iServer

Strategic Portfolio Management
Portfolio Assessment Survey
Q4 2018

orbus
software

iServer

What is Strategic Portfolio Management?

Strategic Portfolio Management (SPM) is a vehicle for business and IT transformation, significant enough to shape an emerging enterprise or reform the core of an existing organization.

Forrester Research say that:

" SPM delivers insight by compiling and translating strategic plans into portfolios, leveraging insight from internal and external data sources to provide a look into investment strategies from various perspectives, including capabilities, products, programs, applications, and project. "

In layman's terms, SPM considers the different entities in an organization as a set of portfolios. Technical Portfolios may include applications, technologies, information and services, whereas business focused portfolios include business capabilities, functions and processes. SPM is the practice of understanding how best to optimise those portfolios to best deliver on the organization's strategic goals.
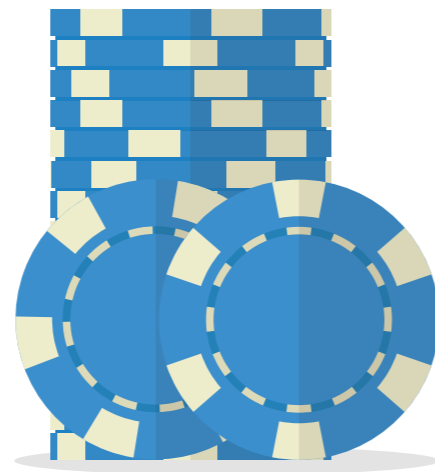
Why did we conduct this survey?

At the start of 2018 Orbus invested in the extension of iServer's Application Portfolio Management (APM) capabilities to support the increasingly pervasive, overarching scope of SPM. Following the release of the SPM solution in August, we are now focused on utilizing our highly valued customer base to help inform the future roadmap for this solution. The research will help us understand the reality of how SPM is conducted in the context of different roles and use cases and elicit the critical requirements for SPM platform support. Furthermore, we are delighted to be able to share the findings with our customers and partners to assist them in their own SPM initiatives.
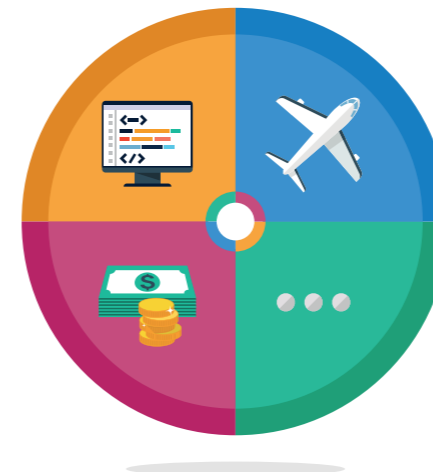
orbus software

iServer

A comprehensive research pool: Orbus Customers.

500+ Organizations
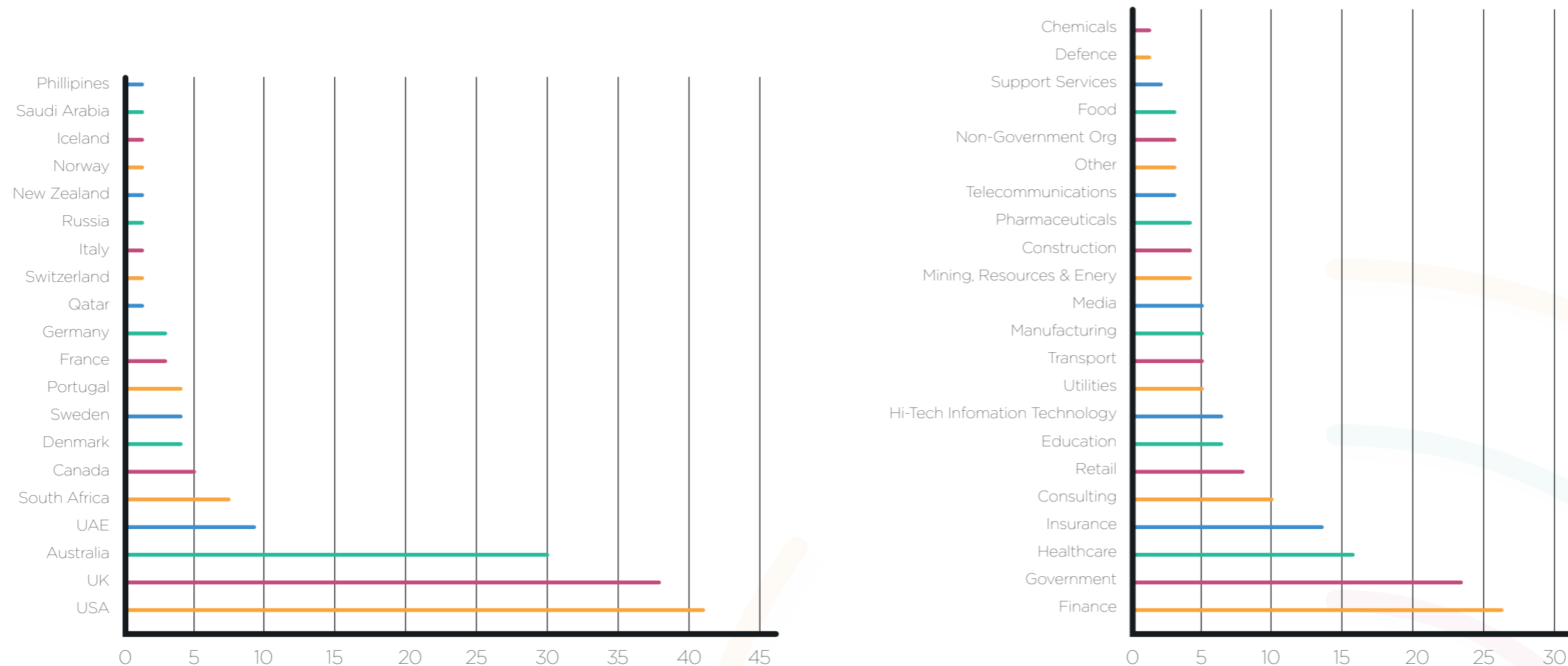
Blue-chip Multinationals
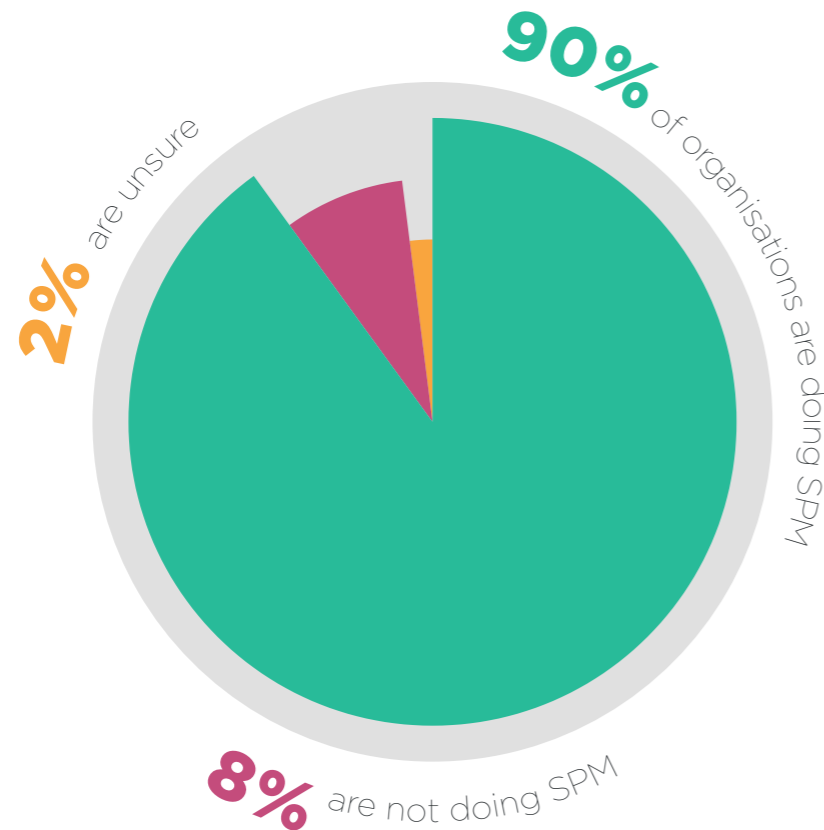
All Industry Sectors

47 Countries

Orbus Software's customers represent all global regions and industries, meaning Orbus have a highly valuable research pool who are working at the coal face of business and IT transformation with projects covering Enterprise Architecture, Portfolio Management, Business Process Analysis and GRC. This community is unique amongst vendors and provides a comprehensive audience who contribute feedback and insights to Orbus Software's R&D process and technology roadmaps.

Strategic Portfolio Management Portfolio Assessment Survey

orbus software
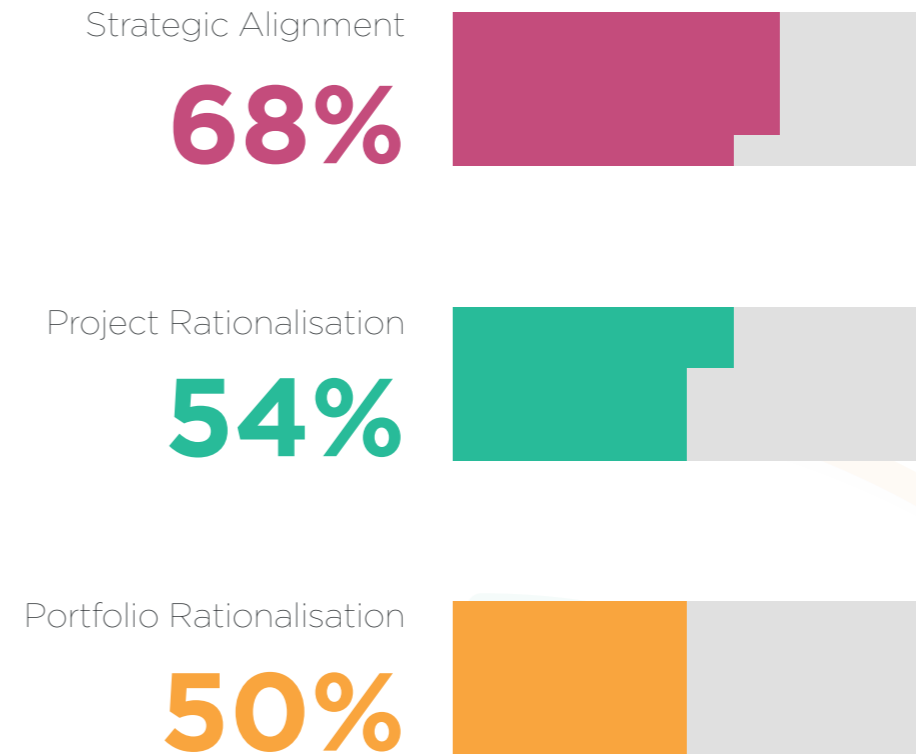
This survey: Portfolio Assessment.

In August we distributed the survey to **165 customer** organizations across the globe, which included a range of questions focused on SPM and specifically Portfolio Assessment. Over 1 month period, **158 surveys** were completed, giving us an impressive **96% response rate**. The responding customer organizations represent **21 different countries** and **24 different industries** – a highly diverse set of perspectives on SPM.

orbus software

iServer

Everyone is doing SPM to some extent!

90% of organisations are doing SPM

2% are unsure

8% are not doing SPM

92% of responding organizations are performing SPM to differing extents, with 26% carrying SPM to a large extent. This indicates to us that there is widespread recognition of the value of SPM, but many organizations are still at early stages of maturity when it comes to actual initiatives. Only 8% of respondents were not engaging in any SPM at all.

Strategic Alignment is the biggest driver.

Strategic Alignment
68%

Project Rationalisation
54%

Portfolio Rationalisation
50%

According to Orbus customers, strategic alignment is the biggest driver for SPM initiatives with 68% of respondents listing this. Project Prioritization scores equally high and seems an often recurring challenge – how to select the project portfolio that will provide the most benefits. Digital transformation is the third highest scoring driver and focuses on identifying the best candidates for digitalization. iServer's SPM dashboards cover both Business, Strategy, Technology and Project portfolios out-of-the-box and our roadmap is focused on bringing together capabilities to support transformation from ideation right through to execution, supporting the end to end SPM lifecycle.

Strategic Portfolio Management Portfolio Assessment Survey

orbus software

Currently Application Portfolio is most assessed...

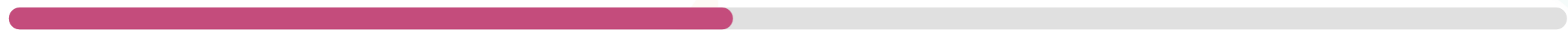## ...but increasing focus on Strategy & Project Portfolios.

Application Portfolio **68%**
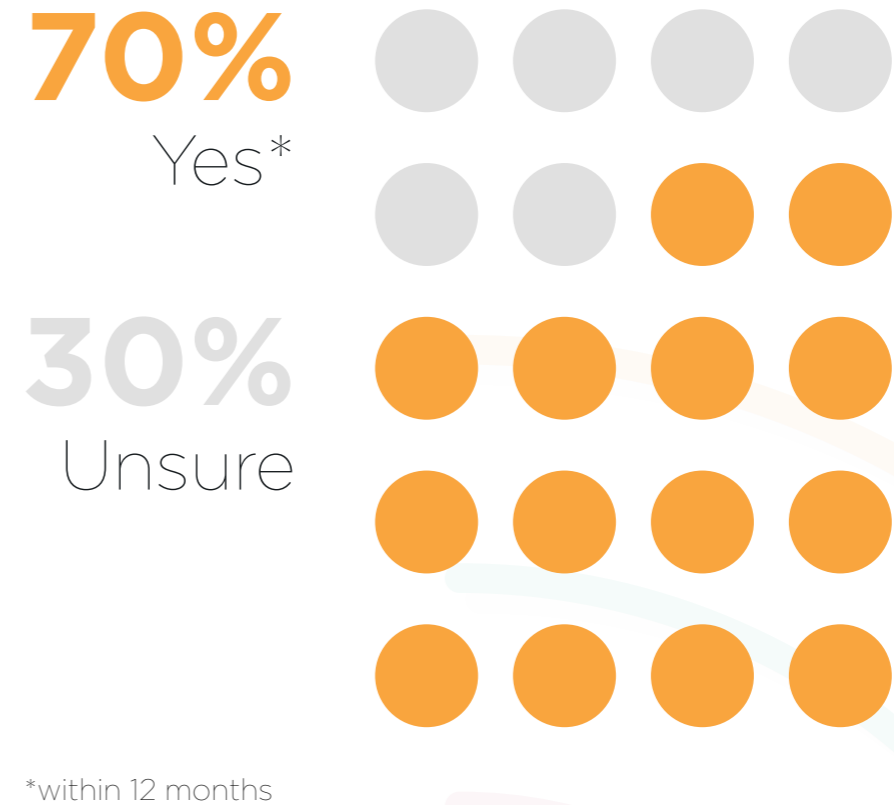
Business Portfolio **47%**

Project Portfolio **46%**

Application Portfolio Analysis is most commonly used which is no surprise to us due to the fact we have supported our customers with the APM solution for a number of years now. With the SPM solution, iServer not only has a wider range of application portfolio dashboards, but they further enrich the information from the application architecture modeled in iServer with data from other sources via iServer's API, such as CMDBs (e.g. ServiceNow), Technology Catalogues (e.g. Technopedia) and also directly from application owners across the business via iServer's HTML 5 Portal.

Although Application Portfolio is the most popular, we see a lot of organizations focused on Strategy and Business – especially on business capability assessment and innovation aligned to the strategy –, Project – prioritizing projects and IT investments – and Information – managing Personally Identifiable Information and who/which systems have access to it. Great news for those already using iServer's Strategy and Business and Project portfolio dashboards. Information Portfolio dashboards for iServer are due for release in the next version of SPM at the end of November 2018.

orbus software

SPM gives EA a seat at the C-level table.   There is a global urgency to invest in SPM.

37%   **46%**   **63%**

CISO & Risk Officer   CTO   CIO

70%
Yes*

30%
Unsure

*within 12 months

Increasingly, the capability for Enterprise Architects to consolidate and map project portfolio data to strategic goals and business capabilities makes them a valuable provider of direction for the C-level, giving them insight into the execution of their strategy. The survey showed that all C-level roles are consuming SPM data with unsurprisingly the CIO being the most common recipient, and these results also align with similar research presented by Gartner. So it seems that iServer is now very well positioned to ensure Enterprise Architecture's seat at the C-Level table.

One of the biggest takeaways was the intention of 70% of customers to invest in SPM dashboard support in the next 12 months, with a further 30% being unsure. It clear to Orbus that the requirement for SPM is imminent and irrespective of global region or industry.

Strategic Portfolio Management Portfolio Assessment Survey

orbus software

iServer

Want to know more?

To find out more about iServer's SPM Solution, **visit the SPM Solution Hub** or better still, **book a live demonstration** with a consultant.

SPM Solution Hub   **Book a Demo**

orbus
software