Application Portfolio Management (APM)

Quick Flow Demo Card

SMA-X 2017.11

# Background

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| Key Messages | * Application Portfolio Management is providing quick insights into a customer’s application portfolio (inventory of applications). * Optimization: Utilize inventory and survey data to determine what makes sense to move to the cloud from both a business & technical perspective. * Reports & Scoring: Tracking of investment throughout the application lifecycle for evaluation linked to strategy and ROI. |
| Customer Challenges | * CIO: How can our existing application portfolio and new investments be optimized and become more efficient? * VP Apps/VP Ops: Should I develop a new application or leverage an existing one? * PMO: What application projects are the most important? |
| Engage Them | * Do you have a complete inventory of all your company’s applications, published in a single, well-known location? * Are poor applications with high on-going maintenance costs contributing to unsatisfactory business performance? * Is your organization under pressure to shift more of your IT budget from KTLO to innovation? * Do your employees understand the roadmap and major milestones of the important internal applications in your company? |
| Differentiators | * Lower cost by using a single tool for Application Portfolio Mgmt, Project & Portfolio Mgmt, ITSM, ITAM, and HR. * Assess feasibility of moving an application to the cloud with the built-in survey for application owners * Assess whether continued investment in a legacy application is appropriate * Document the roadmaps for your applications |

# Quick Flow

The goal of the Quick Flow demo card is to provide a benefit oriented *overview*, to *introduce* the customer to value and solution. It should be completed in ~5-10 minutes; optional sub-flows to demonstrate more of the solution may be included below. Make sure your demo environment is ready – see demo set up below. After practicing and perfecting the flow, you might want to copy and paste the rightmost Cheat Sheet column (below) to serve as a printed or electronic guide during the demo.

| **Do** | **Say** | **Cheat Sheet** |
| --- | --- | --- |
| **Portfolios**   * Login as [Jennifer.falconmf](mailto:Jennifer.falconhpe@gmail.com) * Choose “Application Portfolio” menu item from the Plan column menu. * Drill-down into first portfolio item in list * Left menu, choose “Contents” * Left menu, choose “Analysis” | * SMA-X allows you to create and populate multiple Portfolios. * Defining content of Portfolios is typically done for business reasons. Portfolio is a collection of applications that have related initiatives, services, resources, projects, or programs. * Analysis bubble chart conveys multiple dimensions of data in single chart (health/TCO/Value/Quality) | * Application Portfolio * Select Portfolio item * Show content applications * Show analysis bubble chart * Hover cursor over bubbles in chart for additional information. |
| **Roadmaps**   * “Roadmaps” tab | * Roadmaps provide documentation for an application’s plans for the future. * Phases (start/finish dates) and milestones (flags) can be defined, and displayed visually to allow an application analyst to see impact of the portfolio’s milestones in parallel to each other (any overlap?) | * Roadmaps * Mouse overPhases and Milestones to the Roadmap. |
| **Applications**   * Choose “Applications” from top horizontal menu. * Drill-down into first application in list and review the General tab * Left menu, choose “Workflow” | * An application is the basic unit of application portfolio management. Each application is inventoried and attributes assigned. * As you can see from this application record, a wide variety of attributes may be defined, typically this information is collected over time and not input all at once. * The full application lifecycle is modelled in the workflow, all the way to retirement. | * Applications * General tab: Scroll down the application attributes, open only a couple of sections to keep the demo moving faster. * Workflow tab: workflow phases and steps; full application lifecycle. |
| **Surveys**   * Choose “Optimizations” from the top horizontal menu. * Drill-down into first Optimization in list. * Discuss “Send Survey” button on upper right-side of page. (can’t send survey unless application owners are populated) | * This release of Application Portfolio management supports a single optimization type, the suitability for cloud optimization of your applications. * Surveys can be sent as part of the Optimization workflow. * Surveys are sent to Application Owners. * Survey responses are the basis for Information Quality metrics. | * Hover “Send Survey” button (right side on page) [Don’t press] |

# Optional Sub Flows

Customer intrigued after seeing this overview? A good sub-flows/drill-down would be to deep-dive on the Optimization process, which includes automatic sending of a survey, scoring the survey, and creating a proposal.

| **Do** | **Say** |
| --- | --- |
| Optimizations > **Survey** –   * New to create a new optimization survey   + Select the Limited Portfolio for Demo which has one application owned by Jennifer Falconmf   + See Data Collection has one application * Send Survey. (Survey will be automatically sent to the application owner, Jennifer Falconmf). * As Jennifer, open self service portal in new tab, Inbox, take the survey. * Return to our Optimization, advance to Start Assessment phase * On Report tab, can click on View details (last column in row) for the survey summary * Optional: Click on survey link (right under Refresh) to drill down to Reports and Hot Topics tabs on the survey record. (one answer may not be very interesting here). * Back on the Optimization, Go to “Complete” phase, Create Proposal option is now activated. | * Advancing the optimization workflow allows a customer to automatically send a survey to the application owner (arriving in Inbox of self-service portal). * When the survey is completed, a scorecard report is automatically generated, and the option of creating a proposal for moving the application to the cloud is possible, leveraging SMA-X’s built-in proposal functionality. |

**Demo Preparation**

Demo data prep includes initial set-up tasks and items that must be checked before each demo (e.g., demo data changes over time, or to return to the pre-demo state). Be mindful of whether the changes are appropriate or needed for the demo tenant you’re using – e.g., for the shared demos, initial set-up is probably already done, and some changes shouldn’t be applied (e.g., theme)

Initial Set-up

* None

Per-demo Checklist (in addition to above)

* None