

VENDOR SELECTION MATRIX™ IT FINANCIAL MANAGEMENT AND TECHNOLOGY BUSINESS MANAGEMENT SOLUTIONS

The Top Vendors For Upper Midmarket
Companies And Enterprises In
German Speaking Central Europe
(DACH) 2024

November 2023

ABRIDGED VERSION WITHOUT SCORES AND SCORECARDS

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FOREWORD

Every year, Research In Action surveys 10,000+ enterprise IT and business decision makers in order to gain insights on strategy, investments and ongoing challenges of technology innovation in the IT and Marketing Automation realm. These surveys give us access to a wealth of direct and unfiltered feedback from the buyers. It also helps us to understand how buying decisions are made in today's business environment. The Vendor Selection Matrix™ is a primarily survey-based methodology for vendor evaluation, where 63% of the evaluation is based on a survey of enterprise IT or business decision makers and 37% on the analyst's judgement. The analyst's input is fed by a combination of intensive interviews with software or services vendors and their clients, plus their informed, independent point-of-view as an analyst. All of this combines to make Research in Action **Vendor Selection Matrix™ reports so unique**. This approach is one of the key differentiators of Research In Action in market research. For this report, we interviewed 700 IT and business managers with budget responsibility from German upper midmarket¹ companies and DACH² enterprises. We selected those vendors which achieved the best evaluations scores from the buyers but disregarded those with fewer than 15 evaluations.

With the proliferation of the IT Infrastructure Library (ITIL), today the de facto standard for IT process definitions with a global penetration of around 90% in enterprise IT organizations, the process maturity of IT service delivery and support has matured significantly in the last 25 years. Until recently, however, the financial aspects of managing IT were not treated with the necessary emphasis and seriousness. This is now changing as a large percentage of IT organizations in enterprises have reached the levels of process maturity necessary to fully embrace the complexity of IT service delivery and support. While Technology Business Management (TBM) is a broader framework that covers financial, operational, and strategic aspects of managing technology within a business, IT Financial Management (ITFM) is a subset of TBM, focusing specifically on financial aspects related to IT services. In this report, we will cover both aspects, with a stronger emphasis on IT Financial Management.

This Vendor Selection Matrix™ report provides you with a useful guide to important IT Financial Management and Technology Business Management market differentiators, market trends and names the Top vendors. These details are intended to help you make an informed decision about which vendors might best meet your needs. Enjoy reading it and please feel free to contact us if you have any questions.

To Infinity...and Beyond!

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¹ The German upper midmarket, der "deutsche gehobene Mittelstand" includes companies with a minimum of € 50 million annual revenue.

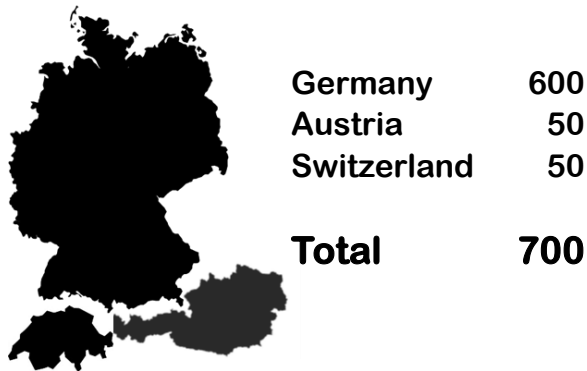
Excluded are PLCs (AGs) as well as government, public sector and non-profit organizations.

² Germany, Austria and the German-speaking part of Switzerland.

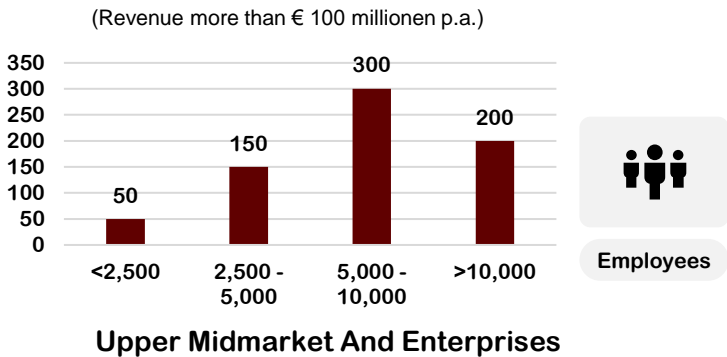


OUR SURVEY DEMOGRAPHICS: IT AUTOMATION

Country Breakdown



Company Size Breakdown



All Research in Action surveys are gender neutral and 100% confidential.

Industry Breakdown

Energy	50
Financial Services	120
Government & Non Profit	15
Life Sciences	110
Manufacturing	185
Technology, Media, & Telecoms	70
Consumer Packaged Goods & Retail	50
Professional Services	60
Travel & Transportation	40
Total	700

Job Title Breakdown

IT Manager	100
IT Operations Manager	90
VP IT	80
CIO	80
VP Service Desk or Help Desk	65
VP IT Infrastructure	60
VP Shared Services	50
Project Manager	50
CTO	40
VP Automation	20
VP Sourcing & Vendor Management	20
Managing Director	15
VP Change Management	10
VP Application Performance Management	10
VP Process Management	5
Other	5
Total	700



50,000+
Data Points



700
IT Managers



37%
Analyst's Opinion



63%
Survey Results

The Vendor Selection Matrix™ Evaluation Methodology:

The basis of our competitive vendor evaluation reports is always an extensive buyer survey.

We then select those vendors which achieved the best evaluations scores from the buyers but disregard those with fewer than 15 evaluations.

The final matrix scores are a combination of the survey results, vendor input and analyst's opinion.



RESEARCH IN ACTION
vendor selection matrix®

OUR MARKET IMPACT IN 2023

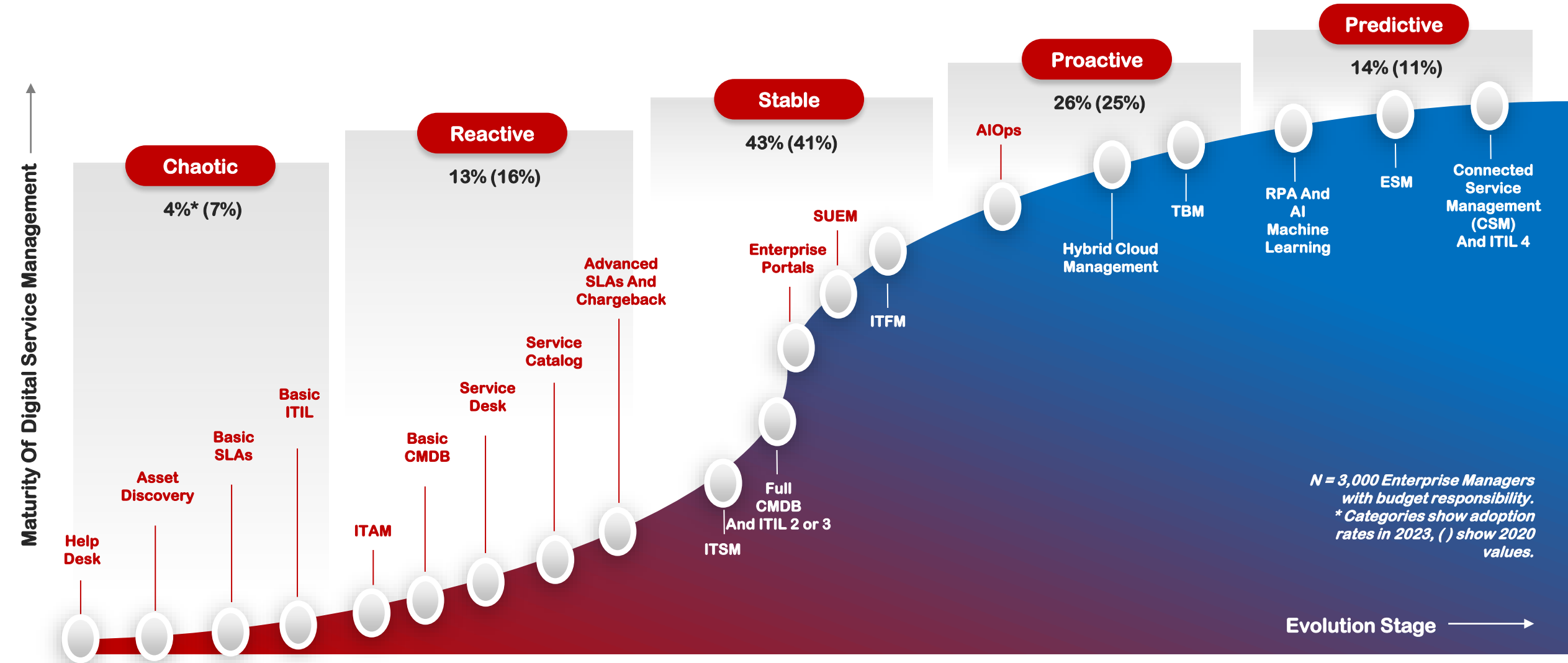


Vendor Selection Matrix™: The right mix makes all the difference
63% customer evaluations + 37% analyst's judgement = 100% success



WELCOME TO CONNECTED SERVICE MANAGEMENT

MATURITY S-CURVE 2023



WHAT IS IT FINANCIAL MANAGEMENT AND TECHNOLOGY BUSINESS MANAGEMENT?

1. Technology Business Management (TBM):

- TBM is a framework and set of practices that provide a structured approach to managing IT as a business within an organization.
- TBM encompasses a broad range of aspects beyond financial management, including portfolio management, service delivery, performance optimization, and cost transparency.
- TBM aims to align IT investments with business objectives and facilitate communication and transparency between IT and other business units.

2. IT Financial Management (ITFM):

- ITFM specifically concentrates on managing the financial aspects of IT services and resources.
- ITFM involves budgeting, accounting, cost allocation, financial planning, and financial analysis pertaining to IT. Financial Operations (FinOps), a relatively new discipline within ITFM deals with the complex financial aspects of Cloud infrastructure and services.
- The primary goal of ITFM is to ensure that IT services are delivered cost-effectively, within budget, and in alignment with the organization's financial objectives.

While TBM is a broader framework that covers financial, operational, and strategic aspects of managing technology within a business, ITFM is a subset of TBM, focusing specifically on financial aspects related to IT services. In this report, we will cover both aspects, with a stronger emphasis on ITFM.



KEY COMPONENTS OF AN IT FINANCIAL MANAGEMENT SOLUTION

ITFM comprises several key components that collectively contribute to effective financial management within the realm of information technology. These components help organizations manage their IT-related expenditures, budgets, and financial performance in alignment with business objectives:

1. **Budgeting and Forecasting:** Budgeting involves the estimation and allocation of financial resources to IT projects and service, taking into account historical spending patterns and future requirements. Forecasting, enables organizations to anticipate financial needs and adapt their budgets accordingly.
2. **Cost Allocation and Chargeback:** The process of attributing IT costs to specific organizational units or projects based on consumption, facilitating financial transparency and accountability. Chargeback mechanisms allow organizations to bill internal departments or business units for their actual use of IT resources.
3. **Financial Analysis and Reporting:** This component entails in-depth examination of financial data to assess the efficacy of IT investments, analyze cost structures, and identify opportunities for cost reduction or optimization. It also includes the generation of comprehensive financial reports and key performance indicators to provide stakeholders with insights into financial performance.
4. **Cost Optimization and Management:** ITFM strategies encompass the formulation and execution of approaches to reduce IT costs while guaranteeing service quality and performance, focusing on efficiency improvements and cost containment.
5. **Vendor and Contract Management:** This area is concerned with the selection and evaluation of IT vendors, the negotiation and management of vendor contracts, and the diligent oversight of vendor relationships to ensure adherence to agreed-upon terms and conditions, ultimately affecting cost control and service delivery quality.
6. **Financial Governance and Compliance:** The establishment of financial policies, guidelines, and compliance measures pertaining to IT spending and procurement, which are crucial for adhering to regulatory requirements and mitigating financial risks, thus ensuring financial governance practices.
7. **Resource and Capacity Planning:** This discipline involves resource optimization, where organizations efficiently manage their IT assets and workforce, as well as capacity planning, which anticipates and prepares for future resource needs based on demand projections.
8. **Business Case Development and Return on Investment (RoI) Analysis:** This element focuses on creating compelling justifications for IT investments by assessing potential benefits, costs, and risks, and conducting RoI analyses to ascertain the financial feasibility and value of proposed IT projects.

By integrating and managing these components effectively, organizations can optimize their IT spending, align IT services with business objectives, and make informed financial decisions for sustained growth and competitiveness.



KEY COMPONENTS OF A TECHNOLOGY BUSINESS MANAGEMENT SOLUTION

TBM is a holistic framework and set of practices designed to help organizations manage their technology investments, optimize IT operations, and align IT with business goals. TBM consists of several key components, each playing a crucial role in the effective management of technology resources within an organization:

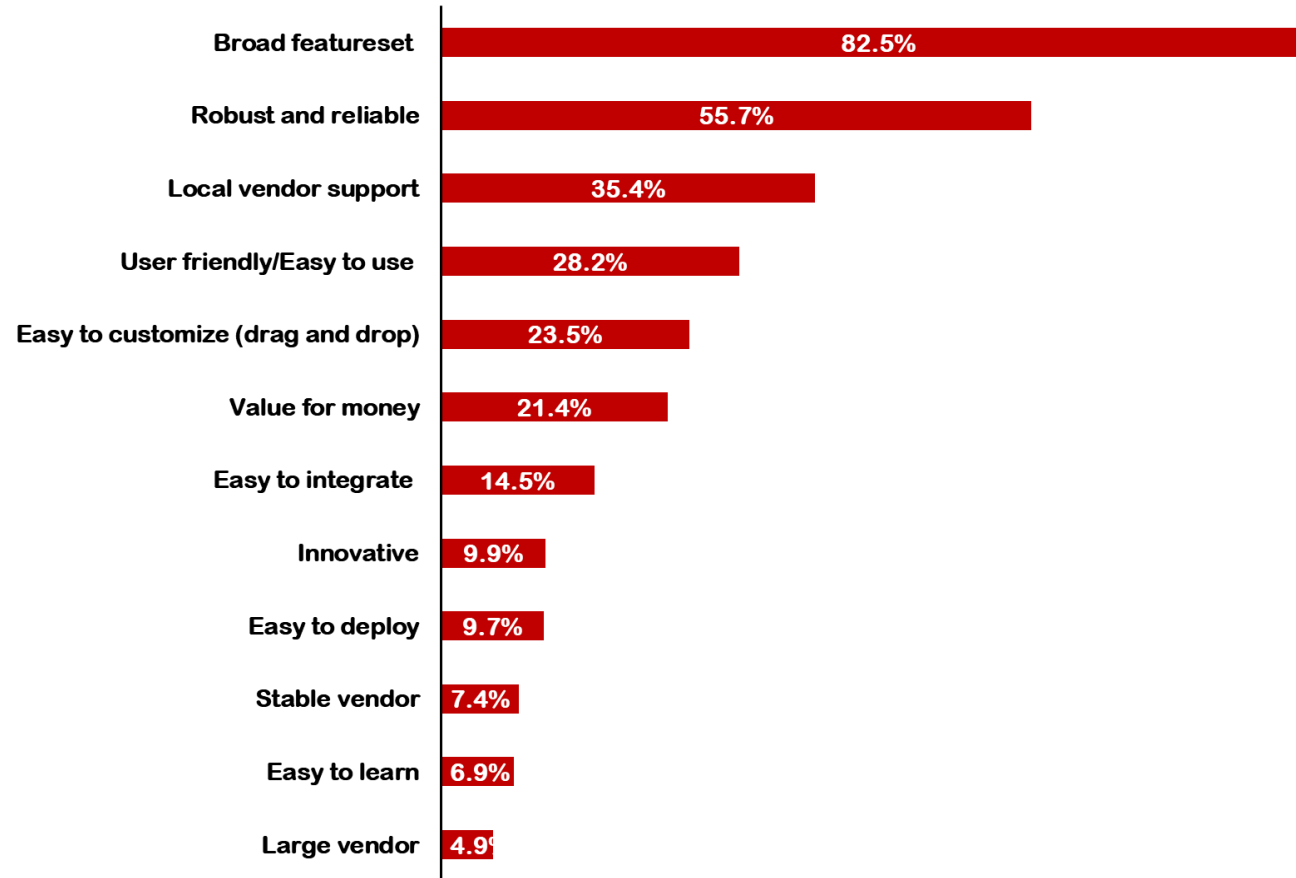
1. **Cost Transparency:** TBM emphasizes the importance of gaining a deep understanding of IT costs through granular cost visibility and allocation. This enables organizations to break down expenses, track them more effectively, and allocate costs to specific business units, projects, or services. The result is a more transparent view of how IT investments are utilized.
2. **Service Portfolio Management:** This component focuses on documenting and defining the IT services offered by an organization, including their descriptions, costs, and the business value they deliver. Additionally, it involves analyzing service demand and consumption to ensure that IT services align with business needs and are optimized for service delivery.
3. **Financial Management:** Financial management within TBM entails budgeting and forecasting IT-related expenditures to ensure that technology investments are in alignment with broader business objectives. Cost optimization strategies are also crucial, aimed at reducing IT costs while maintaining or enhancing service quality and performance.
4. **Performance Management:** Key Performance indicators (KPIs) play a central role in TBM by tracking and assessing the effectiveness of IT services, operations, and projects. Service Level Agreements (SLAs) are established to ensure that IT services consistently meet agreed-upon performance standards and fulfill business requirements.
5. **Technology Portfolio Management:** TBM includes the management of an organization's technology portfolio, covering both applications and infrastructure. This entails efforts to eliminate redundancy and underperforming assets while planning and prioritizing technology investments to align with business goals and technology strategies.
6. **Vendor Management:** Vendor management encompasses vendor assessment and relationship management. It involves the evaluation and selection of IT vendors, contract negotiations, and ongoing vendor relationship management to ensure that services are delivered cost-effectively and to high quality standards.
7. **Enterprise Architecture:** TBM emphasizes the establishment of technology standards and architectural principles. These standards guide technology decisions, ensuring alignment with business objectives. Technology roadmaps are created to align technology initiatives with overarching business strategies and provide a clear path for technology evolution.
8. **IT Governance and Risk Management:** Governance frameworks are implemented to oversee technology investments, ensure compliance with regulations and policies, and manage risks associated with technology operations. Risk assessment and mitigation efforts are employed to protect the organization from potential disruptions.
9. **Business Alignment and Strategy:** TBM underscores the importance of building strong relationships between IT and business units. This includes fostering collaboration and understanding to ensure that technology solutions align with and support the organization's business goals. Strategic planning ensures that technology investments are in harmony with the overall business strategy.
10. **Change Management and Culture:** TBM embraces change management practices to facilitate the adoption of TBM principles and practices throughout the organization. It also encourages cultural transformation, promoting a culture of transparency, data-driven decision-making, and cost awareness among staff members.

In practice, TBM operates as a strategic framework that provides organizations with the tools and insights to make informed decisions about technology investments, optimize technology resources, enhance financial accountability, and align technology with broader business objectives. By employing TBM principles and practices, organizations are empowered to drive greater value from their IT resources and technology-related endeavors.



RESEARCH:

SELECTION PRIORITIES FOR ITFM/TBM SOLUTIONS IN 2023/2024



N = 1,700 Midmarket and Enterprise IT and Business Managers with budget responsibilities.

Question:
What are your top three selection priorities for ITFM/TBM Solutions in 2023/2024?

There is more to selection priorities than features and functions.

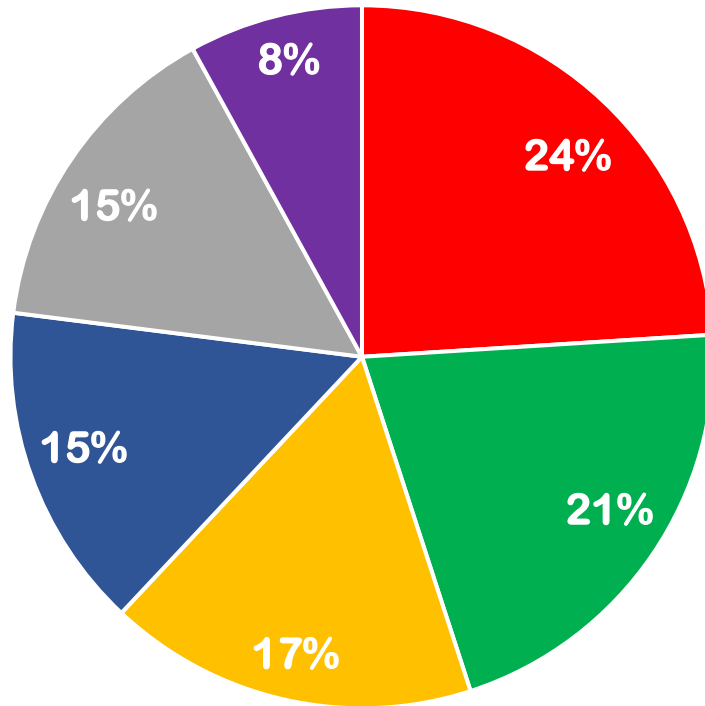
While a broad featureset remains the top priority of the 1,700 IT buyers we interviewed for our survey, there are another 11 selection priorities which gained a significant percentage of nominations.

However, the most important prerequisite for being even considered as an ITFM solution in DACH is a significant project know-how related to the SAP cost model. This is where the DACH market differs fundamentally from the global one.



RESEARCH:

THE ADOPTION OF IT FINANCIAL MANAGEMENT IN DACH 2023/24



- We are currently developing an ITFM strategy
- We are actively improving our ITFM solution
- We are piloting an ITFM solution
- We are fully implementing our first ITFM solution
- We are using conventional financial accounting for IT
- We do not have an ITFM strategy

N = 1,700 Enterprise IT and Business Managers with budget responsibilities.

Question:
What is your current status and your strategy regarding IT Financial Management?

ITFM is quickly becoming a mainstream proposition.

Until a few years ago, the financial aspects of managing IT were not treated with the necessary emphasis and seriousness. This is now changing quickly as a large percentage of IT organizations in enterprises have reached the levels of process maturity necessary to fully embrace the complexity of IT service delivery and support.

Around 36% of companies are actively using ITFM today with another 17% piloting a solution.

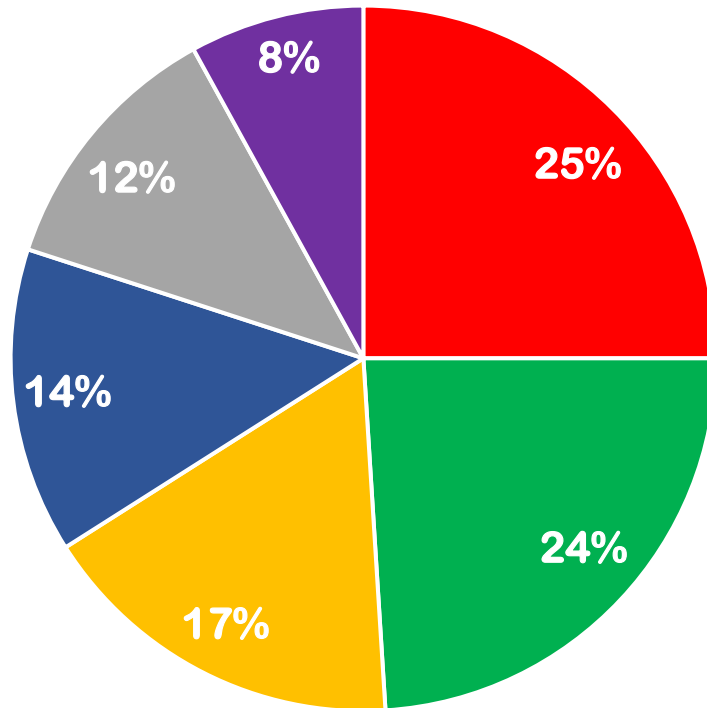
24% are currently developing an ITFM strategy with another 15% of companies using conventional accounting methods for IT.

Only 8% have no ITFM strategy at all.



RESEARCH:

THE ADOPTION OF IT TECHNOLOGY BUSINESS MANAGEMENT IN DACH 2023/24



- We do not have a TBM strategy
- We are currently developing a TBM strategy
- We are piloting a TBM solution
- We are fully implementing our first TBM solution
- We have no TBM plans
- We are actively improving our TBM solution

The complexity of TBM is making a mainstream adoption still challenging.

Around 22% of companies are actively using TBM today with another 17% piloting a solution.

24% are currently developing a TBM strategy.

However, the remaining 37% have either no TBM strategy or even no TBM plans at all.

N = 1,700 Enterprise IT and Business Managers with budget responsibilities.

Question:
What is your current status and your strategy regarding Technology Business Management?



INSIGHTS: TOP MARKET TRENDS 2024

IT FINANCIAL MANAGEMENT AND TECHNOLOGY BUSINESS MANAGEMENT



There is more to selection priorities than features and functions.

While a broad featureset remains the top priority of the 1,700 IT buyers we interviewed for our survey, there are another 11 selection priorities which gained a significant percentage of nominations.

The top five are:

1. Broad featureset
2. Robust and reliable
3. Local vendor support
4. Easy to use
5. Easy to customize



Enterprise adoption rates of ITFM and TBM do not go hand in hand.

While ITFM is quickly becoming a mainstream proposition, the complexity of TBM is making a widespread adoption still challenging.

Until a few years ago, the financial aspects of managing IT were not treated with the necessary emphasis and seriousness. This is now changing quickly as a large percentage of IT organizations in enterprises have reached the levels of process maturity necessary to fully embrace the complexity of IT service delivery and support.

TBM adoption is lagging behind somewhat with 53% of enterprises using or piloting ITFM compared to TBM with 39%.



Most important enterprise IT investment trends shaping ITFM and TMB markets in 2024:

1. AI, data analytics and automation
2. Cloud cost management (FinOps)
3. Hybrid Cloud strategies
4. Cost transparency and accountability
5. Balance between remote and office work force
6. Sustainability and Green IT
7. Cybersecurity
8. New regulatory requirements
9. Definition of business value
10. Linking cost and performance management



VENDOR SELECTION MATRIX™

IT FINANCIAL MANAGEMENT AND TECHNOLOGY BUSINESS MANAGEMENT SOLUTIONS THE TOP VENDORS FOR UPPER MIDMARKET COMPANIES AND ENTERPRISES IN DACH 2024



These are the Top vendors as selected by 700 users from buyer companies based upon product, company and service quality.

VENDOR NAME	SOLUTION
APPTIO, AN IBM COMPANY	ApptioOne, Cloudability, Targetprocess
BMC SOFTWARE	BMC Helix Continuous Optimization, BMC Helix Cloud Cost
BROADCOM	CA Service Management, Clarity
OPENTEXT	HCMX FinOps Express
REALTECH	Realtech Service Management
SAP	SAP Business One
SERVICENOW	Strategic Portfolio Management, Cloud Cost Management
SERVICEWARE	Serviceware Financial
USU	USU IT Financial Management
VMWARE	CloudHealth by Vmware, Vmware Aria Suite

This list is alphabetical and includes all relevant IT Financial Management and Technology Business Management solution vendors named by the survey respondents.

For this report we interviewed 700 midmarket and enterprise IT and business managers with budget responsibility in DACH. We selected those vendors which achieved the best evaluations scores from the buyers but disregarded those with fewer than 15 evaluations.

Notes:

- APPTIO: On August 10th 2023 IBM completed the acquisition of Apptio Inc. for approx. \$ 4.6 billion.
- SERVICENOW: Financial Management for legacy customers only, product development discontinued.


NOTE: If a vendor does not respond, Research in Action will complete its scoring assessment based on analyst experience and desk research. The vendor's products and quick facts will be documented in the report, though a full vendor scorecard will not be written.







VENDOR SELECTION MATRIX™

EVALUATION CRITERIA

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EXECUTION

 Breadth And Depth Of Solution Offering	30%	<ul style="list-style-type: none">› Does the solution cover all necessary capabilities expected by customers?
 Market Share And Growth	15%	<ul style="list-style-type: none">› How big is the company's market share and is it growing above the market rate?
 Customer Satisfaction	25%	<ul style="list-style-type: none">› How satisfied are customers with the solution and the vendor today?
 Price Versus Value Ratio	30%	<ul style="list-style-type: none">› How do customers rate the relationship between the price and perceived value of the solution?

NOTES:

- 63% of the evaluation is based on the survey results, 37% is based on the analysts' assessment.
 - 40% of the evaluation is based on the survey results: (1) Recommendation Index, (2) Customer Satisfaction, (3) Price Versus Value.
 - 15% of the evaluation is based on the analysts' assessment: (1) Viability And Execution Capabilities, (2) Market Share And Growth.
 - 45% of the evaluation is based on a combination of survey results and analysts' assessment: (1) Vision And Go-To-Market (2) Innovation And Differentiation (3) Breadth And Depth Of Solution Offering.
- The Research In Action Recommendation Index (RI) is collected and calculated by asking the survey participants: "Would you recommend this vendor in this market to your peers - Yes or No?".



VENDOR SELECTION MATRIX™

IT FINANCIAL MANAGEMENT AND TECHNOLOGY BUSINESS MANAGEMENT SOLUTIONS

THE TOP VENDORS FOR UPPER MIDMARKET COMPANIES AND ENTERPRISES IN GERMAN SPEAKING CENTRAL EUROPE (DACH) 2024



- THE TOP VENDORS
(LISTED ALPHABETICALLY)
- APPTIO
- BMC
- BROADCOM
- OPENTEXT
- REALTECH
- SAP
- SERVICENOW
- SERVICWARE
- USU
- VMWARE

Notes:

- Scale Explanation: 1 (Low) To 5 (High).
- Potential numerical deviations due to rounding.

THE RESEARCH IN ACTION GMBH VENDOR SELECTION MATRIX™ METHODOLOGY

Vendor Selection Matrix™ Disclaimer:

The Vendor Selection Matrix™ is a primarily survey-based methodology for comparative vendor evaluation. Research In Action GmbH does not endorse any vendor, product or service depicted in our research publications, and does not advise technology users to select only those vendors with the highest ratings. The information contained in this research has been obtained from both enterprise as well as vendor sources believed to be reliable. Research In Action GmbH's research publications consist of the analysts' opinions and should not be considered as statements of fact. The opinions expressed are subject to change without further notice. Research In Action GmbH disclaims all warranties, expressed or implied, with respect to this research, including any warranties of merchantability or fitness for a particular purpose. All trademarks are recognized as the property of the respective companies.

About:

Research In Action GmbH is a leading independent information and communications technology research and consulting company. The company provides both forward-looking as well as practical advice to enterprise as well as vendor clients.



APPENDIX: IT AUTOMATION MARKET TEXTURE DEFINITIONS

- **Application Discovery and Dependency Mapping (ADDM)** solutions automatically discover various applications running on server and network devices within the business hybrid infrastructure and maps the dependencies between them providing a holistic view of all the resources running and the relationships between them.
- **Application Performance Management (APM)** solutions manage the performance and health of applications within a IT enterprise.
- **AI Powered Chatbot Platforms** which are used to build applications that answer questions, provide advice and/or recommendations using natural language processing and other dialog related technologies.
- **Artificial Intelligence and Machine Learning (AI/ML)** are both technologies and are leveraged in automation solutions. Artificial intelligence (AI) is the ability of a computer program or machine to think and learn (AI can mimic human cognition). Within IT Automation AI is used to correctly interpret a variety of data, to learn from such data, and to use those learnings to achieve specific goals and tasks through flexible adaptation. Machine learning enables computers with the ability to learn without being programmed (explicit algorithms). It explores the study and construction of algorithms which can learn and make predictions on data. The algorithms follow programmed instructions or can make predictions or decisions based on the data. Machine learning is used when explicit algorithms cannot be done (e.g., computer vision, search engines, optical character recognition).
- **Artificial Intelligence for Operations (AIOps)** solutions equip IT enterprise teams with analysis of volumes and categories of data to improve key processes, tasks and decision making. The adoption of these tools automates the ingestion of fast volumes of data; leverage machine learning to analyze the data, present findings to either predict or alert on issues, and leverage the knowledge for automation or decision making.
- **Application Release Orchestration (ARO)** solutions equip IT enterprise organizations and their teams with the automation of the software deployment cycle across hybrid technology environments.
- **Configuration Management Database (CMDB)** is a database which captures IT components referred to as configuration items (CIs), which can be software, hardware, a document, article, or any such item that is part of the information system of the organization.
- **Continuous Hybrid Management (CHM)** platforms or solutions that empower, automate and continuously manage the ongoing demands of all digital functions within an enterprise no matter if they are within IT or business teams.
- **Connected Service Management (CSM)** platforms or solutions are part of the management domain which manage the entire spectrum of customer, employee and digital experiences.
- **Digital Process Management (DPM)** solutions automate and manage the digital processes across different business functions.
- **Enterprise Service Management (ESM)** is a category of business management software - typically a suite of integrated applications that a service organization uses to capture, manage, save and analyze data critical to their service business performance. It automates service offerings across internal functional areas such as (1) Human resources, (2) Vendor management, (3) Technical services, (4) Field services, (5) Financial management and (6) Shared services organizations.
- **Hybrid Cloud Management (HCM)** solutions manage the Cloud infrastructures and applications from an end-to-end perspective.



APPENDIX: IT AUTOMATION MARKET TEXTURE DEFINITIONS

- **IT Asset Management (ITAM)** software manages the full lifecycle of IT assets which typically includes all software, hardware, networking, Cloud services, and client devices. In some cases, it may also include non-IT assets such as buildings or information where these have a financial value and are required to deliver an IT service. IT asset management can include operational technology (OT), including devices that are part of the Internet of Things. These are typically devices that were not traditionally thought of as IT assets, but that now include embedded computing capability and network connectivity.
- **IT Financial Management (ITFM)** software enables the accurate and cost-effective management of IT assets and resources with the aim to plan, control, recover (or overall manage) costs which are occurring while providing IT and Enterprise Services to the organization.
- **The IT Infrastructure Library (ITIL)** is the de facto standard for IT Service Management process definitions today.
- **IT Operations Management (ITOM)** solutions monitor and control IT Services and infrastructure and enable IT to execute routine tasks necessary to support the operation of applications, services and hardware components within an organization; typically included are the provisioning of IT infrastructure, capacity management, cost-control activities, performance and security management and availability management for all IT infrastructure and assets.
- **IT Service Management (ITSM)** refers to the entirety of activities – directed by policies, organized and structured in processes and supporting procedures – that are performed by an organization to plan, design, deliver, operate and control Information Technology (IT) services offered to internal customers. It is thus concerned with the implementation of IT Services that meet customers' needs, and it is performed by the IT service provider through an appropriate mix of people, process and information technology.
- **Observability and AIOps** solutions enable the aggregating, correlating and analyzing of steady streams of performance data from distributed applications and the hybrid infrastructure which support the applications. Artificial Intelligence and Machine Learning capabilities are part of this which are reflected through the additional add on of AIOps in the name of this market.
- **Robotic Process Automation (RPA)** solutions enable the automation of tasks, processes and procedures which are normally conducted by a human. RPA solutions create software robots that mimic human actions. Typically, these are tasks that a human would do. (Ro)Bots and Virtual Agents are part of RPA solutions.
- **Secure Unified Endpoint Management (SUEM)** software enables the management and securing of mobile applications, content, collaboration and provides for the management of all endpoints like smartphones, tablets, laptops, printers, ruggedized devices, Internet of Things (IoT) and wearables.
- **Technology Business Management (TBM)** software enables the planning, management and visibility of the supporting and required business and IT technology resources from a cost and capacity perspective by visualizing, planning, prioritizing and optimizing the usage and demands of technology resources (people, processes and technologies) for the enterprise.
- **Value Stream Management (VSM)** software solutions capture, visualize, and analyze the flow of work across the entire Agile software delivery project. The capabilities include end-to-end visibility, traceability and governance over the entire process and help to plan, track, and steer work at the team, program, portfolio, and enterprise levels. It includes the people working on a project, the systems which are operated and leveraged, and the flow of information and materials between teams. It enables the measurement of speed and quality for digital transformations.



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