

## Portfolio Management – Governance and Prioritization in Business Intelligence

Presented By:

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# Agenda

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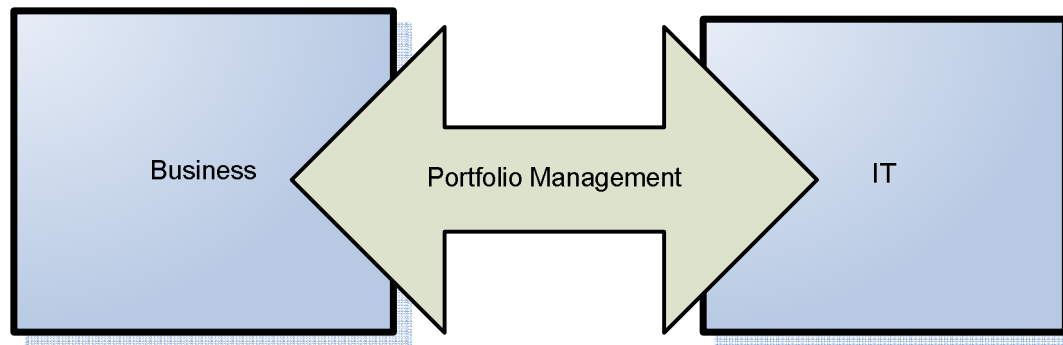
- Portfolio and Portfolio Management defined
- Portfolio Business Benefits
- Portfolio Management Lifecycle
- Vertically Oriented Portfolio Management Structure
- Enterprise Information Management Portfolio Structure
  - Differences
  - Benefits
  - Project Prioritization
  - Value Proposition
  - Critical Success Factors
- COMSYS Business Intelligence Practice Overview

- A collection of projects and/or programs and other work that are grouped together to facilitate effective management of that work to meet strategic business objectives. The projects or programs of the portfolio may not necessarily be interdependent or directly related. (PMBOK®)
- The components are quantifiable.

# Portfolio Management

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The centralized management of one or more portfolios which includes identifying, prioritizing, authorizing, managing, and controlling projects, programs, and other related work, to achieve specific strategic business objectives. (PMBOK®)



# Business Benefits

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## FUNDING

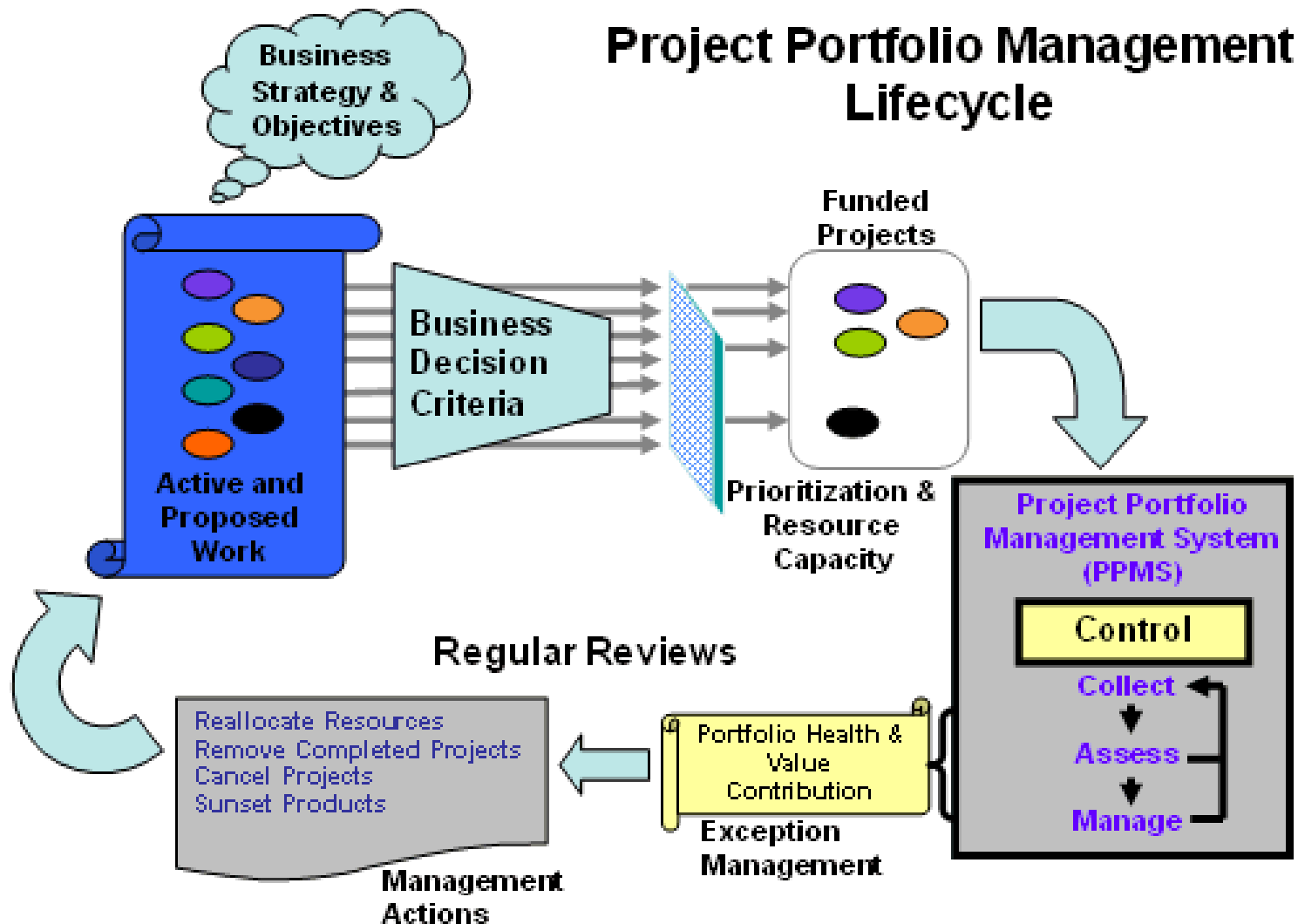
- Business units consider all their requests so decisions are based on full departmental view
- Opportunity for business leaders to ensure IT requests align with business priorities
- Greater business accountability for investments
- More efficient use of human resources, particularly Subject Matter Experts
- Business drives IT funding
- Leverage existing infrastructure/investments

## FOCUS

- Better communication between IT and business leaders
- Fewer redundant and overlapping projects
- Clarifies inconsistencies between project scopes
- Provides “performance” visibility

# Portfolio Management Lifecycle

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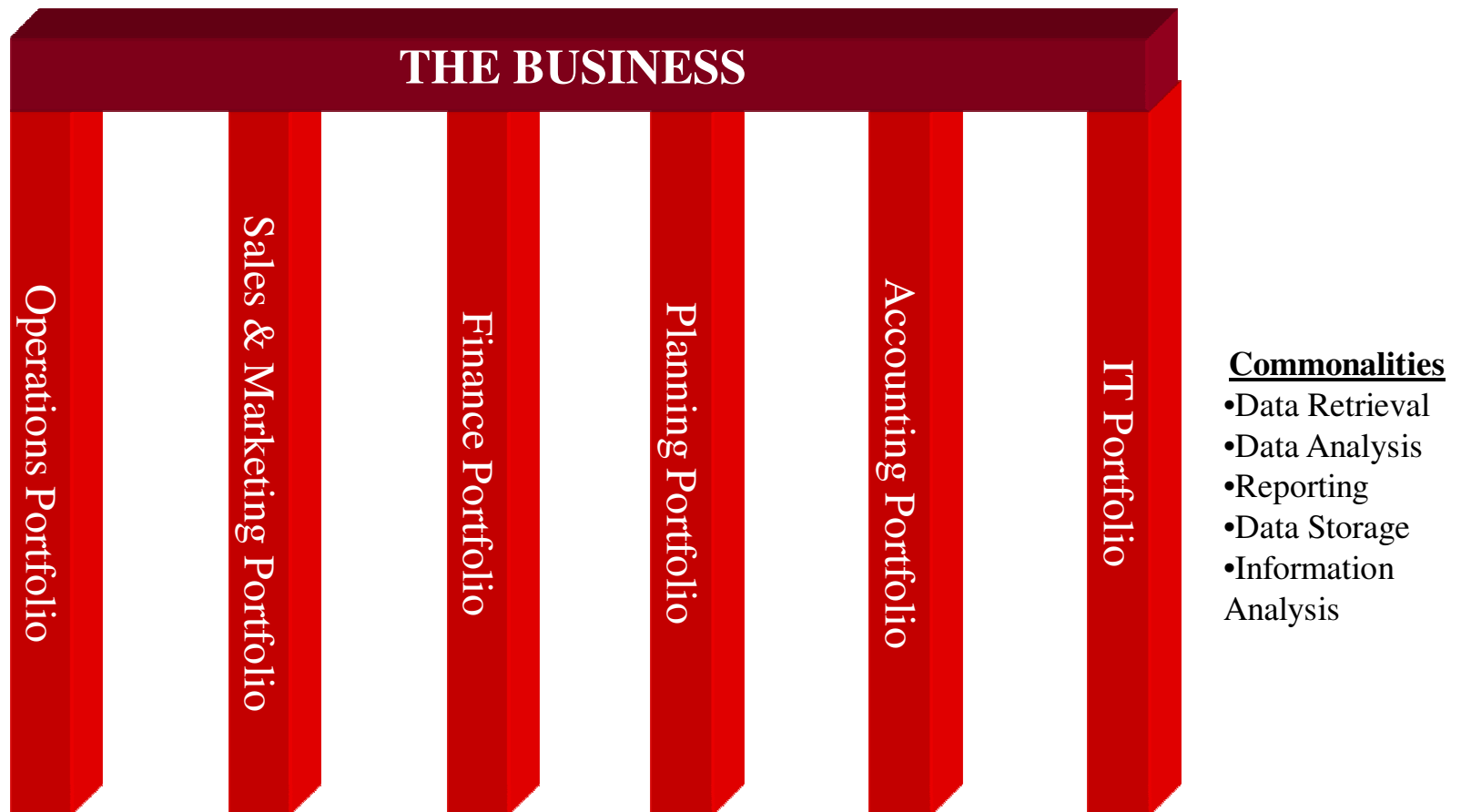


# Vertical Portfolio Management

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Portfolio Management structures are typically vertically oriented to align with the lines of business

Which vertical oriented portfolio manages enterprise wide solutions?

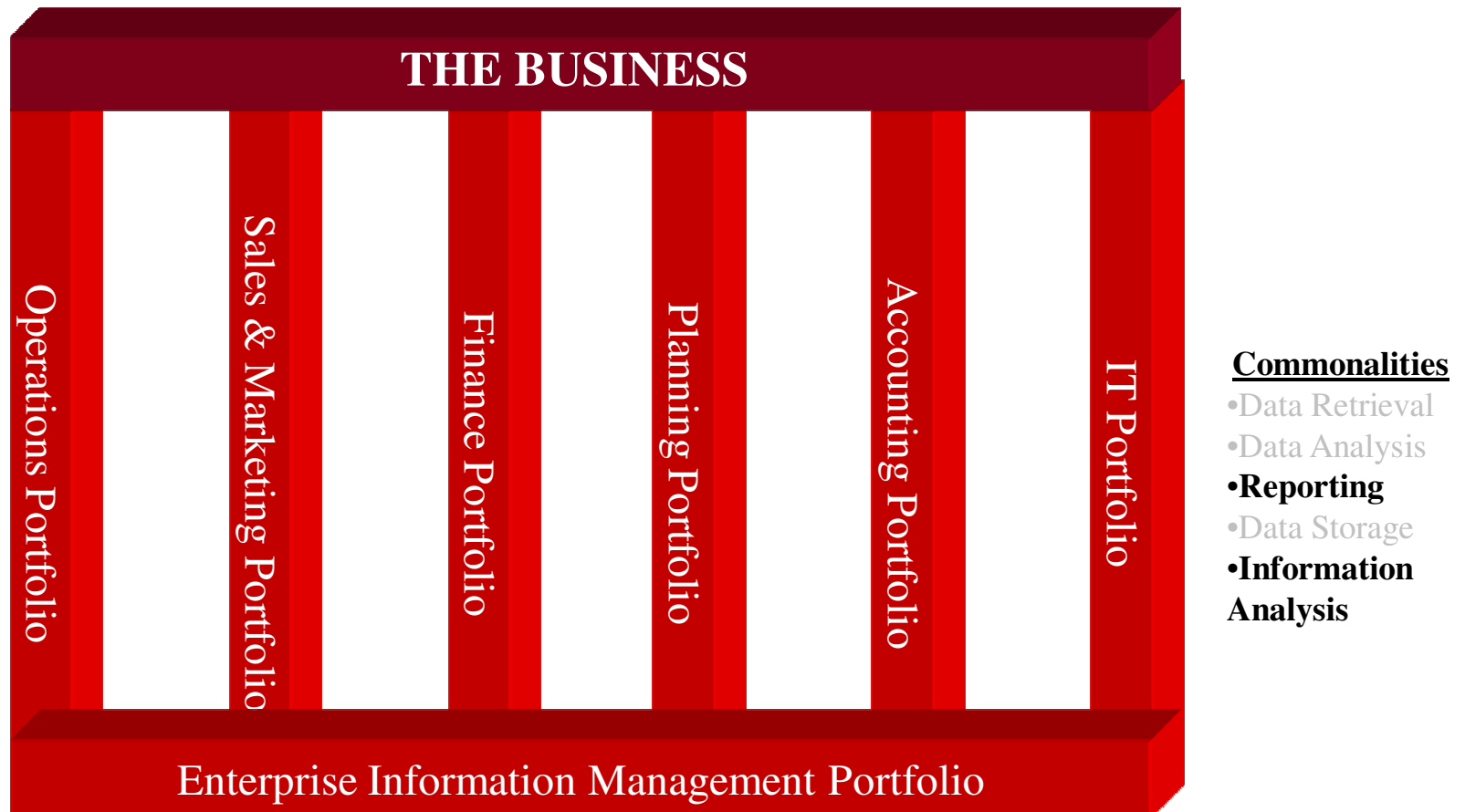


# Enterprise Information Management Portfolio

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Enterprise Information Management may include all or some of the following:

- Enterprise Business Intelligence
- Master Data Management
- Enterprise Data Warehouse
- Data Governance
- Centralized Data Stores
- Enterprise Analytics



# EIM Portfolio Differences

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- **Funding** - able to maximize existing investments – getting the most from the applications, IP and resource skills already in-house
- **Authority** - Project authority is granted, not assumed or inherited
- **Prioritization** - process involves the entire enterprise
- **Project Scope** - are not transactional application based
- **Cost Avoidance/Economies of Scale** – shadow IT, data storage, silo break down, duplication of effort, specialized skill sets

# EIM Portfolio Business Benefits

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## FUNDING

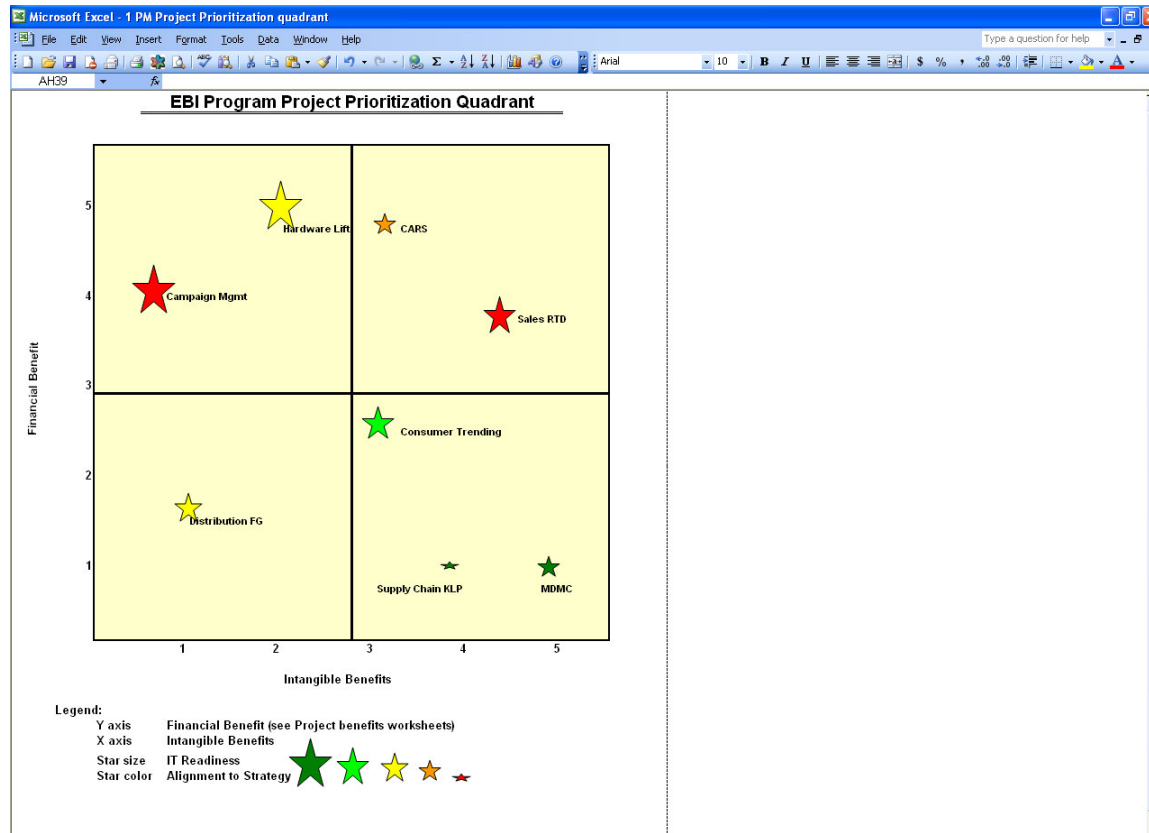
- Funding decisions are based on company-wide needs
  - All business needs are represented and considered – lessening political power struggles
  - Optimal mix of investment risk and reward and areas of the business
  - Greater understanding and cooperation over funding allocation
  - Greater business accountability for investments
- Improved control of project scopes – eliminates project overlaps, redundancy and scope creep

## FOCUS

- Project prioritization process is not done in a departmental vacuum, but with an enterprise view
  - Promotes better cross business awareness, understanding and empathy
  - Better communication between IT and business leaders
- More efficient use of human resources in IT and the business
- Provides project performance visibility and accountability

# Project Prioritization Process

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Business leaders are able to look objectively at each projects' contribution to the organization



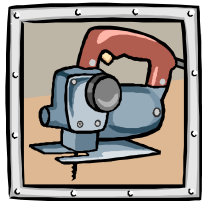
# Critical Success Factors for EIM Portfolio

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- **Authority** – any Enterprise Portfolio organization must possess the direct authority to allow for the prioritization, decisions and monitoring of the enterprise related projects and activities
- **Focus** – an Enterprise Portfolio must have a clear scope / focus of their area of governance
- **Visibility** – an Enterprise Portfolio requires not only visibility as to their own domain, but visibility into the efforts of the Vertical Portfolios
- **Enterprise Framework** – any Portfolio is a system that requires an infrastructure, accountability, ownership, processes, tools and in many cases, specialized skills

# COMSYS BI Approach

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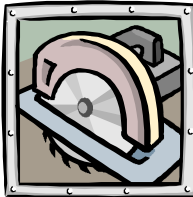
## Strategy & Planning

- ROI Definition
- Strategic Plan
- Integration Estimator



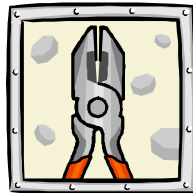
## Engagement Management

- EBI Methodology
- Best Practices



## Quality Assurance

- Praeos Center-of Excellence
- Peer Reviews
- Mgmt. Reviews



## Delivery & Execution

- Data Integration
- Warehousing
- BI/Analytics
- Data Stewardship

# Business Intelligence

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Business Intelligence				
BI Strategic Planning	Data Warehousing & Data Integration	Enterprise Business Intelligence	BI & DW Center of Excellence	Performance Management
<p><b>Confidence in your costs, architecture and plan</b></p> <p>Best Practice Assessments</p> <p>Comprehensive Project Scoping &amp; Estimating</p> <p>Current State Assessments</p> <p>Strategic Implementation Plans</p> <p>Business Case/ROI Analysis</p>	<p><b>Confidence in your data quality and performance</b></p> <p>Complex data integration</p> <p>Data Warehouse and Data Mart Development</p> <p>Data Quality and Data Stewardship</p> <p>Managed Metadata across technology platforms</p>	<p><b>Confidence in your enterprise information</b></p> <p>Integrated Information across lines of business</p> <p>Mainstream Business Use, Multi-dimensional Views of Data</p> <p>Data Aggregation and Drill-down Reports .</p> <p>Operational Reporting</p>	<p><b>Confidence in the quality of your solutions</b></p> <p>Comprehensive BI/DW SDLC Methodology</p> <p>Online Knowledgebase of best practices, templates, sample deliverables</p> <p>COE Forums for knowledge sharing</p> <p>Quality Audits conducted by Sr. BI practice leaders</p>	<p><b>Confidence in your decisions and direction</b></p> <p>Executive Dashboards</p> <p>Balanced Scorecard Reporting</p> <p>Leading-edge Business Use</p> <p>Key Performance Indicator (KPI) Focus</p> <p>Business Impact Analysis</p>

**Slide 15**

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**ATB3**

This is the most up to date version of this slide

Aileen Blass, 9/12/2008

Thank you for your attention.

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