Commonwealth of Massachusetts

Executive Office of Technology Services and Security (TSS)

Enterprise Technology Management
Enhanced IT Financial Management and Business Planning
FY26 - FY27

Deputy Secretary Erica Bradshaw (Erica.Bradshaw@mass.gov)

EXECUTIVE SUMMARY

The Massachusetts Executive Office of Technology Services and Security (EOTSS) transformed its approach to IT financial management, business planning, and enterprise chargeback through the implementation of a unified technology business management framework. Supporting approximately $280 million in enterprise technology services, the initiative modernized fragmented planning, budgeting, forecasting, service costing, and billing processes that previously relied on disconnected spreadsheets, manual workflows, and limited financial visibility.

Using Apptio as a single system of record, EOTSS integrated service planning, forecasting, rate development, chargeback, and customer reporting into one coordinated platform. The effort established a repeatable and scalable model for managing approximately 85 enterprise service rates while streamlining planning activities across 40 Service Owners and 20 financial and executive reviewers.

The transformation delivered measurable operational and customer benefits. Leadership now has faster access to financial and operational insights to support investment decisions, service sustainability, and cost-efficiency initiatives. Service Owners have improved visibility into spending, forecasting, and performance metrics. Customer agencies now receive enhanced billing transparency through detailed usage reporting, variance analysis, and self-service access to service rates, directly addressing longstanding concerns about understanding technology service charges.

More than a technology implementation, this effort established the foundation for sustainable, data-driven enterprise technology management across the Commonwealth. By connecting planning, governance, forecasting, service costing, and customer reporting into a single framework, EOTSS created a replicable model for government organizations seeking greater financial transparency, operational accountability, and strategic alignment in the delivery of enterprise technology services.

IDEA

EOTSS launched an enterprise effort to transform how the Commonwealth plans, forecasts, funds, and bills for enterprise technology services. The project addressed fragmented planning cycles, manual budget development, disconnected financial processes, and limited visibility into technology service costs and consumption.

Chargeback reform was the catalyst, but the broader goal was to establish a more mature, data-driven IT financial management model. EOTSS needed a scalable approach to service planning, forecasting, rate development, and investment decisions across a portfolio supporting approximately $280 million in enterprise technology services.

Before the effort, approximately 40 Service Owners and 20 financial and executive reviewers relied heavily on spreadsheets and disconnected workflows, creating administrative burden, inconsistent timelines, and limited operational insight.

To address these challenges, EOTSS implemented Apptio as a single system of record for service planning, budgeting, forecasting, reporting, rate setting, and customer billing. The result is a more coordinated framework that aligns strategy, service demand, operational forecasting, and financial accountability.

Customer feedback reinforced the need for change. Only 64% of surveyed billing contacts reported that the prior invoice package provided enough information to understand EOTSS service charges. The FY27 rollout addressed this through enhanced invoice reporting, detailed usage visibility, variance analysis, and integrated rate card access.

What makes this effort distinct is that it goes beyond process automation. EOTSS connected strategy, forecasting, actuals, chargeback, and customer reporting into a unified Technology Business Management (TBM) framework that advances operational accountability, cost visibility, and data-driven decision-making.

This model is broadly applicable to other states managing enterprise shared services and facing similar challenges related to cost recovery, budget visibility, and sustainable technology investment planning.

IMPLEMENTATION

EOTSS approached this effort as an enterprise transformation rather than a standalone technology deployment. The project began with discovery and process-mapping sessions across Finance, Business Planning, Strategy, Capital Planning, Billing, and Service Owners to identify inefficiencies, reduce duplication, and design a more coordinated planning model.

The roadmap focused on four phases: customer insights and demand, strategy and priorities, planning and forecasting, and operationalization. Together, these phases created a unified planning cycle aligned to governance, budgeting, and investment timelines.

Apptio was configured to support budgeting, forecasting, variance analysis, service rate modeling, chargeback reporting, and automated financial reporting. EOTSS also implemented a repeatable cost model supporting approximately 85 enterprise service rates and enabling more accurate consumption-based billing.

The project followed a phased governance approach with executive sponsorship, bi-weekly status meetings, stakeholder workshops, working sessions, and ongoing validation with Finance teams, Service Owners, billing contacts, and customer agencies.

Adoption was a critical focus. EOTSS engaged stakeholders through advisory groups, surveys, workshops, training sessions, and phased communications. Service Owners and financial teams actively validated workflows, reporting outputs, and rate structures throughout implementation.

The FY27 rollout introduced:

- Summary invoice reporting
- Service-level variance reporting
- Detailed usage reporting
- Integrated rate card access
- Customer training and self-service documentation

The platform is already delivering operational value. EOTSS completed its first business planning cycle within Apptio, enabling faster multi-year planning, improved financial coordination, and more timely operational insight for leadership.

IMPACT

This effort reshaped EOTSS IT financial management by making planning, forecasting, service costing, and customer billing more connected, transparent, and data-driven.

Previously, planning and billing relied on fragmented workflows, spreadsheets, delayed data, and disconnected governance processes. Customers had limited insight into service charges, while EOTSS teams spent significant time reconciling manual planning inputs and overlapping timelines.

Today, EOTSS operates through one coordinated planning cycle and one integrated financial management platform. Finance and executive leadership now have faster access to operational and financial insight to support investment strategy, service sustainability, and cost-efficiency decisions. The organization has already completed its first enterprise business planning cycle within Apptio, accelerating multi-year planning and improving enterprise coordination.

The effort also strengthened service planning maturity by equipping Service Owners with better financial and operational data. Leadership now has clearer visibility into spending trends, labor and contract costs, forecast variances, and profitability indicators through enhanced reporting and variance analysis.

The most significant customer-facing outcome is improved billing visibility. Agencies can now review service-level usage, monthly and year-to-date totals, charge variances, and rate details in a self-service format. This supports stronger forecasting, license management, deprovisioning decisions, and more informed budget discussions with EOTSS.

Quantifiable outcomes include:

- Integrated financial management platform supporting approximately $280 million in enterprise technology services
- Streamlined planning across approximately 40 Service Owners and 20 financial and executive reviewers
- Improved management of approximately 85 enterprise service rates
- Completion of the first enterprise business planning cycle within Apptio
- Automated forecasting, variance reporting, and chargeback capabilities replacing manual processes
- Enhanced billing visibility driven directly by agency feedback

More than a systems upgrade, this effort established the operational foundation for sustainable enterprise technology management across the Commonwealth. By integrating planning, forecasting, service costing, governance, and customer reporting into a unified framework, EOTSS created a scalable model for data-driven government operations that can be replicated across states facing similar enterprise technology management challenges.