Serena Software

Thinking outside the box on Change Management

Presented to: **CM USERS GROUP**

Presented by:
Matt Procter-cles
Scott Lee-onaukalis

 SERENA™

Federal Product Certifications

508 Compliance

CAC Card (Common Access Card)

DITSCAP (Department of Defense Information Technology Security Certification and Accreditation Process)

ITIL (Information Technology Infrastructure Library) compliant

CMMI (Capability Maturity Model Integrated) compliant
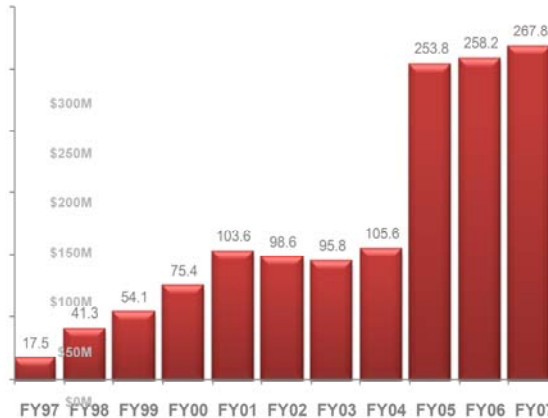
NMCI pending

AKO net worthiness

Cleared services personnel

Multiple federal contract vehicles

Who We Are

Serena Software is leading a revolution in application development. We are a privately owned company with 29 offices in 14 countries and almost 1,000 employees. Founded over 25 years ago, Serena has over 15,000 customers including 96 of the Fortune 100. Our total revenue in 2007 was US$270M. Approximately 10% of Serena's overall business comes from US Federal Government. Today, there are over 300 federal agencies/system integrators using Serena products.

What We Do

Above all, we're in the business of making our customers successful in application development. More specifically, at Serena we're trying to do two things – and both are very focused on the world of application development.

First, it's our observation that over the last decade the data center systems and processes have made great progress being consolidated, standardized and automated…but the application development systems and processes have not advanced nearly as much. Even more importantly, and adding to the complexity of the problem, application development is increasingly global and distributed in nature. As a result, productivity is not what it should be and there is increasing frustration with IT – the application backlog is bigger than ever. Serena can make the software development systems and processes more reliable and more efficient on a global basis. We do this in three ways:

We manage all of the artifacts in the development process – requirements documents, design documents, code, test scripts, build scripts. All of it. And we provide full traceability between those artifacts so, for example, management can see if the code and test scripts have been written to meet every requirement. All artifacts can be accessed quickly regardless of location – US or India due to our unique management of a central repository. And we span mainframe and distributed systems – no artifact is ever left behind.

We provide a process tool to automate all the human and system workflows, starting with everyday tasks

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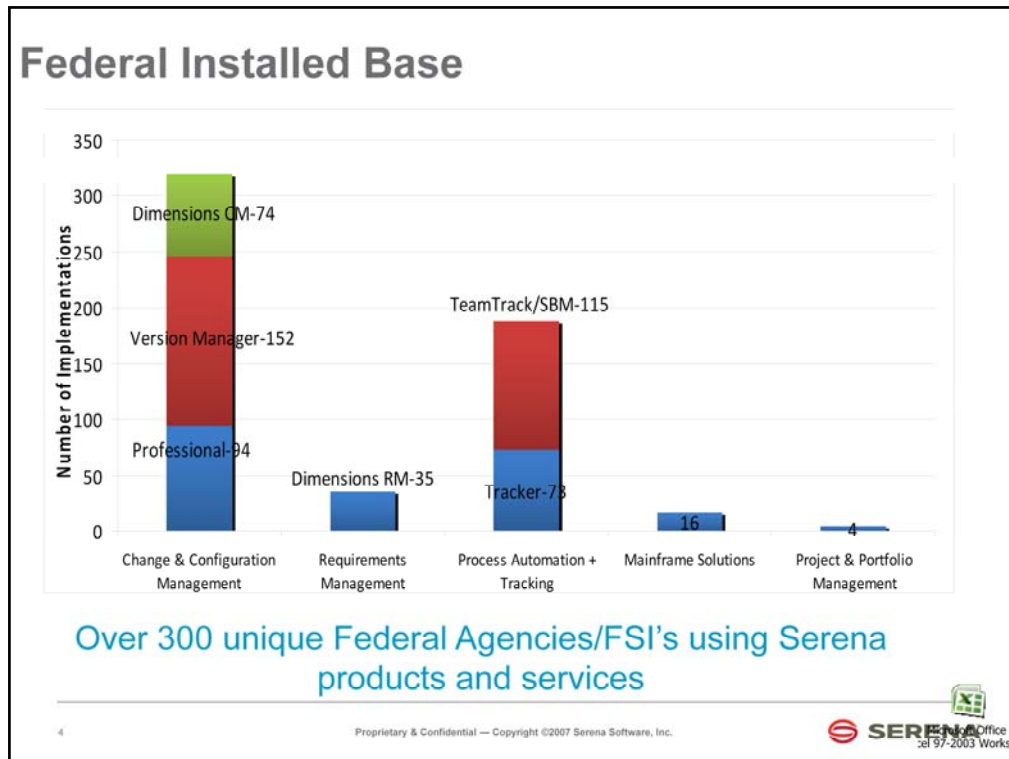
All of our government customers. List of Federal Agencies and Customers is available as an embedded Excel spreadsheet via the icon in the lower right corner.
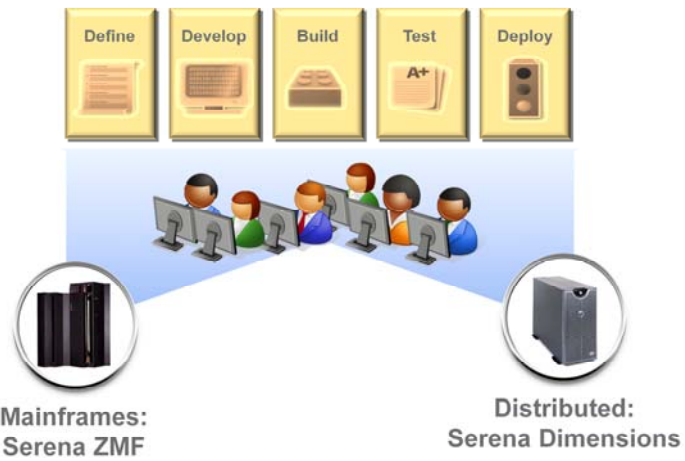
Opportunity: ARRA

How Serena TeamTrack Adds Required Transparency and Speed to Existing Processes

- In its Initial Implementation Guidelines, issued Feb. 18, 2009, the Administration outlined required steps federal agencies must take for meeting the crucial objectives for planning and implementing the Recovery Act. Here is how Serena's TeamTrack is uniquely capable of helping federal agencies meet these requirements.

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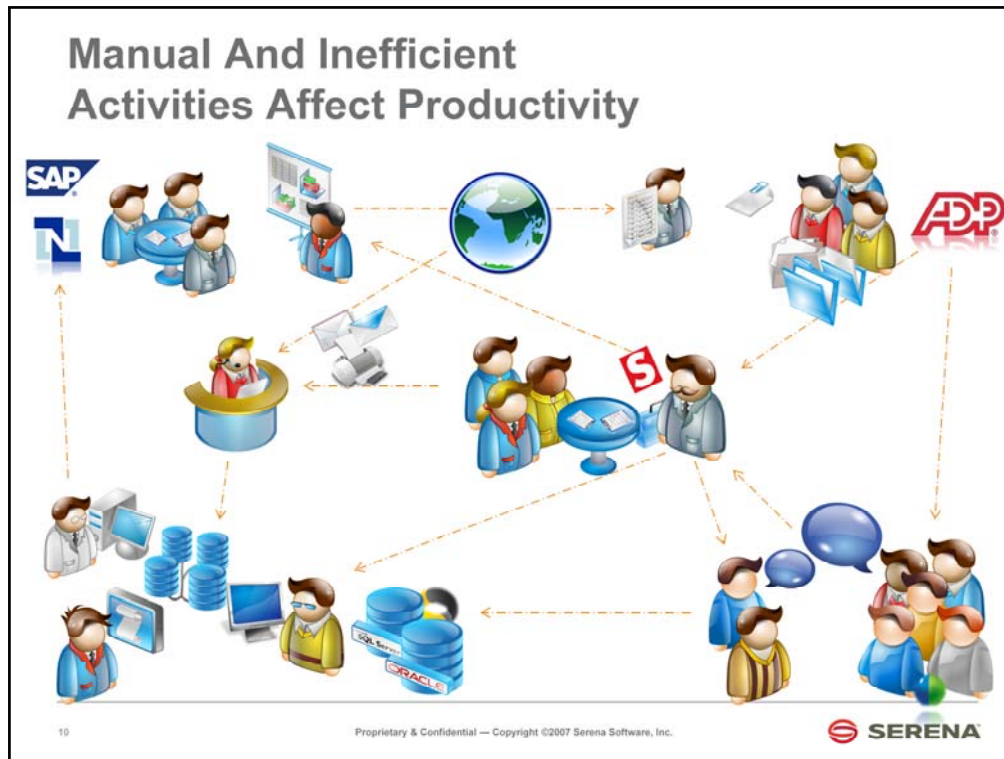
Multiple federal contract vehicles

Organizations operate a lot like assembly lines: work is passed from person-to-person, from team-to-team. This is done in the form of e-mailed, spreadsheets, documents, PowerPoints; wiki and blog postings; hallway conversations; shared reports from legacy applications; web conferences and the like. There are myriad activities we do every day that can benefit from coordination and automation . However, software is the best way to bring together people, the processes in which they participate, and the data they share. The problem with that is that as the business has ideas for increasing productivity and coordinating activities, IT is strapped by flat budgets, growing demand and the reality that about 75% of their money goes to maintaining existing systems. Not much wiggle room. The result: an ever-growing application backlog.

BPM Is NOT The Lean Answer IT Needs Right Now
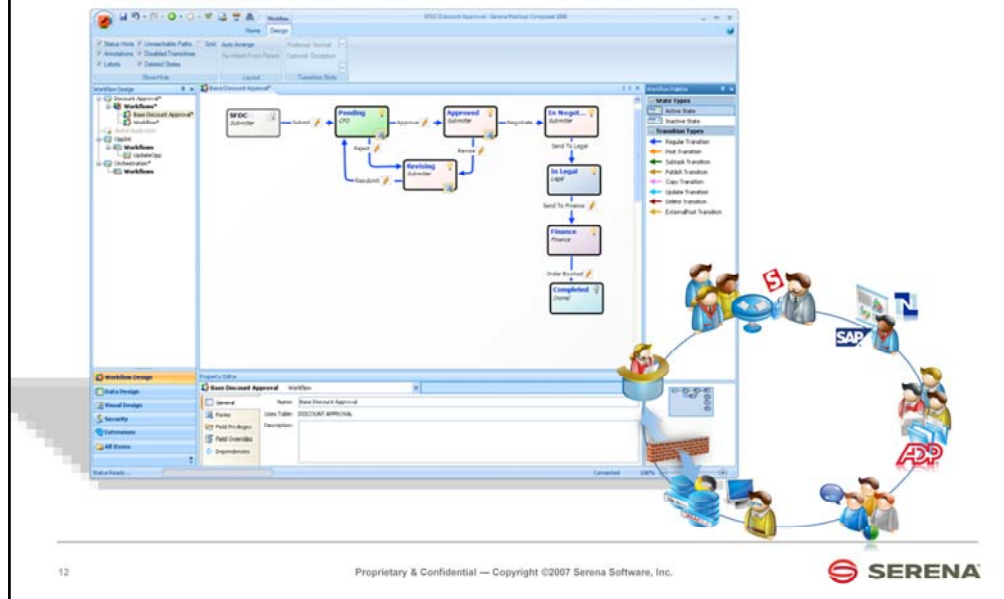
- BPM Is **NOT** An Easy Development Tool For Building Simple Process-Centric Applications
  - Business Analysts Can't Use It

- BPM Is **NOT** A Lightweight "Platform" To Run These Simple Applications That Is Easy To Govern And Audit
  - IT Management Doesn't Like It

- BPM Is **NOT** Low Cost To Acquire And Operate Nor Yields Fast Return On Investment
  - CIO's Can't Save Money

Although the applications in the backlog are all very different (again, think HR recruiting and on-boarding processes, think sales proposal generation, legal document review and approval), there is one thing common across all of these application requests: they drive productivity by coordinating people, process and data. This means no long e-mail chains, no application jumping to double enter data and no being blindsided by critical tasks that fell through the cracks.

Serena Is Unique In Its Support
For Real Business Processes

Lean Processes Available Under Creative Commons	
SERENA	Employee Onboarding
SERENA	Employee Time-Off
SERENA	Hardware Change Request
Salesforce	Sales Opportunity Discount Approval
Salesforce	Customer Data Management & De-Duplication
Salesforce	Sales Opportunity Credit Approval
SERENA	Expense Reimbursement
SERENA	Purchase Requisition Approval
QuickArrow	Service Contract Management
SERENA	HR Provisioning And New Hire Setup
SERENA	Travel Request And Approval
And Many More To Come On The Mashup Exchange	

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Productivity Through
Serena Software

- **<u>Easy</u>** Business Process Development

- **<u>Low Cost</u>** Deployment On Premise Or In The Cloud

- **<u>Fast ROI</u>** Compared To Traditional BPM

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Serena Business Mashups

- Dynamic, graphical workflow editor

- Ability to Customize the Business Mashup End User Experience

- Granular Security for Mashup Privileges and Administration

- Out-of-the-Box Reports/Dashboard
- Flexible Browser Based Reports

- Visibility into project health

- Real time data with "drill down" capabilities
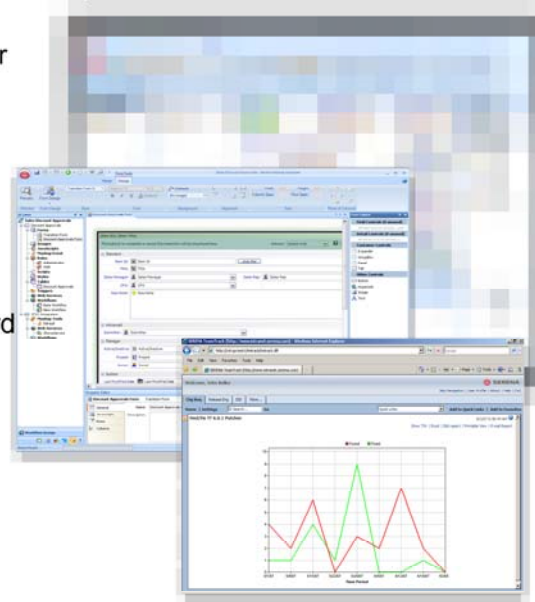
Customer Success:
Office of Personnel Management (OPM)

Business Problem:
- Many applications were behind schedule. Most were developed internally being programmed in java. The cost over rides were high due to the delay. OPM took on additional work from the DoD. They were tasked with doing background checks for anyone needing a clearance for the military. It was very time sensitive.

Serena Products:
- Serena Business Mashups

Results:
- Mashups were initially used for change management to track enhancement and defects within the organization. They quickly realized that Mashups could be used as an application platform by itself.

- Over the last four years, they have developed 80 separate applications. Bill Lamberton said, "we are spending pennies on the dollar to create new applications."

- The CIO office has now deployed Mashups enterprise-wide has 40 more applications scheduled for delivery.

Nearly every U.S. Government Agency has some interaction with the Office of Personnel Management (OPM). OPM will manage that communication, collaboration and enforce their standard processes such as legal reviews, purchase requests and on-boarding with Serena Business Mashups.

OVERVIEW

Serena Business Mashups is well entrenched and continues to expand in this large U.S. government agency, which touches many other agencies. Many U.S. Government agencies use Serena's Business Mashups to connect with the Office of Personnel Management (OPM). For example, all Federal Government retirement checks are processed through the OPM system which utilizes SBM for retirement personnel workflows. Serena Business Mashups has become so entrenched and well received that when new license are needed, the OPM simply makes a business case and they are awarded the seats they require. In early 2008, OPM expanded the use to various projects throughout OPM, such as change request workflows, purchase request, legal review and on-boarding to name a few.

PROBLEM

OPM needed a tool that would connect the agency throughout the nation allowing people to collaborate in a myriad of ways.

They needed something easy to use and very scalable.

They already had a small TeamTrack installation for defect tracking, so we leveraged that to get Serena Business Mashups into mix for these new business needs.

APPROACH

Over the course of months of courtesy calls we showed them that Serena Business Mashups (TT) will do much more then issue and defect tracking. We landed and expanded by painting the vision of what could be with Serena Business Mashups.

July 2007 - Technical Discovery - Scott worked with them to review the basics of TeamTrack including:

- Performance, reliability, Interoperability, scalability, security, training, documentation, communication, service and support, legal, compliance/audit, reporting

December 2007 - We then entered the arduous OPM/Federal buying process which included navigating two high profile executive meetings due to the 7 digit price tag. We supplied custom graphs and PowerPoints to arm our champions with the ammunition to exit the meetings with executive approvals.

Thank You

- Matt Procter
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  - 703-939-1977

- SERENA FEDERAL USERS GROUP
  - Tuesday, March 31st
  - Ronald Reagan Building
  - FREE
  - Contact mprocter@serena.com to register

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How Serena Addresses ARRA

| Requirement	"Crucial Objectives" Outlined in Section 1.2 of the Initial Implementation Guidelines	Serena TeamTrack Capability
Speed	"Recovery funds are awarded and distributed in a prompt, fair and reasonable manner." "Projects funded under the recovery legislation avoid unnecessary delays and cost overruns."	Organizations can expect to get streamlined processes up and running in weeks, for less than one-fifth of competing offerings, with no need to disrupt existing technology investments. Visibility across the process enables you to identify issues early to keep projects on time with high quality.
Transparency	"The recipients and uses of all recovery funds are transparent to the public."	Cross-process visibility enables you to roll up key information to see the big picture.
Clear, accurate, timely reporting	"Public benefits of these funds are reported clearly, accurately and in a timely manner."	Trend reports, dashboards and other mechanisms enable quick and accurate reporting.
Internal controls & oversight to prevent fraud, waste, error and	"Recovery funds are used for authorized purposes, and every step is taken to prevent instances of fraud, waste, error, and abuse."	Automates traceability/auditability to ensure internal, regulatory and/or industry-standard processes are followed.

Agile Is Here And Now

- 2 Flavors Of Software Development Lifecycle
  - Waterfall
  - Agile

- Over 25% Of All New Application Development Projects Are Going To Be Done Using The Agile Methodology

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Serena Offers A No-Compromise Agile Development Tool
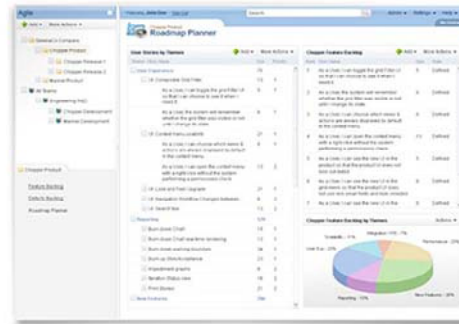
Serena Is Unique In How It Brings These Two Worlds Together

Agility Through
Serena Software

- **Collaborate** With All Stakeholders Anywhere Anytime

- **Increase** Predictability For All Application Development

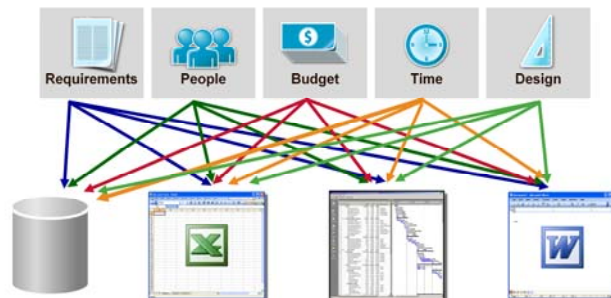- **Enterprise Class** With The Ease Of Use Agilistas Expect

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The 10 minute Elevator Pitch of Serena's Solution

Scott Lee

So you can see that the application development lifecycle includes processes that are complex because application development is inherently: (1) heterogeneous, (2) global, and (3) collaborative. And for that reason, what you find in IT is that a lot of processes are labor-intensive and non-standard.

The result? There's a lot of spreadsheets floating around, a lot of Word documents, a lot of Microsoft Access databases, and a lot of Microsoft Project files. Because these processes are labor-intensive and somewhat haphazard, what ends up happening is requirements get dropped and quality suffers and things don't appear on time – there are lots and lots of issues. It's also almost impossible for senior management to gain visibility to find out exactly what's going on because the information is held in a lot of small, fragmented repositories in Word, Excel, Project, proprietary databases, and email.
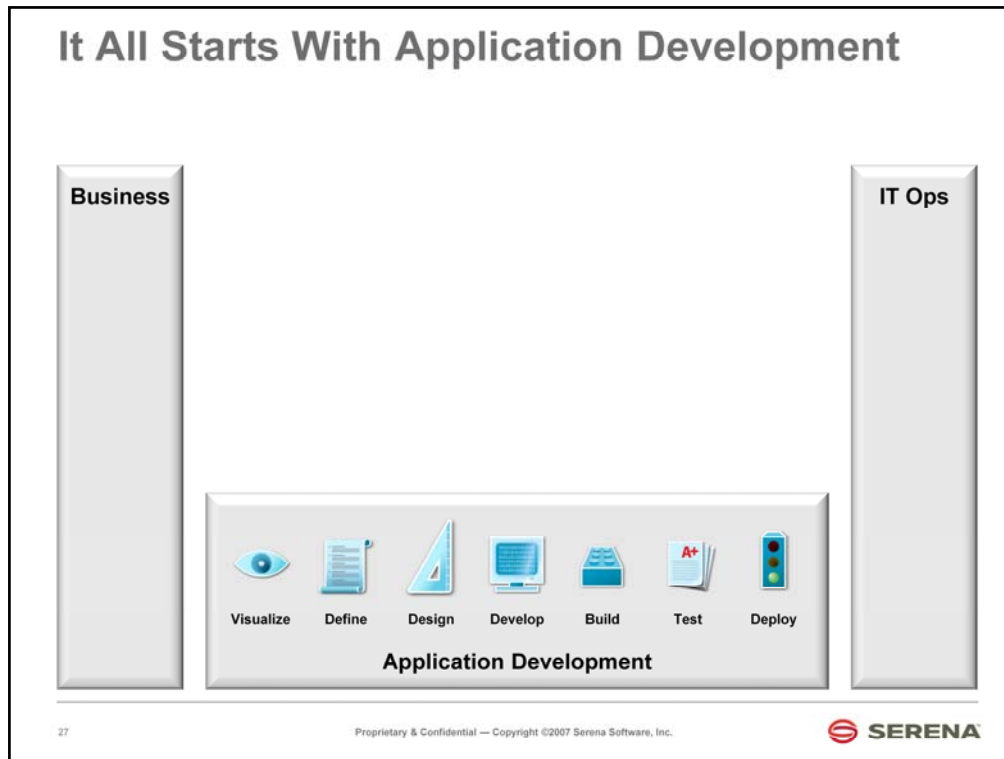
How do we do that? Let me explain with this picture. First, if you look over to the left here, let's assume this is the business. A line of business could be a sales department, it could be a marketing department, it could be a manufacturing department. And on the right here we've got our data center, which is run by the IT operations group. And the goal is to take an idea from the business, and turn it into an application so that the business can either make more money or save money. A very, very simple concept.

The first thing that folks engage in is application development. And application development has a number of steps involved in it. First you gather requirements. Second, you design the application. Then maybe you're going to do some coding. Then you're going to test the application and then send it off into production.
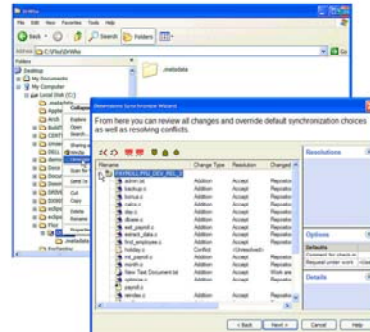
With Dimensions, we collect all of the information throughout the application development lifecycle and we put it into a centralized repository. By doing that, you've got full traceability across the lifecycle. Did the application meet the initial requirements? Did you hit the quality metrics that you expected to? Dimensions allows you to do all of that and it does it in a homogeneous way across a heterogeneous landscape.

It's cross-platform: Unix, Windows, Linux, mainframe. It supports multiple methodologies – CMMI, Scrum – it doesn't matter whether it's waterfall or whether it's agile. And, as I said, it operates in an automated fashion through a single, centralized repository.

We have also architected Dimensions to scale globally. It doesn't matter whether your engineers are in China, India, eastern Europe, the United States, or western Europe. We have the architecture to scale this globally so that multiple engineering teams can collaborate on one development project . . . at the same time.

Customer Success
CBP Office of Information & Technology

Business Problem:
- Replace a 20 year legacy system to better manage their critical change and configuration needs.
- This project migrates all OIT mainframe source currently managed by LIBCTL using CA-Librarian files and place the latest version of the source within Dimensions control.
- When the migration is completed, developers will use Dimensions to manage their source code by checking-out, modifying it, and then checking it back in as they do for other project assets such as MS Word documents and distributed source code.

Serena Products:
- Dimensions 10
- Serena Professional Services

Results:
- The Office of Information and Technology (OIT) has established Dimensions as the standard Configuration Management (CM) Tool.
- It is the enterprise-wide tool for managing change and changes to items.
- Dimensions is used for version, change, baseline, build and release management of project code and documentation.

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The DHS/CBP Office of Information and Technology (OIT) has established Dimensions as the standard Configuration Management (CM) Tool. It is the enterprise-wide tool for managing change and changes to items. Dimensions is used to: version, change, baseline, build and release management of project code and documentation.

The Border Enforcement and Management Systems (BEMS) Program Office has responsibility for the deployment and maintenance of Dimensions. The Dimensions Project Team (DPT) within BEMS has successfully deployed the tool to a large portion of OIT and is prepared to continue this deployment to those organizations not yet using Dimensions.

OIT managers are already using Dimensions to manage requested changes to OIT assets. Various change requests have been implemented to support OIT business needs. When a change has been authorized, a developer is delegated a request within Dimensions to make the authorized change. The changed item is then related to the change request, reviewed and approved.

Legacy OIT mainframe assets have been managed by the use of one of two tools: CA-Endevor or CA-Librarian with the LIBCTL user interface. CA-Endevor was piloted and implemented on a limited basis in 1991. CA-Endevor provided change,
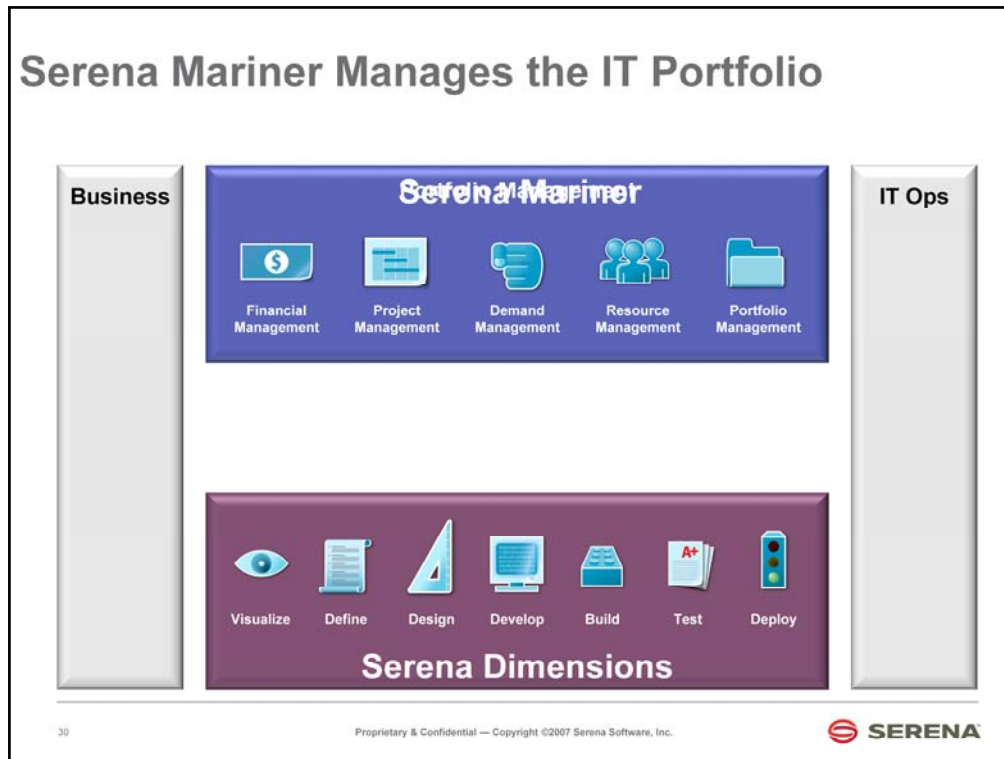
Customers tell us that their IT departments often have four times as many requests as they have available capacity to deliver on requests. And IT departments really struggle with communicating what they do up to senior management within the company and also up to the board. Serena solves those problems with a product called Serena Mariner. What we do, that is unique, is to provide you with real-time visibility into your application development activity with current status on all of your development projects. We do this through our ability to mine the application development data collected by Dimensions and surfacing it into Mariner.

Mariner allows IT to manage the entire portfolio of applications. It ensures that IT has the right balance between innovative applications and infrastructure-oriented applications. It makes sure that projects have the right balance of skills, that they're delivered on time, and that you know the impact of any changes that may be made. So, fundamentally, it enables IT to find out and communicate what's going on.
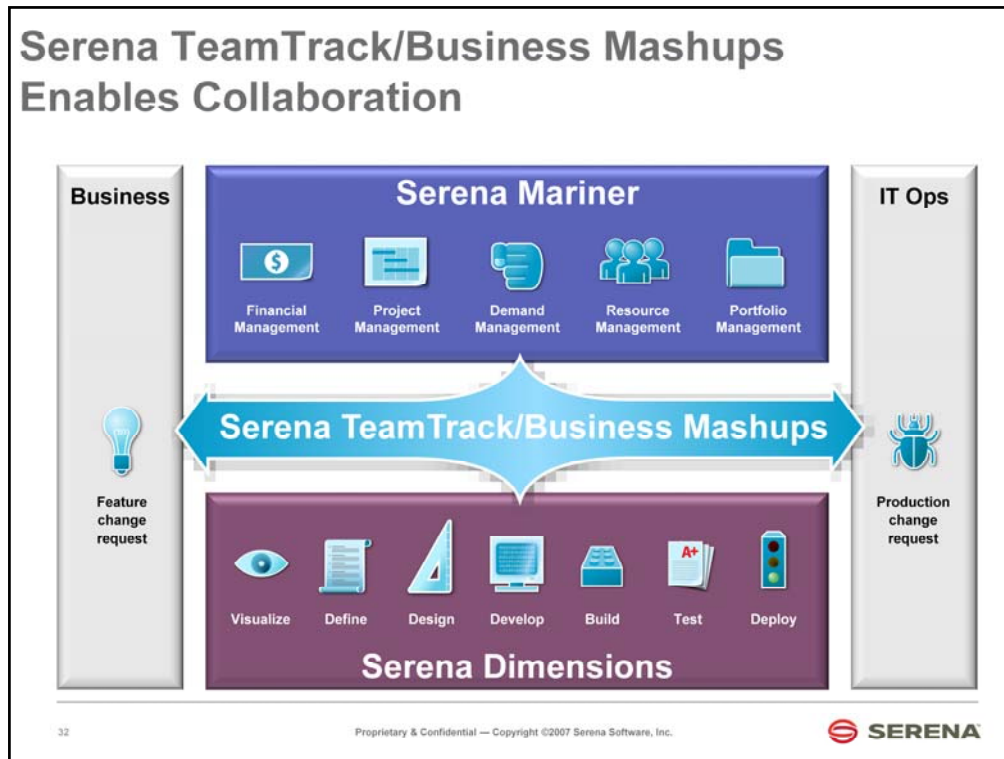
And so to help manage these change-oriented processes inside the organization we have a product called Serena TeamTrack. Now TeamTrack can automate any IT process. It is a fairly generic, collaborative tool. But we've chosen to focus TeamTrack on automating the processes in application development first. So out of the box we provide a workflow to do incident tracking. We provide workflows to track bugs from production to defect tracking. So we're very, very focused on the processes within application development, which we deliver right out of the box. But TeamTrack can be configured to automate any collaborative process inside IT.

A Partnership between
Serena and Pragmatics

What is a partnership?

- **Business partner** is a term used to denote a commercial entity with which another commercial entity has some form of alliance. This relationship may be a highly contractual, exclusive bond in which both entities commit not to ally with third parties. Alternatively, it may be a very loose arrangement designed largely to impress customers and competitors with the size of the network the business partners belong to.

- A business partner can be:

- A supplier,

- A customer,

- A channel intermediary (such as an agent or reseller), or

- **A vendor of complementary offerings (for example, one party sells the services, while the other sells the software)**

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WHY Pragmatics and Serena?

- Complimentary Offerings.

  Pragmatics- IT Services

  Serena- IT Products

- Common Territory

- Similar Size and excellent team alignment

- Smart people that care about Customer Success

- Lets grow our business together

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The Chicken and the Egg

- Chickens hatch from eggs, but eggs are laid by chickens, making it difficult to say which originally gave rise to the other.

- In a Partnership it's easy to get caught up in this.

- Examples of how this works.

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Where the rubber hits the road

Business Development	Account Managers
▪ Agree to the type of partnership that will benefit both companies.	1. Set up a meeting with your counter part
▪ Put Contractual Agreement in Place	2. Strategize on your focus
▪ Joint Messaging / Strategy	3. Go on joint call together
(Focused Opportunities)	

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Thinking outside of the box

Technical Managers / Engineers

1. Make sure both teams understand the others solution. Serena's Tools in the Lab, Training, etc.

2. Strategize on an accounts which results in joint calls with Account Managers.

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