Benefits from your Strategic Initiatives and Investments.

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| We can represent those links using a Diagram such as this one: |  |

## How to demo

Strategic Alignment v5 is easier to demo and implement. It brings a simplified yet very flexible Strategic Data Model, so many different use cases from different customers can be accommodated with close to zero adjustments.

Therefore, it’s fundamental to have a previous understanding of your customer’s use cases so you can decide on how to demo. A few examples:

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| Demo | Audience | Duration | Notes |
| IT Plan | IT Planners, CIOs, IT Management in general | 15 minutes | Optionally, add the Investments Assessment Demo and/or the Top-Down Portfolio Demo if those topics are important for your customer. |
| Operations Plan | Business Planners, non-IT Business Managers | 15 minutes |
| Corporate Plan | Corporate Planners, Strategic Planners, CEO, CFO, COO, | 30 minutes |
| Investments Assessment | All | 15 minutes | Add this when customers want to understand how they can better align investments with their Strategies. |
| Top-Down Portfolios | All | 15 minutes | Add this when customers are interested in understanding how Portfolios are defined, balanced or driven from Strategy. |

## Roles

These are the roles that have been prepared for this Demo.

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| **Login** | **Member of these Groups** | **Description** |
| PT | Corporate Strategic Planner | Peter Thompson is the **Corporate Strategy Manager** for this demo. He is responsible for creating the Corporate objectives, Indicators and Alignment Metrics and creating Evaluation Cycles to assess Investments against Corporate Objectives  His plan is called “2016-2021 Strategic Planning” |
| PG | Business Unit Strategy Planner | Paula Granger is the **Online Order Business Unit Strategy Manager** for this demo. She is responsible for deriving her Business Unit’s objectives from the Corporate Strategy, defining the Business Unit’s Indicators and Alignment Metrics and running Evaluation Cycles to assess Investments against the Business Unit’s Objectives  Her plan is called “2016 Operations Plan” |
| SPM | Department Strategy Planner | Sarah Preston is the **IT Operations Department Strategy Manager** for this demo. She is responsible for deriving her Business Unit’s objectives from the Corporate Strategy, defining the Business Unit’s Indicators and Alignment Metrics and running Evaluation Cycles to assess Investments against the Business Unit’s Objectives  Her plan is called “2016 IT Plan” |
| PM | Strategy User | Paul Martin is a Project Manager responsible for answering the Strategic Alignment Questionnaire (Strategic Evaluations => a Business Case relating the Project to the Strategy) to evaluate how the Investments he manages contribute to the different aspects (scopes) of the Strategy. |

## IT Plan Demo

This first demo script is the most basic one. It has less demo data and is very appropriate for those customers with a lower maturity level in Strategy Planning that just want the ability to create Strategic Goals and follow up on indicators and related projects. That’s described in part I of the script.

Optionally it can go on to the selection of new initiatives (ideas) to help boost the performance of one of the “red” indicators, to maximize the chances of the department to deliver on its strategy. That operation is described in the part II of the script.

### Part I: Monitoring the Execution of the IT Plan

Login: SPM (Sarah Preston)

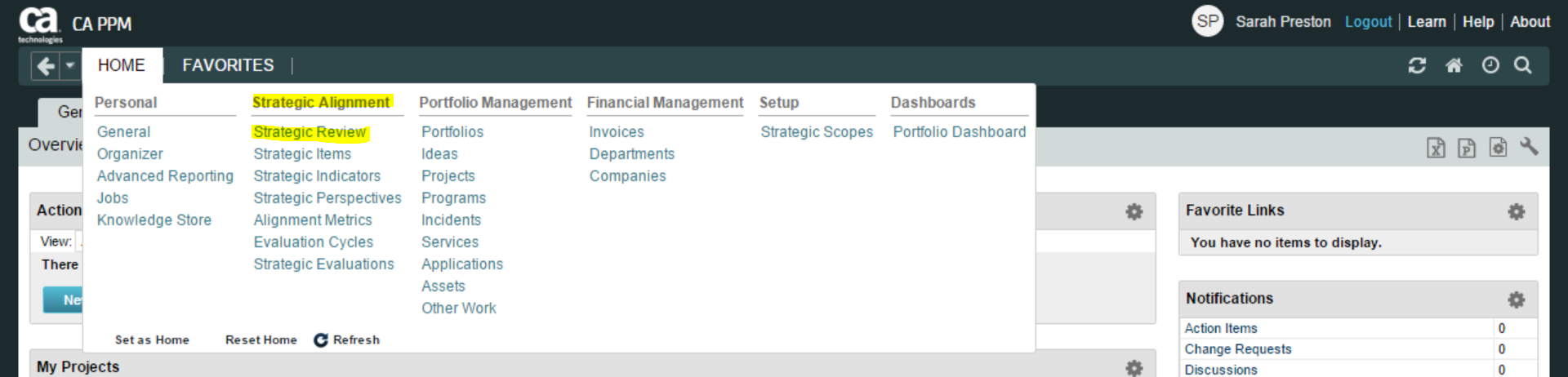
Sarah Preston is responsible for Strategic Planning in the IT Operations department.

She understands the Corporate Strategy and defines, together with the IT Executives, how IT will work to help the company achieve their goals.

Sarah’s constantly monitoring the IT Operations department strategy according to the current Strategic Plan.

On the Strategic Review Page, Sarah can monitor the Company’s current Strategic Plan and see the current situation of the IT Operations Departments Strategies and Indicators.

Start on “Home/Strategic Alignment/Strategic Review”



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|  | On the Strategic Review page Sarah will be able to see the IT Strategy and how it relates to business initiatives.  *Filter Strategic Plan “2016 IT Plan”.*  On the Tree Map she will have information on how the various Strategic Items compare in importance. She sees the weight of Productivity is roughly equivalent to the sum of all others, and that Training and Continuous Improvement together represent the smaller part of the Plan. In the Heat Map she can see importance vs. % Status Indeed she sees Productivity and Quality are higher in importance and closer to green in the heat scale. Continuous Improvement and Training rank lower in importance and are not as green.  She decides to seek additional information to verify that there are no balancing issues between those objectives, so she moves on to the Strategic Plan Review page.  Click on the  Strategic Review Tab |
|  | On the Strategic Plan Review Sarah sees the “2016 IT Plan” has a red indicator with an achievement status of 75%.  Sarah wants to know the reasons behind those results, so she clicks on the Hierarchy View icon to have an overview of the Strategic Map and its status.  Sarah is now looking at the Hierarchical Views for the 2016 IT Plan. Let’s check the full Strategic Map.  *If you see a different portlet from the one in picture, click on the Portlet name and choose “Strategic Map” from the drop-down list.*  She notices that “Quality” is Slightly Below Target (yellow), while “Productivity” is going well with 94% achievement, but she realizes that the “Continuous Improvement” and “Enablement” strategies are struggling around 75% of results, with Goals that are showing a red (below Target) indicator. |
|  | Sarah will drill down further into this issue.  Click on the red bubble for “Achieve IT Process Excellence”.  When drilling down to the “Achieve IT Process Excellence” Strategic Goal Sarah immediately sees what is going on: there are no projects supporting it. This is an important Goal for the IT Department as it is linked to the “Enforce compliance with specifications” Goal from the “2016-2021 Strategic Plan”. She will have to talk to the PMO and see how she can help them balance the portfolios better so that they can squeeze in one or two projects that will help achieve this goal. Otherwise we will see no changes.  Click “Back” to go back to the Strategic Map. Now drill into the “Improve IT Operations effectiveness” by clicking its red bubble. |
| ` | Sarah sees that the Indicator that measures this goal is called “IT Operations Employee Training Index”. It has a current target of 80 and its last measurement was 60, thus, achieving 75% of its results.  She can see here the investments that are supporting that goal and can monitor their health using CA PPM project KPIs.  Expand “Improve IT Operations staff effectiveness”. |
|  | Sarah sees that all of the projects supporting that goal (except for one) are quite late and a couple of them have outstanding critical issues. One of them even has pending scope changes.  That doesn’t look good. If those projects fail, the strategy will fail.  She decides she will work with the PMO to get those projects on track, to minimize the risk of strategic failure.  She decides to see how that indicator is trending over the past few years and into the future, so she clicks the Dashboard icon next to it. |
|  | Using the information on this page Sarah immediately sees what is going on. She notices That indicator was performing well according to expectations, but then started to miss targets from 2014 on. She notices that the target set for this indicator jumped from 40 hours to 56 hours of training in 2014, a 40% increase in target. That is when trouble started. A very aggressive target was set, and the results were not as good as expected.  Sarah knows what is going on with this strategic goal, she can now make a decision: invest more money to reach that aggressive target, or set a more realistic target for the future.  Sarah now knows what to do now to get the 2016 IT Plan back on track.  She will engage with the IT PMO to run an ideation campaign to gather ideas for new investments, get portfolios balanced and Projects back on track. |

### Optional: Running an Investments Evaluation Cycle for new Ideas

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|  | Sarah has decided to run an ideation campaign with the IT PMO to gather feedback on possible investments.  She will use an Evaluation Cycle to evaluate those new ideas against the “2016 IT Plan” and find the best aligned ideas.  *Navigate to “Evaluation Cycles” and click on “New Evaluation Cycle”.* |
| Explanation about Cycle Method:  Discover Supported Goals by Assessing All Metrics: the questionnaires will contain all questions for all metrics of all goals in the plan. Based on the answers CA PPM will automatically infer which Strategic Goals are being supported by each Investment and automatically fill the information in “Supported Goals” attribute.  Assess Investments against their Supported Goals: CA PPM assumes that the Investments have been pre-linked to their supported goals and will create the questionnaire based ONLY in those goals. | An Evaluation Cycle will allow us to assess how much a specific group of investments is in line with our Plan.  Sarah creates the “2016 Ideation Campaign Evaluation” cycle for plan “2016 IT Plan”.  The Strategic Dimension is automatically chosen as “Department Dimension” due to security. That’s the only dimension she is allowed to assess. The same group of investments may be evaluated against various plans – the dimensions allow us to have more than one evaluation – such as department, business unit, product, corporate, etc, for the same investments. All of those scores may then be combined into an “Overall alignment score”.  *Click Save* |
|  | Now Sarah needs to see which investments are available and which ones she will pick to be evaluated.  She may select a specific Portfolio, a specific group of Investments or both.  *Click on the Investments Browse, select Ideas that have been Submitted for Approval.*  *Tablet Office Systems Bundle Mobile Devices On the Road Planner Lost Device Service Upgrade Technology Center*  *Select and click Add.*  *Click Save.* |
|  | Now Sarah can start the Evaluation Cycle. She will Change the “Action” attribute to “Start”.  *Select “Start”.*  *Click Save.* |
|  | This will tell CA PPM workflow it is time to send the Evaluation Questionnaire to the Investment managers responsible for those investments.  Sarah can monitor the answers on the Strategic Evaluations page, but she cannot make any changes unless she is the Investment Manager for one or more investments.  *Navigate to Strategic Evaluations* |
|  | *Filter the Evaluation Cycle “2016 Ideation Campaign Evaluation”.*  Only the Investment Managers will be able to answer the questions.  Sarah takes a look at the questions and sees they haven’t been answered yet. Because the column “Investment Evaluation” is still blank.  We will now login again to CA PPM as Paul Martin, who is the manager of those ideas. |
|  | *Logout and Log back in as “PM”*  Paul Martin will now answer to those the Questions regarding how the ideas support the IT Operations goals.  He navigates to the Strategic Evaluations page and use the filter to find the appropriate Evaluation Cycle.  He sees he needs to answer three questions on each idea. |
|  | He just clicks on the grid and enters the correct values for those questions.  Paul has entered the values according to each one of the Ideas and saves his work.  *Enter the values and Click Save.*  Now, let’s go back to Sarah Preston and finish our Evaluation Cycle.  *While you log back in with Sarah Preston and Navigate to the Strategic Evaluations page, explain the following:*  These metrics will be configured by each CA PPM customer. Some customers have fewer, more generic metrics; Some customers have more specific metrics. That’ll depend on your company’s maturity level for the Demand Management and Project Initiation processes and how you work with Business Cases. |

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|  | Either way, CA PPM can help you move away from subjective opinions and enable business executives to make fact-based decisions.  CA PPM Workflows can be configured to either send action items – to warn people they have pending tasks – or give people a time limit to perform a pending task – after which the workflow will continue automatically.  In our case, let’s just assume Sarah has given Paul enough time to respond the questionnaire. She will now go back to the Evaluation Cycle and close it.  *Set Cycle Action to Close.*  *Click Save.*  When she does that CA PPM workflow knows it’s time to calculate the Alignment Score for those ideas.  The answers given by Paul Martin are then processed by and those investments are updated with their new Department Alignment Score. That score can later be used for selecting investments using CA PPM’s Portfolio management capabilities. |
|  | *Navigate back to the Strategic Review Page, Evaluation Cycle Results Tab.*  As a result from this new evaluation cycle Sarah realizes a couple of ideas have interesting alignment, but none of them are really exciting ideas that will generate much value. She can see the resulting score and the answers that are contributing to that score. |
|  | *Navigate to Ideas and open one of the Ideas.*  *Go to the Alignment & Risk Sub-page.*  When Sarah navigates to any one of those Ideas she will now see that they have a Department Alignment Score and Supported Goals. |

## Corporate Plan Demo [NOT READY]

This second demo script is targeted at the Strategic Planner. On this script we talk about monitoring on the execution of the Corporate Strategy as well as checking the alignment of investments according to that strategy. We also talk about how the Corporate Plan interconnects to other plans such as Department or Business Unit plans. It has more demo data and unlike the first script, it brings Corporate Strategy data, instead of department objectives and indicators.

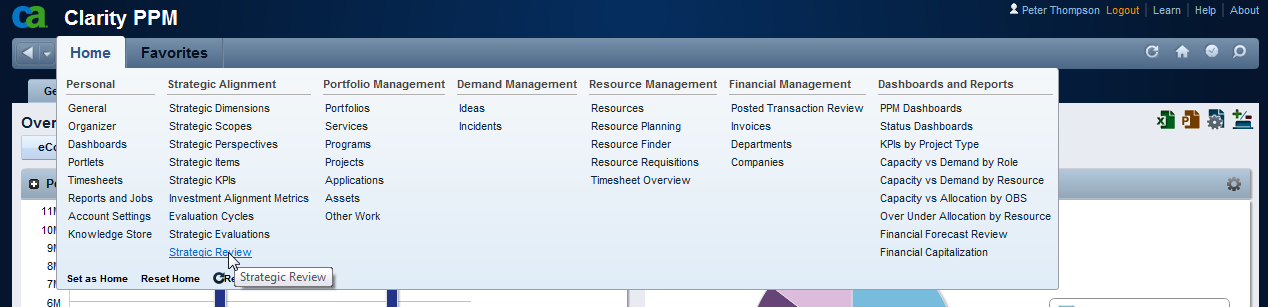
Just like the previous one, this script has been broken in two parts, the first part targeted at strategy execution and the second one is targeted at selecting investments to “correct” the direction of the company by trying to search more investments to boost strategy.

### Corporate Plan Demo

Login: PT (Peter Thompson)

Peter Thompson is part of the Strategic Planning division of our company. He is one of the people responsible for the definition and monitoring of the Corporate Strategy. Peter is constantly monitoring the Corporate Strategy according to the current Strategic Plan.

Start on “Home/Strategic Alignment/Strategic Review”



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|  | On the Strategic Review Page, Peter can monitor the Company’s current Strategic Plan and see the current situation of the Strategies and Indicators.  He notices the Item Status for the “Create the Foundation for Growth” Strategic theme is Below Target (red). He decides to investigate to see what is going on in that front.  There are three Strategic Goals associated with that Theme; one of them is Below Target (red) and the other two are Slightly Below Target (Yellow). Peter will start his investigation by the worst case – the Strategic Goal called “Streamline Manual Processes”.  Click the Item Dashboard Icon for “Streamline Manual Process” |
|  | Peter sees the Status for this Item comes from its Direct Indicators. In this case – the only Direct Indicator is “Manual Process Index”. He also notices that, although it is not influencing the Item status directly, there is a Strategic Initiative from the Online Operations BU that is Far from Target (black). He will contact them to assess the situation later.  For now, he will take a closer look into the “Manual Process Index Indicator”.  Click the Dashboard icon for the Indicator. |
|  | Here Peter realizes that the Measurement values have improved in the past few years although never reaching the target. Maybe the targets are too aggressive, or maybe there are not enough Investments supporting that strategic goal of “Streamlining manual processes”. Peter knows that coming up with a strategy is not enough: we need to make it real, we need execution, and Projects are the engines that execute on our strategy to deliver actual results.  Peter decides to take a look at the projects that are being executed to support that Strategic goal.  He clicks on the Dashboard Icon for the Strategic Goal in “Strategic Items Related to Indicator” to go back to the Strategic Goal. |
|  | Now Peter can expand the “Streamline manual processes” goal in the “Strategic Item Hierarchy with Projects” portlet and he see the Strategic Projects linked directly to that Strategic Goal. There are quite a few of them.  The issue Peter notices is that most strategic projects are late, have pending critical issues to be solved or have high risk scores. But now he can pro-actively work with the Project Manager, the Business Sponsor and the Project Team in making sure those projects are successful, minimizing the chance of missing the company’s targets again for that strategic objective and the corresponding strategic Indicator. On the other hand, it is a lot of projects. And if they are consistently not delivering enough value, we may have set a very aggressive Target.  Peter will re-consider his options after talking to the Project Sponsors and better understanding the situation. |
|  | If necessary, Peter can also verify if there are more initiatives that can support that strategic goal by running a new Evaluation Cycle.  During an Evaluation Cycle Proposed and Existing projects are assessed against Strategic objectives and a Strategic Alignment Score is calculated.  With that strategic score he can use CA PPM Portfolio Management capabilities to select the best projects that fit the Corporate budget and that deliver the best strategic return. |

### Part II: Evaluating new Initiatives to boost Strategy execution

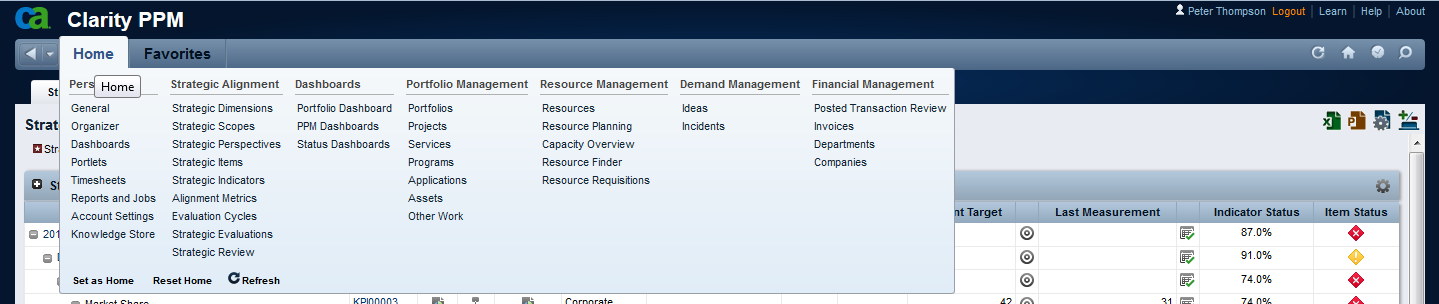
|  |  |
| --- | --- |
|  | *Optional Steps: Run An evaluation for new Ideas*  *Navigate to “Evaluation Cycles” and click on “New Evaluation Cycle”.* |
|  | Let’s create a new Evaluation Cycle for new Ideas that came from the Demand Management functionality of CA Clarity PPM.  First we give the Cycle a name; we link it to the Strategic Plan and define the Scope.  We’re selecting Ideas to help with the Corporate strategy, so that’ll be our Scope.  Now there are two Methods for Evaluating your Investments.  The first one allows you to have your Investments evaluated against ALL of the Metrics found on your Strategic Hierarchy. The system will find all the Metrics and prepare a questionnaire that asks for the Manager’s evaluation on all of them for each investment. The Supported Goals attribute on the Investments will then be updated automatically by the system taking into account the metrics influenced by the investment - according to answers provided by the Investment Managers in the Evaluation questionnaire.  The second one allows you to manually define which Investments support which Strategic Goals – and evaluate the Investments ONLY against the Metrics related to those Supported Goals.  *Click Save* |
|  | Now Peter needs to see which investments are available and which ones he will pick to be evaluated.  He will do that by opening the Investments Browse.  Notice he can filter by Investment Type and Status.  Peter wants to check on new Ideas that have been Submitted for Approval and maybe compare them with a previously Approved Idea.  He filters using the required criteria and selects the appropriate investments.  *Click Add.*  *Click Save.* |
|  | Now Peter can start the Evaluation Cycle. He will Change the “Action” attribute to “Start”.  *Select “Start”.*  *Click Save.* |
|  | This will tell Clarity workflow it is time to send the Evaluation Questionnaire to the Investment managers responsible for those investments.  Peter can monitor the answers on the Strategic Evaluations page, but he cannot make any changes unless he is the Investment Manager for one or more investments. |
|  | Only the Investment Managers will be able to answer the questions.  Peter takes a look at the questions and sees they haven’t been answered yet. Because the column “Investment Evaluation” is still blank.  We will now login again to Clarity as Paul Martin, who is the manager of those ideas. |
|  | *Logout and Log back in as “PM”*  Paul Martin will now answer to those the Questions regarding how the ideas support the IT Operations goals.  He navigates to the Strategic Evaluations page and use the filter to find the appropriate Evaluation Cycle.  He sees he needs to answer three questions on each idea.  He just clicks on the grid and enters the correct values for those questions.  When Paul is finished he will just save this page. |

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|  | Now, let’s go back to Peter Thompson and finish our Evaluation Cycle.  *While you log back in with Peter Thompson and Navigate to the Strategic Evaluations page, explain the following:*  These metrics will be configured by each Clarity customer. Some customers have fewer, more generic metrics; Some customers have more specific metrics. That’ll depend on your company’s maturity level for the Demand Management and Project Initiation processes and how you work with Business Cases.  Either way, Clarity can help you move away from subjective opinions and enable business executives to make fact-based decisions.  Notice that Peter can see the answers from Paul but he cannot make changes. That is due to our role-based security model, that establishes who can view or edit any information of the system |
|  | Peter will now go back to the Evaluation Cycle and close it.  *Set Cycle Action to Close.*  *Click Save.*  When he does that Clarity workflow knows it’s time to calculate the Alignment Score for those ideas.  The answers given by Paul Martin are then processed by and those investments are updated with their new Corporate Alignment Score. That score can later be used for selecting investments using Clarity’s Portfolio management capabilities. |
|  | *Navigate back to the Strategic Review Page, Evaluation Cycle Results Tab.*  As a result from this new evaluation cycle Peter realizes these two ideas have good cost reduction values but will not help much in the Manual Processes Index.  **Link into Ideation**  Peter now decides he will run an Ideation campaign using Clarity’s Demand Management features to request that people collaborate and share their thoughts on how to achieve the company’s goals for streamlining or automating manual processes. |
|  | *Navigate to Ideas and open one of the Ideas.*  *Go to the Alignment & Risk Sub-page.*  Peter can also navigate to those ideas and see the final result of his evaluation. He will notice they now have a Corporate Alignment Score and Supported Goals.  *NOTE: in this case the Supported Goals have been updated* ***automatically*** *by the system – based on the answers of the questionnaires. The system will assume that the goals related to the metrics with answers other than “blank” or “zero” are the ones supported by that investment. This behavior is determined by the Evaluation Cycle Method - when it is set as “Evaluate against all metrics and update Supported Goals accordingly”.*  *The* ***other option*** *would be: have the Supported Goals* ***manually*** *updated and have the Evaluation Cycle only consider the metrics related to those Goals declared. To use this option, set the Evaluation Cycle Method as “Evaluate only against metrics related to the Supported Goals”.*  *NOTE 2: if you previously ran a Department Evaluation Cycle (see Basic Departmental Goals Demo Script) you may see a Department Alignment Score here.* ***Use this in your favor*** *– and maybe it’s actually worth doing this in advance, avoiding showing the same process twice, but still making the following talking point:*  Notice how this idea has a Department Alignment Score of 57, with a yellow stoplight, but a Corporate alignment score of only 13 with a red stoplight. This means that although it’s a not-such-a-bad idea from the department view, on a corporate level it scores really low. This doesn’t mean you won’t approve it, it just means that now you have more information to make better fact-based decision. |

## Top-Down Portfolio Planning [NOT READY]

Optionally, you may add the Top-Down Planning demo to the other demos.

Login: PT (Peter Thompson) – Start on “Home/Strategic Alignment/Strategic Review”



Start on “Home/Strategic Alignment/Strategic Review”

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|  | Another one of Peter’s responsibilities is to help the Board of Directors in their CAPEX and Headcount Top-Down Planning exercises.  He starts by reviewing how everything is going in the current Plan, by Comparing the Top-Down values with the Bottom-Up accumulated values.  He access the Strategic Review page once again, but now he will navigate to the Top-Down Planning Tab |
|  | At the Top-Down planning Tab there are three different views (portlets): one for FTEs, one for Benefits and one for Funding.  Peter starts by verifying the funding information.  Peter sees the basic descriptive information for the Strategic Items and Icons that drill down to the Strategic Item Dashboard and the Strategic Item Top-Down Planning page.  Peter sees the **% Allocation** that guides how the values were cascaded down to children level initially. |
|  | On the **Received Funding** column Peter can see the values that were initially distributed from the Top-Down (initially applying the % Allocation).  At the top level (2014 Strategic Planning) the initial Strategic CAPEX was USD 22M.  The **Distributed Funding** columnindicates how much was actually distributed to the lower levels. Please notice you may distribute an amount different from the **Received Funding.**  If you take a look at the “Delight the Customer” Strategic Theme, for instance, you will see it received USD 5,866,667 from the 2014 Strategic Planning – corresponding to 27% of the total of USD 22,000,000 strategic capex funding.  At the time, Peter had decided to reserve part of the funds – so he distributed only USD 5,000,000 to the lower levels. You can see the difference in the **Unused Funding** column. |
|  | Under “Delight the Customer” there are three Strategic Goals, each one equally receiving 33% of the parent value. Since the Distributed Value was USD 5M in total, each of the Strategic Goals has received USD 1,666,667 in strategic capex funds. |
|  | For the lower level items we need to Allocate the funds – again we don’t need to allocate all of the amount. Peter notices that for “Enhance customer Experience” he had allocated only USD 1,350,000 out of the USD 1,666,667 that were receive, leaving an amount of USD 316,667 as unallocated. You can verify those values in the **Allocated Funding** and **Unallocated Funding** columns, respectively.  The Allocated Funding is the limit of CAPEX available for Investments (Projects) funded by that Strategic Goal.  The Committed Funding column indicates how much CAPEX was actually planned and approved at the investment level. Peter notices there is a lack of balance here. Although only USD 1,350,000 were allocated, we currently have over USD 6M in approved investments. He needs to review the portfolio and cut the budget for some of those investments. But which investments can he cut?  CA PPM Portfolio Manager can help answer that question. |
|  | Peter will create a new Portfolio for the “Enhance Customer Experience” Strategic Goal.  He starts by drilling down to the Top-Down Planning page for that goal.  (Click on the corresponding icon). |
|  | Peter verifies that all of the information required for Portfolios is defined (Portfolio Manager, Currency Code, Start and Finish Dates).  *\**  *If the Start Date is Blank, enter 01/01/2014.*  *If the Finish Date is Blank, enter 12/31/2016.*  *Click Save.*  *Do NOT click Save and Return.* |
|  | Peter uses the Action Menu to start the “Generate Portfolio” Action. This process will create a new Portfolio with all of the investments related to that Strategic Goal. With this new Portfolio, Peter will be able to balance the approved investments against the budget and put the extra investments on hold. |
|  | After the process is finished Peter navigates to the Portfolios feature, so he can take a look at the situation. |
|  | Peter sees his new Portfolio called “Enhance Customer Experience” is available for analysis. He clicks on the Waterline icon to see the Portfolio Contents. |
|  | At the Waterline view, Peter notices There is one approved project that is below the waterline. This approved project should not be in this portfolio as it is not related to Enhancing Customer Experiences.  Peter will now correct the wrong data so he can have an accurate view of the situation.  Navigate to Projects, open the 2014 Winter Franchise Manager Release and go to the “Business Alignment” subpage. |
|  | At the Business Alignment Page Peter sees the issue right away: This project is mistakenly linked to the “Improve Delivery Process” Initiative as its Strategic Funding Source. This initiative is related to the Enhance Customer Experience goal, and thus, gets inserted into the portfolio.  Peter Clears that bad information and clicks “Save and Return”. |
|  | Back to the “Enhanced Customer Experience” goal, at the Top-Down Planning Tab, Peter starts the “Rollup Allocations and Commitments” Action, to correct the rolled-up data in the Strategic Plan. |
|  | Back to the Top-Down Planning Page Peter sees the Committed information is closer to USD 1.3M. |
|  | Back to the Portfolio, Peter Syncs the data using the “Sync Now” button in the Contents Editor, and verifies the information is correct now. He is ready to re-evaluate the portfolio when necessary. |