

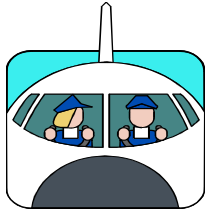
NYC SPIN –  
IT MANAGEMENT TOOLS  
EVALUATION CASE STUDY

**CHRISTIAN WEINSCHENK**  
December 5<sup>th</sup>, 2006

## **DISCLAIMER**

- Opinions presented are not those of JPMC
- Analysis is based on data points from 4 years ago and the tools have advanced significantly since then
- Intent of presentation is to focus on selection process and criteria rather than results
- Not for further reproduction without permission

# GOALS OF THE PROGRAM



- **Provide IT Management with a world-class tool set**
  - Provide IT Managers with the tools and information to manage their functions optimally
  - Provide CIOs with comprehensive and consolidated view of their IT organizations
  - Provide Technology Council with consolidated view of IT across the Firm (e.g., balanced scorecards and management dashboards)

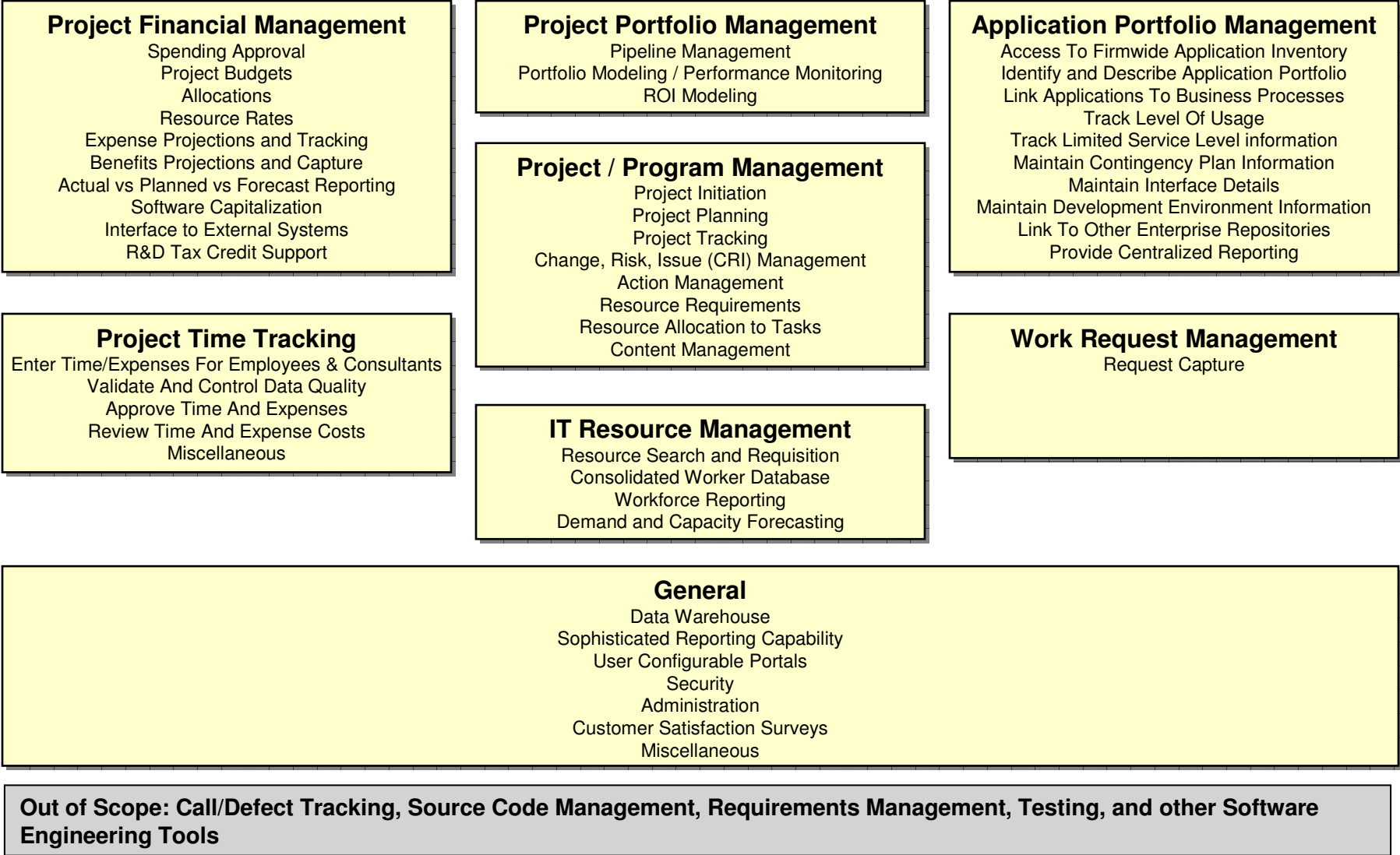


- **Underpin AD Optimization program goals**
  - Enable detailed, fact-based application portfolio optimization
  - Support CMM and Six Sigma/digitization objectives
  - Provide integrated resource management



- **Maximize ROI on IT management tools spend**
  - Upgrade and streamline current tools and processes across the Firm
  - Create a center of excellence to manage expense and drive continuous improvement
  - Establish governance model with relevant constituents

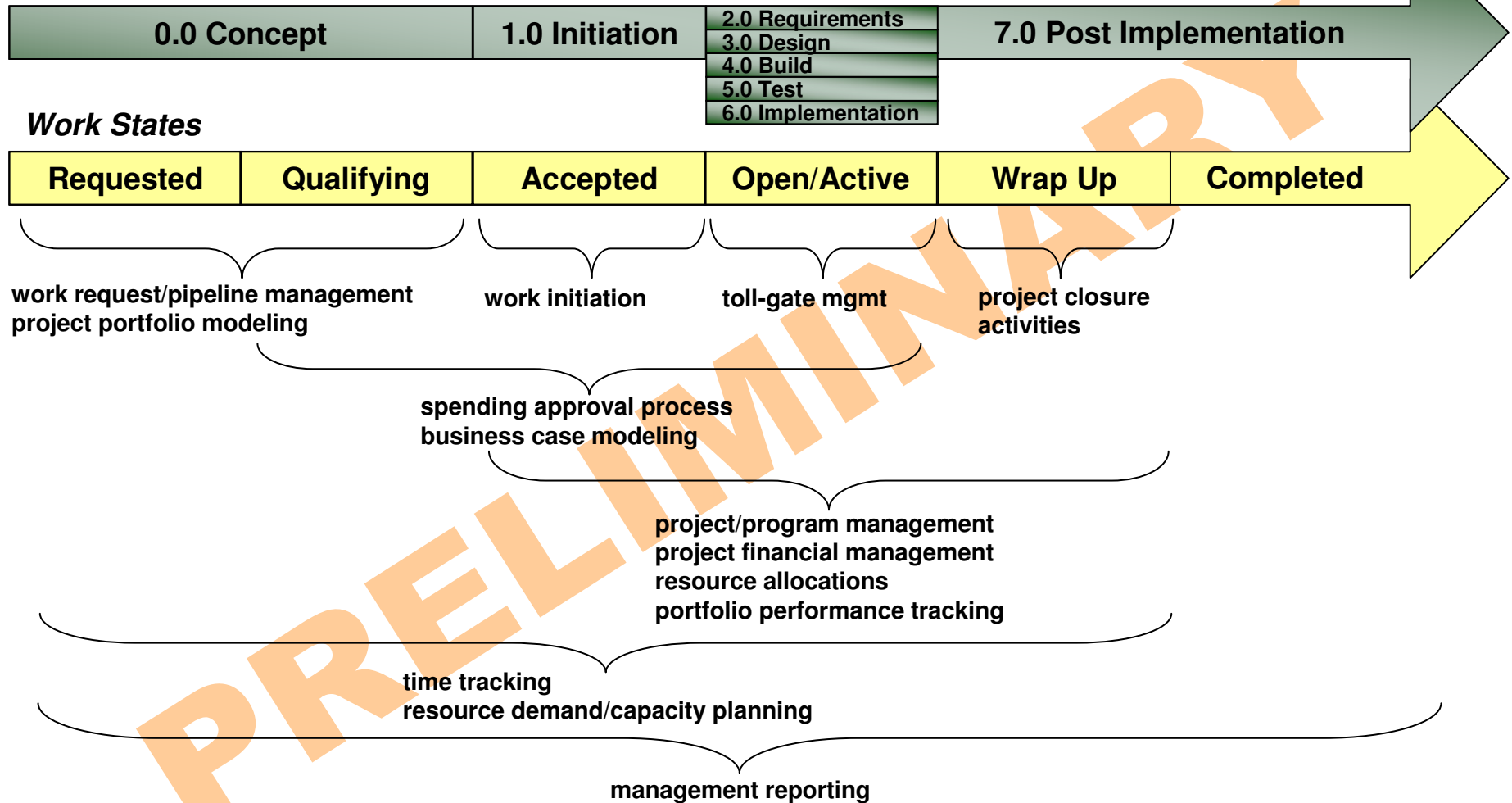
# FUNCTIONAL SCOPE AS BASIS FOR ANALYSIS



Note: See Appendix for detailed functional requirements

# SCOPE OF PROCESSES TO BE SUPPORTED

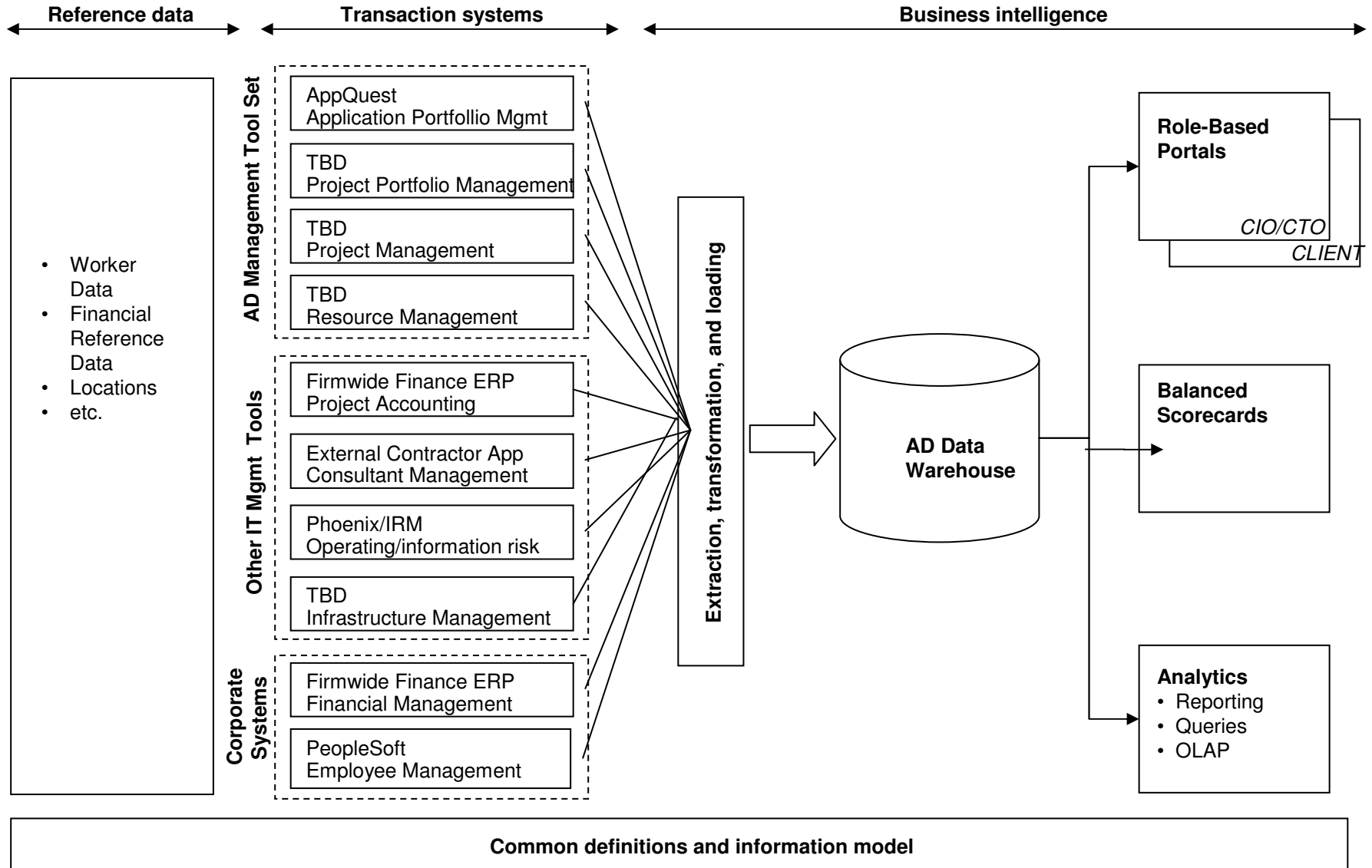
*Project Phases (Based on Project Delivery Framework)*



**Notes:**

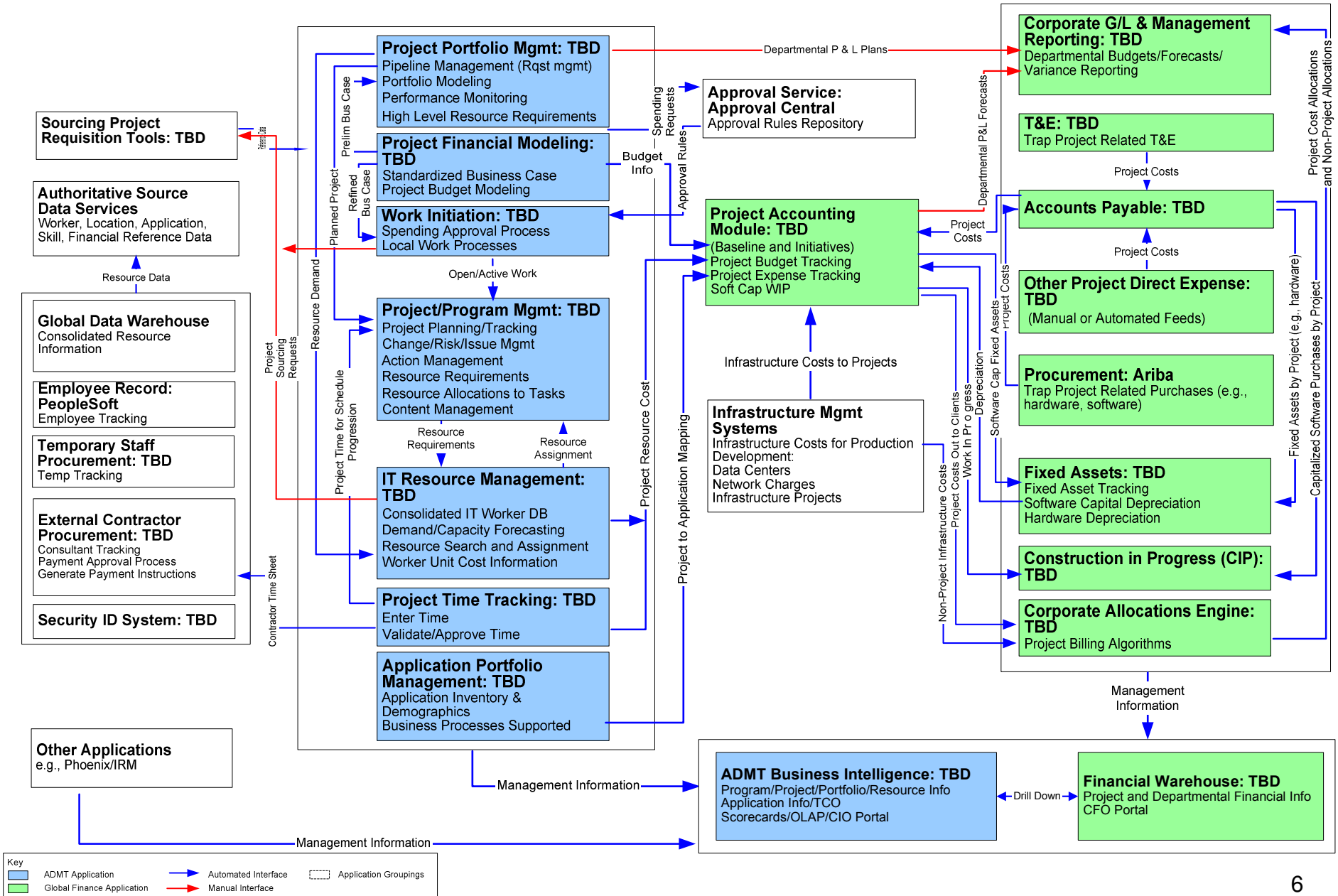
- Work states are being rationalized against firmwide process work
- See Appendix for detailed process examples and project delivery framework

# CONCEPTUAL INFORMATION ARCHITECTURE

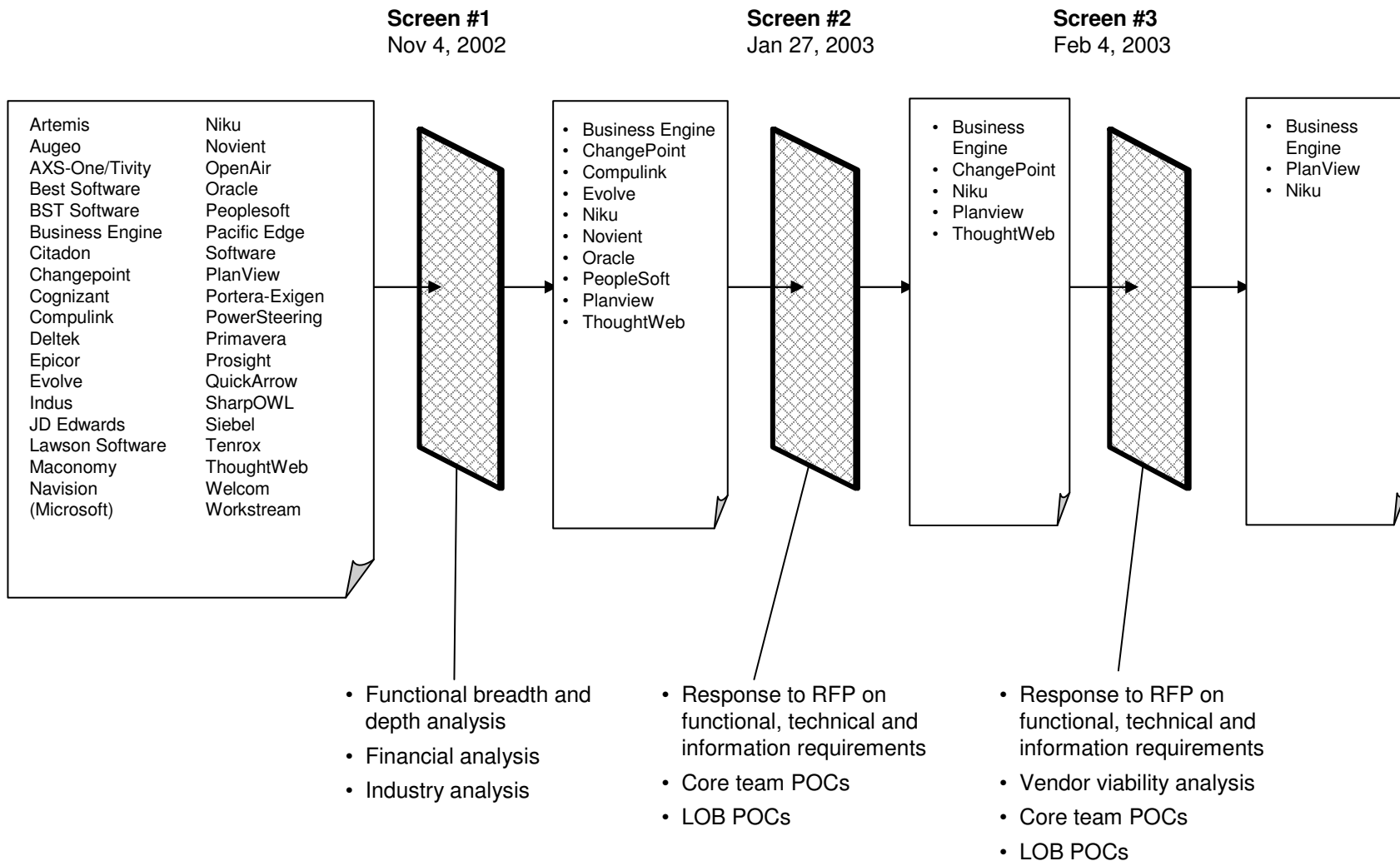


Note: See Appendix for JPMC ADMT info model

# CONCEPTUAL APPLICATION ARCHITECTURE



# DETAILED VENDOR EVALUATIONS RESULTED IN CHOICE OF TOP THREE VENDORS





# STRENGTHS AND WEAKNESSES OF THE TOP THREE VENDORS

NOT EXHAUSTIVE

## Strengths

---

## Weaknesses

---

### Business Engine

- Strong program management capability
- Highly configurable GUI
- Standard reports, flexible queries, and OLAP capabilities are included

- Poor workflow support
- Resource matching functionality not intuitive
- Financial tracking cumbersome

### PlanView

- Robust resource & financial management functionality
- Strong workflow support
- Highly configurable
- Tight integration with Business Objects for reporting/querying/OLAP

- No out-of-the-box concept of programs
- Risks and issues can only be tracked at the individual project level

### Niku

- Strong project lifecycle support
- Good searching/matching resource functionality

- Non-intuitive user interface
- No flexible reporting or OLAP capabilities
- Lack of flexibility in project financials (e.g., cost can only allocated to a single cost center)

# ADDITIONAL ANALYSES WAS USED TO SELECT A SINGLE VENDOR

Not covered in detail before Feb. 12

## Functional capabilities

- Functional depth and breadth
- Willingness to address functional gaps
- Product pipeline and strategic roadmap
- Willingness to partner with JPMC

## Technology fit

- Technology fit within JPMC context
- Willingness to address technology gaps
- Technology dependency with other vendors
- Technology fit with evolving views on Business Intelligence

## Commercial terms

- Scope of license
- Pricing (e.g., licenses, maintenance fee)
- Timing of payments
- Professional services support for pilot
- Customer support
- Remedies for non-performance

## Vendor viability

- Financial position
- Investment dollars
- Financial management philosophy

## Other considerations

- Reference Calls
- Support structure
- Site visit impressions

## LESSONS LEARNED

- Successful implementation requires:
  - Concurrent process reengineering
  - Very strong sponsorship
  - Willingness to compromise—no solution is perfect
- Fully integrated solution may not be better than multiple best of breed modules: need to weigh benefit of integration vs. disruption caused by wholesale change required.
- Also, integrated solutions may force unwanted trade-offs in functionality.
- Intuitive user interface is key—lots of functionality does not overcome a cumbersome interface.