



Custom Indicators

Getting Started Guide

The CAST Highlight November 2018 release includes a new capability to create & customize indicators. Here are the [corresponding release notes](#).

Custom **indicators** are key dimensions to support portfolio segmentation and prioritization. The ability to create new indicators enables customers & partners to **implement their own methodology (IP)** within the solution.

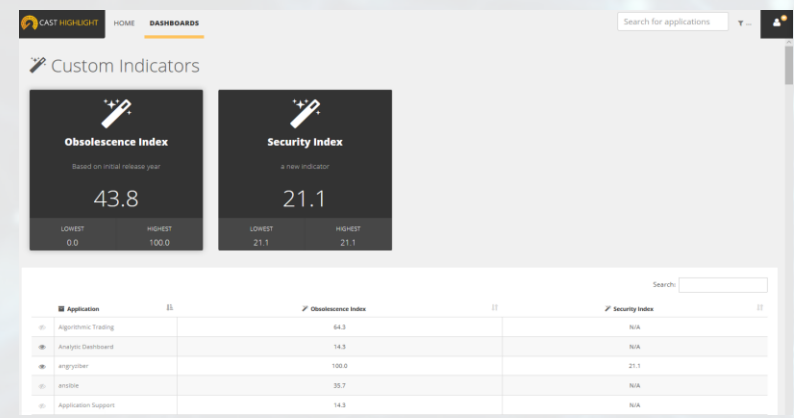
Custom indicators are implemented using custom **survey questions combined with weights**.

Please note that **only Portfolio Managers** can create/modify/delete indicators. The configuration of an indicator can **be changed over time**, and CAST Highlight handles the **re-computation** to update scores according to the new rules.

Custom indicators are available at both Portfolio & Application levels, and they are included in **export** files.

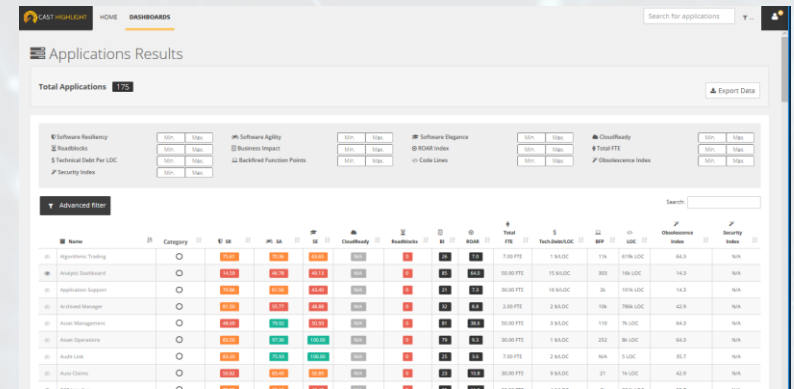
Dashboards \ Custom Indicators

Consolidates all the custom indicators. Each tile displays the lowest & highest scores. The table presents the custom indicator scores for all applications.



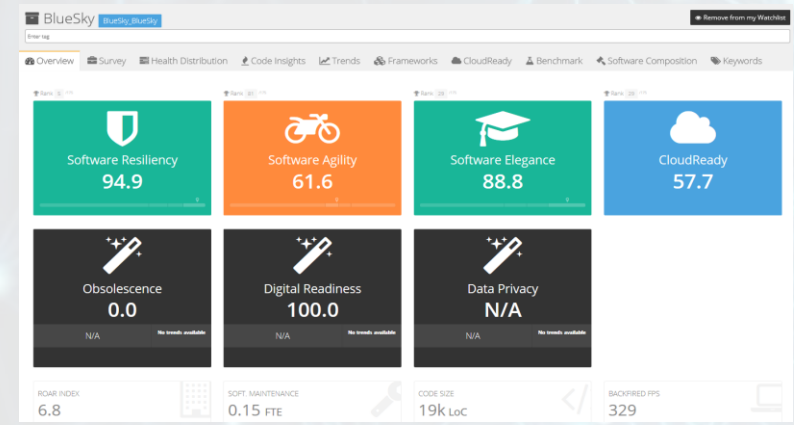
Dashboards \ Applications Results

The custom indicators appear in the table and are also available in the advanced filters. They are also part of the CSV & XML export files.



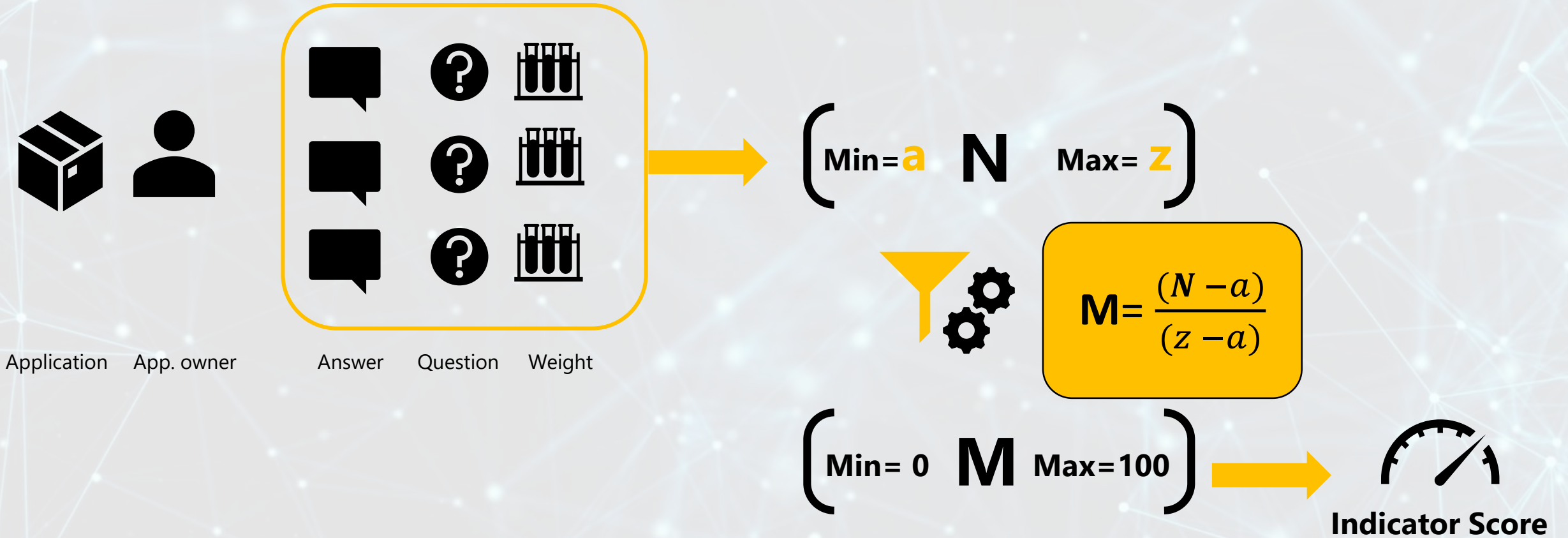
Application ID Card

The custom indicators appear on the Overview tab at the application level.



Computation Model – Logical Approach

Here is a diagram that explains the indicator computation principle:



Application Contributors provide answers to questions in the online surveys associated with the campaign. Custom indicators receive their values from the combination of responses and the associated weights

The sum of the scores for the selected question responses is normalized to provide a final score of between 0 and 100

Business Impact Calculation Example

The Business Impact is a standard indicator which is meant to prioritize the applications across portfolios. Whether we are trying to rationalize, modernize or simply understand the applications, Business Impact puts these assets in perspective.

By default, Business Impact is a score between 1 to 100 which is computed using **9 questions**.

These answers can be either **"numbers"** or **"single selections"**.

Each of these nine questions have specific **weights** associated with each of their answers (Manage Portfolio \ Manage Custom Indicators)




> Business Impact	
Could failure of this application lead to disruption? Please define the level of impact.	
Could failure of this application lead to harm of the company's public image? Please define the level of impact.	x
Could failure of this application lead to loss of customer confidence? Please define the level of impact.	x
Could failure of this application lead to loss of revenue or business opportunity? Please define the level of impact.	x
Does the application serve internal or external users?	x
Is this application in line with the company's future technology direction?	x
The average number of people (FTE) that worked on the code over the last 12 months?	x
The number of major releases delivered over the last 12 months?	x
What is the approximate number of end users?	x



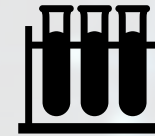
☰ Question parameters

Could failure of this application lead to disruption? Please define the level of impact.

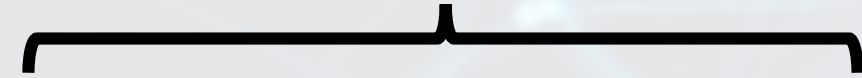


Low	<input type="text" value="2"/>
Medium	<input type="text" value="4"/>
High	<input type="text" value="8"/>
Very High	<input type="text" value="12"/>

Business Impact Calculation Example



Each question applies the weight presented on the previous slide

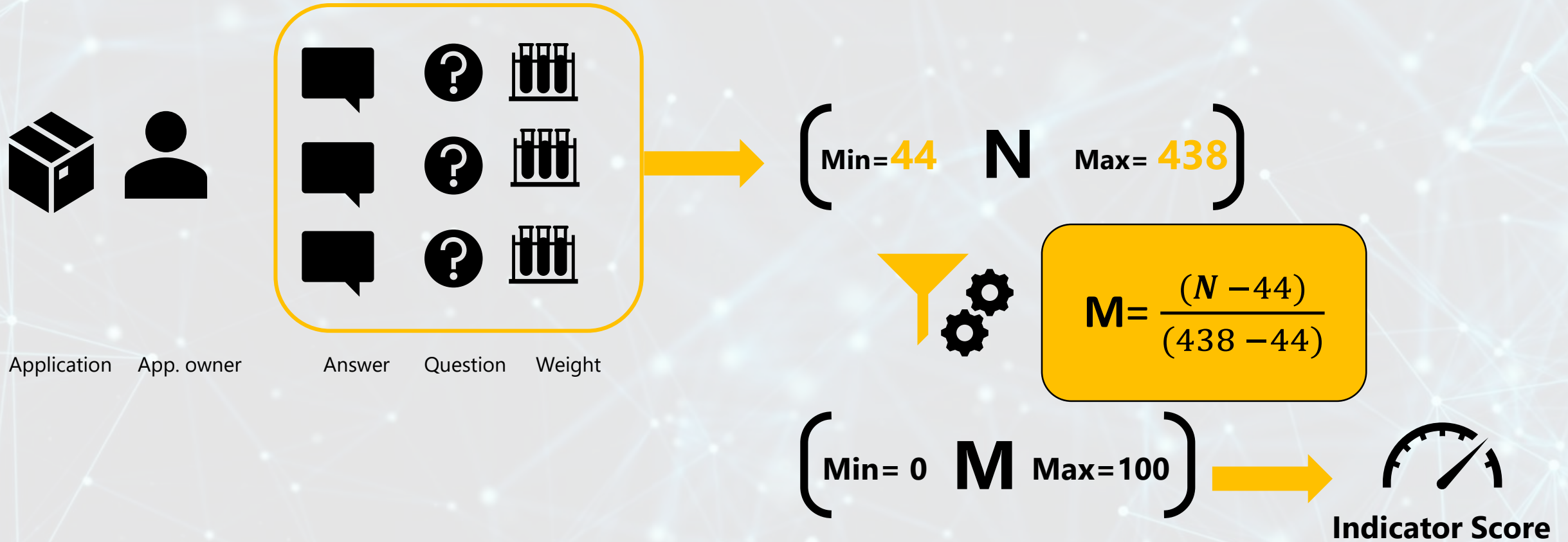


> Business Impact	Range 1	Range 2	Range 3	Range 4
Could failure of this application lead to disruption? Please define the level of impact.	Low: 2	Medium: 4	High: 8	Very High: 12
Could failure of this application lead to harm of the company's public image? Please define the level of impact.	Low: 2	Medium: 4	High: 8	Very High: 12
Could failure of this application lead to loss of customer confidence? Please define the level of impact.	Low: 2	Medium: 4	High: 8	Very High: 12
Could failure of this application lead to loss of revenue or business opportunity? Please define the level of impact.	Low: 2	Medium: 4	High: 8	Very High: 12
Does the application serve internal or external users?	Internal users: 5	External Users: 25	Both: 30	
Is this application in line with the company's future technology direction?	No: 1	Yes: 10		
The average number of people (FTE) that worked on the code over the last 12 months?	[0 -3]: 10	[3 -10]: 50	[10 -50]: 75	[50 -]: 125
The number of major releases delivered over the last 12 months?	[x<4]: 10	[4<x<6]: 50	[7<x<12]: 75	[x>12]: 100
What is the approximate number of end users?	[x<100]: 10	[100<x<500]: 50	[500<x<2500]: 75	[x>2500]: 125

The sum of the scores varies between a Minimum: 44 and a Maximum 438

Business Impact Calculation Example

Here is a diagram that explains the indicator computation principle:



For each application, the App. Owner provides answers to 9 questions related to the Business Impact. Each question has a corresponding weight as seen into the previous slide

The sum of the scores for the selected question responses is normalized to provide a final score of between 0 and 100

Business Impact Calculation Example

Here is a table that shows the Business Impact scores depending on the survey answers for 4 apps.



> Business Impact
Could failure of this application lead to disruption? Please define the level of impact.
Could failure of this application lead to harm of the company's public image? Please define the level of impact.
Could failure of this application lead to loss of customer confidence? Please define the level of impact.
Could failure of this application lead to loss of revenue or business opportunity? Please define the level of impact.
Does the application serve internal or external users?
Is this application in line with the company's future technology direction?
The average number of people (FTE) that worked on the code over the last 12 months?
The number of major releases delivered over the last 12 months?
What is the approximate number of end users?

	app 1	app 2	app 3	app 4
Low: 2	Low: 2	Medium: 4	Very High: 12	
Low: 2	Low: 2	Medium: 4	Very High: 12	
Low: 2	Low: 2	Medium: 4	Very High: 12	
Low: 2	Low: 2	Medium: 4	Very High: 12	
Internal users: 5	Both: 30	Internal users: 5	Both: 30	
No: 1	Yes: 10	Yes: 10	Yes: 10	
[0 -3]: 10	[50 -]: 125	[10 -50]: 75	[50 -]: 125	
[x<4]: 10	[x>12]: 100	[7<x<12]: 75	[x>12]: 100	
[x<100]: 10	[x>2500]: 125	[500<x<2500]: 75	[x>2500]: 125	
44	<u>398</u>	<u>256</u>	438	
0	90	54	100	

$$M = \frac{(N - a)}{(z - a)}$$

$$M_{app2} = \frac{(398 - 44)}{(438 - 44)}$$

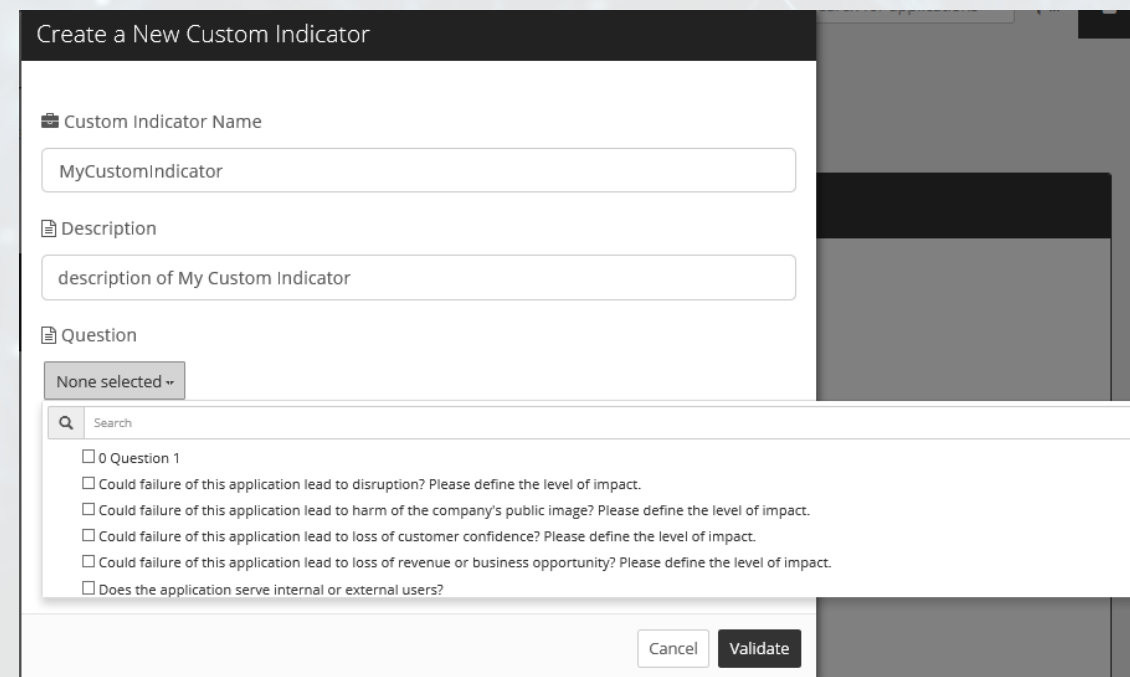
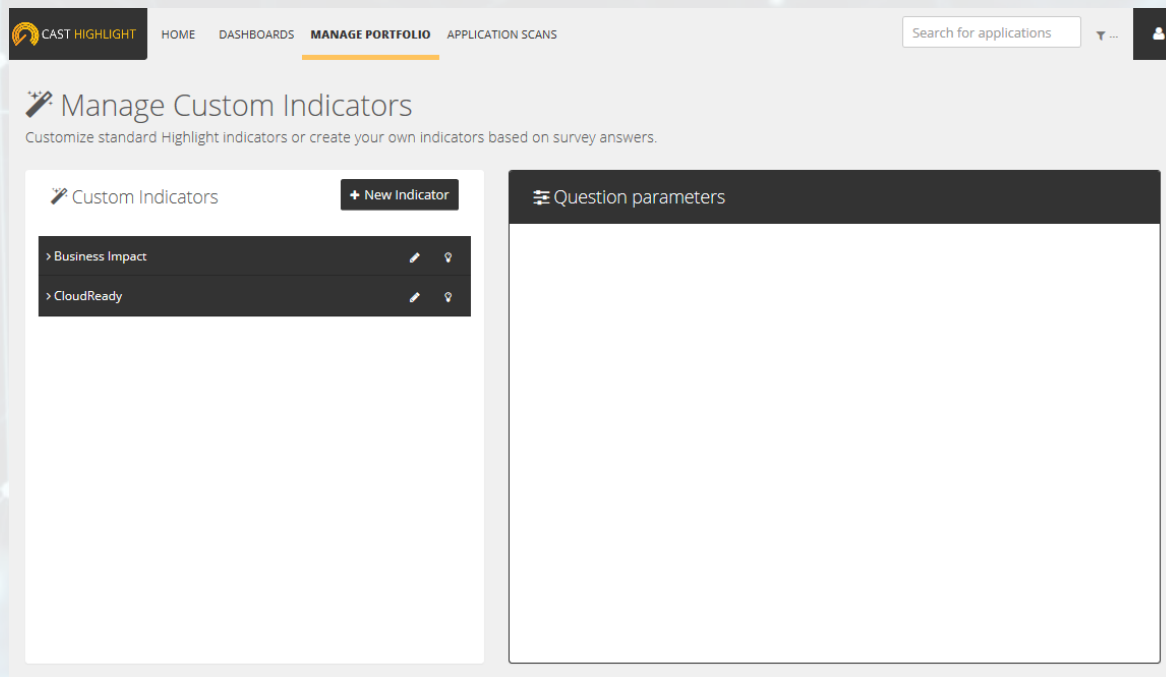
$$M_{app3} = \frac{(256 - 44)}{(438 - 44)}$$

N =

M =

Create a customer indicator & select the questions

- From The Manage Portfolio Menu, select **Manage Custom Indicators**
- From the left hand side, press the “**+ New Indicator**” button
- Provide a **name and** description (optional), and select the **existing questions** that will be used to compute the custom indicator.
- **Important:** you can pick & choose questions from the existing standard survey sections or from your own custom survey sections.



Configure the weight formulas

Define the **score** for each survey question that belongs to the indicator

- In case the answer is a **single-selection** > define a weight for each choice
- In case the answer is a **number** > define several ranges & apply a weight

Custom Indicators + New Indicator

- > Business Impact
- > CloudReady
- > MyCustomIndicator

Could failure of this application lead to disruption? Please define the level of impact.

Could failure of this application lead to loss of revenue or business opportunity? Please define the level of impact.

Question parameters

Could failure of this application lead to disruption? Please define the level of impact.

Low 1

Medium 2

High 3

Very High 4

Weight Formula for a single-selection

- "-1" for infinite
- CAST Highlight allows scores to be recalculated (bulb icon)

Custom Indicators + New Indicator

- > Business Impact
- > CloudReady
- > MyCustomIndicator

Could failure of this application lead to disruption? Please define the level of impact.

Could failure of this application lead to loss of revenue or business opportunity? Please define the level of impact.

The average number of people (FTE) that worked on the code over the last 12 months?

Question parameters

The average number of people (FTE) that worked on the code over the last 12 months?

+ Add range parameter

From value:	0	To value (included):	100	Weight:	1	⌫ Delete
From value:	100	To value (included):	500	Weight:	2	⌫ Delete
From value:	500	To value (included):	-1	Weight:	3	⌫ Delete

Weight Formula for a number (apply ranges)

Computation Model – Best Practices

The “**weight**” are the number of points you’d like to grant to a **dedicated answer**. Because the indicator score is computed through many weighted answers, it’s mandatory to keep consistency between the weights for a given indicator across the questions.

For instance, we want to compute an indicator based on three questions.

- The question A is extremely important, so we’ll grant more weight to all **its answers**
- Questions B has less impact on the customer indicator, so the question response **weight** is established accordingly.
- Finally, although Question C is generally the least impactful amongst the proposed options, there **is one answer** which can drastically influence the overall indicator score.



To make sure your indicator spreads the weight in alignment with your grading system, make sure that you always keep an eye on the **total weight**, its distribution **by question** and its distribution **by answer**



IT Portfolio Management Topic

- **Business / IT Alignment Index**
 - Using dimensions such as: Customer Satisfaction, Customer Experience, Part of the Roadmap, Business Value ...



IT Rationalization Topic

- **Retire, Replace, Remain, Reprioritize Index**
 - Using dimensions such as: obsolescence, total cost of ownership, business value ...



Cloud Migration Topic

- **IaaS / CaaS Index**
 - Using dimensions such as: Elasticity, Scalability, Latency, Throughput ...



Digital Transformation Topic

- **Digital Readiness Index**
 - Using dimensions such as: Scalability, Growth, Customer Experience, Innovation ...

Frequent Asked Questions

Indicators can use:

- Questions which come from the **standard existing survey sections**, namely: Business Impact, Software Maintenance, Application Properties & CloudReady
- Custom questions
- Questions which come from **several survey sections**.

Indicators are computed as soon as **at least one answer is provided**. The score is calculated through the provided answers. For instance, if the indicator is built on 5 questions and the app. owner only answered 2 out of 5, then the indicator score will still be computed but only based on the information provided so far.

Indicators can be built using both **standard** & **custom** questions.

There is **no limitation** in terms of: number of indicators or number of questions that are associated to them.

If any changes are made to the scoring for a custom indicator, such as changing the score for the answers or adding or removing questions, simply click on the bulb icon to **recalculate the custom indicator** using the new weights.

Deleting a question from a custom indicator removes the question's contribution to the indicator weight formula; it does not remove the question from the question catalog.

Prior to deleting a question from the Question catalog, you must first ensure that this question is not used as part of a custom indicator



Custom Indicators

Digital Readiness, Business Value, Cost, Obsolescence, Compliance...