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The Forrester Wave™: Strategic Portfolio Management Tools, Q3 2017

Six Leaders Provide Agile Tools To Drive Digital Transformation

by Margo Visitacion and Robert Stroud
September 20, 2017

Why Read This Report

In our 27-criteria evaluation of strategic portfolio management (SPM) software solutions providers, we identified the 13 most significant ones — AgileCraft, CA, Changepoint, Decision Lens, GenSight, MEGA, Microsoft, Planisware, Planview, ServiceNow, Software AG, Sopheon, and StrategyBlocks — and researched, analyzed, and scored them. This report shows how each provider measures up and helps enterprise architecture (EA) and portfolio management office (PMO) professionals make the right choice.

Key Takeaways

Software AG, Planisware, Sopheon, ServiceNow, Planview, And GenSight In Front

Forrester's research uncovered a market in which Software AG, Planisware, Sopheon, ServiceNow, Planview, and GenSight lead the pack. AgileCraft, Microsoft, MEGA, CA, Decision Lens, and StrategyBlocks offer competitive options. Changepoint is a Contender.

EA And PMO Pros Are Looking For Analytics Insights, Collaboration, And Practical Usability

The SPM market is growing because more EA and PMO professionals see SPM as a way to address their top challenges in continuous planning. They trust SPM to deliver seamless traceability from strategy through execution.

Analytics Insights And Integrated Business Technology Planning Are Key Differentiators

As organizations become increasingly Agile, EA and PMO pros require technology that supports insights-driven planning that uses data to help them make smarter decisions in compressed planning cycles. Vendors that can combine Agile and sequential planning capabilities in a highly collaborative fashion with a strong user experience will differentiate.

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SPM Tools Are Essential In Digital Transformation

Digital transformation challenges the way companies plan and deliver products and services to their customers. Speed is a prerequisite. Getting the most value while keeping waste to a minimum illustrates that companies need a portfolio-centered approach to both strategic planning and product delivery because:

› **Planning disciplines are transitioning from annual to continuous.** Organizational structures change to maximize throughput via data-driven, action-oriented feedback. In a world of digital transformation, the concept of project portfolio management (PPM) provides too narrow of a focus. With organizations increasingly embracing Agile planning and delivery methods, they must get away from bottom-up, departmental, budget-based project planning, which enforces silos that impede true business agility.

› **SPM tools support planning at a unified level.** Organizations can view investments through various lenses that leverage features, integration, and implementation best practices to create traceability from corporate strategic planning. This is done through strategic portfolio road mapping that guides program and product planning and delivery. 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 projects. The solution leverages robust business analysis, capacity planning, and predictive analytics capabilities that support investment decisions.

› **SPM underpins organizations' embrace of Agile planning.** Seventy-one percent of organizations use Agile techniques to deliver at least some of the time.[1] Digital transformation and customer-centered strategies bring a new set of challenges to today's organizations. Accelerated planning and delivery practices are needed to meet customer demand and to provide fast feedback to guide funding and prioritization decisions.

The Strategic Portfolio Management Tools Landscape Is Shaped By Diverse Elements

In assessing the SPM tools landscape, buyers should recognize the following market characteristics related to technology, industry segmentation, and business innovation:

› **Digital transformation requires integration of business and technology planning.** The voice of the customer and the increased digitalization of business compress the cycle of planning. Discrete strategic planning, design, development, and delivery practices no longer work efficiently as organizations put the customer in the center of their planning processes.[2] This changes the picture of planning — market data is still important, but it's no longer paramount. Organizations now need a mixture of customer information and market research to help them identify markets. And as more organizations adopt design thinking in introducing products and services, technology planning becomes a concurrent exercise, requiring the introduction of a unified view of how business products, domains, and capabilities drive technology innovation.[3]

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› **Contextual collaboration and analysis form a key part of strategic planning.** Strong traceability requires greater levels of transparency. Spending on business technology (BT) now makes up 55% of new project spending, outpacing traditional IT.[4] These investments target customer-facing capabilities that are continuously delivered. Agile techniques require fast feedback, and with planning cycles becoming shorter, discrete dissemination of information no longer supports fast planning and delivery cycles. Companies now need to collaborate within the context of planning and delivery cycles, and they need valid feedback to support reprioritization to maintain their competitive advantage.

› **Company size, geography, and industry segmentation drive vendor market strategies.** While "Agile" is the word on every executive's lips, specific industry requirements, their ability to invest, and geographic footprint are three factors that drive buying decisions. Large, global companies require broader, global capabilities and more robust planning and analytics features, while midsize companies demand straightforward, practical features that they can implement and see value from quickly. Core competencies don't vary from industry to industry, but value-added capabilities such as predefined content and services do. As we see demand for insights-driven analytics, predictive analytics is quickly becoming table stakes for capacity planning and long-term financial projections.

Strategic Portfolio Management Tools Evaluation Overview

To assess the state of the strategic portfolio management tools market and see how the vendors stack up against each other, Forrester evaluated the strengths and weaknesses of top strategic portfolio management tools vendors. After examining past research, user need assessments, and vendor and expert interviews, we developed a comprehensive set of evaluation criteria. We evaluated vendors against 27 criteria, which we grouped into three high-level buckets:

› **Current offering.** Each vendor's position on the vertical axis of the Forrester Wave graphic indicates the strength of its current offering. Our evaluation of a vendor's current offering focused on the integration of strategic planning capabilities, including goals, assessment, decision support, validation, gap analysis, and collaboration. We also included portfolio management capabilities such as alignment, integrated operational alignment, portfolio analytics, and data security. Finally, we focused on usability capabilities that include services and programs to drive customer success and practical usability that brings office collaboration into the product.

› **Strategy.** The strategy position on the horizontal axis of the Forrester Wave graphic shows our assessment of each vendor's strategy. We evaluated the product strategy, partner ecosystem, corporate strategy, go-to-market strategy, and entry price.

› **Market presence.** The bubble size of each vendor on the Forrester Wave graphic demonstrates its market presence. We assessed market presence based on company revenue, the number of new customers and subscription renewals, and the number of employees focused on the strategic portfolio management market.

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Evaluated Vendors And Inclusion Criteria

Forrester included 13 vendors in the assessment: AgileCraft, CA, Changepoint, Decision Lens, GenSight, MEGA, Microsoft, Planisware, Planview, ServiceNow, Software AG, Sopheon, and StrategyBlocks. Each of these vendors has (see Figure 1):

› **A minimum of 50 live strategic portfolio management customers.** The vast majority of today's market is PPM customers. To qualify for inclusion, we required a minimum of 50 active SPM customers as of May 25, 2017.

› **Flexible implementation requirements.** Companies have different requirements for storing strategic data. Vendors had to demonstrate software-as-a-service (SaaS) or on-premises implementation capabilities in public and private settings.

› **A comprehensive set of strategic portfolio management capabilities.** The functional breadth of an SPM offering must include core features of strategic business and technology planning on a global level, core portfolio management capabilities, and integration support to bring in necessary external strategic and performance data for assessment, prioritization, and choice.

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FIGURE 1 Evaluated Vendors: Vendor Information And Inclusion Criteria

Vendor	Product evaluated	Product version evaluated
AgileCraft	AgileCraft Scaled Agile Management Platform	
CA	CA Project & Portfolio Management	15.2
Changepoint	barometerIT	
Decision Lens	Decision Lens	
GenSight	GenSight	9.3
MEGA	HOPEX	
Microsoft	Microsoft Project & Portfolio Management	
Planisware	Planisware	
Planview	Planview Enterprise	
ServiceNow	IT Business Management	Jakarta
Software AG	Alfabet	
Sopheon	Accolade	11.1
StrategyBlocks	StrategyBlocks	

Vendor inclusion criteria

A minimum of 50 live strategic portfolio management customers. The vast majority of today's market consists of project portfolio management customers. To qualify for inclusion, we required a minimum of fifty active strategic portfolio management (SPM) customers as of May 25, 2017.

Flexible implementation requirements. Companies have different requirements for storing strategic data. Vendors had to demonstrate the ability to implement in public and private software-as-a-service or on-premises implementation capabilities.

A comprehensive set of strategic portfolio management capabilities. The functional breadth of an SPM offering must include core features of strategic business and technology planning on a global level, core portfolio management capabilities, and integration support to bring in necessary external strategic and performance data for assessment, prioritization, and choice.
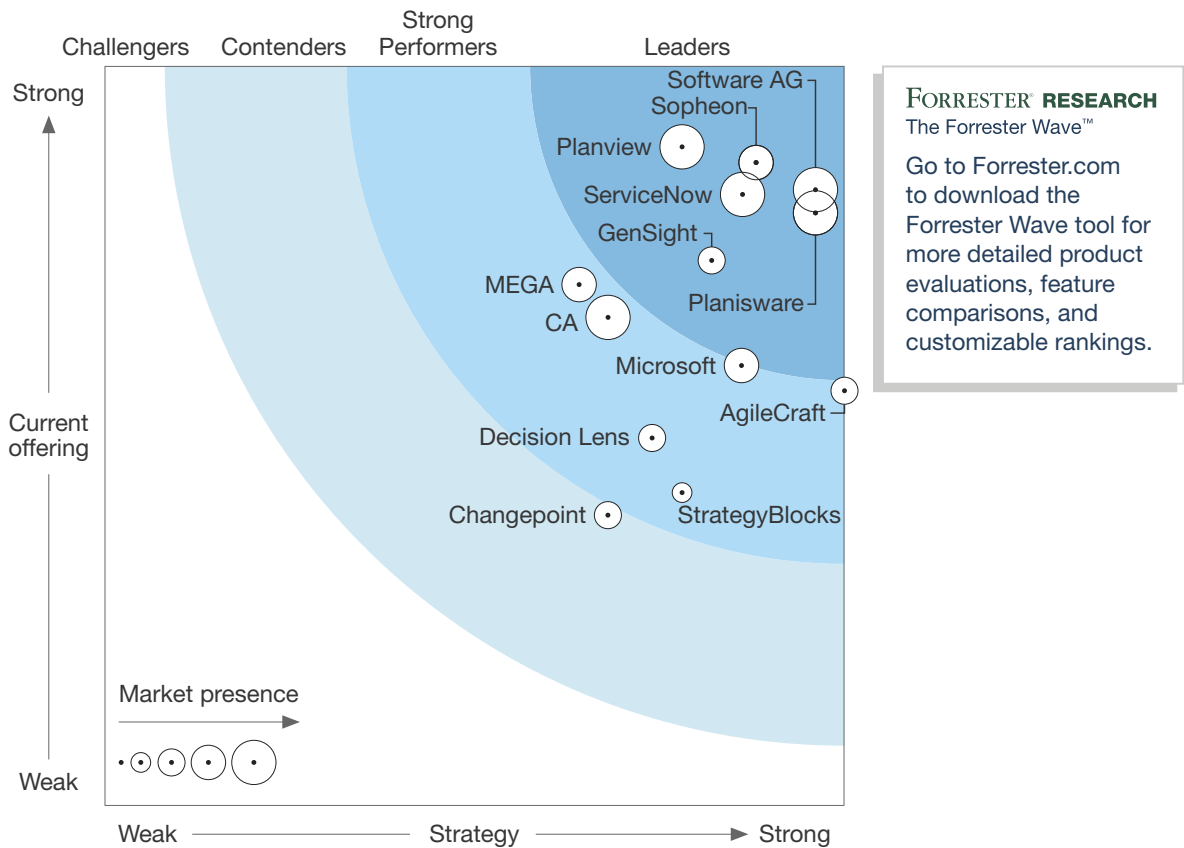
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Vendor Profiles

This evaluation of the strategic portfolio management tools market is intended to be a starting point only. We encourage clients to view detailed product evaluations and adapt criteria weightings to fit their individual needs through the Forrester Wave Excel-based vendor comparison tool (see Figure 2).

FIGURE 2 Forrester Wave™: Strategic Portfolio Management Tools, Q3 '17

The Forrester Wave™: Strategic Portfolio Management Tools, Q3 2017
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FIGURE 2 Forrester Wave™: Strategic Portfolio Management Tools, Q3 '17 (Cont.)

	Forrester's weighting	AgileCraft	CA	Changepoint	Decision Lens	GenSight	MEGA	Microsoft	Planisware	Planview	ServiceNow	Software AG	Sopheon	Strategy Blocks
Current offering	50%	2.80	3.30	1.96	2.48	3.68	3.52	2.97	4.00	4.45	4.12	4.16	4.34	2.11
Strategic planning support	15%	2.50	3.00	3.10	4.10	4.10	3.80	2.70	3.60	3.90	3.70	3.70	3.90	3.20
Portfolio management	10%	3.00	2.50	3.80	2.45	3.65	3.05	3.10	3.10	4.25	4.30	4.25	3.20	2.45
Integrated risk management	10%	2.00	3.00	3.00	3.00	4.00	5.00	2.00	3.00	4.00	3.00	4.00	5.00	3.00
Financial management	10%	3.60	3.30	0.00	2.30	4.30	3.70	2.00	4.00	4.70	3.60	4.30	4.00	3.00
Resource capacity planning	10%	3.00	5.00	0.00	4.00	4.00	3.00	2.00	5.00	5.00	4.00	4.00	4.00	0.00
Program/product management	15%	5.00	3.00	0.00	1.00	3.00	3.00	3.00	5.00	5.00	5.00	5.00	5.00	1.00
Customer experience	15%	2.40	3.80	2.40	2.60	3.80	1.80	3.00	5.00	3.80	3.80	3.00	4.20	1.20
Integration support	15%	1.00	3.00	3.00	1.00	3.00	5.00	5.00	3.00	5.00	5.00	5.00	5.00	3.00
Strategy	50%	5.00	3.40	3.40	3.70	4.10	3.20	4.30	4.80	3.90	4.30	4.80	4.40	3.90
Product strategy	20%	5.00	3.00	3.00	3.00	3.00	3.00	5.00	5.00	3.00	5.00	5.00	3.00	3.00
Partnership ecosystem	10%	5.00	5.00	5.00	3.00	0.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00
Corporate strategy	25%	5.00	3.00	3.00	5.00	5.00	3.00	5.00	5.00	3.00	3.00	5.00	5.00	5.00
Go-to-market strategy	35%	5.00	3.00	3.00	3.00	5.00	3.00	3.00	5.00	5.00	5.00	5.00	5.00	3.00
Entry price	10%	5.00	5.00	5.00	5.00	5.00	3.00	5.00	3.00	3.00	3.00	3.00	3.00	5.00
Market presence	0%	2.80	4.80	3.00	2.60	2.80	3.80	4.00	4.20	4.20	4.60	5.00	3.20	2.00
Installed base	40%	4.50	4.50	3.00	4.00	4.50	5.00	2.50	5.00	5.00	4.00	5.00	4.50	3.50
Revenue	40%	1.00	5.00	2.00	1.00	2.00	2.00	5.00	3.00	3.00	5.00	5.00	2.00	1.00
Employees	20%	3.00	5.00	5.00	3.00	1.00	5.00	5.00	5.00	5.00	5.00	5.00	3.00	1.00

All scores are based on a scale of 0 (weak) to 5 (strong).

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Leaders

› **Software AG.** Software AG was founded in 1969 and entered technology strategic planning via its acquisition of Alfabet in 2013. The company's largest client segments include energy, logistics, and financial services. The vendor has a global presence and an extensive partner network. Taking a business technology approach, Software AG has significantly expanded its portfolio planning and delivery capabilities to include both traditional and Agile capabilities and is prepared for the European Union's General Data Protection Regulation (GDPR). Customers referenced the ability to better tie investments to capabilities in order to deliver on their strategic portfolios.

› **Planisware.** Planisware, founded in 1996, is a global provider of portfolio management capabilities targeting product development, engineering, and research and development. The company's largest client segments include life sciences, manufacturing, energy, food and beverage, and consumer product goods. Planisware is among the leading vendors and provides ample support in all capabilities, with investment planning, program, and road map capabilities highlighted as particular strengths. Clients referenced flexible resource management, strong financial planning, and the ability to manage hybrid — traditional and Agile — projects as differentiators.

› **Sopheon.** Founded in 1993, Sopheon is a global SPM vendor headquartered in the US with operating units in the UK, Darmstadt, Germany, and the Netherlands. Possessing a robust business and product focus, its largest client segments are in consumer products, food and beverage, high tech and electronics, chemical and coatings, industrial manufacturing, and aerospace and defense. Sopheon is one of the leading vendors, with a broad range of support in all of its areas of focus, but the vendor is particularly strong in innovation planning, financial controls, and process management. Clients highlighted strong technical and process support and usability as key strengths.

› **ServiceNow.** Founded in 2004, ServiceNow is a global cloud computing company offering enterprise software. ServiceNow's recently introduced Jakarta release leverages a common platform, a configuration management database, and resource capabilities to align strategy with critical business and technology services, programs, and applications. The company's largest client segments are financial services, healthcare, higher education, life sciences, and government. Clients talked about the common platform, flexible workflow, and configurability as prominent features that helped them to deliver on strategic technology portfolios.

› **Planview.** Planview, founded in 1989, has grown through acquisitions of Projectplace (in 2014), a collaborative work management vendor, Troux (in 2015), an enterprise architecture vendor, and Innotas (in 2016), a midmarket project portfolio management vendor. The vendor has a strong US presence and is expanding its global presence. Planview's largest client segments are financial services, manufacturing, and business services. The vendor provides comprehensive capabilities in areas of corporate strategic planning and enterprise-level portfolio management that encompasses corporate finance, product, services, and IT capabilities. Clients noted the ability to consolidate their strategic views, product and program delivery, and flexible workflows.

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› **GenSight.** GenSight was founded in 2002. With locations in the US and UK, the vendor's largest client segments are consumer products, industrial products, and science and technology. Of the Leaders, GenSight is the most strategically focused, targeting corporate, product, and enterprise portfolio planning. The product offers robust capabilities in all areas of strategic planning and portfolio management and supports flexible integration with third-party solutions for data analysis. Clients highlighted product support, ease of use, and financial analysis strengths as differentiators.

Strong Performers

› **AgileCraft.** Founded in 2013, AgileCraft is one of the first strategic portfolio management solutions designed for Agile at scale. AgileCraft employs a horizontal strategy to serve cross-industry needs. The vendor supports both top-down strategic product planning and delivery capabilities, providing straightforward budgeting and capacity planning in a highly usable UI. In addition, AgileCraft supports the ability to manage traditional investment workstreams concurrently with Agile release trains. Clients referenced data aggregation and delivering business metrics as particular key strengths.

› **Microsoft.** Microsoft, founded in 1974, delivers Microsoft Project & Portfolio Management, a collaborative, cloud-based project portfolio management solution. Its cross-industry strategy, tight integration with Office 365, and robust mobile solution help a wide range of organizations work together. Core functionality remains focused on project portfolio management that enables delivery functions. Clients mentioned easy project planning and collaboration as the most beneficial features; they pointed to strategic planning as an area for improvement, however. Future enhancements will focus on expanding different approaches to work with native Agile planning, integration with Microsoft Planner, and a new portfolio service.

› **MEGA.** Founded in France in 1991, the vendor has expanded to nine countries and a worldwide network of distributors and partners. MEGA's largest client segments are government and financial services. MEGA's HOPEX product leverages its strong enterprise architecture capabilities and application portfolio management as the foundation for planning to build alignment between business and technology capabilities; today, resource management capabilities require a separate PPM solution. Clients referenced ease of use, a common taxonomy, and analysis as key attributes that enable them to mature their planning processes.

› **CA.** CA was founded in 1976 and acquired its project portfolio management solution in 2005. CA PPM has a significant presence in the global technology PPM market in financial services, government, pharmaceutical, insurance, and telecom markets. The core functionality is strongest, but the product's flexible configurability enables users to extend functionality to a more strategic level. Improved data management capabilities allow for stronger analysis. Clients highlighted ideation, demand management, and using storyboards for executive reporting as particular strengths.

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› **Decision Lens.** Founded in 2002, Decision Lens delivers a strategic portfolio management solution that emphasizes decision-making capabilities. Its largest client segments are government, aerospace and defense, and technology. Leveraging decision science and the analytic hierarchy process, the product supports collaborative strategic planning through building consensus in a highly configurable, user-friendly format. Users are guided through tradeoff and scenario analysis to identify optimized portfolios. Clients mentioned a strong mobile solution for anytime analysis and voting, using it primarily in decision making and reporting versus ongoing portfolio management. At this time, integrations are limited, but future releases should bring more out-of-the-box integrations and enhanced resource optimization.

› **StrategyBlocks.** This vendor, with offices in New Zealand and the United Kingdom, offers a flexible SaaS-based strategic planning solution applicable across a wide number of industries. The product, targeted at the C-suite or senior executives, offers the ability to quickly build visual analysis of a strategy, identify outcomes, and cascade metrics to monitor outcomes in a series of blocks that can be aligned horizontally or vertically. Clients highlighted the solution's ease of use, ability to easily identify risks and activities within blocks, and establishing relationships between blocks to identify dependencies. The tool is generally used as a standalone; future releases will include an expanded metrics module, ideation, and execution capabilities.

Contenders

› **Changepoint.** Changepoint, founded in 1992, acquired barometerIT, an enterprise architecture solution, in 2015. The US-based organization's global customer base crosses multiple industries, including professional services and healthcare. barometerIT is a simple-to-use solution to identify strategies, organizations, capabilities, and data in support of strategic planning. Flexible, graph-driven data analysis and pivoting provide users with insights into various perspectives of strategies. Clients spoke of strong collaboration, workflow, and advanced analytics as benefits. barometerIT can be implemented as a standalone solution; for full strategic portfolio management capabilities, however, potential clients should consider teaming the implementation with Changepoint's Daptiv PPM.

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Supplemental Material

Online Resource

The online version of Figure 2 is an Excel-based vendor comparison tool that provides detailed product evaluations and customizable rankings. Click the link at Forrester.com at the beginning of this report to download.

Data Sources Used In This Forrester Wave

Forrester used a combination of four data sources to assess the strengths and weaknesses of each solution. We evaluated the vendors participating in this Forrester Wave in part using materials that they provided to us prior to September 7.

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› **Hands-on lab evaluations.** Vendors spent one day with a team of analysts that performed a hands-on evaluation of the product using a scenario-based testing methodology. We evaluated each product using the same scenario, creating a level playing field by evaluating every product on the same criteria.

› **Vendor surveys.** Forrester surveyed vendors on their capabilities as they relate to the evaluation criteria. Once we analyzed the completed vendor surveys, we conducted vendor calls where necessary to gather details of vendor qualifications.

› **Product demos.** We asked vendors to conduct demonstrations of their products' functionality. We used findings from these product demos to validate details of each vendor's product capabilities.

› **Customer reference calls.** To validate product and vendor qualifications, Forrester also conducted reference calls with three of each vendor's current customers.

The Forrester Wave Methodology

We conduct primary research to develop a list of vendors that meet our criteria to be evaluated in this market. From that initial pool of vendors, we then narrow our final list. We choose these vendors based on: 1) product fit; 2) customer success; and 3) Forrester client demand. We eliminate vendors that have limited customer references and products that don't fit the scope of our evaluation.

After examining past research, user need assessments, and vendor and expert interviews, we develop the initial evaluation criteria. To evaluate the vendors and their products against our set of criteria, we gather details of product qualifications through a combination of lab evaluations, questionnaires, demos, and/or discussions with client references. We send evaluations to the vendors for their review, and we adjust the evaluations to provide the most accurate view of vendor offerings and strategies.

We set default weightings to reflect our analysis of the needs of large user companies — and/or other scenarios as outlined in the Forrester Wave evaluation — and then score the vendors based on a clearly defined scale. We intend these default weightings to serve only as a starting point and encourage readers to adapt the weightings to fit their individual needs through the Excel-based tool. The final scores generate the graphical depiction of the market based on current offering, strategy, and market presence. Forrester intends to update vendor evaluations regularly as product capabilities and vendor strategies evolve. For more information on the methodology that every Forrester Wave follows, go to http://www.forrester.com/marketing/policies/forrester-wave-methodology.html.

Integrity Policy

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Endnotes

[1] Source: "PMI's Pulse of the Profession 9th Global Project Management Survey," Project Management Institute, 2017 (https://www.pmi.org/-/media/pmi/documents/public/pdf/learning/thought-leadership/pulse/pulse-of-the-profession-2017.pdf).

[2] Seventy-three percent of survey respondents (business and technology decision makers and influencers whose level of seniority is manager or above) say that they have achieved at least a defined level of maturity in practicing customer-led IT planning. Source: Forrester Data Global Business Technographics® Priorities And Journey Survey, 2017.

[3] Portfolios represent the action plan that delivers on business technology road maps. Business technology domains, capabilities, and services serve as prioritization criteria in making investment decisions. See the Forrester report "Link Strategic Portfolios To BT Road Maps To Win, Serve, And Retain Customers."

[4] Growing consumer spending and business investment keeps CIOs focused on the BT agenda and will fuel the majority of technology investments. See the Forrester report "US Tech Market Outlook For 2017 And 2018: Mostly Sunny, With Clouds And Chance Of Rain."

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