



# Do You Really Know Where You Are Going?

Why Technology Roadmaps are  
Your Key to Success

May 12, 2016





# KPMG At a Glance

# Who We Are

**KPMG is a global network of professional firms providing Advisory, Audit and Tax services. We trace our origin back to 1897.**

Our high performing team, uses our experience and insight to deliver clear perspectives and methodologies that public sector agencies value. Our client focus, commitment to excellence, and consistent delivery build trusted relationships that are at the core of our business and reputation.

# What We Do

**KPMG provides services and public sector insight to help agencies address some of their most complex challenges.**

We believe that the quality of our services separates us from our competitors, and by bringing different perspectives, sound judgment and extensive collaboration, we help enable our clients to make informed decisions.



# Government IT... Past, Present and Future

# Government IT in the Past

## Past

- Services are in-person and in line
- Brick and mortar office
- No direct access to my data
- Paper-based channel
- Physical records
- Stovepipe systems
- Multiple versions of truth
- Disconnected
- Clerical workers
- Big and inefficient
- Dissatisfied customers

# Government IT in the Present

## Present

- Self-service, on-line
- Virtual office
- Direct access to my data
- Multi-channel and paperless
- Virtual records
- Integrated systems
- A single version of the truth
- Intelligent
- Knowledge workers
- Smaller and more efficient
- “Customer Experience”

# Government IT in the Future

## Future

- Participatory government
- Citizen-centered – “My government”
- Social media driven
- Collaborative – bi-directional
- Cloud based
- Agile
- Disruptive
- Big Data driven
- Secure





# Strategic Plans and Business Plans Alignment

# Elements of a Strategic Plan

## **Strategic Plans typically run for seven years**

### ★ Goals

- Three-six high-level statements
- Goal statements should describe where your organization wants to be in seven years (Long View)

### ★ Objectives

- Two-five statements per each goal
- Each Objective Statement provides clarity around achieving the goal

### ★ Strategic Initiatives

- One-three statements per each objective
- Each Initiative Statement should describe how an objective will be achieved in the next two years

# Elements of a Business Plan

## **Business Plans typically for two years**

### ★ Business Initiatives

- At least one business Initiative per each Strategic Initiative
- Each business initiative provides a vehicle for implementing strategies within 12-18 months
- Requires an executive to be named as Initiative owner

### ★ Implementation Projects

- Each project should be executable within three-four months
- Each project should build upon the previous project

### ★ Relationship to IT Roadmaps



# CalPERS Strategic Plan and Business Plans

# CalPERS at a Glance



**\$300 billion**

Largest public pension fund in the U.S. with more than \$300 billion in assets



**1.7 million members**

1.7 million members in the CalPERS retirement system



**3,094 employer benefits**

Administers health and retirement benefits on behalf of 3,089 public school, local agency and State employers



**1.4 million health members**

Health program covers more than 1.4 million active and retired State, local government and school employees and their family members



**2,900 employees**

CalPERS has nearly 2,900 employees

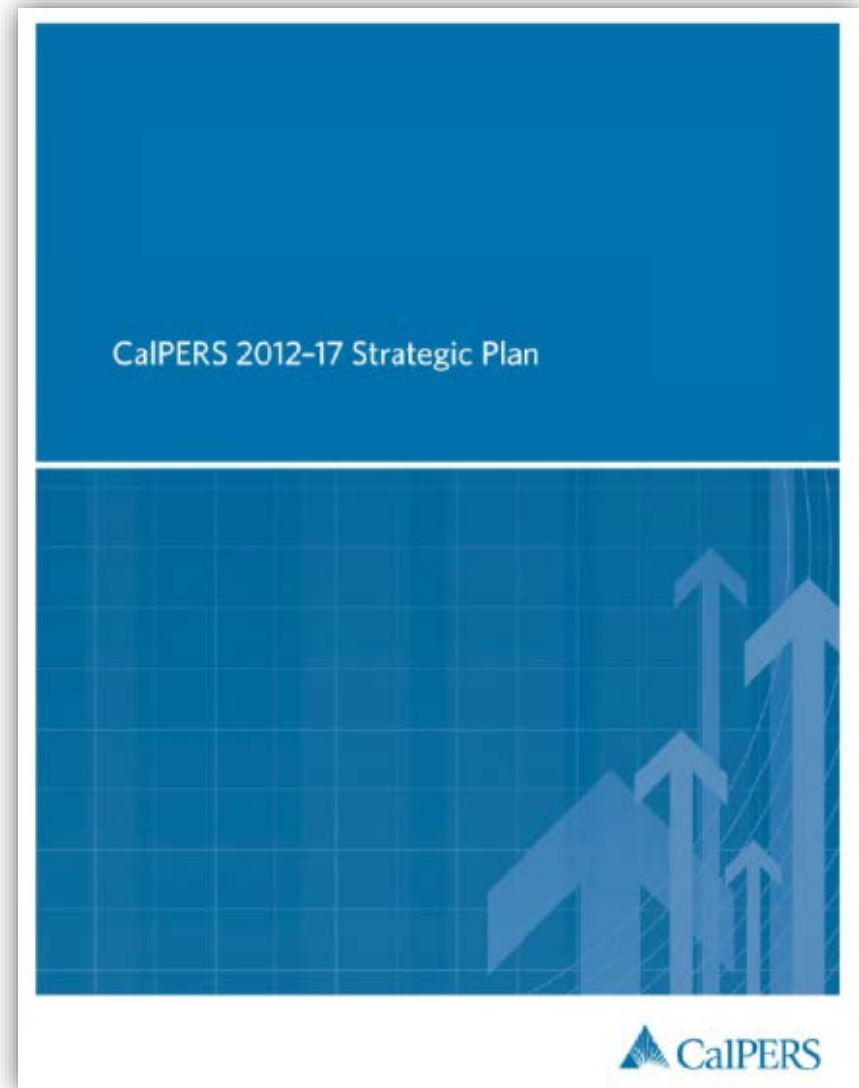
*We serve those  
who serve California*

# Strategic Planning

**Goal A** | Improve long-term pension and health benefit sustainability

**Goal B** | Cultivate a high-performing, risk-intelligent and innovative organization

**Goal C** | Engage in state and national policy development to enhance the long-term sustainability and effectiveness of our programs



# Strategic Objectives & Initiatives

**Goal B** | Cultivate a high-performing, risk-intelligent and innovative organization

**Objective** | Deliver superior, end-to-end customer service that is adaptive to customer needs

## Strategic Initiatives |

Promote the use of business intelligence throughout the organization to optimize customer service and delivery

Enhance business processes to achieve high-quality, timely, effective and efficient customer service delivery to our members and employers

# Demonstration

CalPERS Strategic and Business Plans:

[www.CalPERS.ca.gov](http://www.CalPERS.ca.gov)





# A Roadmap to Success

# Why develop & publish a Technology Roadmap?

## ★ Benefits to the business areas

- Business gains insight into the technology planning process
- Business gains ownership/positive belief of their technology direction
- Business more willingly funds the technology implementations
- Business becomes the driver of the technology enabled transformation

## ★ Benefits to the technology division

- Technology engineers and designers contribute vital input into the technology direction
- Technology staff gain insight into the technology direction
- Technology staff contribute to the positive inertia of the technology transformation
- Technology staff gain ownership/positive belief of their technology direction

# Elements of a Technology Roadmap

## Technology roadmaps typically cover a five year horizon

### ★ A separate roadmap for each major IT service

- ERP Roadmap
- Business Intelligence/Business Analytics Roadmap
- Information Security Roadmap
- Legacy Systems Reengineering Roadmap
- Content Management Roadmap

### ★ Sequencing of IT projects (Agile)

- High degree of scope accuracy/precision in years one and two
- Less scope accuracy/precision in the out years
- At the completion of year one projects, the out years are recalibrated



# CaIPERS Technology Roadmaps

# Strategic Programs



Business  
Intelligence



Information  
Technology



Pension & Health  
(my|CalPERS)



Investments



Enterprise Content  
Management



Enterprise  
Resource Planning



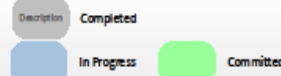
Security  
Roadmap



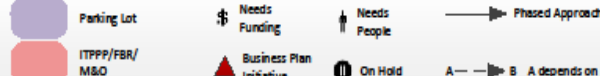
# ERP Roadmap

V32 May 4, 2016

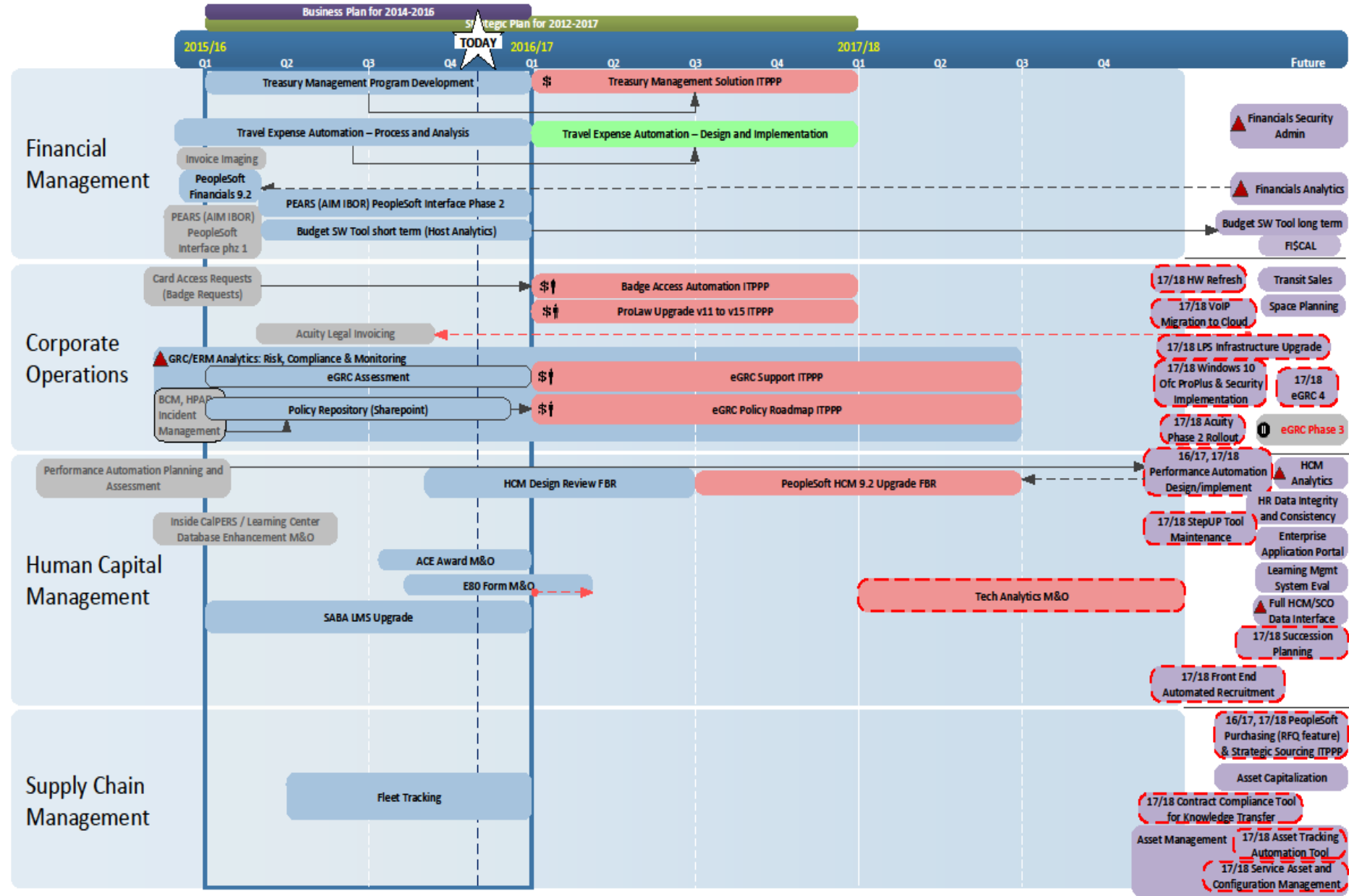
### LIFECYCLE



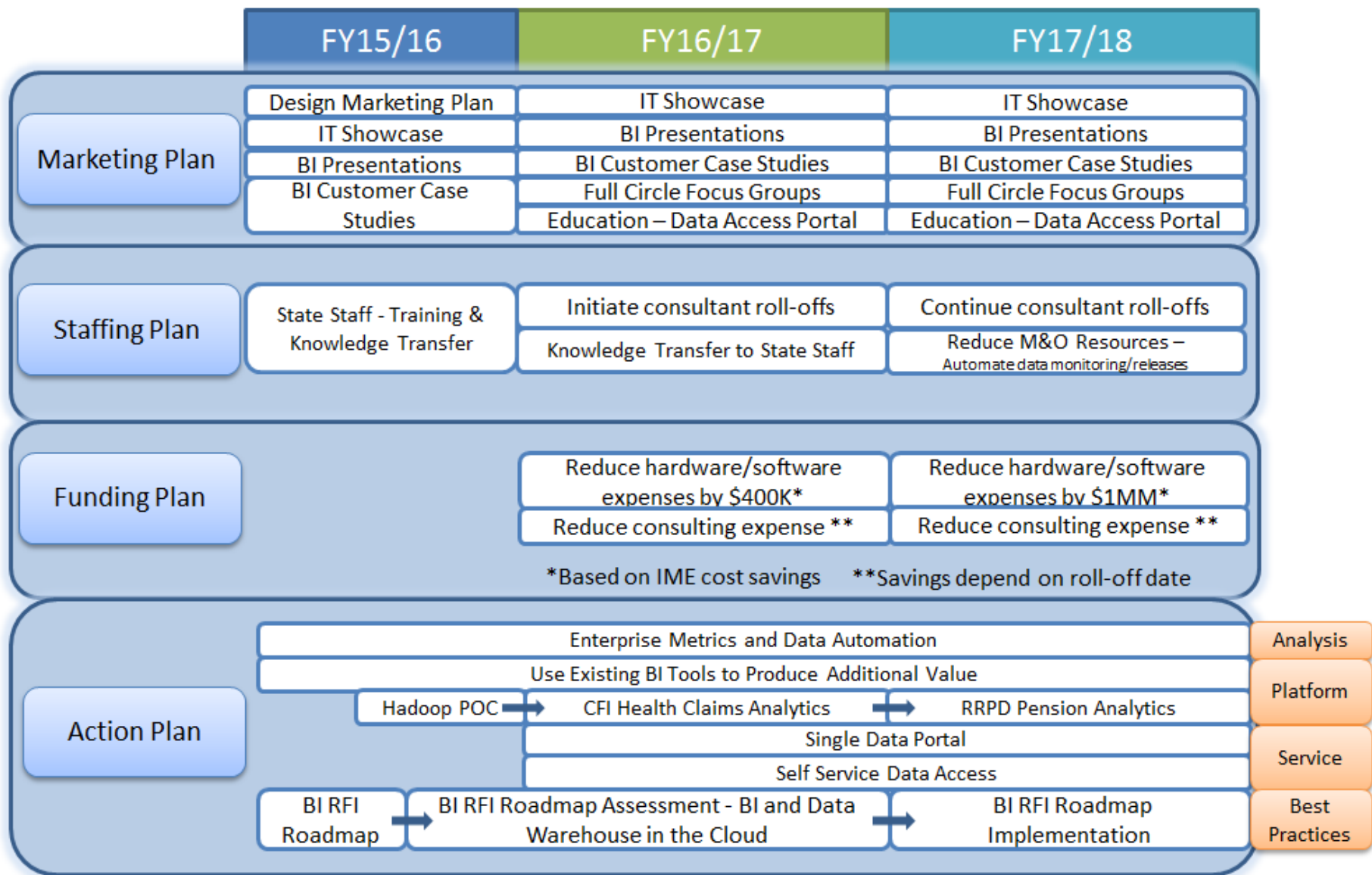
### DESCRIPTORS



### CHANGE HIGHLIGHTS

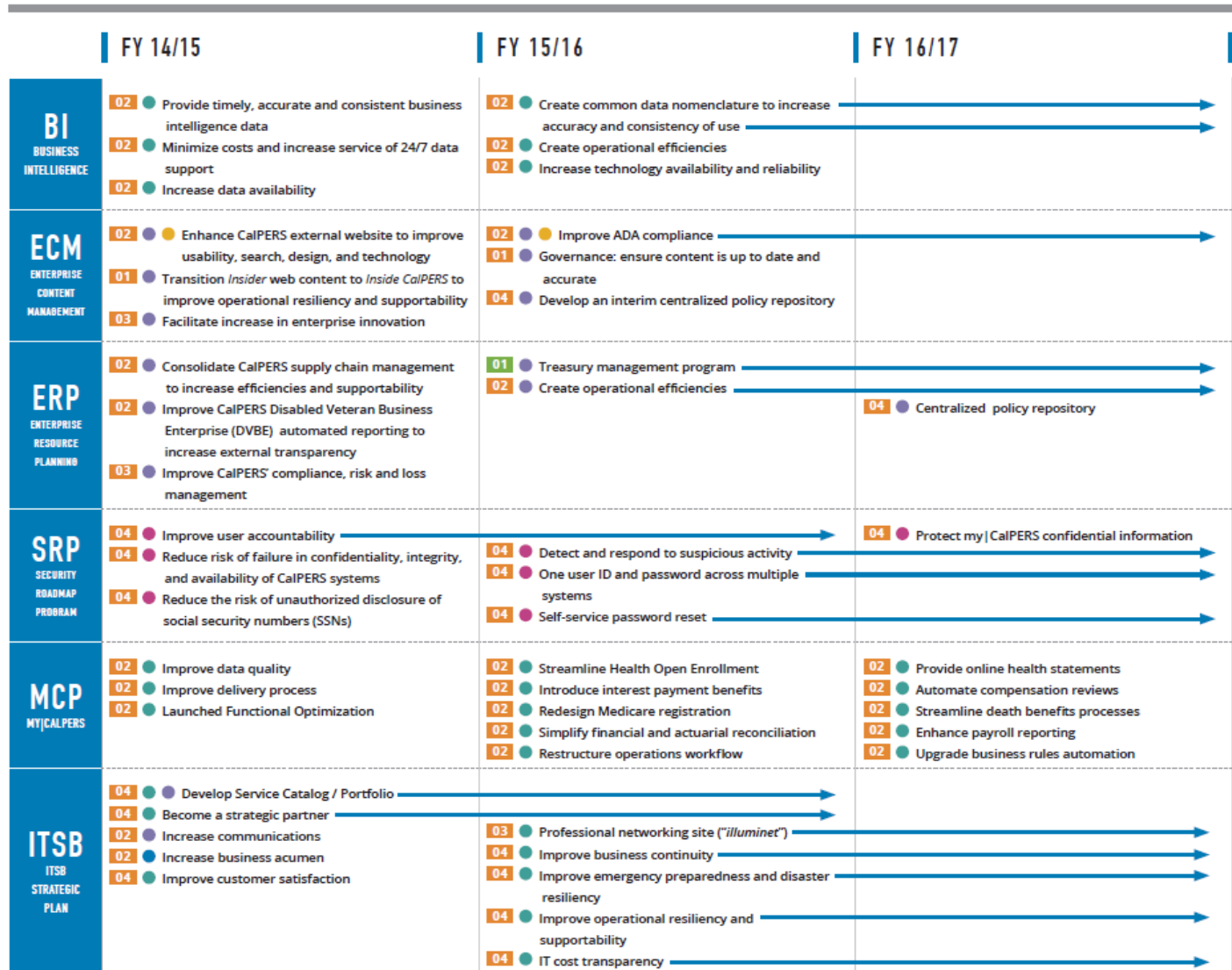


# Business Intelligence Program Roadmap



NOTE: Detailed roadmaps have been or are being developed for each plan

# ITSB CONSOLIDATED ROADMAP: DELIVERING BUSINESS VALUE



CalPERS Strategic Plan Alignment Legend	
<span style="color: green;">■</span>	Goal A: Improve long-term pension and health benefit sustainability
<span style="color: green;">■</span> 01	A.01: Fund the system through an integrated view of pension assets and liabilities
<span style="color: orange;">■</span>	Goal B: Cultivate a high-performing, risk-intelligent and innovative organization
<span style="color: orange;">■</span> 01	B.01: Use a focused approach to generate, test, refine and implement new ideas
<span style="color: orange;">■</span> 02	B.02: Deliver superior, end-to-end customer service that is adaptive to customer needs
<span style="color: orange;">■</span> 03	B.03: Recruit, retain, develop and empower a broad range of talents against organizational priorities
<span style="color: orange;">■</span> 04	B.04: Actively manage business risks with an enterprise-wide view

CalPERS Business Plan Initiative Alignment Legend	
<span style="color: purple;">●</span>	BP3: End-to-End Business Intelligence—Enhance end-to-end services through the use of business intelligence by enhancing enterprise research, innovation, and organizational performance.
<span style="color: teal;">●</span>	BP4: Digital Communications—Develop and implement a strategy to enhance digital communications capabilities to support outreach and communication to members, employers, and other stakeholders.
<span style="color: yellow;">●</span>	BP7: Workforce Strategic Plan Implementation—Continue implementation of the five-year Strategic Workforce Plan to administer the Organizational Health Index survey, develop and implement an Emerging Leader training program, and talent management strategies that focus on role clarity, accountability and support diversity and inclusion.
<span style="color: blue;">●</span>	BP10: Participating Employer Financial Hardship/Insolvency—Assess the impacts of participating employer bankruptcy cases and evaluate
<span style="color: pink;">●</span>	BP15: Information Security Roadmap—Implement risk mitigation strategies to enhance management of security events, access to information and data loss prevention to safeguard information assets.



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Thank you



[kpmg.com/socialmedia](https://kpmg.com/socialmedia)

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