PPM Integration Provider for North and South American Markets

About IT-ROI Solutions

IT-ROI Solutions is a software development company and a PPM integration provider with offices in Miami, Vancouver, and Bogota. Our exposure to both North and South American markets strengthens our position and access to key customers. IT-ROI also provides technical and functional consulting services to tier one enterprises and is a Certified CA technologies partner. Founded in 2009, we have been profitable since our inception. This year will be no exception as we continue our aggressive growth strategy and expand our product line.

Interview conducted by: Lynn Fosse, Senior Editor, CEOCFO Magazine

Federico Peña - President

CEOCFO: *Mr. Pena, would you tell us the concept behind IT-ROI Solutions?*
Mr. Pena: Our main concept is also our mission to make PPM simpler. What do I mean by that? To minimize the total cost of ownership of large enterprises that use project portfolio management tool sets. It would be anything from mass changes, integrations, reporting, and ideation to collaboration. We provide a unified platform that allows end users to have a familiar interface that they are accustomed to therefore minimizing user adoption and the learning curve of end users.

CEOCFO: *What are some of the common challenges you address and maybe something that would seem outside of the box, where you are able to provide help?*
Mr. Pena: One of the biggest challenges that we address is how to integrate products or enterprise systems with minimal cost and disruption to the client. One of our software tools "Integration Bridge" or IB3 for short overcomes this challenge. The tool integrates project portfolio management products with other associated products such as change management tools-sets or issue management tool-sets or even financial management tool-sets. C-level executives demand a holistic view into their organization and must keep pace with quickly evolving strategic business goals in order to out compete in the marketplace - IB3 delivers on that premise. What we do is provide a common platform that allows them to merge all of their data and therefore report on all that data, giving them a 360-degree view of their organization.

CEOCFO: *Are there many services that work on that concept and is it a common concept?*
Mr. Pena: There are other integration software tools but they are more at the enterprise level for different types of integrations. Our focus is more project resource management related and financial management. We definitely have a niche in the market, and there are not many players in this space. Our other area of expertise is making project portfolio management simpler by implementing and integrating it with all of their common Microsoft (e.g. SharePoint, Exchange) products.

CEOCFO: *Are the companies or individuals who would benefit from your services aware of IT-ROI?*
Mr. Pena: Even though we are in a niche market, we initially started working with a product called CA Clarity in the PPM space, and since then we have penetrated that niche market and are delivering our products and services at a very exciting rate. We have now expanded and have gone into other platforms. I would say that we scratched the surface as a whole with maybe a 10% market share. So, there are still several thousands of companies out there who need to learn about us, it's crucial to their continued success.

CEOCFO: *How do you reach out to people?*
Mr. Pena: We have several different approaches. We leverage inbound marketing practices, webinars, social media, newsletters, etc. but the top 2 most valuable marketing tools for IT-ROI are word-of-mouth and tradeshows. We attend the Gartner PPM Summit and CA World along with few other smaller trade shows that are project portfolio management specific.

CEOCFO: *What does IT-ROI understand about project management that perhaps your competitors do not?*
Mr. Pena: We understand bottom line and ROI when it comes to PPM. The concept of trying to save clients' money and time is easy for us because of our hands-on approach to developing software. You see, our tools are built by architects

and software engineers who started their careers as PPM consultants. These passionate go-getters wanted to make their job easier, while on the job, so they did and IT-ROI Solutions was born. We developed software to make PPM simpler. Most organizations that offer consulting around this product and try to become a staffing house. Their business is to increase head-count but ours is to minimize head-count.

CEOCFO: *When you are talking with a prospective customer is there an aha moment when they realize the value and depth of what you offer?*
Mr. Pena: By the time we start talking to someone, they are very aware of our offerings. Usually clients reach out to us and it is mainly through word-of-mouth, so they already had the "aha" moment before they talked to us, But during our success criteria process, we always manage to "wow" our clients when they realize just how much time and money our tools will actually save them.

CEOCFO: *What is involved in implementing your system?*
Mr. Pena: Another value-added benefit of our products is that they are extremely simple to implement. With standard client side requirements, our Microsoft Office and SharePoint connectors/integrations/adapters implementation take a couple days and our integration products are very similar to that.

CEOCFO: *How do you ensure that it is user-friendly?*
Mr. Pena: Most project portfolio management tool sets are huge and complicated; I think this is what makes them scary to end users. We merge them into common platforms that end users are accustomed to using. One of the most common platforms we offer is SharePoint because it is popular and everyone in the enterprise uses it every day, SharePoint utilizes all of Microsoft's technology. We provide clients with enhancement requests sites that we take seriously. We are agile and proactive in our development and UI layout design.

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CEOCFO: *Would you give us an example of a recent change that was incorporated because a user pointed it out to you?*
Mr. Pena: We implemented a task management component inside of SharePoint that allows end users to perform agile task management directly through SharePoint without utilizing Gantt or Gantt functionality. That was something that a client wanted; they wanted a lightweight, agile methodology to manage their products. They did not want to go purchase a full agile tool. It fit perfectly within our task management component that we utilize.

CEOCFO: *How do you stay on top of the new technology?*
Mr. Pena: We have to keep on top of technology at all times to make sure we are providing the most effective and efficient solution out there. We are always hiring new top-notch talent who bring bright and energetic new ideas for new technologies. This has helped us in evaluating new products that we can implement. Technology studies allow us to evaluate different technology sets as well.

CEOCFO: *Do you have a number of products or is it one offering?*
Mr. Pena: We have several different products. We have a technical side of product sets and a functional side of product sets. The technical side is more for IT departments so they can build and generate functionality for their end users. Our functional side of tool sets incorporates PPM tools into common platforms such as SharePoint and Microsoft Office or Excel. One of the common problems that clients have is that they need to mass update projects or resources, sometimes in the tens of thousands. To do that via the traditional method is cumbersome, so we give them an ability to do that same work via our Microsoft Excel integration tool, that offers a familiar platform that they are used to using and it dramatically reduces the time required to do the job.

CEOCFO: *Where do you see the most growth?*
Mr. Pena: Everything is growing at about the same rate, but SaaS (Software as a Service) is definitely our fastest-growing market segment.

CEOCFO: *What is your geographic reach today?*
Mr. Pena: We are worldwide. I would say that 80% of our clients are in the United States, 3% in Latin America and 8% in Europe and the rest in Australia.

CEOCFO: *Are there geographic areas where you see more opportunity?*
Mr. Pena: We have partners located worldwide and the recent demand for new partner alliances with IT-ROI is high. Increased opportunity from a global perspective has been in the Nordic and South American countries.

CEOCFO: *Are there particular industries that have more need where you have not cracked the surface?*
Mr. Pena: We do not have a vertical market specifically. It is anyone who works with project and portfolio management tool sets. It goes anywhere from construction to IT projects.

CEOCFO: *What is ahead?*
Mr. Pena: We are continuing to grow our integration business, every year it grows exponentially, SharePoint is our hottest integration offering at the moment. We also have two cloud products that are being released later this year.

CEOCFO: *Are there particular features you like about SharePoint that allows you to work well?*
Mr. Pena: SharePoint is very popular and I would say that a high percentage of organizations have it. It is flexible and has a good development platform. The beauty of it is the end user ease-of-use. That is why people are using it "familiarity" and it is in the Microsoft family. Microsoft has done a big push to ensure that their products offer the same look and feel with an enhanced UI that offers "familiarity" and easier navigation.

CEOCFO: *Why should the business community take note of IT-ROI?*
Mr. Pena: We take the complexity out of PPM that significantly increases your ROI.

BIO: A passionate and visionary entrepreneur with a global perspective. He has worked in over a dozen countries around the world successfully implementing large-scale, highly complex, enterprise management systems solutions for the private and public sector.

Federico has both depth and a clear focus when it comes to IT. He is a Certified Senior CA Clarity architect, consultant and instructor; an Oracle developer and Network administrator with expertise with both the Unix and Windows platforms.

He founded IT-ROI Solutions in 2009 driven by the twin purpose of creating a company that combines, under one roof, cutting-edge software development with best in class client- focused consulting services.

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