knowledge16

Experience the Service Revolution



Portfolio & Project Management

Enabling End-to-End Transparency Throughout Delivery

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servicenow

Agenda

Background & Challenges

Capability Development Approach

Delivery Approach & Project Overview

Lessons Learned

Key Points

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What we hope you get out of the Session Today

- "Vision" of how SNOW can be leveraged to be a single platform for Portfolio and Project Management
- "Insight" to the capabilities provided OOB, options to extend beyond OOB and integrate across the platform
- "Wisdom" from our lessons learned to make you successful in your implementation or on-going roadmap for SNOW Demand, PPM and Resource Mgmt

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HALYARD Background

- As a spin-off of a $2B global business unit from a $20B manufacturing firm, Halyard Health had a short time frame to address these unique challenges:



Building an Organization

- Designing, staffing, and developing the capabilities of a new IT organization while inheriting the IT complexities and footprint of a $20B company
- Short period of time to develop process capabilities, and implement



Meeting Portfolio Needs

- An existing large and broad portfolio backlog of IT demand that had been put on hold for2+ years
- Business stakeholders historically perceiving their needs going into a black hole with no transparency



Right Sizing Capabilities

- A need for Portfolio capabilities to be “fit for purpose,” meet Halyard’s size and allow them to be smart with their IT Investment decisions
- A solution that would automate, simplify, bring standardization and ultimately enable not hinder a smaller workforce

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Capability Development Approach

- To stand up the Portfolio and Project Management capability from the ground up, a process-first approach was taken to accelerate and enable success in automating.

Define Process and Governance Structure

OBJECTIVES

Defined the key processes to support the portfolio & project organization:

- Demand in-take & portfolio prioritization
- Project Management & PMO governance
- Resource Management

Develop Initial Toolsets to Support & Pilot Processes

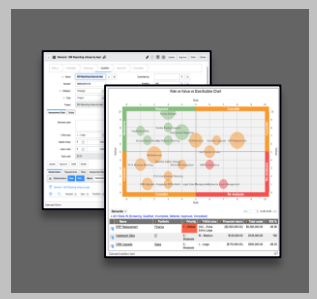
OBJECTIVES

- Developed interim toolkits (e.g. Excel, SharePoint, Word) to support the execution of the process
- Deployed new processes and interim toolkits to pilot and capture lessons learned to refine requirements

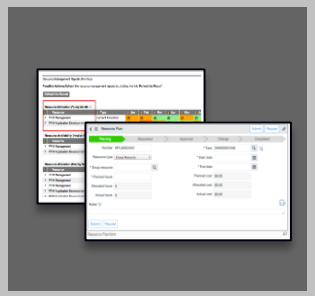
Automate Foundational Capabilities

- Automated the process, implementing Demand, Project, and Resource Management modules in ServiceNow

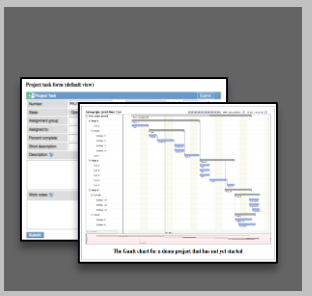
Project & Portfolio Suite



Demand Mgmt.



Project Mgmt.

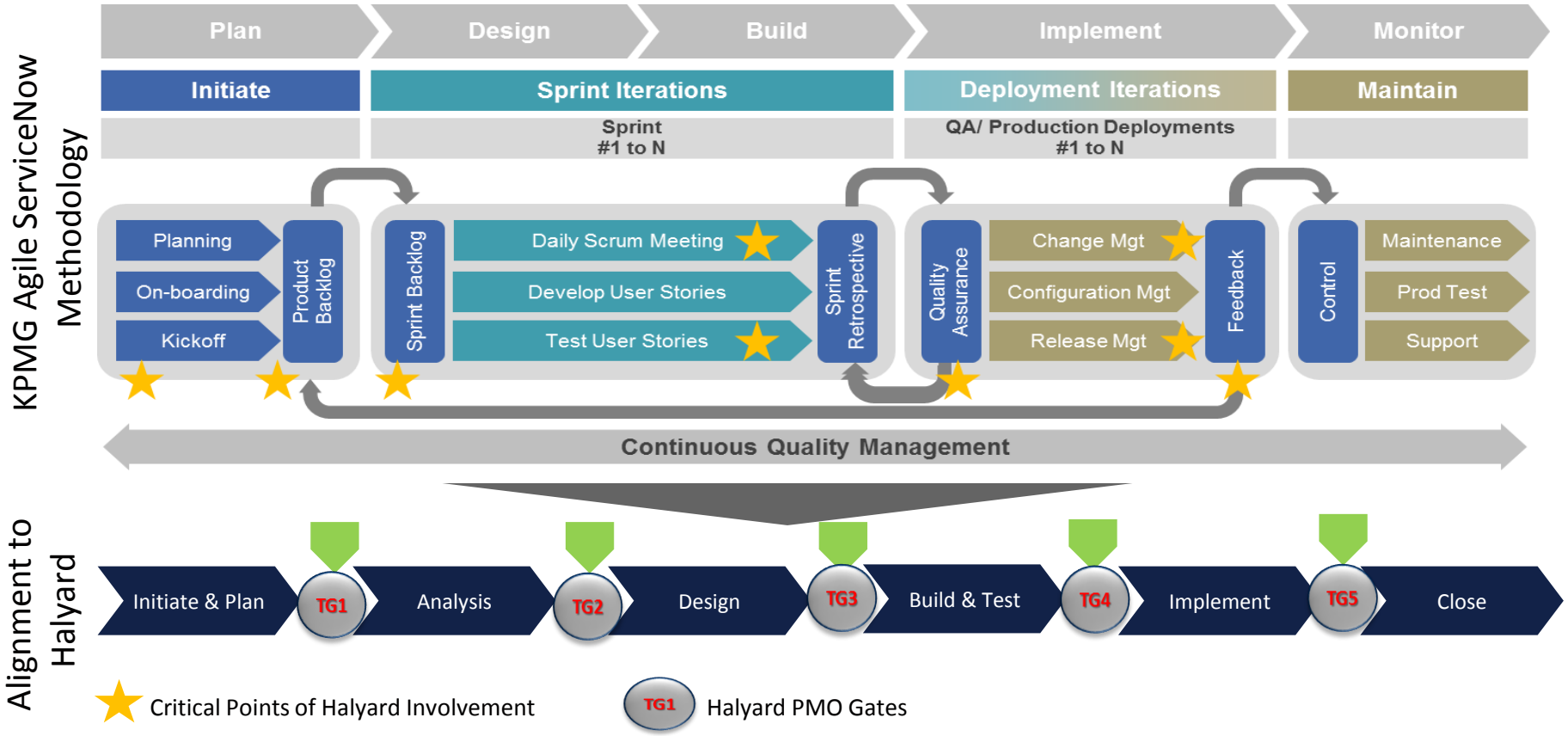


Resource Mgmt.

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Delivery Approach

- An Agile methodology was used to increase stakeholder engagement and iteratively deliver capabilities.



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Snapshot of Delivery Timeline

- To quickly enable processes and focus on “must have” capabilities, a 4 two-week sprint approach was taken.

PPM Task		Weeks										
		1	2	3	4	5	6	7	8	9	10	11
Plan	Project Mobilization & Planning											
Build	Configure SN Demand Mgmt. Module		Sprint									
	Configure SN Project & Portfolio Mgmt. Module				Sprint							
	Configure SN Resource Mgmt. Module						Sprint					
	Configure SN PPM Suite Reports & Dashboards							Sprint				
	Develop Training Guides							Resource		PPM		
Implement	Release Testing (Regression & UAT)											
	Train the Trainer											
	Deployment											

Although configuration on functionality was completed PPM and Resource Mgmt. were not rolled out to the user community in this timeline. We will expand upon this and our key lessons learned later on..

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Demand Management – ServiceNow Capabilities Delivered



HALYARD Key Need Areas	Capabilities Delivered in servicenow
1 Single Source	• Opportunity In-Take: Provides a single source to capture all IT demand types, both internal IT and business ad-hoc, and annual business planning requests, including enhancements, projects, and programs, which removes the challenges of having demand captured across multiple and disparate systems • Opportunity Categorization: Ability to categorize and align demand to portfolio areas across the enterprise
2 Standard and Holistic Screening & Planning	• Business Case Development & Evaluation: Ability to standardize and customize business case development to fit the needs for all demand types; provides capability to evaluate, compare, and align IT demands to business strategies • Budget and Resource Estimation & Forecasting: Promotes cross IT team collaboration on resource planning and estimation that leads to increased accuracy in estimates to forecast both budget and resources eliminating delays and re-work downstream in delivery • Planning & Evaluation: Capability to perform resource planning allocations and budget scenario planning to evaluate multiple options
3 End-to-End Transparency	• Lifecycle View & Management: Provides the ability to view and manage across the IT lifecycle from demand capture/evaluation to project delivery and operations support of products

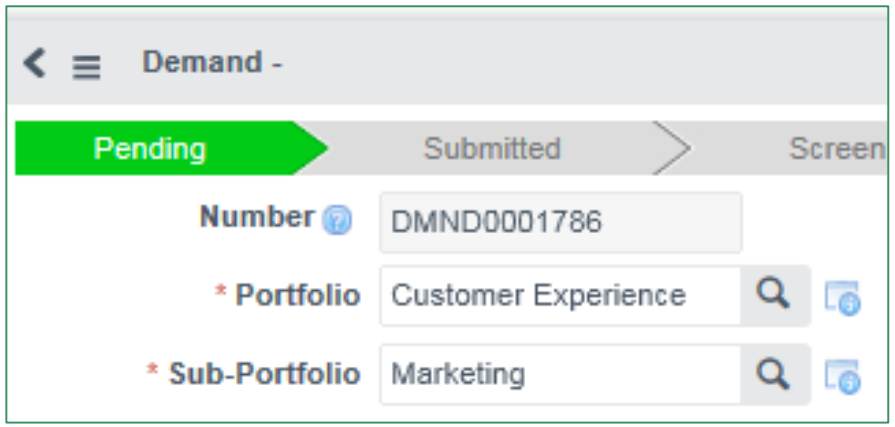
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Demand Management
Beyond OOB Capabilities Delivered – Portfolio and Workflow

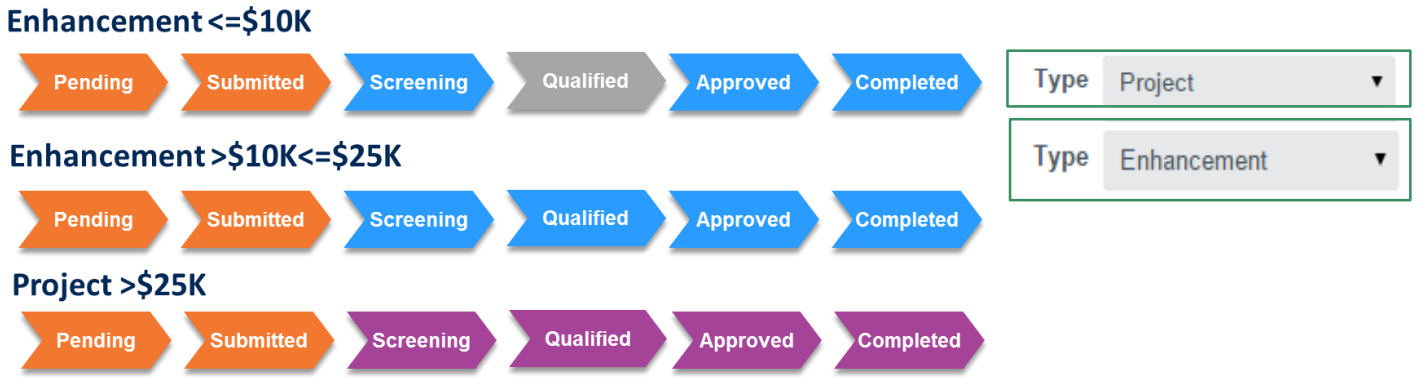
1 Single Source

Halyard needed the ability for anyone in IT to submit a demand request for both project and enhancement work in a centralized location to assist their portfolio leads with managing their workload and prioritization.

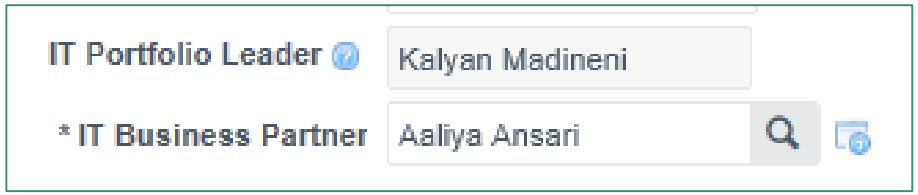
Customized the Portfolio Table to Allow for Sub-Portfolios



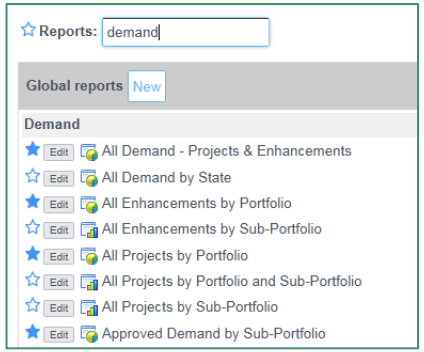
Designed Workflows to Meet Process Requirements to Fit Needs of Different Demand Types

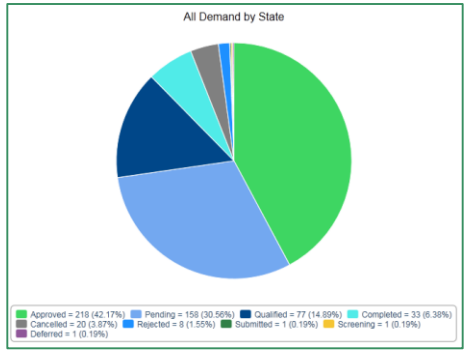


Customized the Workflow to Provide the Ability for Portfolio Leads to Manage Workload and Assign Teams



Prepared Reports and Dashboards to Have 1 Place to View All Demand Across the Organization





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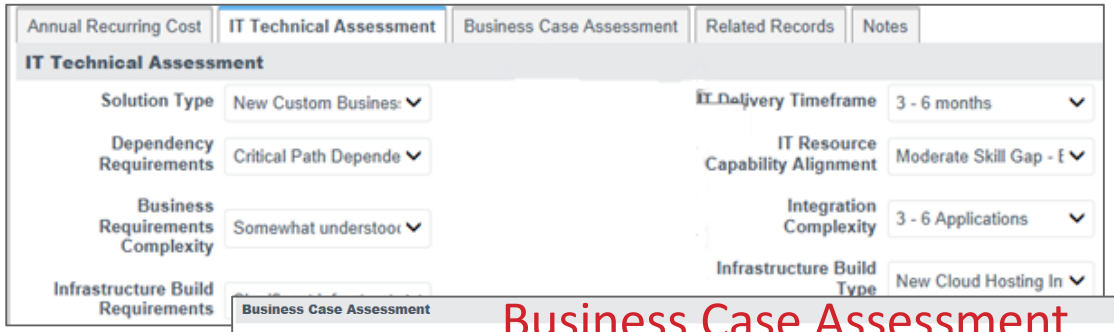
Demand Management
Beyond OOB Capabilities Delivered – Demand Evaluation

2 Standard and Holistic Screening & Planning

To standardize and improve the screening of opportunities an IT Technical and Business Case Assessment was configured to better assess opportunities risk, size, value, impact, and complexity.

Pending > Submitted > **Screening** > Qualified > Incomplete > Deferred > Rejected > Approved > Completed > Cancelled

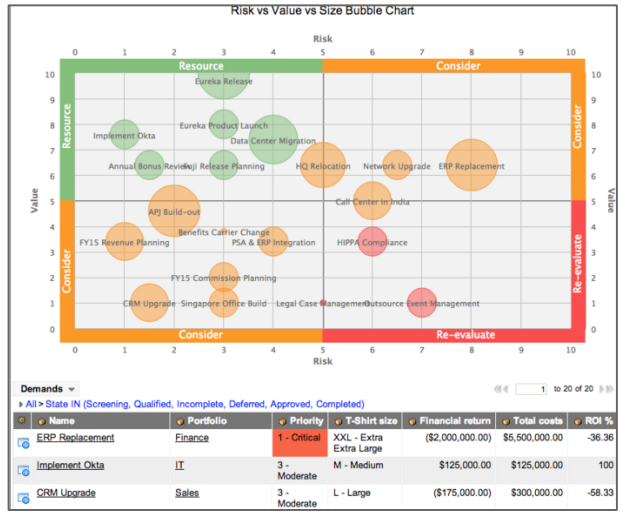
IT Technical Assessment



Business Case Assessment



Scoring and Comparing Opportunities



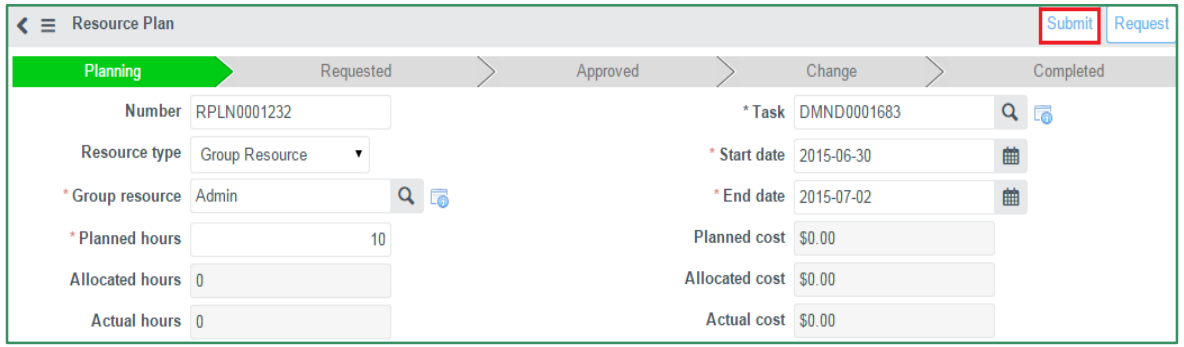
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Demand Management
Beyond OOB Capabilities Delivered – Cost & Resource Planning

2 Standard and Holistic Screening & Planning

OOB Eureka did not provide the capability to perform bottom up and multi-year cost planning to capture both resource/labor cost and non-resource labor cost. To meet this need the resource mgmt. module and a custom “Cost Estimate” table were leveraged to provide a robust cost planning capability.

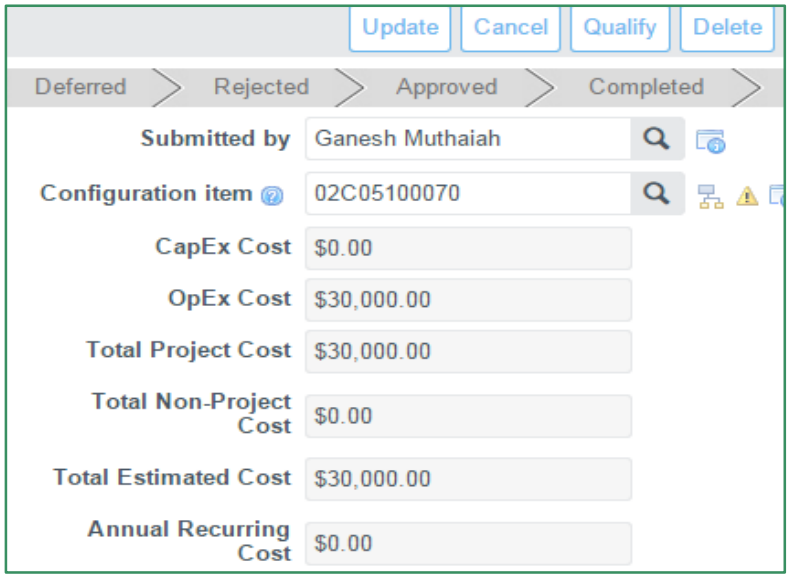
Resource Labor Cost



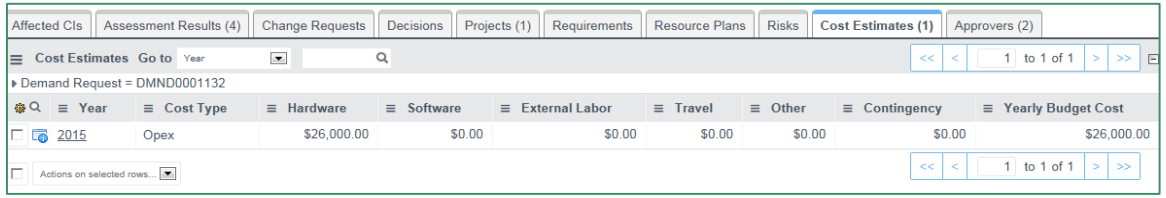
Non- Resource Labor Cost



Demand Total Cost Estimate



Demand Yearly Cost Estimate



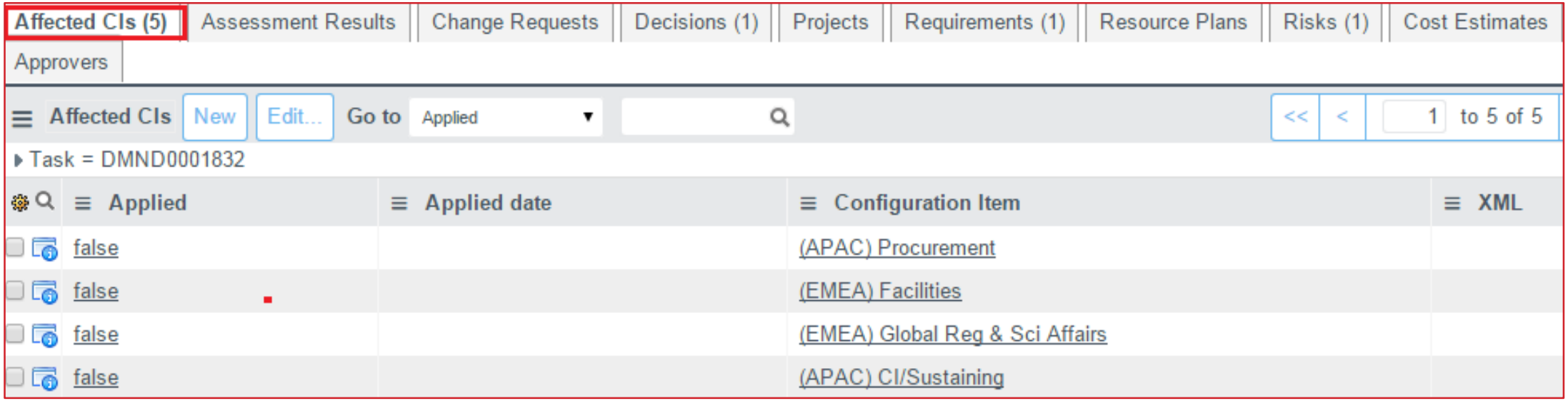
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Demand Management
Beyond OOB Capabilities Delivered – Application Tracking

3 End to End Transparency

Halyard was in the process of identifying opportunities to rationalize its IT Portfolio and reduce cost.
The business case assessment and OOB capability to relate application CIs was leveraged to track these opportunities.





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Key Challenges and Lessons Learned in Demand Management

Area/Challenge

Balancing the data entry requirements

Challenge:

Users initially struggled with the purpose of data fields required to capture a business case and technical assessment and felt it is was administrative overhead, not value added.

Lessons Learned

Lessons learned to overcome included:

- Conducting review and working sessions with user community to document value/purpose and who consumes/uses the data for each field removing those fields that did not add value or were not consumed by anyone.
- Run executive updates and status meetings from the tool or reports from demand showing the users that their leadership teams are using the data to make decisions. This drove accountability.

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Project MANAGEMENT – ServiceNow Capabilities Overview

HALYARD Key Need Areas

Capabilities Delivered in servicenow

1 Project Delivery Flexibility

- Delivery Methods: The ability to deliver projects via a waterfall or Agile method in one tool versus having separate tools and sources of data to manage project delivery and reporting for different methodologies.
- Project Plan Templates to Project Type: Ability to customize and auto-generate project plan templates based on project type to standardized and tailor delivery

2 Project Management Core Functions

- Project Planning: Ability to manage project plans across the organization in one tool to provide visibility and traceability. (e.g., Current OR Plan) without large manual effort
- Risk/Issue Management: Ability to track issues, risk, key decisions, and meeting minutes
- Project Document/Deliverable Management: Upload and route required project deliverables to approvers/stakeholders to promote the one-stop shop for project management
- Project Financial Management: Ability to track cost forecast, actuals, and compare to budgeted cost
- Status Reporting: Create weekly status reports in the tool versus manual PowerPoint, which enables the ability to auto-create milestone schedule & baselines into a PDF

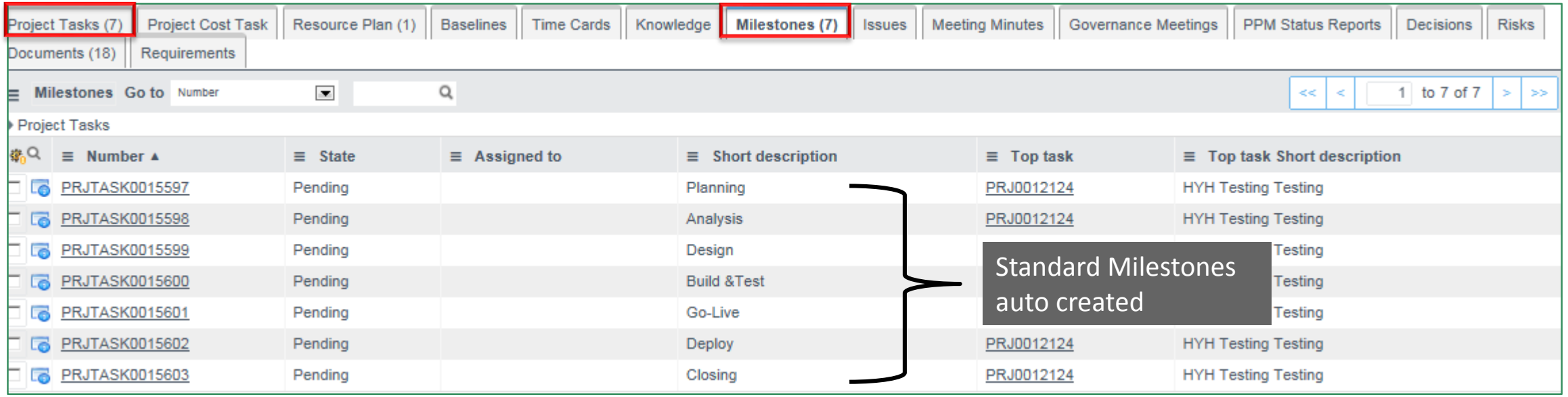
3 Project Governance

- Governance and Gate Meetings: Ability to request and schedule governance meetings (e.g. PMO, ARB) and facilitate those meetings to capture key decisions, approvals, and action items.

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Project Management
Beyond OOB Capabilities Configured – Project Planning

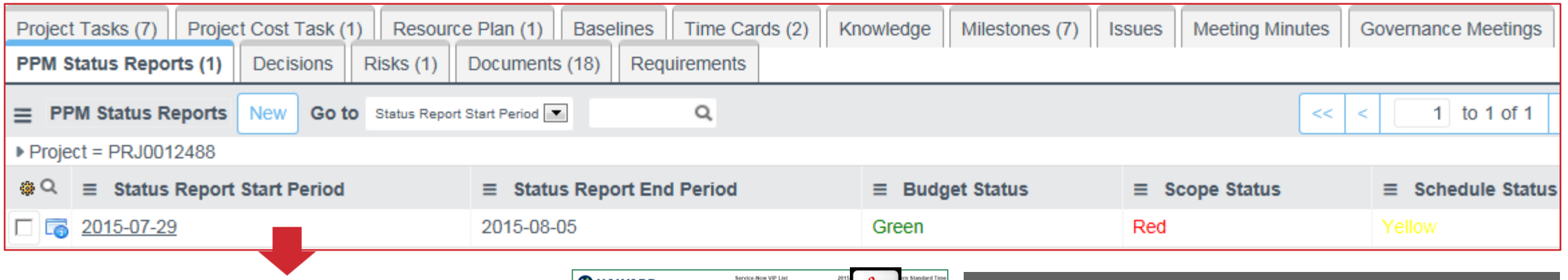
As a foundational starting point to creating project templates based on different project types, a set of standard Milestones were setup to be auto-generated on the project record to assist with methodology standardization.

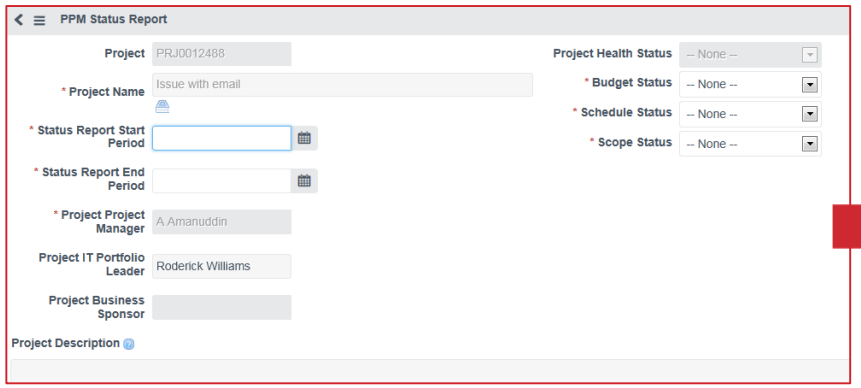


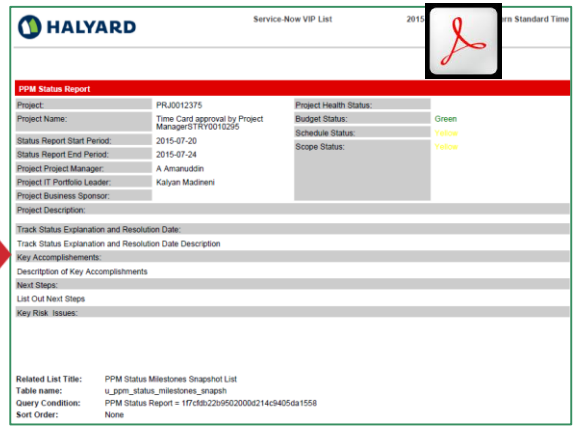
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Project Management
Beyond OOB Capabilities Configured – Status Reporting

A custom PPM Status Report table was created to automate a current manual process of creating a weekly project status report and provide a historical snapshot view of a project's status throughout its lifecycle utilizing the baseline capability to take a snapshot of key milestones, risks/issues, and budget.







Key Capabilities

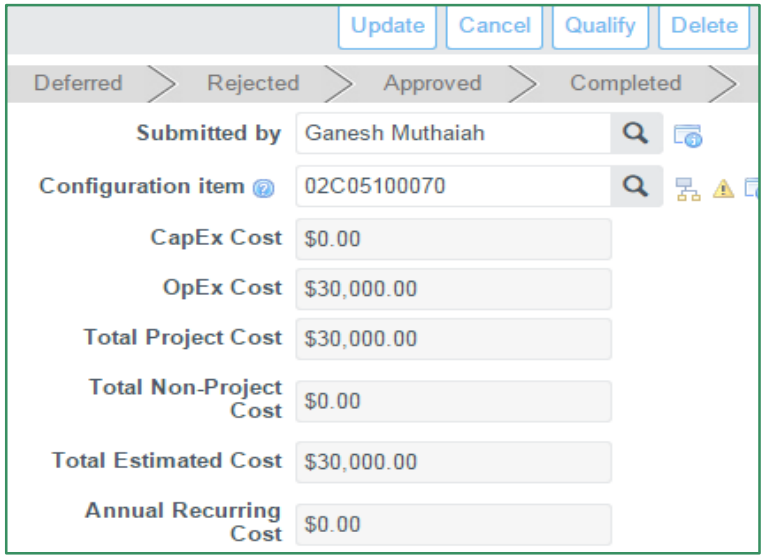
- Ability to create weekly status report and export to pdf with key status information captured including key risk, issues, milestones, and project financials.
- Ability to see historical project status view in one place on the project record to assist in facilitating status reviews.

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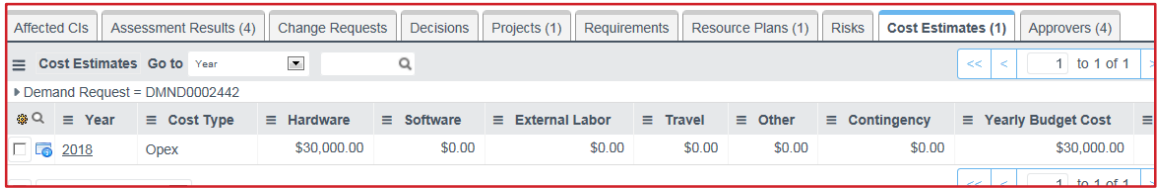
Project Management
Beyond OOB Capabilities Configured – Financial Management

To provide a end-to-end view of project cost, a custom solution was utilized to bring over the approved budget cost from the associated demand record to assist in managing the project to the approved budget.

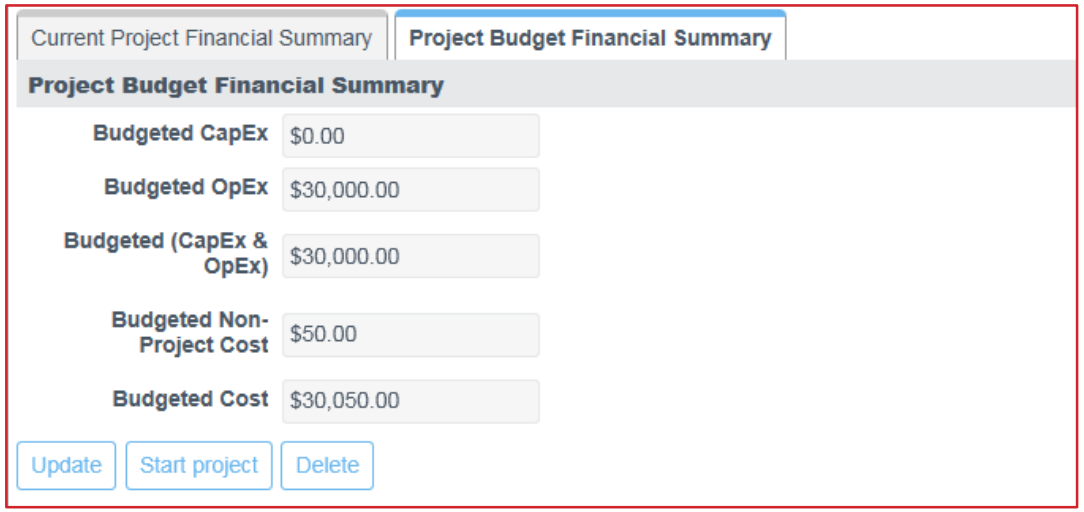
Approved Budget on Demand Record



Cost Estimate Breakdown on Demand Record



Project Budget Summary Provided on Project Record from Approved Demand Record

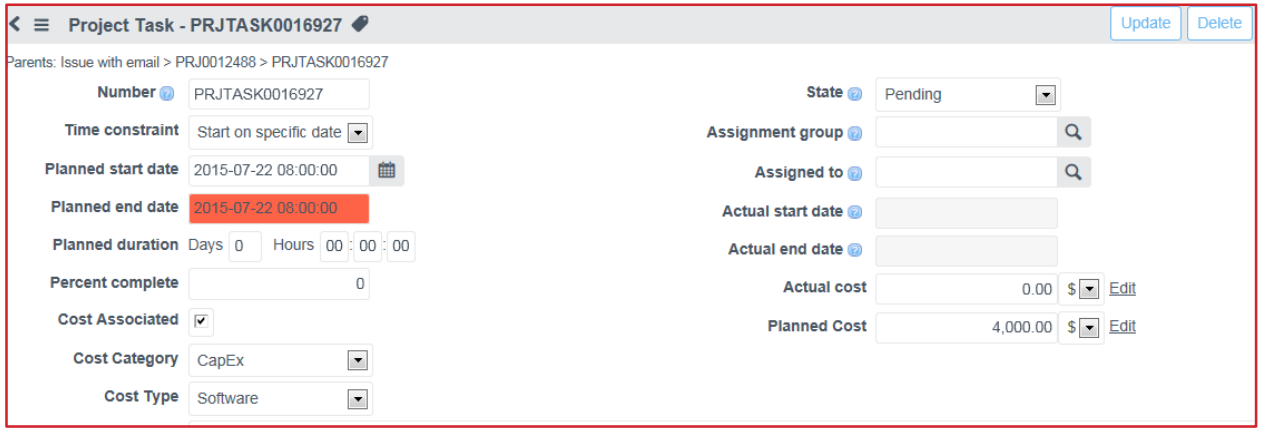


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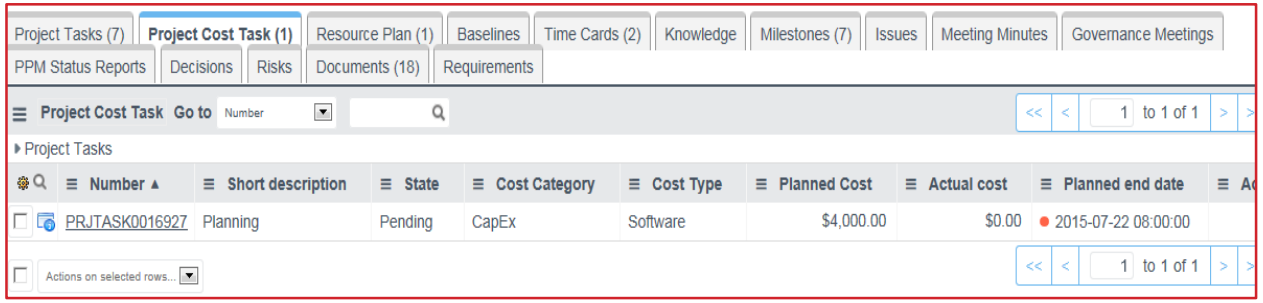
Project Management
Beyond OOB Capabilities Configured – Financial Management

A custom solution utilizing the project task and actual time cards was utilized to enable the ability to create and manage a project cost plan within the project record versus using the current manual Excel-based cost plan template.

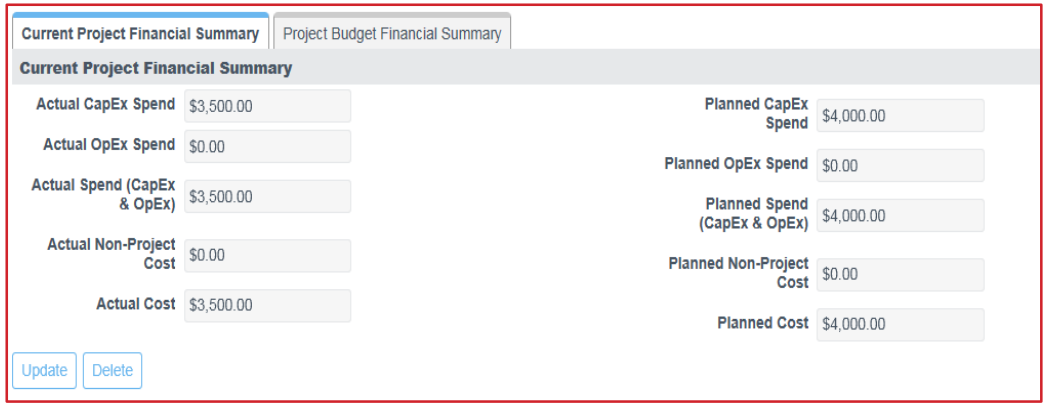
Ability to Add Cost Type and Amount to Project Task



Filtered View of Cost Task to Manage Project Cost Plan



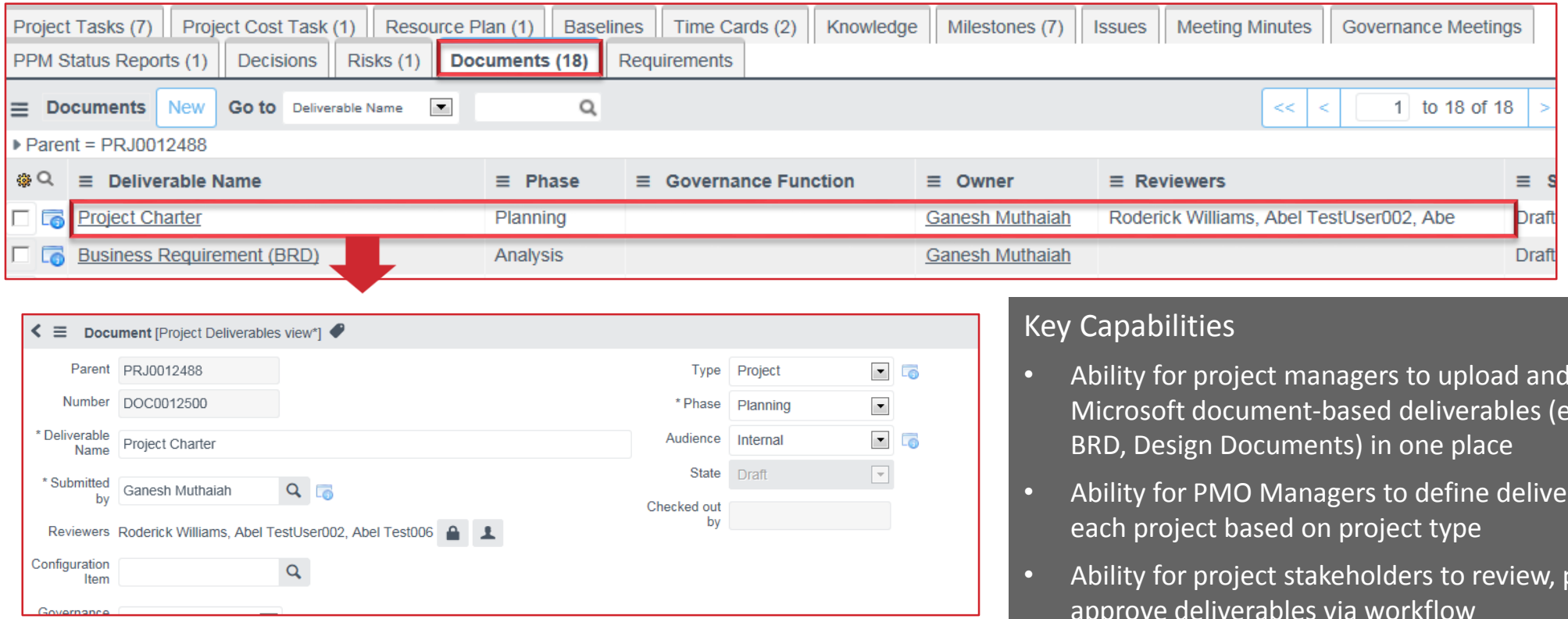
Project Financial Summary Provided on Project Record with Planned Cost and Actual Cost to Date



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Project Management
Beyond OOB Capabilities Configured – Deliverable Mgmt.

The managed documents capability on ServiceNow was leveraged to auto-create deliverable requirements and provide a mechanism for project managers to upload, request team reviews, and gain approval of required deliverables all from the project record.



Key Capabilities

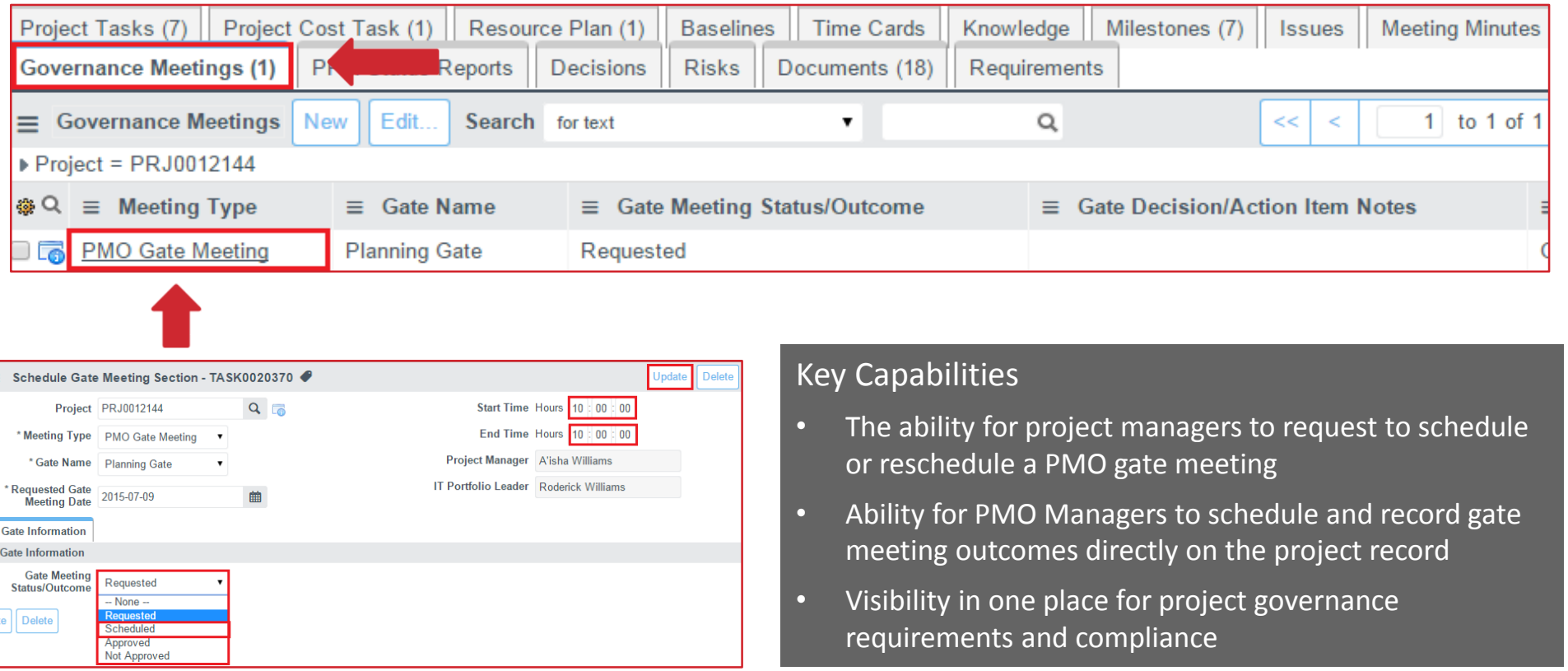
- Ability for project managers to upload and mange their Microsoft document-based deliverables (e.g., Project Charter, BRD, Design Documents) in one place
- Ability for PMO Managers to define deliverable requirements for each project based on project type
- Ability for project stakeholders to review, provide feedback, and approve deliverables via workflow

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Project Management
Beyond OOB Capabilities Configured – PMO Gate Meetings

3 Project Governance

To provide project managers with a one-stop shop for managing their projects a custom Governance Meeting table was created to facilitate the scheduling and management of PMO gate meetings. It has been architected in such a way to facilitate broader project governance meetings such as the ARB in the future.



Key Capabilities

- The ability for project managers to request to schedule or reschedule a PMO gate meeting
- Ability for PMO Managers to schedule and record gate meeting outcomes directly on the project record
- Visibility in one place for project governance requirements and compliance

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Key Challenges and Lessons Learned in Project Management

Area/Challenge

Organizational Change Management

Challenge: There was a significant amount of change taking place in the organization, a user community that previously had not been the sole owner of PM responsibilities, and had little to no experience on the platform as a whole.

User Experience

Challenge: The project planning functionality provided on the Eureka release did not match users' historical experiences/preferences with ability to edit in real-time like Microsoft Project.

Lessons Learned

Lessons learned to overcome included:

- Pilot functionality completed and focused on gaining adoption and value on demand management to set up success for rollout of Project Management
- Continue to leverage interim manual-based tools to facilitate Project Management and reporting to gain additional insight

Lessons learned to overcome included:

- Wait to roll out PPM after upgrade to Geneva release to gain updated planning console functionality that provides like-for-like project planning capability

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Resource Management – ServiceNow Capabilities Overview



HALYARD Key Need Areas

Capabilities Delivered in servicenow

1 Resource Planning & Forecasting

- Ability for projects and enhancements to plan for resources and determine resource availability before committing to delivery
- Determine resource gaps/capacity proactively to mitigate drop in ability to deliver to the business

2 Time Card and Actual Tracking

- Track weekly time cards across the IT organization with focus on project work and non-project work
- Enables project managers to obtain actuals to their projects for internal and co-source resources
- Assign rates for resource type to gain clarity into true total cost of delivery of projects and ownership
- Enables IT to determine areas that are understaffed and build business case or make decisions on staffing

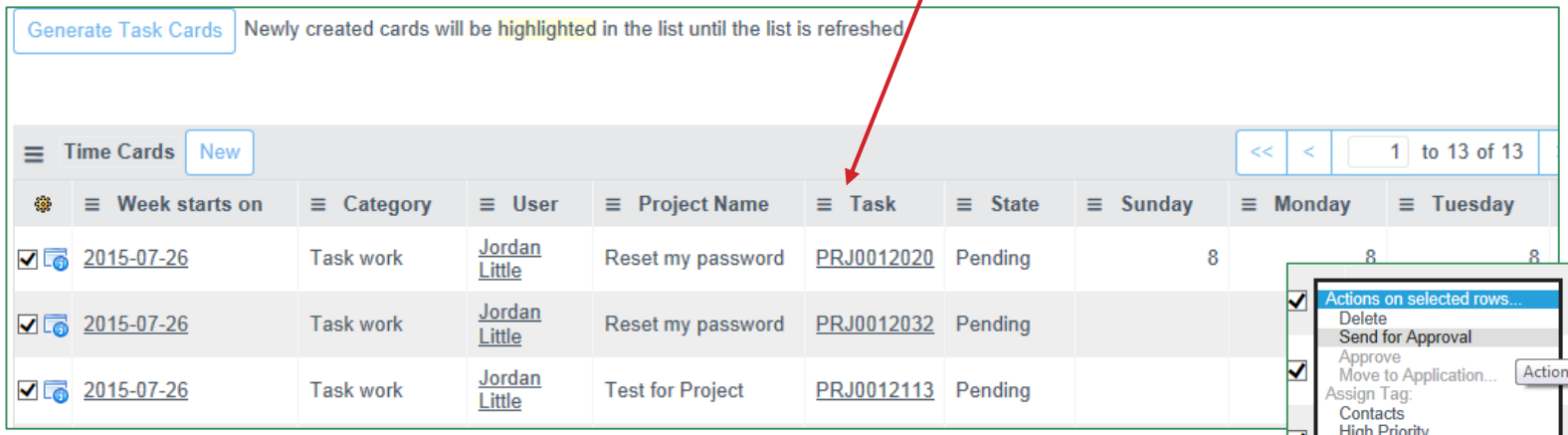
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Project Management
Beyond OOB Capabilities Configured – Weekly Time Cards

1 Resource Planning & Forecasting

To reduce the effort and complexity with leveraging the OOB time card capability of tracking time at the task level we customized to track time at the project and non-project time category level. This assisted with user adoption and use.

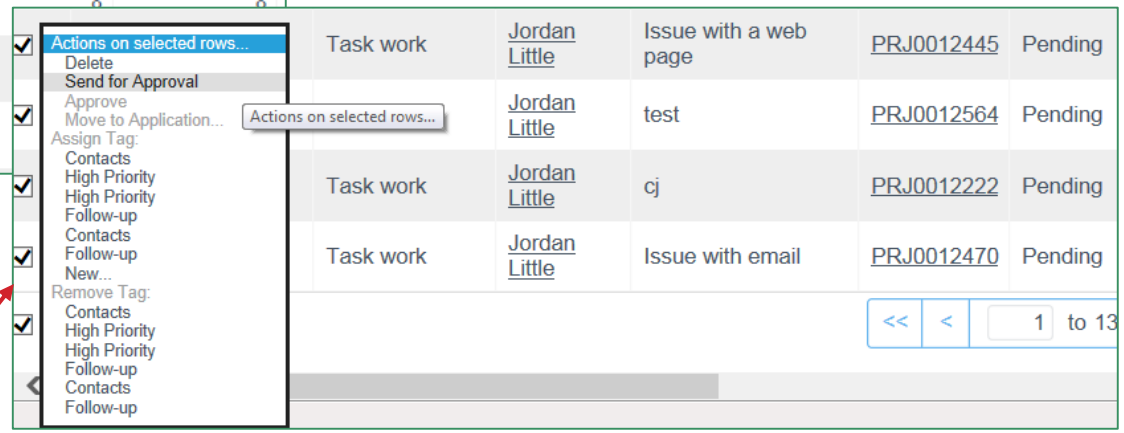
Projects Assigned to Automated on Time Card Based on Resource Plan





Project Phase Auto-Populated to Assist with CapEx vs. OpEx Tracking

Custom Script Action to Enable the Ability to Mass Submit a Complete Week of Time Cards for Approval versus Requiring Each Individual Task Time Entry to Be Submitted One by One



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Key Challenges and Lessons Learned in Resource Management



Area/Challenge

Resource Planning
& Forecasting – Allocation

Challenge: The eureka release did not provide a easy way to allocate a resource across multiple projects over a month+ period.

Lessons Learned

Lessons learned to overcome included:

- Decision was made to move ahead swiftly with implementing Geneva to embrace the Resource Planning and Forecasting functionality. We delayed this process in Eureka, and used Excel spreadsheets for planning, coupled with actuals from SNOW for the interim.
- Focused on capturing actuals as a foundational first step. Team members are now used to following the normal cadence of reporting actuals against projects, preparing them for resource planning and forecasting post Geneva upgrade.

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Our Immediate Roadmap – Continuously Evolving

Timeline

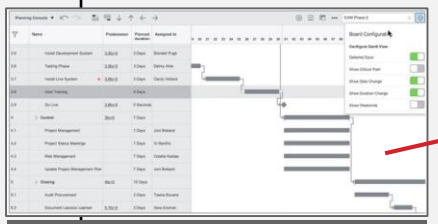
May	June	July	August

Geneva Upgrade



- Resource Allocation – spread and stagger
- Soft Allocations
- Utilize Resource Mgmt. groups vs. assignment groups for resources
- What-if analysis

Configure Resource Mgmt. to Include Geneva Capabilities and Train



- Utilize updated planning console to establish enhanced project plan templates and increase PM adoption

Configure Project Mgmt. to Include Geneva Capabilities and Train

Train and Update Resource & Project Mgmt. Connection

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Top Takeaways

1. Have a startup mentality to focus on enabling capabilities and not boiling the ocean

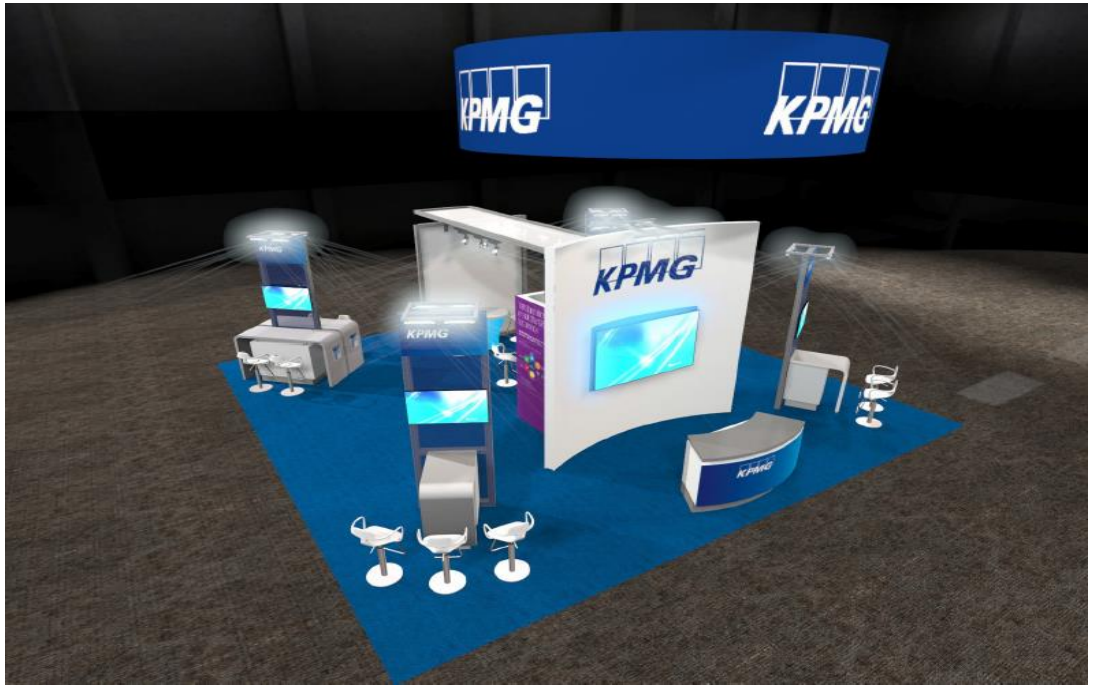
2. Drive process standardization first and then automate

3. Communicate and demonstrate the value of a single source to knock down siloes and drive organizational Change Management

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Marcia Calleja

IT Strategy & Performance Leader

Halyard

Jordan Little

Manager KPMG CIO Advisory

KPMG

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