



 **signifyhealth**[™]

&

ATE
American Technology Consulting

Agenda



About ATC



LEAN Portfolio Management Problem & Solution



Tool comparisons And ATC Approach



Recommended Solution & Roadmap



Questions

About Us

Incorporated in 2008
with home office in Des
Moines, IA



Enterprise and small
business consultation
expertise



Implementation
Consulting - DevOps
and SAFe



Strong presence in
over 25 states
across US



Application Testing –
Performance, Automation,
Security, System



258
Consultants



124
Clients



270
Projects



LEAN Portfolio Management

The Future **Demands** a New Approach



- Digital disruption is causing fierce competition in delivering high quality services through software solutions.
- Software planning and delivery processes require tooling solutions that are highly **flexible**, **fast**, **agile**, **scalable** and **adaptable** to keep up with the ever changing demands of business and technology.
- Organizations need an approach that will help them leverage tooling solutions as a strategic asset to compete.

LEAN Portfolio Management

ATC is that Approach



- We develop, evolve and implement a complete agile management ecosystems for our customers.
- Our mission is to integrate tools and dramatically simplify software development processes by aligning business strategy and program execution.
- We enable organizations to manage the productivity of Teams, Programs, Portfolio and Enterprise.
- Our solution helps you improve operations, build efficiencies, track progress and increase revenue through lean processes.
- Our solution fits for organizations implementing SAFe, Scaled Scrum, Less or any other approach.

Lean Portfolio Management

What we will do?

Make All Work Visible

Roll-up status to make all work visible via dashboards and reports across the portfolio, programs and projects in real time.

Align Teams

Provide trainings to your teams to effectively manage roadmaps, scope, and dependencies across teams and portfolios.

Optimize For Value

Implement Lean processes to rapidly scale and deliver value with the shortest possible lead time.

Portfolio Tracking

Business Vision, Strategic Themes, Portfolio Backlog, Budgeting and Time management, Risk Management, Reporting

Program Tracking

Product Backlog, Architecture Backlog, Cross Project Release Planning and Management, Risk Management

Project Tracking

Team Backlog, Development Status Testing Status and Bug Tracking

Tool Comparison | ATC Approach



Tooling Options:

Customized Solution:

- ATC's Jira Template for Portfolio Management

Out of Box Solution:

- Jira Align setup by ATC
- Portfolio for Jira add-on setup by ATC

Tool Comparison | ATC Approach

Out of Box Solution vs. Customized Solution:

Out of Box Solution

Pros:

- One time setup that can be replicated across multiple projects.
- Built in features to support agile development.
- Visual reporting inline with project methodology.
- End to end portfolio management for entire enterprise.
- Drilldown capability to finest level of data elements.
- Integrate with other Atlassian products such as confluence, Bitbucket, Jira etc.

Cons:

- Limited customization.
- Require external dashboard tools to overcome reporting limitations.
- Require significant training and data migration effort.

Customized Solution

Pros:

- Highly customizable and integrates well with other tools.
- Optimize the existing setup of tools with couple of add-on software.
- Integrate tools using APIs to bring transparency with reporting.
- No data migration from current Jira software needed.
- Leverage the existing Jira tool skillset.

Cons:

- Tool integration for every projects.
- Expertise in dashboard tool to keep dashboards working.

Tool Comparison | ATC Approach

Portfolio Management



ATC's Jira Template for Portfolio Management

***** 5

Align Execution with Strategy:

Understand how work in progress fits into strategic themes at enterprise, portfolio and program level.

**** 4

Capacity Planning and Budgeting:

Understand team capacity requirement by rolling up story points across epics. Understand capacity requirement for portfolio.

***** 5

Portfolio Backlog:

Jira workflow templates for managing portfolio backlog including Business Epics and Enabler Epics with setup to track progress of backlog items.

***** 5

Reporting:

Interactive visual dashboards with drilldown capability with 100% customization capability.

Tool Comparison | ATC Approach

Portfolio Management

Jira Align

Strategy and Vision:

Built-in screens for tracking progress against strategic themes and business vision.

Capacity Planning and Budgeting:

Built-in screens for budget and capacity management.

Portfolio Backlog:

Feature for managing portfolio backlog including Business Epics and Enabler Epics with setup to track progress of backlog items.

Reporting:

Built in reports for portfolio level.

Portfolio for Jira

Strategy and Vision:

Does not have built-in screens to provide progress against strategic themes and business vision.

Capacity Planning and Budgeting:

Built-in screens for capacity planning, however, it does lack the feature for managing budgets.

Portfolio Backlog:

The plugin is not designed to track portfolio backlog at business epic or enabler epic level.

Reporting:

Interactive visual dashboards with low level of customization.

Tool Comparison | ATC Approach

Program Management

ATC's Jira Templates for Portfolio Management

***** 5

Release Planning & Tracking:

Jira workflows and integration for planning releases & tracking progress including cross project releases.

***** 5

Product Management:

Track and manage for Product Backlog tracking across projects.

***** 5

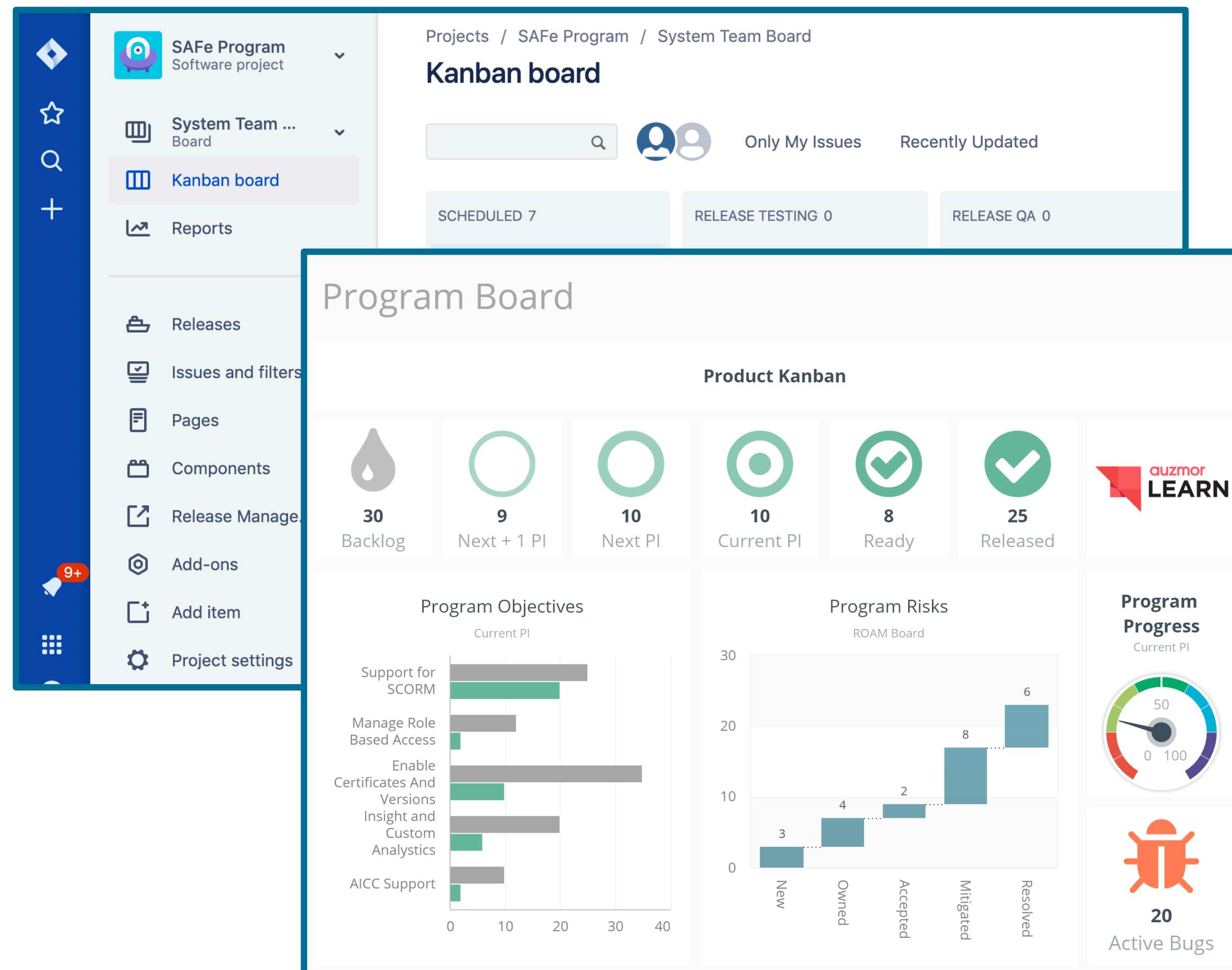
Architecture Management:

Track and manage architecture backlog across products.

***** 5

Risk Management:

View and manage risks across program.



Tool Comparison | ATC Approach

Program Management

Jira Align

Release Planning: 👍

Built-in screens for release planning.

Release Tracking: 👍

Built-in screens for release planning.

Product Management: 👍

Built-in screens for tracking product backlog across projects.

Architecture Management: 👍

Built-in screens for tracking architecture backlog across products.

Risk Management: 👍

Built-in screens for tracking risks.

Portfolio for Jira

Release Planning: 👍

Built-in screens for release planning.

Release Tracking: 👍

Built-in screens for release planning.

Product Management: 👍

Built-in screens for tracking product backlog across projects.

Architecture Management: 👎

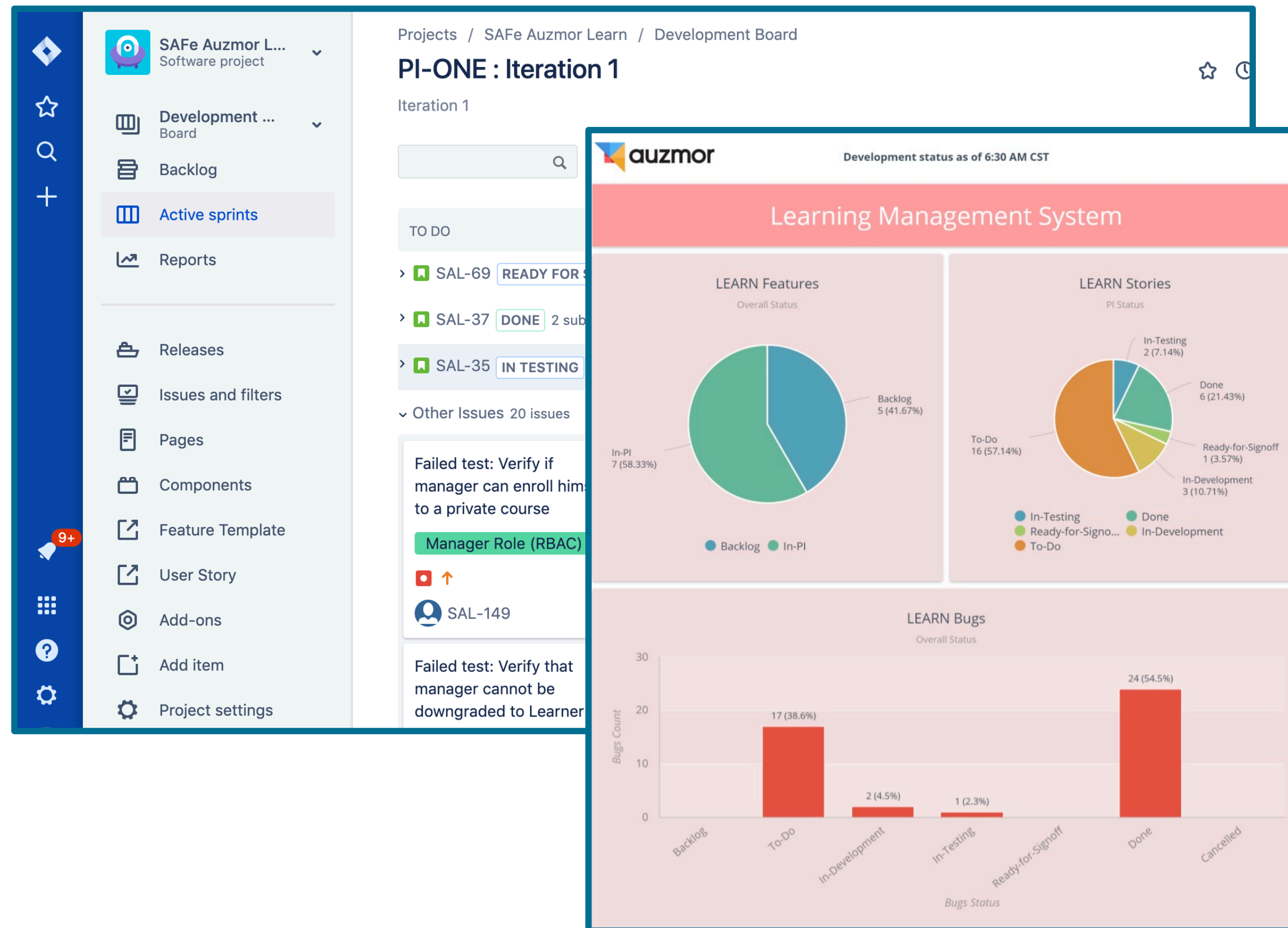
Does not have built-in screens to track architecture backlog.

Risk Management: 👎

Does not have built-in screens to track risks.

Tool Comparison | ATC Approach

Project Management



ATC's Jira Templates for Portfolio Management

**** 4

Program Board:

View and manage feature product development across multiple agile teams.

***** 5

Development Lifecycle:

Schedule and manage sprints, development and dependencies.

***** 5

Test Management:

Integrated tools for creating and managing functional and non-functional testing and tracking bugs.

***** 5

Report Delivery:

Online and via email.

Tool Comparison | ATC Approach

Project Management

Jira Align

Program Board: 👍
Built-in program board.

Development Lifecycle: 👍
Built-in screens for managing sprints, development progress and dependencies.

Test Management: 👎
No built-in screens for test management.

Report Delivery: 👍
Online and via email.

Portfolio for Jira

Program Board: 👎
Does not have built-in screen for program board.

Development Lifecycle: 👍
Built-in screens for managing sprints, development progress and dependencies.

Test Management: 👎
No built-in screens for test management.

Report Delivery: 👎
Online.

Tool Comparison | ATC Approach

Implementation

The image shows a collage of three screenshots. The top-left screenshot is a Jira Software sidebar with 'Jira settings' and 'Issues' sections. The top-right screenshot is a 'SAFE Workflows' page listing items like 'SAFE Auzmor ATS', 'SAFE Auzmor Identity', 'SAFE Auzmor Learn', 'SAFE Auzmor Platform', 'Unassigned Types', 'Epic', 'Sub-task', and 'Risk'. The bottom screenshot is a 'CLICDATA' advertisement for 'HEALTHCARE REPORTS & DASHBOARDS' with a 'Sign Up For Free' button.

ATC's Jira Templates for Portfolio Management

***** 5

Setup:

One-time setup. Can be completed in a week. The setup is role based and hence requires minimal amount of tool training.

***** 5

Cost:

Minimal cost only for analytics and test management tools considering that Jira licenses are already procured. No additional plugins are required.

Tool Comparison | ATC Approach

Implementation

Jira Align

Setup: 👍

One-time setup without need for customization. Requires tool training onboarding.

Cost: 👎

Need to buy licenses for the entire company. Additional cost of test management and analytics tools.

Portfolio for Jira

Setup: 👍

One-time setup without need for customization. Requires tool training onboarding.

Cost: 👎

Need to buy licenses for the entire company. Additional cost of test management and analytics tools.

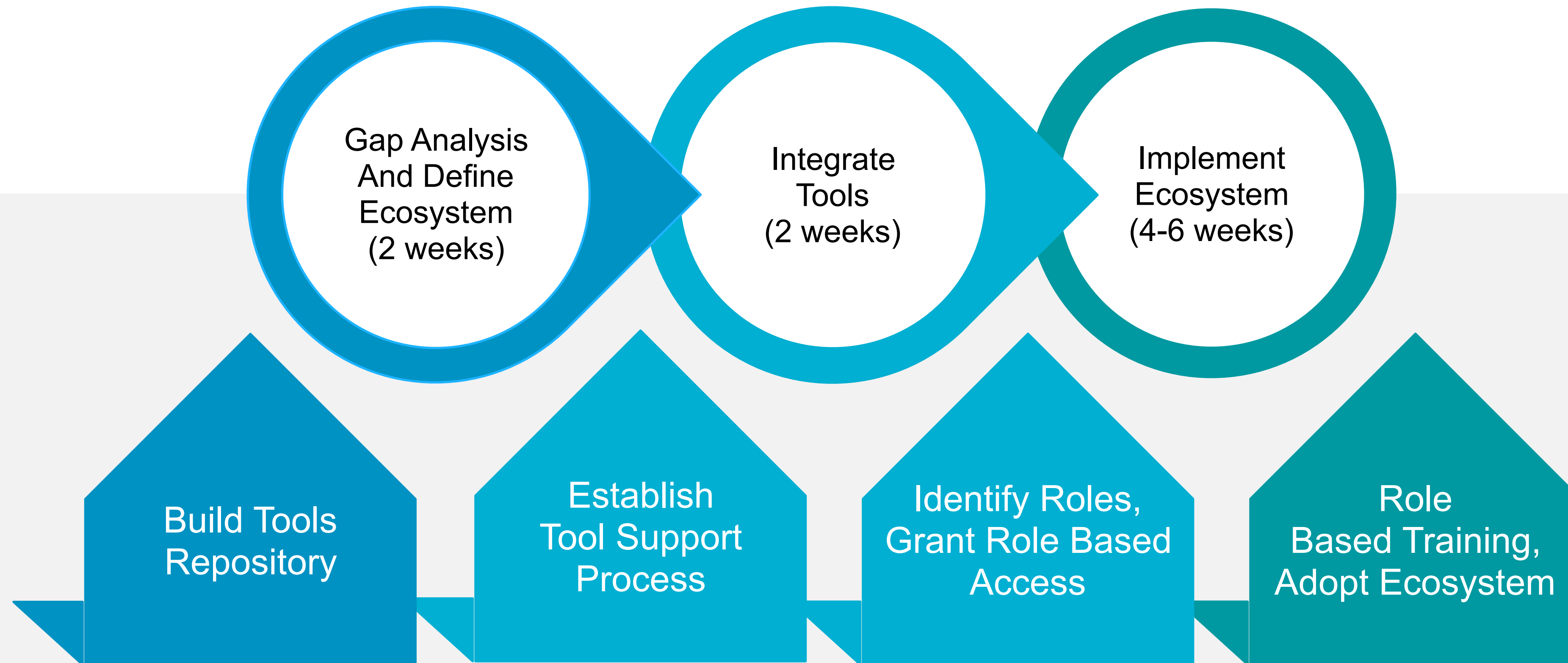
Recommended Solution



ATC's Jira Templates for Portfolio Management

- Create an eco system that enables flow of work and information while keeping the processes lean.
- Increased efficiency and productivity with seamless tool integration.
- Automated custom graphical reporting and data analytics enabling better business decisions. View dashboard across devices include mobile devices.
- Increased visibility into the development process and releases through enhanced visualization.
- Significant saving on licensing cost due to lean tooling suite and partner discounts.
- Training and support for a successful implementation of the tooling solution.

Solution Roadmap



Our tools implementation service include

Data transformation and reporting setup service | Skills matrix preparation and role based training
Post training support for 3 months after implementation | Access to online training material, courses and videos



Questions ?

Thank You!

Get in touch with us:

American Technology Consulting, LLC
12951 University Avenue, Suite 200
Clive, Iowa 50325

Phone: 515-974-5619

Fax: 515-309-9715

www.american-technology.net

