

Case Study | 2022 TBM Council Award Winner: Public Sector Excellence

# How the United States Secret Service Uses TBM to Drive Significant Time Savings & Establish a Common Language

A United States Secret Service Case Study

## Executive Summary

The United States Secret Service (USSS) Office of the Chief Information Officer (OCIO) sought to improve IT functionality, reporting, and efficiency by enabling an IT financial management tool to create fiscal transparency, formulate and defend their budgetary position, automate reporting requirements, and reduce effort for data calls. The journey began with a pilot program which allowed USSS to understand the value that Technology Business Management (TBM) could provide by bringing together multiple, disparate data sources to create an accessible and trusted financial baseline in which they could defend their budgetary position and more accurately target opportunities for optimization. After a successful pilot, USSS embarked on their TBM journey and has achieved significant results through the improvement of processes, a centralized repository of information, and a common taxonomy that TBM provides.

## United States Secret Service Overview

The United States Secret Service (USSS) is an agency under the Department of Homeland Security whose mission is to protect our nation's highest elected leaders, visiting foreign heads of state, and national special security events and safeguard the United States financial infrastructure and payments systems. USSS combines these two missions into a unique dual objective to synergize with each other providing crucial benefits to special agents.

## 2022 TBM Council Award: Public Sector Excellence



### Website

[www.secretservice.gov](http://www.secretservice.gov)

**Founding date:** July 5, 1865

**Employee count:** 7K (based on 2021 YE)

**Headquarters:** Washington, D.C.

**Industry:** Government/Public Safety

**TBM Solutions:**  
ApptioOne Plus™



**“TBM has driven business optimization by streamlining a lot of processes.”**

**Frances Humphrey**  
Chief of IT Governance  
& Accountability

## The Challenge

The OCIO oversees a budget of approximately \$120 million, with the CIO having accountability over \$165 million of IT spend across other organizations as mandated by the Federal IT Acquisition Reform Act (FITARA). The USSS OCIO sought to improve IT functionality, reporting, and efficiency by enabling an IT financial management tool to create fiscal transparency, formulate and defend their budgetary position, automate reporting requirements, and reduce the effort for data calls. The journey began with a pilot program which allowed USSS to understand the value that TBM could provide by bringing together multiple, disparate data sources to create an accessible and trusted financial baseline in which they could defend their budgetary position and more accurately target opportunities for optimization.

## Establishing the Solution

The Secret Service started by developing a vision, building a roadmap, and garnering buy-in from executive leadership. Next, the USSS team developed a business case and received approval for funding the initial TBM investment. With dedicated resources, the team proceeded to leverage existing data sources across the organization to deliver their TBM solution. Using an agile approach, USSS focused on delivering value quickly and incrementally building new TBM capabilities.

## The Result

USSS has achieved significant results through the improvement of processes, a centralized repository of information, and a common taxonomy that TBM provides.

### Leveraging Common Frameworks to Overcome Data Challenges

Governance processes within government agencies often require sharing technology investment and spend data to support the federal IT transparency and data modernization initiatives. Because the information must be accurate and comprehensive, coordinating the gathering and submission of this information is labor

#### Benefits:

- 100% increase in FITARA scores after TBM practices and tools adopted
- Department of Homeland Security compliance score increased to a "B" from previous "D-" in June 2019
- Improved velocity and time saved for report preparation
- Increased consistency and credibility of reports, allowing for better tradeoff discussions between consumers and service owners

intensive and requires immense effort from across the organization. Furthermore, internal leadership needs very similar data but often presented in different perspectives with more granularity to manage USSS IT. Frances Humphrey, Chief of IT Governance & Accountability, shared, "TBM has driven business optimization by streamlining a lot of processes. As an organization that has no room for failure, business processes, a lot of times, get left behind".

Understanding IT expenditures within federal agencies can be very challenging. Critical data for TBM is spread across various systems and owners, and the strong culture of data protection can make it difficult to foster collaboration. Additionally, those data repositories are characterized in different ways and use varying methodologies. To address these issues and improve reporting capabilities, the USSS leveraged a three-pronged approach in 2019. First, the agency sourced data from their financial management, procurement, and asset management systems and aligned it to the [TBM taxonomy](#). This was done in the Technical Investment Planning System (TIPS), a term coined by the agency to represent the systems that manage their IT finances. Next, the unified data within TIPS was linked with the IT service management system to establish a common service framework. Lastly, USSS used leading change management practices to socialize updates to their data management policy guidance. This approach resulted in a continuous improvement in the understanding and reporting of the IT environment.

As a testament to this improvement, Secret Service's compliance for FITARA scores went from 50% at the start of TBM to 100%. This helped the Department of Homeland Security raise their compliance score from a D- in June 2019 to a B in the latest rating. The wins have led to an increase in trust in the quality of data provided and the recognized value in IT services delivered to the organization.

### **Varying Benefits of Dynamic Reporting of Cost & Operational Data**

The TIPS tool has been used to stand up dynamic reporting as well as support data calls requiring interpretation of several fiscal years of financial data. One of the key use cases, identified with other divisions within the CIO organization, was to be able to compare financial actuals against spend plans established at the beginning of the year. TIPS provides a centralized source for this data as opposed to individual spreadsheets held separately in multiple locations, helping to both modernize and digitize the financial planning workflow. To establish a common baseline of understanding, actuals and spend plans have been aligned to the TBM taxonomy, with investment standardization in progress, setting the stage for modernization efforts to include cloud migration

and FinOps practices. Several data sources have been incorporated, including CMDB data which will be used to establish application total cost of ownership (App TCO), service TCO, and chargeback capabilities within the TIPS tool allowing for a comprehensive view of the computing environment and value-based discussions with stakeholders. Standardized reporting has provided visualizations that easily convey key information in a user-friendly format. More importantly, the reports align spend to the administration's broader objective focus on improving the federal customer experience.

Reporting at USSS now requires less time to prepare, has become more consistent and credible, allowing for better tradeoff discussions between consumers and service owners. The transformed data ingested from the financial management system allows the tool to present data from different perspectives and is becoming the definitive source for IT cost and asset data. The combination of contract data with asset information allows leaders to quickly compare actual technology refresh acquisitions against planned acquisitions. This spend can be viewed by year, directorate, or technology, and this yields a significantly better forecast and budget for out-years.

## Conclusion

As the winner of the 2022 TBM Council's Public Sector Excellence Award, the United States Secret Service offered advice to new government TBM programs. Because government agency goals are not rooted in financial profits, TBM provides a foundation to deliver on the strict and unique requirements of federal mandates and initiatives. Combining tight budgets with the stipulated deliverables required by numerous stakeholders, the USSS TBM team highlights the savviness and attention to good communication is required to achieve TBM success. The USSS TBM team also shared that becoming intimately familiar with what your executive stakeholders truly need, and focusing on delivering successful use cases that build trust and momentum, rather than trying to deliver on all use cases at once, is a very important factor when rolling out a new government TBM program. Pick one or two priorities, do those extremely well, and then grow your program from there, but always lead with the priorities of your executive customers.



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## Join the TBM Council

Founded in 2012, the Technology Business Management (TBM) Council is a nonprofit business entity dedicated to advancing the discipline of TBM through education, standards, and collaboration. Governed by an independent board of both global and regional business technology leaders, this diverse group represents some of the world's most innovative companies, including Mastercard, Wells Fargo, State Farm Insurance, Nike, Stanley Black & Decker, Equifax, ANZ Group, Commonwealth Bank of Australia, Adidas, Bank of Ireland, and more. The TBM Council provides best practices for leaders to leverage so they can react quickly to changing market dynamics and optimize cloud and agile strategies to deliver on business objectives.

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[tbmcouncil.org](https://tbmcouncil.org)