



STRATEGIC ROADMAPPING FOR BANKS AND FINANCIAL SERVICES

HELPING FINANCE BUSINESSES SWITCH TO STRATEGIC
PORTFOLIO MANAGEMENT WITH CLARITY™



FINANCE BUSINESSES CAN NO LONGER AFFORD TO RELY ON RIGID, ANNUAL PLANNING PROCESSES

Today, competitors are more disruptive, operational challenges are more profound, and regulatory compliance is more complex. From a planning perspective, this pressures finance organizations to make every project a top priority. Yet, critically, the data needed to inform decision-making and deliver sustainable competitive advantage is lacking, too.

The result? Finance businesses are overcommitted, and investment plans are driven by operational backlogs rather than a shared strategic vision.

With digital start-ups raising the stakes and customers demanding a slicker experience, finance businesses need deeper insights from their data and systems to stay competitive.

TO SUCCEED, FINANCE BUSINESS LEADERS NEED TO TRANSITION FROM TRADITIONAL PROJECT MANAGEMENT TO STRATEGIC PORTFOLIO MANAGEMENT (SPM).

SPM allows you to continuously plan and prioritize work to fit both customer demands and business needs. To succeed, however, you need a digital solution that utilizes customer and organizational data insights to help you manage the entire value stream—from concept to cash.

These benefits are exactly why the Saudi bank, Al Rajhi, chose to make the switch. Al Rajhi needed to speed up project approvals as a part of the bank's digital product management journey. They worked alongside

Broadcom partner Ignite Technology to implement Clarity in just over five months. The result has been huge cost and time savings and an uplift of approvals by over 300% versus the year before.

“I’M DELIGHTED TO SEE HOW CLARITY HAS PLAYED SUCH AN IMPORTANT ROLE IN THE BANK’S DIGITAL TRANSFORMATION JOURNEY. IT JUST SHOWS WHAT IMPACT THIS TYPE OF TECHNOLOGY CAN HAVE, AND IN A RELATIVELY SHORT SPACE OF TIME.”

– Jamie Wallace, Business Development Director, Ignite Technology

WHY CLARITY?

IT'S NOT ENOUGH FOR YOUR SPM SOLUTION TO SIMPLY STACK RANK DEMANDS FROM DIFFERENT PRODUCT GROUPS.

Agile banking, insurance, and finance enterprises need lightweight, adaptable planning tools that facilitate stakeholder engagement and top-down investment strategy across the portfolio.

Every business leader knows their investment strategy needs to be supported by comprehensive and reliable data, but that doesn't mean

there's a magic formula that can spit out a perfect plan. Today's finance leaders understand that growth means managing innovation, not managing a series of operational silos that create a backlog. They need the ability to create—and maintain—a shorthand view of what every business unit is planning and doing and how it supports a global strategy.

Data is a challenge for most finance businesses

86%

of global financial services organizations lack trust in their data

98%

of global finance leaders say data silos exist in their business

37%

of global finance businesses highlight delays in getting data as a big challenge

Source: InterSystems



YOUR FINANCE BUSINESS NEEDS A STRATEGIC PLANNING SOLUTION

STRATEGY IS A CONSTANT CONVERSATION, NOT A ONE-TIME CALCULATION.

It's time to move beyond pseudo-project portfolio management solutions that were really only designed for tactical IT demand management. While these tools may be capable of aligning resources to work, they can quickly become a barrier to meaningful innovation by encouraging cumbersome, bottom-up planning.

Strategy, work, people, and money should be connected to one solution, so your organization can benefit from faster digital transformation that delivers for customers and regulators alike. Decision-makers in your business need a 360-degree view of every project, variable and strategic plan.

Clarity removes data silos and supports operational resilience to give stakeholders a visual and interactive view of what's happening across all their business units at a high level. Moreover, it connects those high-level strategic plans to the product roadmaps and the actual work being executed. It's about having the correct data at the right time in an intuitive format to make better decisions faster.

**INTRODUCING NEW ROADMAPPING CAPABILITIES DESIGNED TO
SUPPORT THE WAY FINANCE ENTERPRISES ACTUALLY PLAN:
ITERATIVELY AND COLLABORATIVELY.**

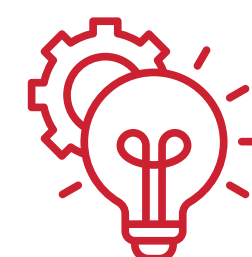
THREE REASONS AGILE ROADMAPS ARE ESSENTIAL TO SPM IN FINANCE BUSINESSES

A roadmap is a high-level visual summary of the vision and trajectory of a portfolio over time. It is a visualization of your strategy and the “why” behind what you’re building. For modern finance businesses, a roadmap is an essential bridge between those steering the strategy and those doing the work. It’s what enables 10, 20, 100 different teams to function as one.



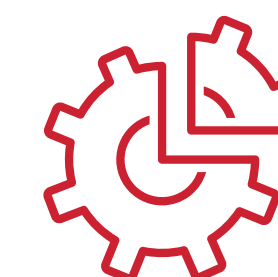
Planning should be quick and easy

Traditional investment planning requires users to articulate projects at a far too granular level just to get started, leading to organizational fatigue or even an absence of meaningful planning.



Integrated product portfolio management drives innovation

Connecting current work with the long-term vision places the emphasis on growth and broadens the realm of possibility across products and services.



Users need a single integrated vision of objectives

Stakeholders need a method to visualize, communicate and gain consensus around a proposed set of objectives. That means they need the ability to analyze new initiatives alongside work that is already planned or underway.



THE CLARITY ROADMAP

Clarity's powerful roadmapping capabilities are designed to meet the needs of many stakeholders involved in strategic management and planning. There's no limit to the number or types of roadmaps that can be created in the Clarity system. For example, they might include product, architectural or feature roadmaps or any other roadmaps an organization requires.

Each agile roadmap has multiple views, including a timeline, board, and grid view. Users can toggle from one view to the next to access the information they need and easily save personalized views. Users can also plan and compare multiple scenarios at once with a few clicks.

LET'S TAKE A LOOK AT HOW THESE DIFFERENT VIEWS ADDRESS THE UNIQUE NEEDS OF TEAM MEMBERS ACROSS A FINANCE ORGANIZATION.



MEET SUSAN JOHNSON: EXECUTIVE LEADER

IT'S HER JOB TO PRIORITIZE AND FUND WORK, ENSURING THE ORGANIZATION IS STRATEGICALLY ALIGNED AND ABLE TO RESPOND TO CHANGE. SHE NEEDS CLEAR VISIBILITY INTO ALL PROJECTS WITHOUT HAVING TO GET DEEP IN THE WEEDS OR HUNT DOWN DATA FROM DIFFERENT SOURCES.

PAIN:

"It's my job to drive innovation, but I spend too much time doing demand management. At any given moment, I need to know how different initiatives align with our goals and how changes will impact our overall strategy."

PAIN RELIEF:

ROADMAP TIMELINE VIEW: EASILY VISUALIZE AND COMMUNICATE INVESTMENT OPTIONS

- Customize time horizons and easily pivot the timeline to different swim lanes—e.g., executive sponsor, outcomes, status.
- Configure investment types to match the way your finance business operates.
- Show milestones and dependencies and expose relevant metrics—e.g., capex, opex, capacity.

THE RESULT:

STAKEHOLDERS ARE ABLE TO VISUALIZE AND COMMUNICATE A PROPOSED SET OF OBJECTIVES AND SEE A COMPLETE, INTERACTIVE PICTURE OF INVESTMENTS ACROSS MULTIPLE TIME HORIZONS.



MEET JENNIFER LOGAN: PRODUCT MANAGER

AS A MODERN PRODUCT MANAGER AT A TIER 1 BANK, JENNIFER IS PLUGGED INTO CUSTOMER NEEDS, PRODUCT FEATURES AND HOW MUCH THE PRODUCT IS EXPECTED TO COST. IT'S HER JOB TO MAXIMIZE RETURN ON INVESTMENT AND CUSTOMER VALUE. SHE IS ALSO INCREASINGLY INVOLVED IN ROADMAPPING—NOT ONLY AT THE PRODUCT LEVEL BUT ACROSS THE ENTIRE ORGANIZATION OR BUSINESS UNIT.

PAIN:

“For me, it’s about connecting the dots. I need tools to support my product roadmapping needs and show me how current work supports the broader portfolio strategy because both plans and status can change quickly.”

PAIN RELIEF:

ROADMAP GRID VIEW: EASILY PERFORM CONSTRAINT-BASED PLANNING

- When it’s time for more detailed planning, easily drill into the “spreadsheet view.”
- Sort and arrange items by any number of constraints.
- Easily communicate the impact of different changes or strategic pivots back up the chain.



MEET RITA LEE: FINANCIAL MANAGER

RITA IS AN EXPERT AT FINANCIAL PROJECTIONS—KNOWING HOW MUCH THE PROJECT IS EXPECTED TO COST AND HOW TO MINIMIZE FINANCIAL RISK. IT'S HER JOB TO ACT AS AN INDEPENDENT SET OF EYES, EVALUATING PROJECTS AND PRODUCTS THROUGH THE LENS OF FINANCIAL PERFORMANCE. SHE NEEDS TO CALL OUT WHEN THINGS ARE OFF PACE AND RAISE A FLAG BEFORE ISOLATED ISSUES BECOME CASCADING FAILURES.

PAIN:

“It’s not enough to view projects or initiatives in isolation. I need to see the dependencies and interconnections between different work streams so I can understand the true impact of changes and issues and advise stakeholders accordingly.”

PAIN RELIEF:

CLEAR, EASY-TO-USE OPERATIONAL INVESTMENT VIEW OF THE WORK

- Visualize investments based on funding, approval gates, status or any other custom dimension.
- Change item status through a simple, drag-and-drop interface.
- Fully configurable, with the ability to customize columns, colors and fiscal periods.
- Easily save or share custom views.

THE RESULT:

STAKEHOLDERS GET A STATUS VIEW OF ALL IN-PROGRESS AND PLANNED WORK, CONNECTING FINANCIAL INVESTMENT TO ACTUAL TASKS AND PROJECT STATUS. EVEN IF THE ROADMAP WAS SET AT THE BEGINNING OF THE YEAR, THEY CAN JUMP IN QUARTERLY—OR ANYTIME—TO APPROVE INVESTMENTS, ALTER PLANS OR ANALYZE DIFFERENT INVESTMENT SCENARIOS.



MEET SID PATEL: PORTFOLIO MANAGER

SID NEEDS TO UNDERSTAND THE BIG PICTURE. HE'S RESPONSIBLE FOR FUNDING AND HEADCOUNT ALIGNMENT ACROSS THE PORTFOLIO. HE PROVIDES INSIGHTS FOR STRATEGIC PIVOTS TO ENSURE THE COMPANY IS DELIVERING SUPERIOR OUTCOMES BASED ON SOLID BUSINESS DECISIONS.

PAIN:

"A lot of different teams roll up to me. I need to know what questions to ask to provide stakeholders the insights they need to make strategic decisions about investing across the portfolio."

PAIN RELIEF:

COMPARE BASELINE PLANS AGAINST WORK-IN-PROGRESS

- Easily save and compare different roadmap plans.
- Compare scenarios and measure outcomes against a baseline or the original plan.
- Identify and manage changes and identify opportunities at a glance.

THE RESULT:

PRODUCT AND PORTFOLIO MANAGERS ARE ABLE TO PRIORITIZE INVESTMENTS BASED ON VALUE BEFORE ENTERING INTO DETAILED PLANNING. THEY CAN FORECAST THE IMPACT OF CHANGES AND VISUALIZE DEPENDENCIES, WHICH HELPS THEM BUILD CONSENSUS AND PUT MORE EMPHASIS ON INNOVATION.

THREE REASONS AGILE ROADMAPS ARE ESSENTIAL TO SPM IN FINANCE BUSINESSES

CONNECT ROADMAPS TO PROJECTS—WHEN AND HOW YOU WANT

- Link roadmap items to projects.
- Drill into project data via timeline, board and grid views.
- Import projects to create new roadmaps faster.
- Control **what** roadmap items and attributes you sync and **when** you sync them.

This is where strategy meets execution in an intuitive and powerful way. It's great to keep roadmapping lightweight and high-level until it's time to put it into action. Then, you need the ability to connect the “plan” to the “plan of action.” With Clarity, the transition is seamless, and users get full control over what is synced, so you're free to explore many scenarios and never be forced into detailed planning before you're ready.

CLARITY IS BUILT FOR THE WAY PEOPLE AND FINANCE ORGANIZATIONS PLAN AND WORK TODAY

The market is full of bare-bones roadmapping tools and low-cost project management solutions, but they may not deliver the forecasting capabilities modern finance leaders need to make data-driven business decisions.

CONSIDER:

- Whether you need a SPM solution that can only provide low-level functionality for the project manager or if your organization could benefit from SPM technology that provides 360-degree optics across your organization.
- Whether a simple, visual roadmapping tool will meet your needs or if you need a tool that can actually connect to the work being planned and executed across your organization.

DOES YOUR SOLUTION SUPPORT:



An intuitive visual interface for planning and communicating investment strategy?



Rapid and adaptable investment planning across your whole portfolio?



Flexible, personalized views to support the needs of different stakeholders across your finance business?



The ability to connect your roadmap to compare baseline or actual project data once in progress?



TALK WITH AN EXPERT

More than just projects, Clarity is the leading enterprise solution for strategic portfolios, digital products and collaborative work across the finance sector. Connect with a Broadcom ValueOps specialist to learn more about how we can help your business handle strategy, data, work, people, and money.

VISIT [BROADCOM.COM/CLARITY](https://broadcom.com/clarity)

ABOUT BROADCOM

Broadcom is a leader in the VSM software market. With our Clarity solution, businesses including leading banks, insurance and financial services organizations, can implement and manage an effective, efficient DPM strategy that enables internal teams to gain the visibility required to maximize alignment, reduce inefficiencies, and speed time to value.

With Clarity by Broadcom, executives can more effectively understand priorities, capacity, progress, and results across their organizations.

As part of Broadcom's ValueOps platform, Clarity enables every role within a finance enterprise to manage, track and analyze digital products and their associated value streams, focusing on delivering the strategic outcomes that matter to your business.



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