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The Forrester Wave™: Project/Program Portfolio Management, Q4 2012

by Margo Visitacion and Phil Murphy, December 20, 2012

KEY TAKEAWAYS

Demand For Business Agility Drives Change To BT Governance Processes

Accelerating demand for business agility forces firms to adapt. Manual data entry and ponderously slow feedback loops from planning-as-usual don't enable firms to pivot as business conditions change. Today's organizations need to see and trust information as it develops to make decisions that will help them outpace their competition.

The PPM Tools Market Has A New Dividing Line -- With Key Features On Both Sides

The need to support Lean and Agile processes makes today's PPM tool choice more difficult. Above-the-line tools support strategic planning focused on value, risks, and benefits. Below-the-line tools focus on managing demand and day-to-day work. Several vendors have functionality that straddles the line, but few vendors are strong across the board.

One-Size-Fits-All Is No Longer Relevant -- It's Time To Take A Layered Approach

As firms turn to Agile and Lean practices, a single PPM tool may not make sense. Think more in terms of constructing a "layered approach" to PPM. Seek flexible solutions that handle the day-to-day work for both waterfall and Agile projects (below the line) that also convey aggregated information to more strategic (above-the-line) planning.

The Forrester Wave™: Project/Program Portfolio Management, Q4 2012

How The Top 10 Providers Stack Up In A Newly Divided Market

by [Margo Visitacion](#) and [Phil Murphy](#)

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WHY READ THIS REPORT

Demand for business agility fuels adoption of Agile development techniques that can deliver differentiating business technology (BT) solutions within accelerated time frames. Agile development disrupts operations and governance processes such as project/program portfolio management (PPM). That disruption drives a bifurcation in the tools market — traditional PPM doesn't suit the lighter-weight/Lean governance processes that Agile projects require. Organizations that fail to adopt governance processes that span traditional waterfall and Agile will struggle. The largest firms have come to rely on heavier-weight tools with rich resource forecasting features, what-if prioritization scenarios, and multiple capabilities for discerning business value. Hybrid scenarios abound — making tool choice far more difficult than it once was. Forrester's 68-criteria evaluation of PPM vendors identifies the 10 most significant PPM vendors and analyzes and scores them in the context of the market's bifurcation to enable you to navigate this rapidly changing market.

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Notes & Resources

Forrester conducted product demos and strategy briefings in July and August 2012 and interviewed 20 customer references.

Related Research Documents

[What's Ahead For PPM?](#)

March 15, 2011

[The PPM Implementation Road Map](#)

June 21, 2010



PPM NOW HAS TWO DISTINCT SEGMENTS: PLANNING AND EXECUTION

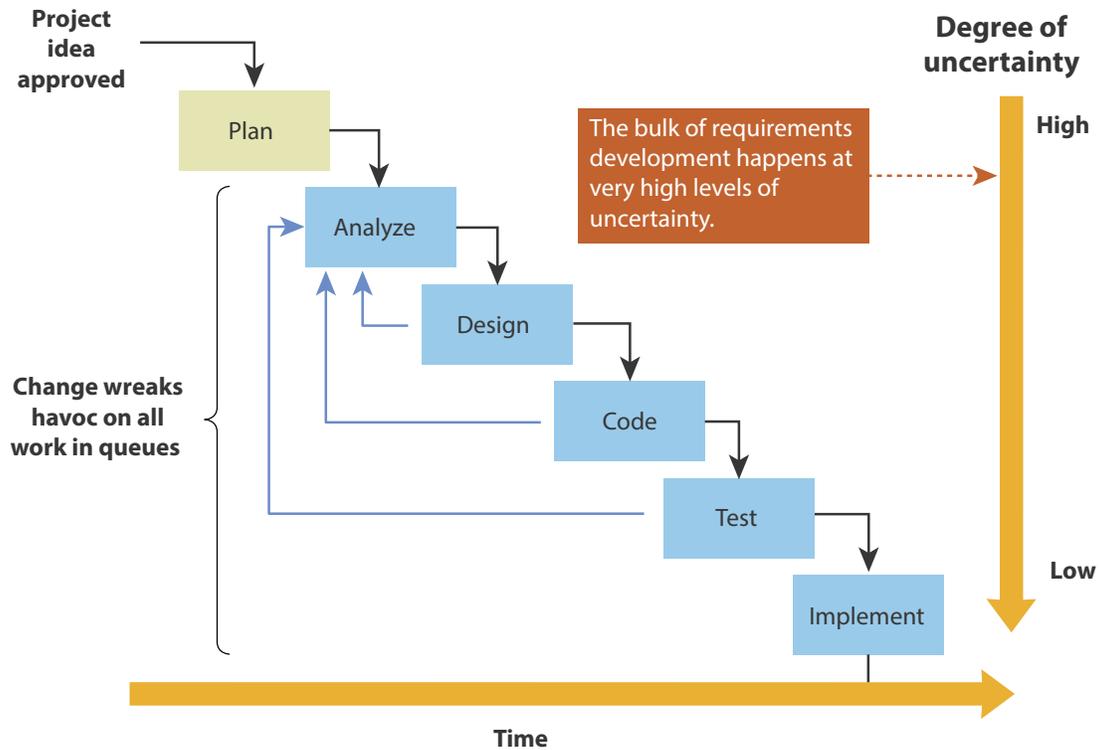
While PPM has historically been seen as a tool for either top-down forecasting and planning or for project management, organizations rarely use a single tool for both purposes.

Historically, Top-Down Planning Ruled

Over the past several years, use cases for PPM have expanded dramatically. Forrester Research's Q4 2009 PPM Wave evaluation targeted top-down planning as the driving factor for adoption at organizational/divisional levels because PPM:

- **Loosely coupled top-down strategic planning and project execution.** In the absence of PPM, top-down strategic planning often began life in standalone spreadsheets, limiting traceability and disconnecting business cases from business-value delivery. The multiple disconnects between demand and delivery occluded visibility into resource capacity and demand — the net result was that politics, rather than strategic needs, governed prioritization. PPM created a handshake.
- **Brought transparency into resource capacity to help manage unrelenting demand.** In the face of insatiable demand for new business applications, PPM appeared as a logical solution. With newfound transparency into resource capacity, allocation, and consumption, BT leaders could take actions that would constrain demand and more strategically focus limited resources.
- **Enabled optimization of the mix of projects within and across portfolios.** To optimize the most profitable mix of projects, portfolio managers painted elaborate what-if scenarios and evaluated how total cost of acquisition, return on investment, or net present value stacked up for each custom blend of priorities. To conduct that analysis manually was virtually impossible with as few as a dozen or so proposed projects.
- **Introduced the segmentation we see in today's market.** To be completely transparent — the line we describe today that splits the market actually existed as an opaque or dotted line — when projects were finally approved and started, governance traversed the line to project execution. Either the PPM tool continued with governance or it handed off responsibility to project-level tracking tools such as Microsoft Project or to a project-planning spreadsheet.
- **Relied heavily on waterfall as the near-exclusive project management methodology.** While waterfall remains a valid project management method for large projects (especially non-IT projects), it has serious flaws for many types of software development efforts. Writing most or all project requirements upfront when project sponsors and technical staff have very low levels of certainty about how things should be built wastes resources because business conditions (and therefore requirements) change over time (see Figure 1). So what changed — what made the opaque line become bold enough to split the PPM tools market?

Figure 1 Waterfall Projects Fix Scope Too Early In The Software Development Process



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Source: Forrester Research, Inc.

Business Drivers And Technical Advances Combine To Alter The PPM Landscape

Business demands for software solutions that can exploit the new business opportunities afforded by social, mobile, cloud, and big data trends have BT organizations reeling from the pace of change. Application delivery professionals *must* become more nimble to survive. Big-bang projects that deliver working software on 18- to 24-month project cycles make it impossible for business leaders to pivot when business conditions change quarterly, monthly, and even daily due to new threats, competitors, and opportunities. Agile development loomed as an answer because it focuses on delivering the most critically important features — a “minimum viable product” (MVP) in the Agile lexicon — as incremental bits of functioning software much sooner than conventional methods. Through more incremental, iterative delivery, when business conditions change, the impact is limited to the current volume of work in progress (see Figure 2).

Much of the *traditional* tooling used by BT organizations is in a state of change and renewal to better support short sprints of development activity, team-oriented execution, resource allocation, and other Agile practices. Application life-cycle management (ALM) tooling emerged to automate software development traceability in the SDLC, and lighter-weight work-management and governance offerings have emerged from firms like AtTask, Clarizen, and Rally. In other words, the PPM market segmentation has much clearer delineation based on changes driven in large part by the adoption of Lean governance in support of Agile development (see Figure 3).

Figure 2 Agile Software Development Permanently Changes Project Execution And Governance

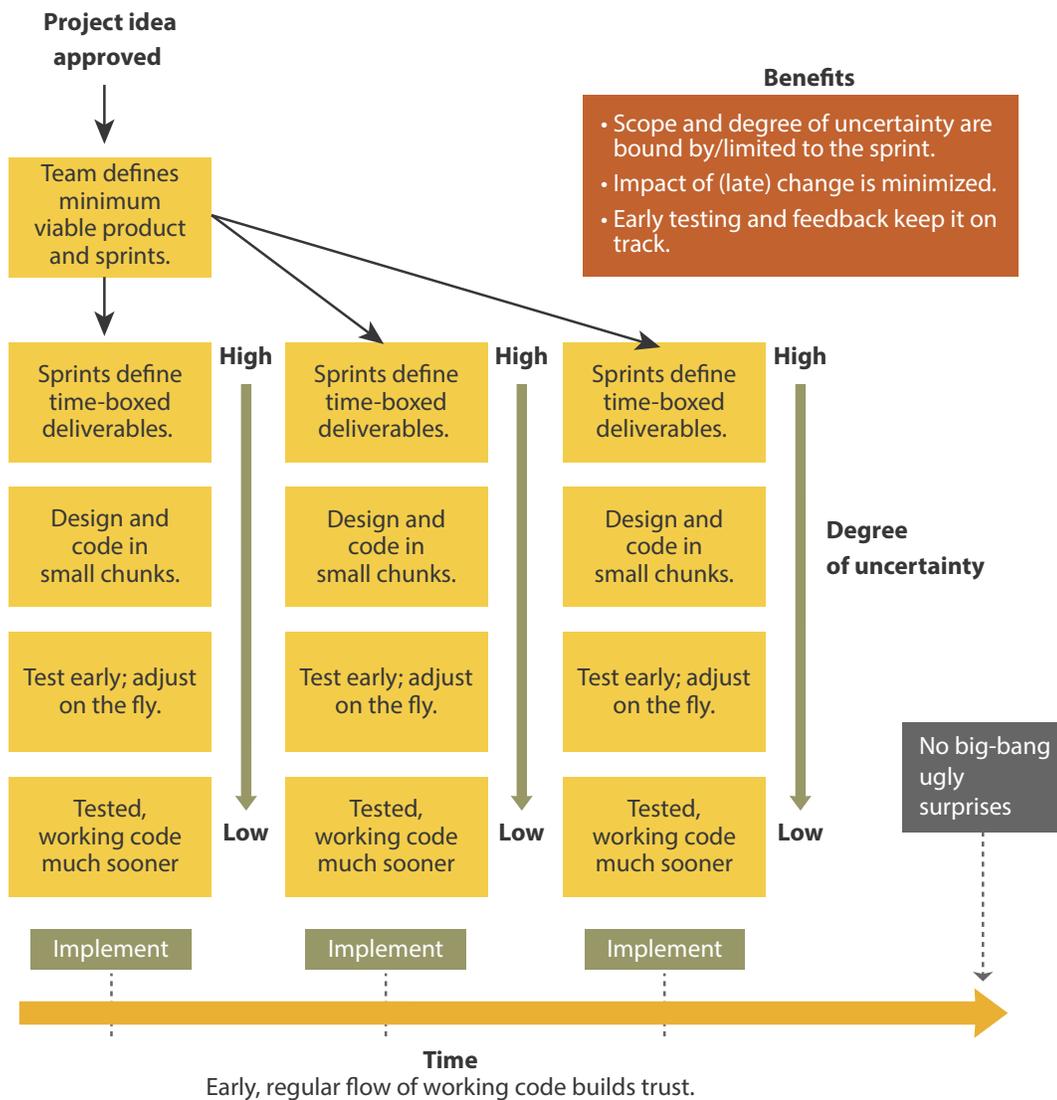
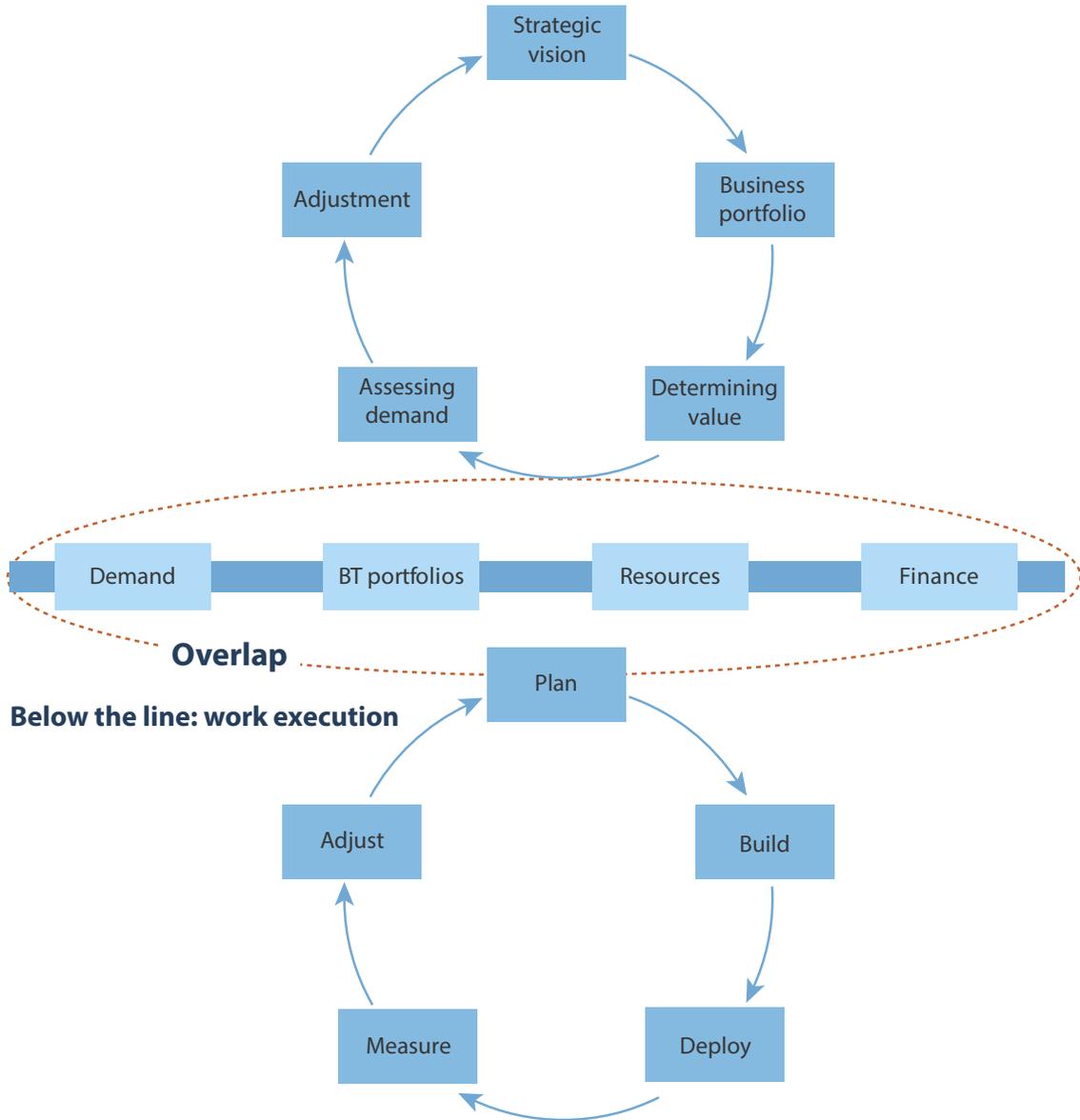


Figure 3 The PPM Segmentation Line Delineates Strategic And Tactical Execution Functionality

Above the line: strategic planning



ABOVE- AND BELOW-THE-LINE FUNCTIONALITY NOW GOVERNS PPM CHOICE

Forrester evaluated the strengths and weaknesses of leading PPM vendors and culled out 10 for deeper evaluation as measured by their support of above-the-line and below-the-line functionality. Our results are shown in two Forrester Wave models. Above-the-line vendors serve enterprises primarily interested in portfolio planning, with linkage to tactical work planning and execution. Below-the-line vendors support enterprises seeking immediate help with planning, execution, and work management.

Generalists Still Rule The Day, But Needs Drive A Bifurcating Market

After examining past research, user need assessments, and vendor and expert interviews, we developed a comprehensive set of evaluation criteria. We evaluated vendors against 68 criteria, which we grouped into three high-level buckets:

- **Current offering.** In this category, we looked at deployment options, global support, and features that enable organizations to perform either top-down portfolio planning or work-driven execution. We looked at tools that have a long track record of managing traditional, sequential projects and those that can adapt to Agile and Lean processes. For those that were primarily focused on Agile, the ability to manage in a hybrid methodology environment was equally important.
- **Strategy.** In this category, we looked at product strategy, deployment options, support, and pricing. More and more customers want to start PPM deployments with little cost or risk. On-demand deployment supports that objective; however, a significant number of enterprises *require* on-premises solutions. Having a flexible deployment strategy enables customers to achieve both objectives. From a product strategy perspective, we looked at how vendors plan to support greater Lean and Agile demands and an increasingly mobile workforce as a part of portfolio planning and execution.
- **Market presence.** In this category, we looked at revenue growth, financial strength, sales and support services, and the ability to support global implementations. As organizations become more product- and program-focused, the need to gain global visibility becomes paramount.

Forrester included 10 vendors in the assessment: AtTask, CA Technologies, Clarizen, Daptiv, GenSight, HP, Microsoft, Planisware, Planview, and Rally. Each of these vendors has (see Figure 4):

- **A formal product dedicated to IT and business-driven PPM.** PPM is a broad-based market with a number of flavors including IT PPM, new product development (NPD) PPM, and professional services automation (PSA). We narrowed the evaluation's scope and focus to those vendors and products addressing the disruption that Lean and Agile brings to software development and delivery organizations today.

- **An active client base of more than 100 current paying customers.** The exploding PPM market consists of new vendors with compelling offerings such as Wrike, LiquidPlanner, ServiceNow and established players such as Métier and Innotas. Our evaluation focuses on vendors with a minimum active client count to address enterprises' risk in working with too small a technology provider.
- **More than 60% of its revenue coming from IT PPM.** As mentioned above, the disruption from Lean and Agile was a critical component in this Forrester Wave. While organizations use PPM much more broadly than just in software and IT, Agile's impact hits here hardest. With business leaders increasingly relying on technology and software to achieve business outcomes, the need for PPM at the crossroads of business and technology planning drove this evaluation.

Figure 4 Evaluated Vendors: Product Information And Selection Criteria

Vendor	Product	Release date
AtTask	Anaconda 2012	December 2012
CA Technologies	CA Clarity Project and Portfolio Management (CA Clarity PPM), v13.0 CA Clarity Ideation CA Clarity Requirements CA Clarity Agile	December 2011 May 2012 October 2010 May 2012
Clarizen	Clarizen 5.4	June 2012
Daptiv	Daptiv PPM	July 2012
GenSight	GenSight 8.4	April 2012
HP	HP PPM 9.14	March 2012
Microsoft	Microsoft EPM	May 2010
Planisware	Planisware 5.3	Q1 2012
Planview	Planview Enterprise 10.4	February 2012
Rally	Rally 2012.07.07	June 2012

Vendor selection criteria

The vendor has a formal product dedicated to IT and business-driven PPM.

The vendor has an active client base of more than 100 current paying customers.

More than 60% of the vendor's revenue comes from IT PPM.

Source: Forrester Research, Inc.

ABOVE THE LINE, SOME REALLY SHINE

The evaluation uncovered a market in which significant differences exist among vendors and offerings (see Figure 5). Above-the-line vendors have more sophisticated strategic portfolio planning functionality, targeting analysis that considers benefits, value, and fit, while work-oriented vendors emphasize transactional project health such as scope, cost, and time.

- **HP, CA Technologies, Planview, and Daptiv lead the pack.** These vendors provide robust top-down reporting capabilities. Organizations can perform critical alignment and value-based analysis based upon user-entered information as well as data automatically imported from third-party tools. Each of these vendors supports strategic, project, application, and service portfolios to varying levels. CA Technologies and HP have made significant investments in application portfolio management to bring greater transparency to BT planning.
- **Microsoft, Planisware, Rally, AtTask, and Clarizen offer competitive options.** The Strong Performers category has a wide range of vendors. Microsoft and Planisware offer similar planning capabilities to those in the Leaders category, such as road-mapping or robust portfolio analytics. The bulk of the vendors in this category, however, focus more on project health and resource consumption than strategic alignment capabilities.
- **GenSight has solid functionality, but a boutique strategy keeps it narrowly focused.** GenSight offers all of the strategic features of the leading vendors and in some cases exceeds their analytic capabilities. This vendor takes a specialist approach to portfolio management, preferring to focus on customization of approach (not product) over a more vanilla quick-start method. GenSight offers some flexibility in its deployment options, but its implementations tend to be on-site and targeted to portfolio-level users.

This evaluation of the PPM market is intended to be a starting point only. We encourage readers to view detailed product evaluations and adapt the criteria weightings to fit their individual needs through the Forrester Wave Excel-based vendor comparison tool.

Figure 5 Forrester Wave™: Above-The-Line Project/Program Portfolio Management, Q4 '12



Source: Forrester Research, Inc.

Figure 5 Forrester Wave™: Above-The-Line Project/Program Portfolio Management, Q4 '12 (Cont.)

	Forrester's Weighting	ATTask	CA Technologies	Clarizen	Daptiv	GenSight	HP	Microsoft	Planisware	Planview	Rally
CURRENT OFFERING	50%	2.62	4.25	3.05	3.58	4.24	3.62	3.55	4.09	4.73	2.59
Product fundamentals											
Deployment options	2%	3.60	4.60	2.60	3.20	2.00	3.80	3.80	4.60	3.40	3.80
Global support	2%	2.70	4.20	2.50	3.80	2.55	4.50	4.60	3.30	3.50	1.85
Administration	1%	3.00	5.00	5.00	5.00	5.00	2.50	3.00	5.00	2.50	3.00
Integration and customization	5%	3.00	5.00	3.00	4.00	3.00	3.00	2.00	3.00	5.00	3.00
Demand management	14%	2.60	4.20	4.20	4.20	4.20	4.20	4.20	3.80	5.00	3.00
Portfolio management	40%	2.20	4.00	2.10	3.30	4.80	3.00	3.00	4.10	5.00	2.30
Project management	2%	4.40	4.40	4.60	4.00	2.00	4.00	5.00	4.60	5.00	4.60
Resource management	15%	3.80	5.00	5.00	3.20	4.40	5.00	4.40	4.80	4.40	3.30
Business intelligence	10%	2.30	3.90	1.80	4.30	5.00	3.90	4.60	4.60	5.00	1.90
IT-specific functionality											
Application life-cycle management (ALM)	2%	3.50	4.50	4.00	4.00	2.50	3.50	4.00	4.50	4.50	4.50
Service management	5%	1.75	4.50	4.00	4.00	3.50	3.00	3.00	3.50	5.00	1.50
Application portfolio management (APM)	2%	1.00	2.25	0.75	0.75	0.75	2.50	0.75	1.00	0.75	0.75
STRATEGY	50%	3.38	4.15	2.48	3.62	1.13	4.92	3.20	2.53	3.50	3.70
Support for implementations	25%	5.00	5.00	3.50	5.00	1.50	5.00	4.50	5.00	5.00	4.50
Product strategy	65%	3.00	4.00	2.00	3.00	1.00	5.00	3.00	1.50	3.00	3.50
Price	10%	1.80	3.00	3.00	4.20	1.00	4.20	1.20	3.00	3.00	3.00
MARKET PRESENCE	0%	3.63	3.15	3.30	4.00	3.00	2.40	2.31	2.30	2.99	3.40
Installed base	25%	4.50	5.00	4.50	5.00	4.50	5.00	1.25	5.00	0.75	4.00
Financial strength	50%	5.00	3.00	3.75	4.50	3.75	1.50	3.00	1.50	5.00	4.50
Support services	25%	0.00	1.60	1.20	2.00	0.00	1.60	2.00	1.20	1.20	0.60

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

Source: Forrester Research, Inc.

ABOVE-THE-LINE VENDOR PROFILES

The above-the-line market is extremely competitive: Three of the four Leaders — HP, CA Technologies, and Planview — are in a virtual dead heat based on overall score, with Daptiv rounding out this impressive group of Leaders.

Leaders: Strategic Planning Health

- **HP's strategy for integrated portfolio management and delivery make it a Leader.** HP has long seen an integrated approach as its differentiator and has made strides in delivering that vision. Of the Leaders, HP focuses most closely on application development organizations and targets ALM and application portfolio management as part of the entire portfolio analysis process. Like CA Technologies, it offers a wide range of deployment options and provides support for global implementations. HP's portfolio management and dashboards are particular strengths in the current offering.
- **CA Technologies offers robust analytics at transactional and strategic levels.** From demand management and resource forecasting to reporting on project health, CA Clarity PPM provides one of the most solid solutions. Users can choose from a wide range of deployment options, which allows them to either start quickly via software-as-a-service (SaaS) or proceed on a traditional on-premises route that supports a number of configurations. Able to support global deployments, CA's adaptable integration strategy permits companies to bring in critical data from third-party applications such as ALM and service portfolio management to analyze performance and health to determine portfolio alignment. Recent investments in reporting and application portfolio management enable CA to provide greater transparency and insight into BT planning strategies.
- **Planview's analytics and integration make it stand out.** Planview consistently delivers strong planning capabilities. Flexible demand management enables its solution to capture a wide variety of demand requests. Planview provides out-of-the-box analytics as well as the ability to configure custom views of portfolio data. Resource management continues to be a strong suit for Planview, supporting the ability to forecast resource consumption at multiple levels for both traditional and Agile organizations. Planview's robust analytics engine and its OEMed version of Pervasive, an integration platform vendor, allow its customers to integrate ALM, IT service management, financial management, and other third-party tools in order to build comprehensive views of performance, health, and value of BT investments.
- **Functional strength on multiple fronts pushes Daptiv into the Leaders category.** While Daptiv has consistently been a Strong Performer in past evaluations, its investments in analytics, integration, and mobile have pushed the vendor into the Leaders category. Daptiv OEMed IBM Cognos to support deeper analytic reporting for firms wanting stronger business intelligence capabilities than just standard dashboard views. Like Planview, Daptiv leverages Pervasive as its integration engine for straightforward integration into ALM tools like Rally, enterprise resource planning, and financial applications like Oracle and SAP. Finally, Daptiv makes good use of HTML5 to provide solid and consistent mobile and web experiences.

Strong Performers: Solid Pragmatism

- **Microsoft EPM provides a solid project oriented view on portfolios.** This latest release from Microsoft has consolidated Project Server and Portfolio Server into a single repository, reducing workflow and supporting a standard method of managing demand and reporting status. Organizations have more options this time for deployment: They can still go to Microsoft partners, or they can use Azure for on-demand services. To get the most value out of Microsoft EPM, customers must commit to a Microsoft architecture. EPM requires SharePoint: The products share many features, and much of what makes Project much more user-friendly in portfolio creation and collaboration comes from SharePoint. Firms can build custom reports and views using Excel Services.
- **Planisware remains a strong option for portfolio management.** Planisware's top-down planning capabilities for road-mapping and program planning remain a strength for the vendor. Planisware offers a number of out-of-the-box portfolio scenarios and prebuilt key performance indicators for creating and monitoring portfolios. Reporting, powered by Planisware Explorer, is another strong feature; it enables users to build and model reports without having to rely upon a third-party report-writing tool.
- **Rally emphasizes project health but is strong on Lean portfolio management.** Rally emphasizes progress and performance more than value. Rally does, however, capably manage demand for new work and prioritizes requests based upon Lean principles for allocation to project teams. Rally provides competent team-based resource management but lacks the reporting capabilities found in its competitors
- **AtTask targets health and resource performance over value.** At its core, AtTask delivers a solid work management tool that allows organizations to consolidate demand and evaluate and allocate work. The vendor's strong progress tracking support allows users to easily compare performance of project portfolios from a cost, schedule, and resource consumption perspective. AtTask is lighter on reporting and business intelligence capabilities than most of its competitors. The vendor best suits project and work managers who largely just need to see day-to-day activity performance.
- **Clarizen offers pragmatic performance data for project and work management.** Like AtTask, Clarizen is more tactically focused. The vendor provides clear, performance-oriented portfolio reporting, evaluating work based on user-defined priorities and resource capacity rather than financial performance. Clarizen's competent portfolio analytics focuses more on tactical execution than strategic value. Clarizen does leverage road maps to help with prioritization and sequencing of portfolios. Solid demand management and collaboration support helps Clarizen stand out. Users can generate demand and collaborate from email; however, all information is captured and leveraged within the application.

Contenders: Singular Focus

- **GenSight delivers stronger capabilities than its ranking implies.** From a portfolio perspective, GenSight offers some of the most robust capabilities found in the market. A portfolio manager's tool, it leverages deep business analytics and modeling to support decision-making and measure performance. A narrowly focused strategy keeps GenSight from being a Stronger Performer.

ABOVE-AVERAGE MARKS FOR SOME BELOW-THE-LINE VENDORS

The evaluation uncovered a market in which core below-the-line planning capabilities helped established vendors score well (see Figure 6). Newer vendors to the PPM market tackle planning and tracking functionality surprisingly well.

- **HP, Planview, and CA Technologies lead the pack.** These have been the dominant vendors in the PPM field for the past several years, and they continue to offer compelling offerings. All continue to expand traditional planning features with Agile planning, resource management, and reporting support. CA Technologies, in particular, has expanded its support for helping organizations manage the transition from traditional to Agile projects. Planview's versatile resource planning capabilities and reporting strength remain critical components of its offering. HP PPM's continuing integration of its PPM and ALM solutions enables users to achieve greater visibility into the entire project life cycle.
- **Microsoft, Rally, and Daptiv follow close behind.** While it was not unexpected to see above-the-line Leaders also show well in below-the-line support, it is telling that Rally, a new vendor to the Forrester PPM Wave, is vying with established vendors such as Microsoft and Daptiv. Rally's below-the-line emphasis on managing how teams work together in an Agile or hybrid environment positions it well to compete with Microsoft's new (and improved) EPM 2010 and Daptiv's across-the-board planning strengths.
- **AtTask, Clarizen, and Planisware offer competitive options.** Designed to support different types of work environments, these vendors have competent solutions that address simple work management as well as sophisticated business-driven project needs. Clarizen and AtTask present user-friendly designs that work well in team-driven environments where users may not be formally trained in project management, while Planisware aims for organizations with more mature planning capabilities.
- **GenSight offers a product better suited to strategic planning.** GenSight's strategic approach to portfolio management is its focus. While the vendor provides the capability for project-level planning, task management is not its forte. Its business analytic strength is overkill for small work teams.

Figure 6 Forrester Wave™: Below-The-Line Project/Program Portfolio Management, Q4 '12



The Forrester Wave™
Smart data for smart decisions

Go online to download the Forrester Wave tool for more detailed product evaluations, feature comparisons, and customizable rankings.

Source: Forrester Research, Inc.

Figure 6 Forrester Wave™: Below-The-Line Project/Program Portfolio Management, Q4 '12 (Cont.)

	Forrester's Weighting	AtTask	CA Technologies	Clarizen	Daptiv	GenSight	HP	Microsoft	Planisware	Planview	Rally
CURRENT OFFERING	50%	3.56	4.48	4.05	3.67	2.99	3.90	3.93	4.12	4.44	3.78
Product fundamentals											
Deployment options	5%	3.60	4.60	2.60	3.20	2.00	3.80	3.80	4.60	3.40	3.80
Global support	5%	4.10	3.50	3.10	3.00	2.25	4.70	4.50	2.90	3.40	3.95
Administration	1%	3.00	5.00	5.00	5.00	5.00	2.50	3.00	5.00	2.50	3.00
Integration and customization	5%	3.00	5.00	3.00	4.00	3.00	3.00	2.00	3.00	5.00	3.00
Demand management	17%	2.40	4.00	4.60	4.00	4.00	4.00	4.00	3.40	5.00	3.00
Portfolio management	5%	2.02	4.40	2.36	3.80	4.70	3.00	3.00	3.42	5.00	2.80
Project management	20%	4.60	4.60	4.60	3.80	1.80	3.80	5.00	4.60	5.00	4.60
Resource management	20%	4.60	5.00	5.00	3.40	3.80	5.00	3.80	4.60	3.80	3.60
Business intelligence	2%	2.20	4.00	1.60	4.20	5.00	4.00	4.80	4.80	5.00	2.00
IT-specific functionality											
Application life-cycle management (ALM)	18%	3.20	4.50	3.70	3.70	2.20	3.20	3.70	4.50	4.50	4.80
Service management	1%	1.75	4.50	4.00	4.00	3.50	3.00	3.00	3.50	5.00	1.50
Application portfolio management (APM)	1%	1.00	2.25	0.75	0.75	0.75	2.50	0.75	1.00	0.75	0.75
STRATEGY	50%	3.38	4.02	2.61	3.62	1.13	4.92	3.72	2.46	4.28	3.64
Support for implementations	25%	5.00	5.00	3.50	5.00	1.50	5.00	4.50	5.00	5.00	4.50
Product strategy	65%	3.00	3.80	2.20	3.00	1.00	5.00	3.80	1.40	4.20	3.40
Price	10%	1.80	3.00	3.00	4.20	1.00	4.20	1.20	3.00	3.00	3.00
MARKET PRESENCE	0%	3.63	3.15	3.30	4.00	3.00	2.40	2.31	2.30	2.99	3.40
Installed base	25%	4.50	5.00	4.50	5.00	4.50	5.00	1.25	5.00	0.75	4.00
Financial strength	50%	5.00	3.00	3.75	4.50	3.75	1.50	3.00	1.50	5.00	4.50
Support services	25%	0.00	1.60	1.20	2.00	0.00	1.60	2.00	1.20	1.20	0.60

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

Source: Forrester Research, Inc.

BELOW-THE-LINE VENDOR PROFILES

Leaders: Breaking Down The Walls Between Developers And Project Managers

- **Project management workhorse HP offers a strong vision for the future.** HP provides project managers with the ability to manage various types of projects from traditional to Agile. With strong, flexible deployment options and its ability to support global implementations, HP allows distributed teams to work together efficiently. HP PPM's particular strength in resource

management and pipeline management enables teams to plan resource utilization effectively. HP's strategy of incorporating its ALM offering into its PPM solution enables organizations to fully meld project management and application development practices to deliver a higher level of transparency into managing project health and changes to scope.

- **Planview remains a Leader in a quickly changing market.** Leveraging its strength in pipeline management, resource planning, and robust yet flexible reporting options enables Planview to help teams to work together efficiently. With a long tradition of managing waterfall or sequential projects, the vendor is transitioning well in Agile, too. Planview is best-suited to project managers, but it also leverages a productized integration with IBM Rational Team Concert and an OEMed version of Pervasive to allow developers to work in their own tool set to roll in necessary project data for reporting.
- **CA Technologies is an accomplished Leader.** CA Clarity PPM offers one of the most comprehensive planning solutions for project and work management. Its ability to leverage both traditional and Agile approaches allows users to manage a wide variety of projects and work activities. Adaptable ideation, demand management, and resource planning give organizations flexibility to manage in multiple approaches. Agile organizations, or those transitioning to Agile, have the ability to collaboratively plan and execute projects regardless of approach.
- **Microsoft's EPM solution takes a big step forward into the Leaders category.** No doubt about it, Microsoft Project is the ubiquitous project-planning tool at the desktop level. Microsoft's latest version takes it beyond schedule coordination and establishes it as an enterprise planning solution, albeit a project-driven one. Traditional formal project planning is still its forte; however, the latest version has simplified project management by leveraging SharePoint to enable casual project managers to benefit from centralized tracking. Integration with Microsoft's Team Foundation Server allows development teams to collaborate with project managers on Agile, hybrid, and traditional projects.
- **A new entrant into the Forrester PPM Wave, Rally shines for managing Agile projects.** Rally's new project portfolio management solution is the most classically Agile project management tool in the evaluation. Rally's quick, adaptable implementation strategy and its active education and user community help teams get up and running quickly. Targeted at development teams, Rally's PPM solution connects with its ALM solution to provide a comprehensive planning and tracking project management solution for Agile teams — and those transitioning to Agile.
- **Daptiv matures into a robust project portfolio management solution.** Daptiv, one of the early players in the SaaS PPM market, continues to provide rich functionality that supports project and work management. Supported on every browser, Daptiv offers quick-start implementations and flexible configurations. Daptiv integrates with Rally via Pervasive, enabling teams to build a

collaborative project platform that can support both Agile and traditional projects. Reporting is made richer by an OEMed version of IBM Cognos.

Strong Performers: Managing Work Effectively

- **AtTask leverages straightforward planning and social experience to project planning.** Targeted at midsized organizations, AtTask enables organizations to implement PPM quickly. Templates and content provide support for both Agile and traditional projects. While primarily team- or department-oriented, AtTask also has sufficient resource planning to support larger organizations.
- **Simple, easy-to-use, and team-focused, Clarizen is a product to watch.** Built on Force.com, Clarizen presents an extensible solution aimed at how organizations work. Tightly integrated email workflows allow users to contribute and work on projects either inside or outside of the application. Customizable widgets allow users to build custom experiences. Flexible processes allow project managers to plan at either the team or role level. Clarizen supports traditional and Agile estimation processes.
- **Planisware continues to offer a solid solution for project management.** Planisware continues to deliver a consistently competent project management solution that targets business driven and new product development projects. Traditionally an on-premises solution, Planisware now offers SaaS implementations as an option. The product provides the ability to manage traditional projects and report on Agile projects. Planisware offers a productized integration with Rally for organizations that want to dive deeper into Agile project management.

Contenders: Focusing On Strategy, Not Execution

- **GenSight has the functionality but emphasizes more strategic features.** GenSight historically focused on strategic business planning. Its core features and implementation practices best suit organizations that have specific business process needs automated in order to support portfolio planning. GenSight provides support for traditional project management but can be configured to support Agile project reporting. It is primarily an on-premises tool, although hosting options are available.

SUPPLEMENTAL MATERIAL

Online Resource

The online versions of Figure 5 and Figure 6 are Excel-based vendor comparison tools that provide detailed product evaluations and customizable rankings.

Data Sources Used In This Forrester Wave

Forrester used a combination of three data sources to assess the strengths and weaknesses of each solution:

- **Product demos.** We asked vendors to conduct demonstrations of their product's functionality. We used findings from these product demos to validate details of each vendor's product capabilities.
- **Strategy briefings.** We asked vendors to provide a 1.5-hour strategy briefing highlighting product strategy and vision.
- **Customer reference calls.** To validate product and vendor qualifications, Forrester also conducted reference calls with two 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 document — and then score the vendors based on a clearly defined scale. These default weightings are intended only as a starting point, and we 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.

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« **ANDREA DAVIES**, client persona representing Market Insights Professionals

