

CLARITY™ from NIKU

An overview of the new features of this new generation EPM system and insights of a specific implementation project, practical experiences and business benefits from a customers view.

PMI Zurich Summer Event
June 23rd, 2004

Agenda

- Introduction
- Overview of CLARITY
- Insight into a project
- Customer's view
- Q&A

- **Speakers**

Andreas Natter, ConTec-X
Simon Grice, NIKU

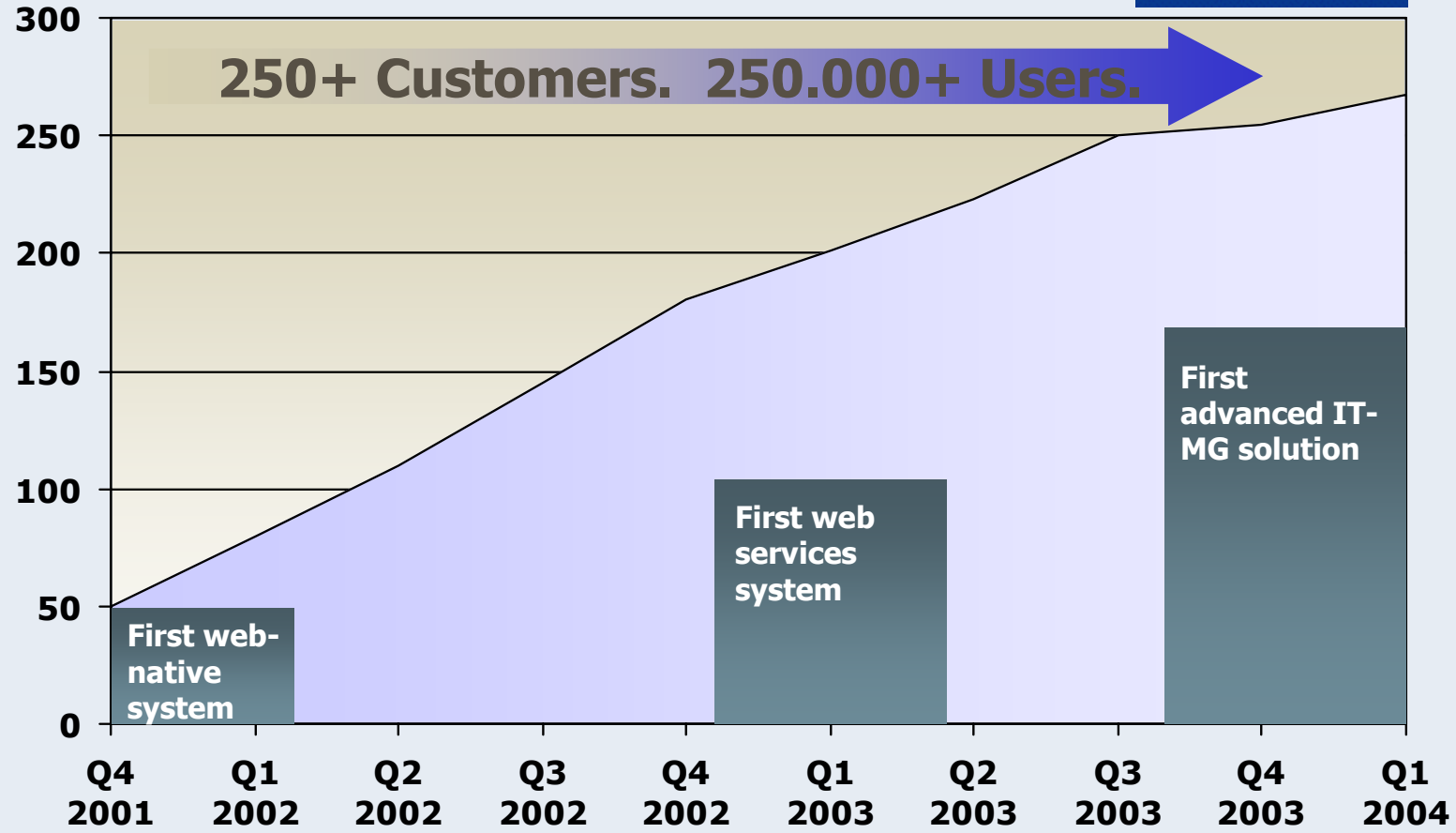
- **ConTec-X**

- IT consulting and services company specializing on project centric organizations
- many years of experience with Enterprise Project Portfolio Management solutions
- NIKU partner

- **NIKU**

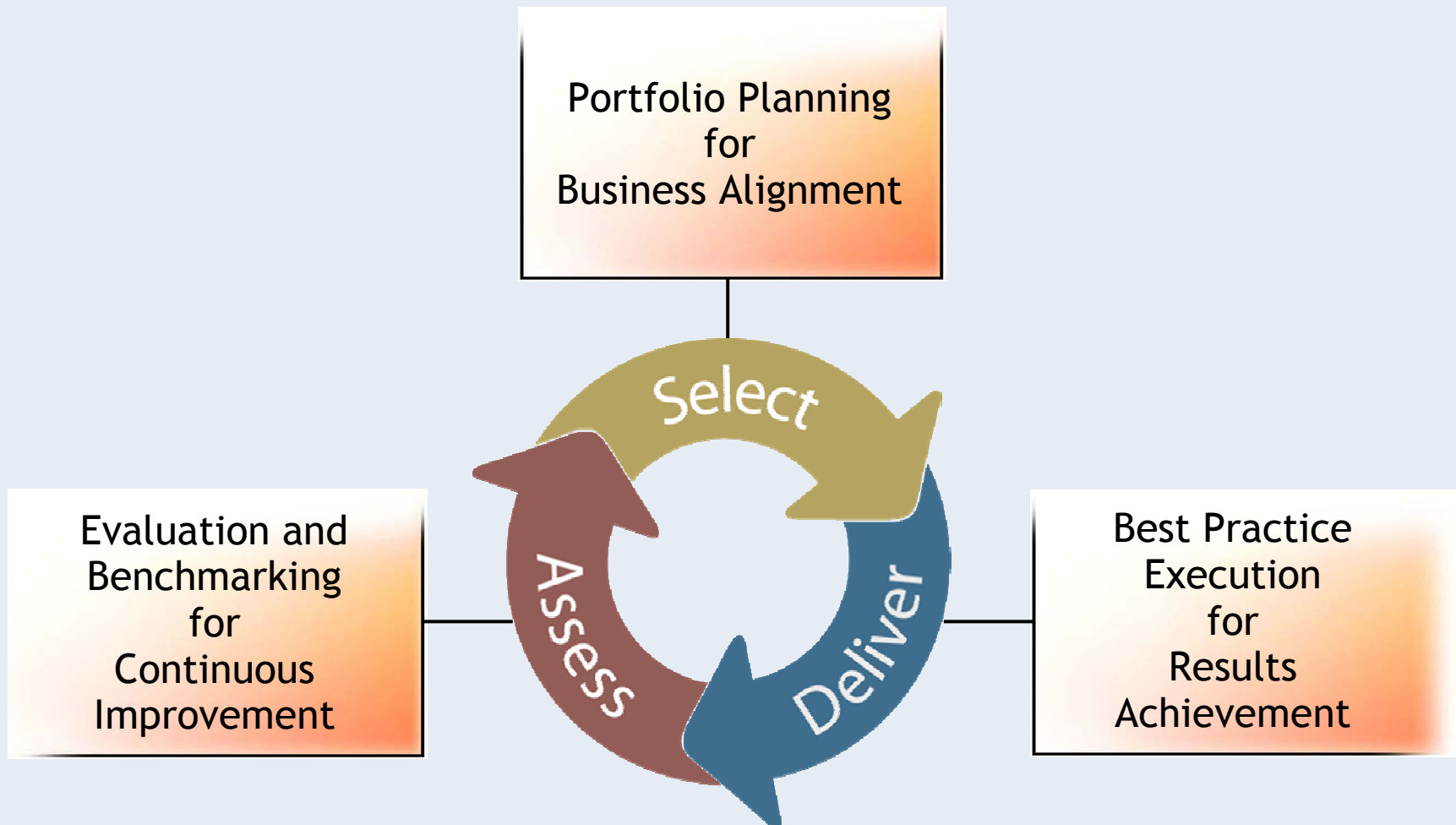
- software company focusing exclusively on Enterprise Project Portfolio Management software

NIKU - a new player



As of January 2004

Project Management - a broader view



Select



- **Define The Portfolios**
 - Applications, Assets & Projects
 - Inventory the Opportunities
- **Establish Investment Criteria**
 - Risk, Cost, Benefit, Alignment
- **Make Hard Decisions**
 - “What If?” Scenario Planning
 - Visualize Tradeoffs
 - Select Optimal Investments
- **Connect Plans To Delivery**
 - Ensure Plan Viability
 - Obtain Stakeholder Buy-in



Deliver

- **Manage Resources, Schedule & Cost**
 - Align Skill Sets with Needs
 - Best Practice Project Planning
- **Monitor In Real Time**
 - Track Key Performance Indicators
 - Role-based Dashboards
- **Collaborate**
 - Continuously Update Stakeholders
 - Support Distributed Teams
- **Assure Process Adherence**
 - Meet CMMI, Six Sigma, SDLC Standards

Assess

- **Measure Performance**
 - Score Investment Results
- **Audit Business Value**
 - Determine True Costs/Benefits
- **Benchmark**
 - Compare to Industry Leaders
- **Continuously Improve**
 - Institute Feedback Loops
 - Allocate Costs, Automate Charge Backs

Portfolio: Development

Portfolio: Scorecard [Personalize][Manage Tabs]

Properties Contents Scenarios **Scorecard** Analysis

Portfolio: Development Scenario: --None-- Status: All [Back to Portfolios]

Gantt Gantt

Filter: [--Select--] [Create Filter Expression][Expand Filter]

| Name ▲ | Stage | Stage | Alignment | Status | Q1 2004 | Q2 2004 | Q3 2004 | Q4 2004 | Q1 2005 | Q2 2005 |
|--------------------------------------|------------------------|----------------------------------------------------------------|-----------|------------|---------|---------|---------|---------|---------|---------|
| Bus Ops Call Center Enhancement | Business Case | <div style="width: 25%;"><div style="width: 25%;"></div></div> | ◆ | Unapproved | | | | | | |
| CRM Implementation - Asia Pac | Scoping | <div style="width: 50%;"><div style="width: 50%;"></div></div> | ◆ | Unapproved | | | | | | |
| CRM Upgrade Data Conversion | Business Case | <div style="width: 25%;"><div style="width: 25%;"></div></div> | ◆ | Unapproved | | | | | | |
| Customer Tracking System | Idea | <div style="width: 25%;"><div style="width: 25%;"></div></div> | ◆ | Unapproved | | | | | | |
| Enhance Call Center System | Scoping | <div style="width: 25%;"><div style="width: 25%;"></div></div> | ◆ | Approved | | | | | | |
| Enterprise Web Portal Infrastructure | Scoping | <div style="width: 25%;"><div style="width: 25%;"></div></div> | ◆ | Unapproved | | | | | | |
| GL Posting Interchange | Business Case | <div style="width: 25%;"><div style="width: 25%;"></div></div> | ◆ | Approved | | | | | | |
| HR Benefit Statement Reporting | Business Case | <div style="width: 25%;"><div style="width: 25%;"></div></div> | ◆ | Approved | | | | | | |
| HR Enhancements | Testing and Validation | <div style="width: 25%;"><div style="width: 25%;"></div></div> | ◆ | Approved | | | | | | |
| Journal Entry Enhancements | Business Case | <div style="width: 25%;"><div style="width: 25%;"></div></div> | ◆ | Approved | | | | | | |
| New Partner Web Site | Idea | <div style="width: 25%;"><div style="width: 25%;"></div></div> | ◆ | Unapproved | | | | | | |

Point solutions...

- Standalone portfolio assessment tools
- Spreadsheets
- Whiteboards



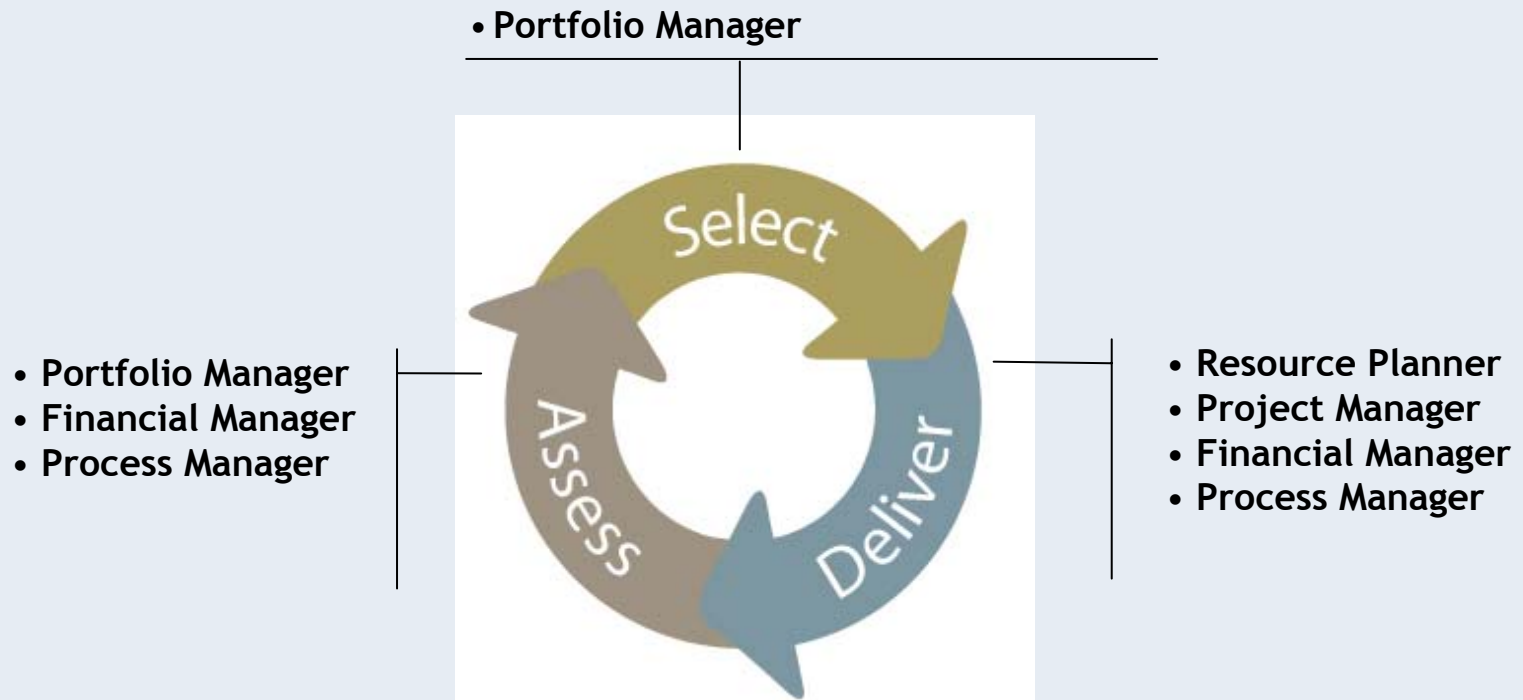
- Status reports
- Spreadsheets
- Custom analytics

- Microsoft Project
- Spreadsheets
- Emails, phone calls, meetings

...Don't Solve the Problem

CLARITY - a new generation EPM system

- Integrated
- Comprehensive
- Modular
- 100% bBrowser-based





Portfolio Manager

Project Manager

Resource Planner

Financial Manager

Process Manager

Clarity Studio

Workbench

Author

New

Clarity Core Services

Collaboration

Document Management

Portals

Reporting and Analytics

Clarity G2000 Architecture

Massive Scalability

Global Availability

Precision Security

XML Open Gateway (XOG)

Platform Neutrality



CLARITY™

Portfolio Manager

- Portfolio modeling and analysis
- Scenario planning
- Portfolio performance dashboards
- True cost/benefit capture
- Idea and demand management
- Stakeholder engagement

Project Manager

- Project planning, WBS creation, project templates
- Estimating, budgeting and forecasting
- Time capture
- MSP integration

Resource Planner

- Capacity planning
- Skills management
- Resource search and qualification
- Staff requisitions
- Resource reporting

Financial Manager

- Billing and invoicing
- Charge-backs and allocations
- Multiple bill and cost rate matrices
- Currency conversion

Process Manager

- Graphical workflow
- Phase-gate process support
- Automated activities and notifications
- Workflow-driven project creation
- Role-based assignments

Clarity Studio

- PowerMods – field, form, page and menu configurator
- Portlet creation – multiple graph and table formats
- User interface personalization

Workbench

- Automated scheduling

Author

- Methodology development

Clarity Core Services

Collaboration

- Threaded discussions
- Action items and notifications
- Global knowledge store

Document Management

- Full text search
- Version control
- Check-in/check-out
- Routing and approval

Portals

- Personalized home pages
- User-configurable views
- Web content feeds
- Precision Security

Reporting and Analytics

- Built-in Actuate reporting
- Executive and Stoplight dashboards
- Integrated data mart
- Excel and PDF report distribution

Clarity G2000 Architecture

Massive Scalability

Global Availability

Precision Security

XML Open Gateway (XOG)

Platform Neutrality

Analyst acclaim

- "Niku offers the most functionally rich solution, covering all areas of technology identified as differentiators, and with a fair amount of proven, large scale deployments."
- METAspectrum, February 2004
- Beste Bewertung in der Kategorie Enterprise Project Management Tools.
- Studie der Uni Osnabrück 2004
- Magic quadrant Leader in Gartner's current and previous "Project/Resource Management Magic Quadrant" report.
- Gartner Magic Quadrant, July 2003

Project insights

- Customer
- Scope
- Timeline
- Management Goals & Visions
- Implementation Experiences
- Benefits

Customer

- Large energy/utility provider
- 5000+ people
- 300+ people in IT
- 30+ complex projects / year
- 100+ smaller projects

Scope

- Integrated system for all IT projects
 - Portfolio Planning
 - Budgeting
 - Project / Subproject Management
 - Resource Management
 - Subcontracting
 - Reporting
- IT Order management
 - Process Automation
- Real-Time Reporting & Control

Timeline

- Evaluation June-Oct 03
- Implementation & Go-Live
 - Planning & Analysis Nov-Dec 03
 - System Setup Jan 04
 - Pilot & Customizing Jan-Mar 04
 - Lessons Learned Apr 04
 - Roll-out & Reporting May-Sep 04
 - Integration Q4
 - IT Order management 2005
- Optimization ongoing

Management Goals & Vision

- Transparency
 - All processes in the system
 - Real-Time Reporting & Control
- Efficiency
 - No paperwork / ‚Elektronische Projektakte‘
 - Integration / no double data entry
 - Process work flow & automation
- Quality
 - Standardization of processes
 - ISO 9000 certification

Implementation Experiences

- Get quick wins
 - Use Clarity for the implementation project itself
 - Run a key project on the system immediately
 - Postpone non-critical enhancements & customizations
- Get user acceptance
 - Provide quick access to the collaboration module
 - Distribute project information through CLARITY
 - Establish coaching & internal help-desk
- Involve Management
 - Provide online reporting & status reports
 - Make them ,hungry‘ to see all projects online

Benefits

- ONE integrated system
- No client/server - easy deployment
- Easy access for customers & subcontractors
- Real-Time control
- Standardized documents (i.e. status reports)
- Central repository for all project documents & data
- Reduced errors
- Accelerated approval processes
- What-if scenarios

?

Q & A

Thank you !