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Experience the Service Revolution



PPM – Annual Budgeting to Benefits Capture

Changing the Relationship with Stakeholders

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Legg Mason

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Agenda

Legg Mason Overview

Project Governance

Financial Reporting

Fiscal Year Planning

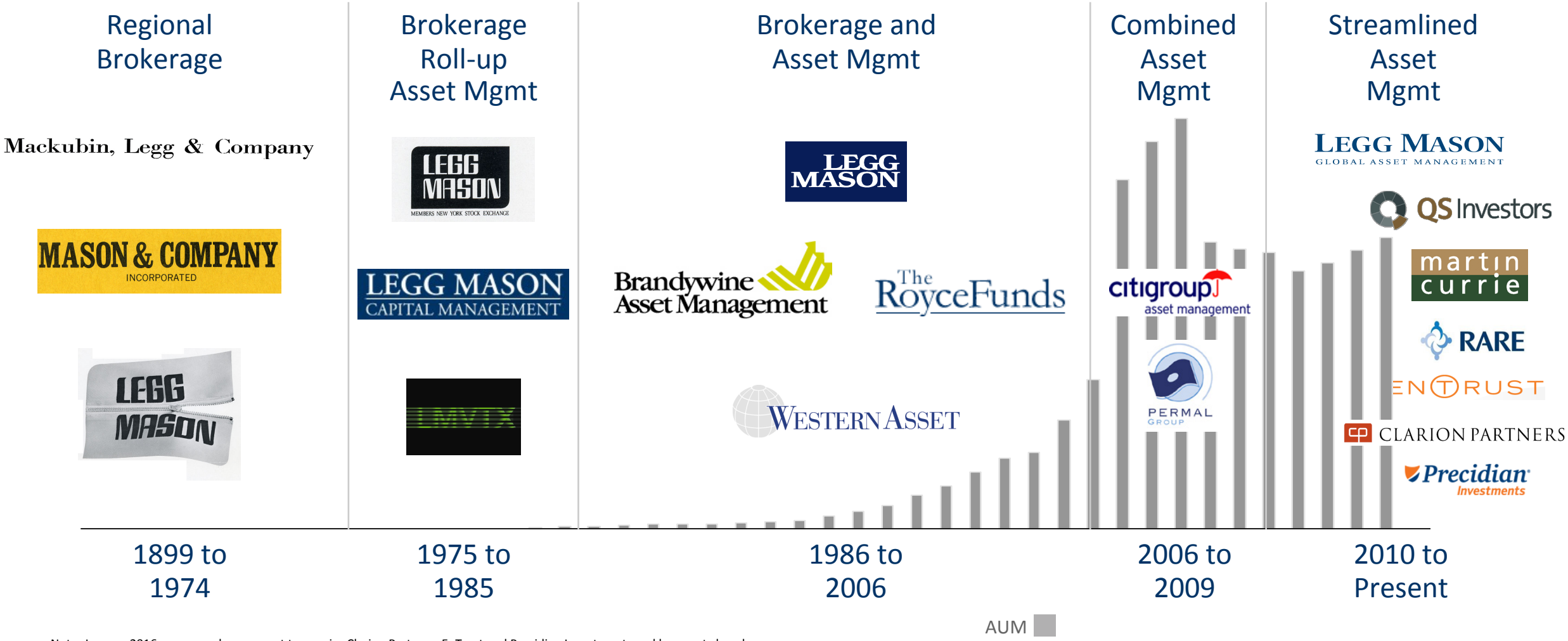
Takeaways

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Legg Mason Overview

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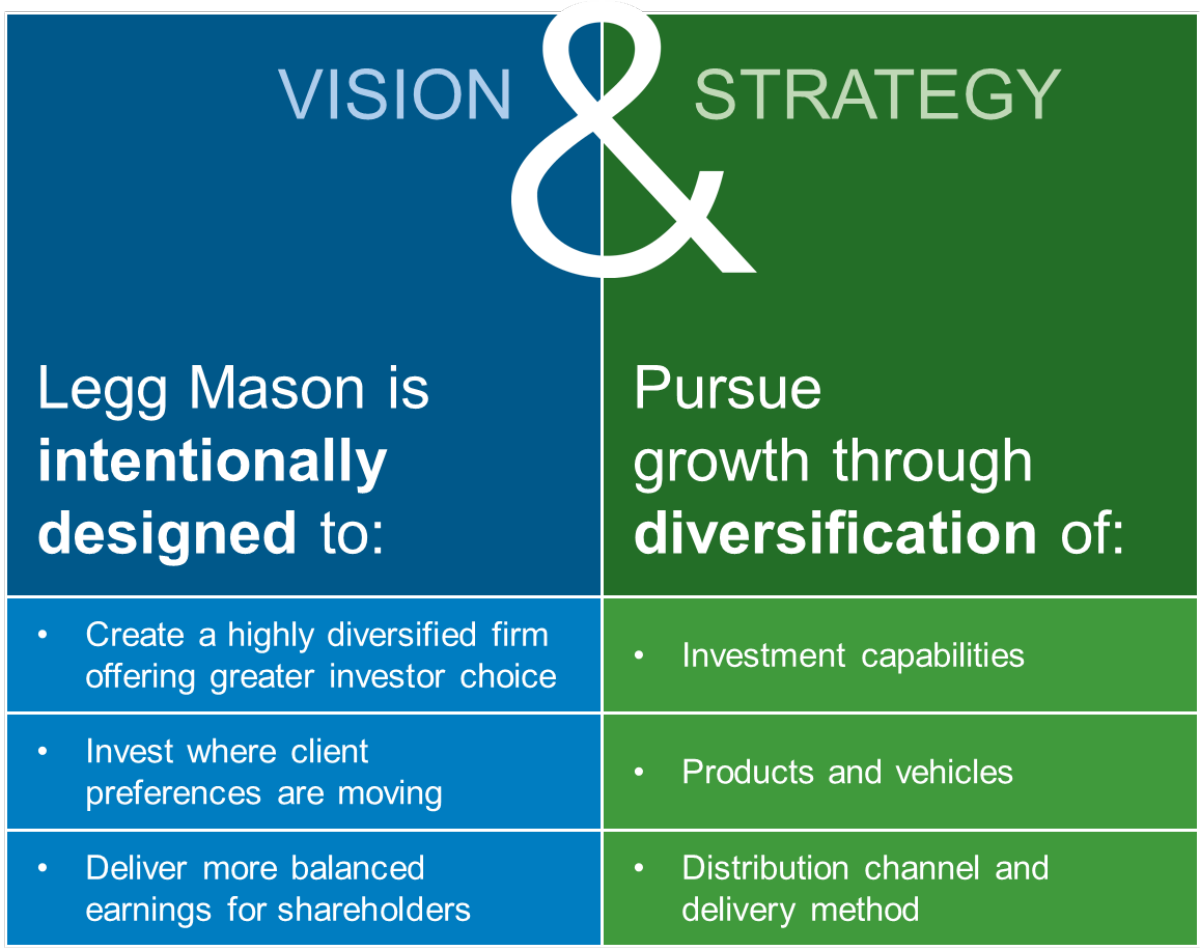
Legg Mason's History



Note: January 2016 announced agreement to acquire Clarion Partners, EnTrust and Precidian Investments and have not closed

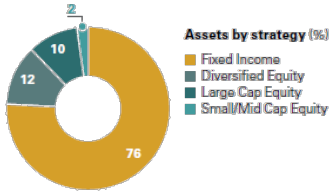
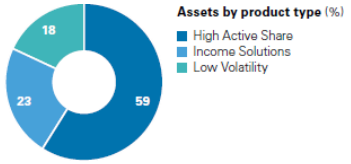
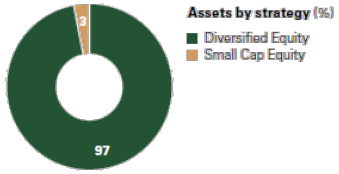
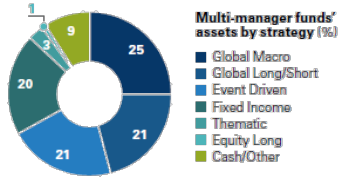
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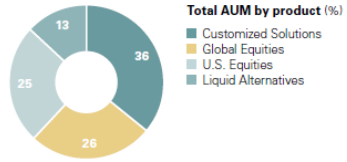
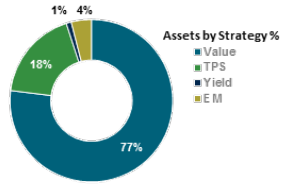
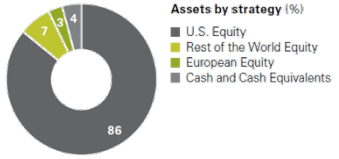
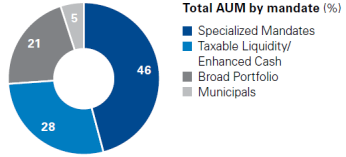
Legg Mason – Vision and Strategy



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Affiliate Overview

Affiliate	Brandywine GLOBAL	ClearBridge Investments	martin currie	PERMAL
Description	**Global value investing** Pursuing value since 1986 across equity and fixed income, globally an din the U.S. Historically institutionally focused, the firm has both a boutique's agility and an industry leader's stability and resources.	**Quality-focused equity** Global investment manager with over 50 years of experience and long-tenured portfolio managers who seek to build income, high active share or low volatility portfolios.	**Active equity specialists** An active equity specialist that builds global, stock-driven portfolios based on fundamental research, devoting all of its resources to delivering optimum investment outcomes and superior client relationships.	**Global alternative funds-of-funds** A global pioneer in multi-manager, multi-strategy alternative investing. The firm has made investments in new and established hedge fund managers across strategies, asset classes and regions since 1973.
Business Mix				

Affiliate	QS Investors	RARE	Royce&Associates	Western Asset
Description	**Quantitative equity and multi-asset manager** Applies a diversified, systematic and adaptive approach to its investment discipline to provide consistent, repeatable and risk-managed returns across multiple market environments.	**Specialist in global listed infrastructure investing** One of the largest alternative asset managers in the listed infrastructure asset class category.	**Small-cap equity** Known for its disciplined, value-oriented approach to managing small-caps. An asset class pioneer, the firm's founder is one of the longest-tenured active managers.	**Fixed income** One of the world's leading global fixed income managers. Founded in 1971, the firm is known for team management, proprietary research and a long-term fundamental value approach.
Business Mix				

Data as of March 31, 2015, except RARE whose data is as of October 21, 2015

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Project Governance

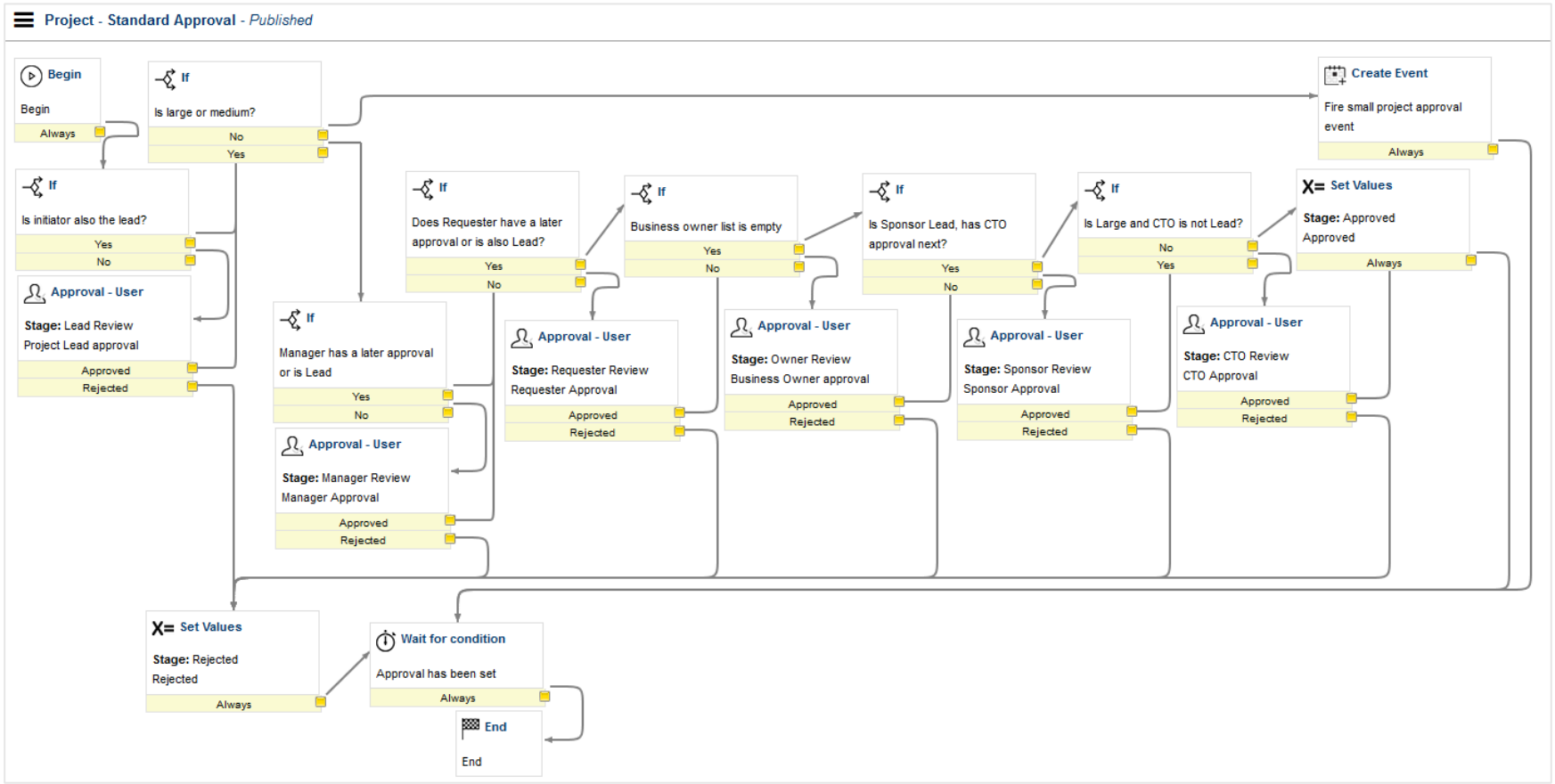
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Big Payoff From Early Steps

- We implemented Project in 2011 to track project approval, budgets, and timelines
  - More and better data than ever before
  - Statistics for on-time, on-budget performance
  - Records of actual effort against new initiatives versus KTLO
  - A fact base to request additional headcount for the coming year
- BUT some large projects overran budget significantly, spurring questions about financial transparency
- Senior management called for clearer, more consistent reporting at steering committees

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Project Approval Workflow



Approval workflow differs by size of project. Changes to budget, scope, or dates require the same signoffs.

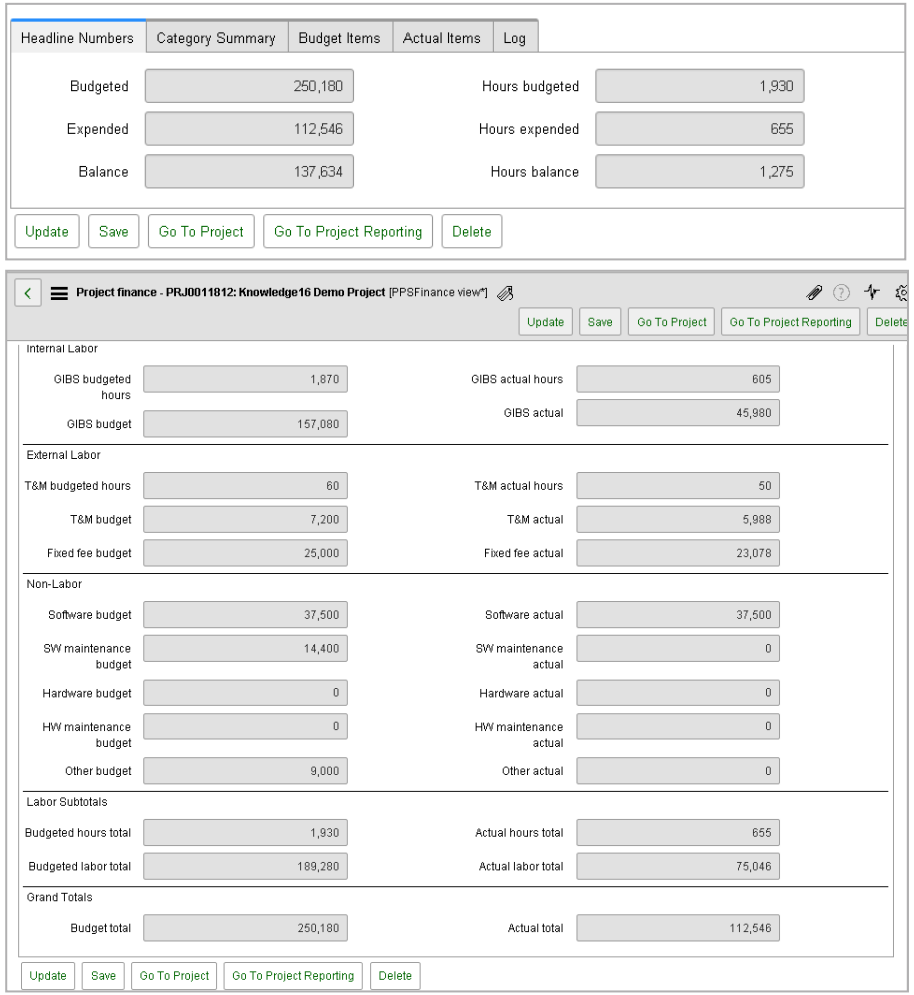
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Financial Reporting

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Financial Tracking

- In 2014, we changed the game for our project managers
- Onscreen, detailed breakout of budget and actual costs drove greater accuracy and precision in managing the work
  - Employee and contract labor, fixed fee contracts, hardware, software, and maintenance costs were clearly visible



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Lookback Exercise Strengthens Ongoing Processes

- Financial detail is recorded ir the Project Change Requests
- Post implementation project reviews are fact-based
- And we strengthened the surrounding processes to increase our success rate going forward

PCRs approved:

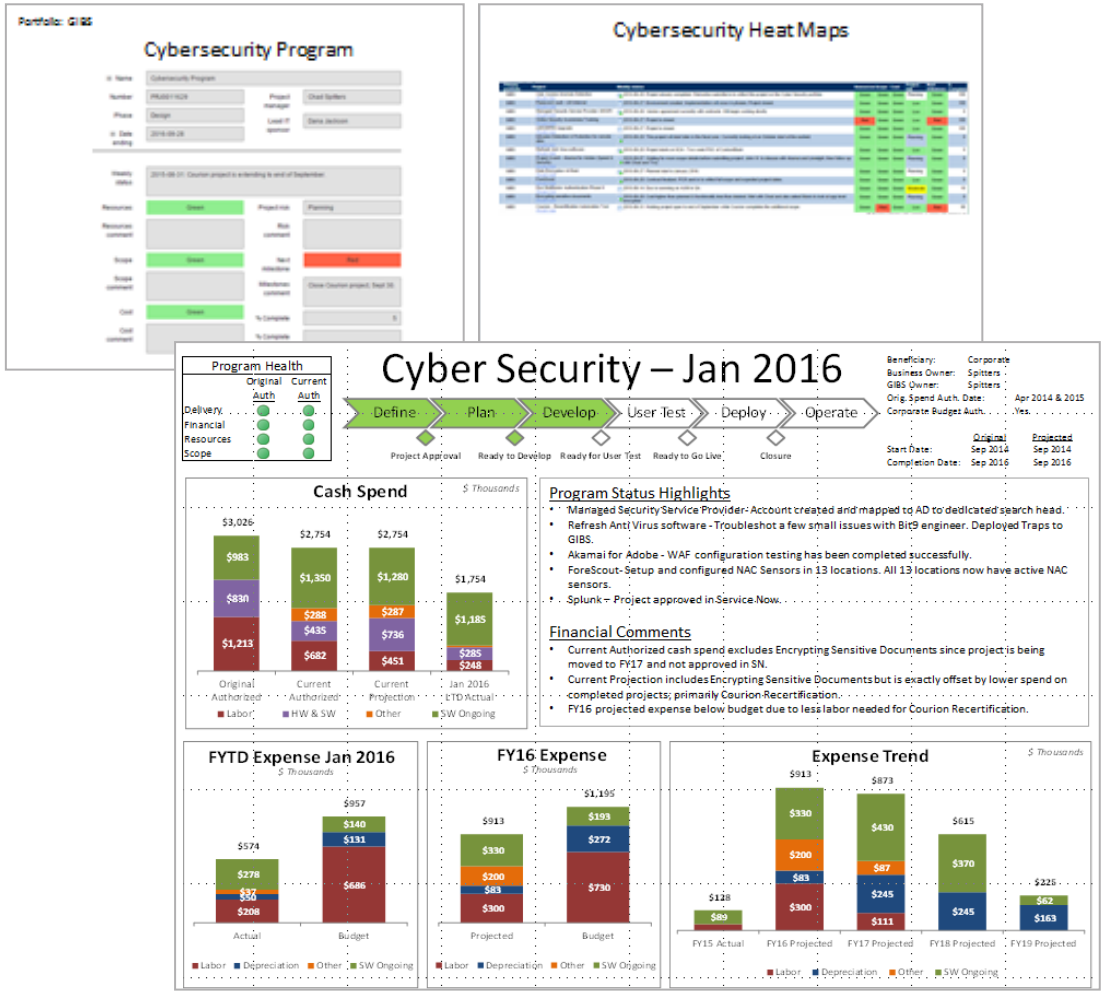
Budgeted	Expended	Balance	Budgeted hours total	Actual hours total	Effective from ▼	Effective until
2,615,000	2,702,420	-87,420	25,000	26,410	11/04/2015	
2,615,000	2,575,443	39,557	25,000	24,739	10/07/2015	11/04/2015
2,615,000	2,483,863	131,137	25,000	23,534	08/19/2015	10/07/2015
2,235,000	2,325,771	-90,771	20,000	21,268	07/09/2015	08/19/2015
2,235,000	1,656,872	578,128	20,000	12,722	06/17/2015	07/09/2015
1,855,000	1,837,695	17,305	15,000	15,286	11/28/2013	04/21/2015

PCR rationale
1st request – full requirements in hand, effort estimate revised
2nd request – added time when key resource unavailable, no $$ change
3rd request – tech design adjusted for SSO; additional effort needed
4th and 5th – business requested more UAT time. No change in $$$

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PPM - Significant Improvement

- 2015 brought Fuji and PPM:
  - Program and Fiscal Year Rollups
  - Portfolios by customer
  - Reporting dashboards
- IT and Finance partnered on reporting that incorporates project health and P&L impact
- Relationships with senior stakeholders significantly improved, a function of improved clarity and transparency



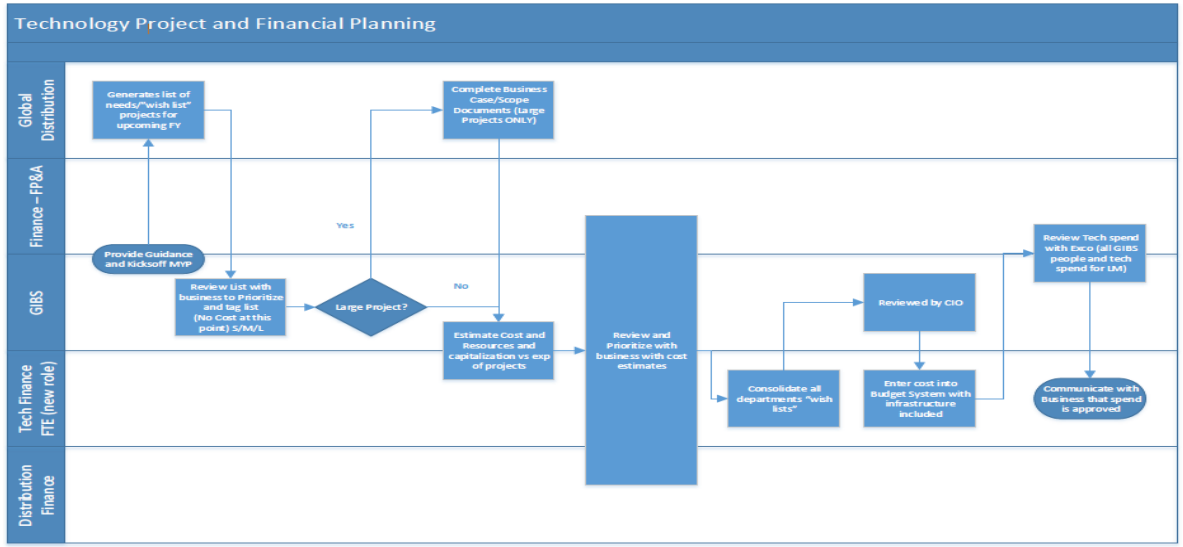
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Fiscal Year Planning

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Annual Planning

- Last year we tackled the annual planning process
- Budget for all projects with a technology component was consolidated, again seeking transparency
- IT sponsored a Kaizen review, capturing requirements for a shared, more open approach
  - How should it work?
  - And where would we track the results?



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A Work in Progress

Process

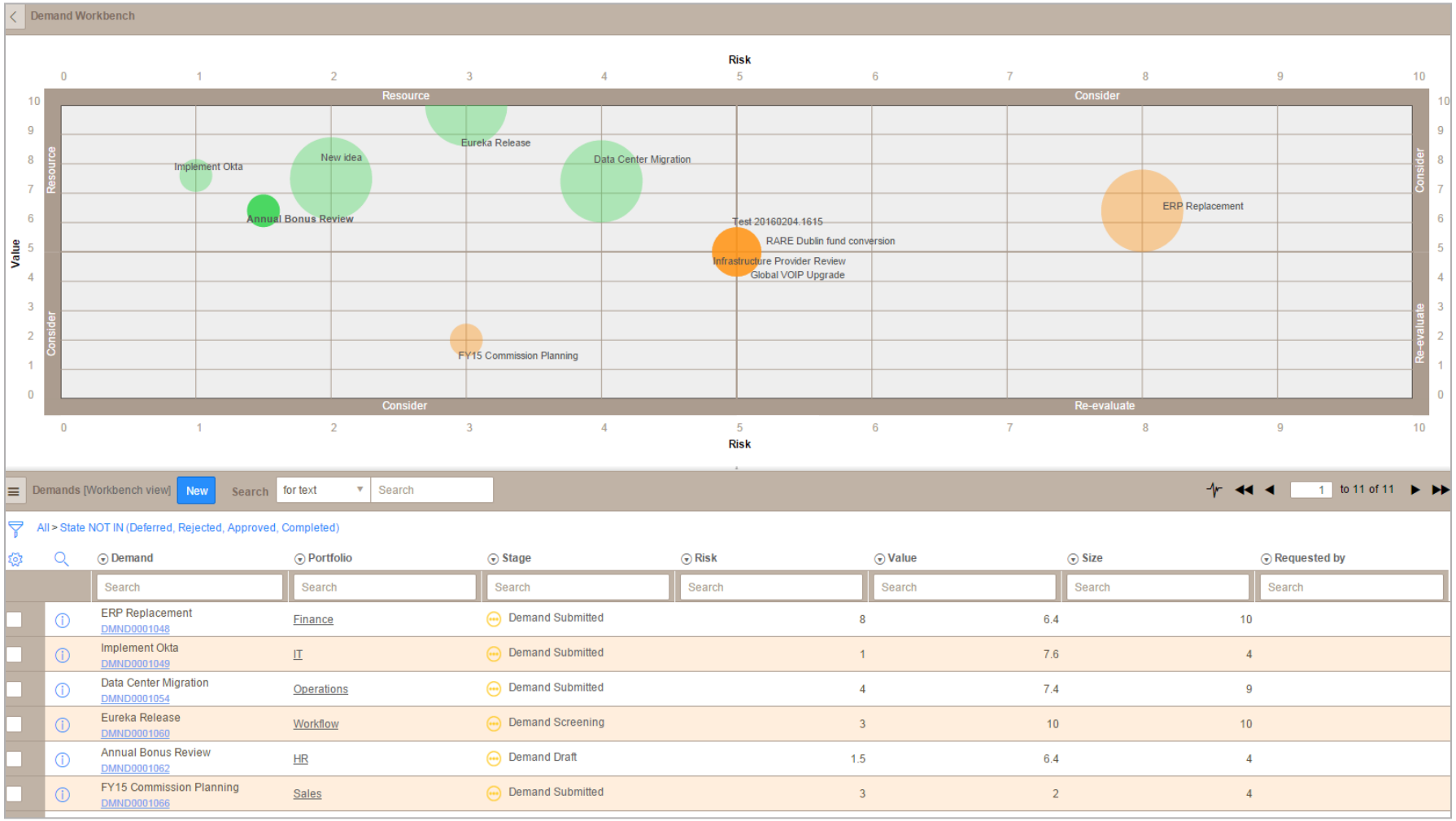
- Managers refine wish lists to prioritized lists
- Department heads rank and submit
- Executives set prioritization
- Final request list goes to Executive Committee
- The Board sets the Fiscal Year budget

Tools

- Excel remains the entry point: People use the tools they know
- ServiceNow Demand is the system of record
- Approved Demand moves into PPM
- We have a seamless record from initial demand with high level budget and benefits, through the project execution cycle with any changes along the way: additional clarity, transparency, and customer satisfaction

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Demand Ranked and Recorded



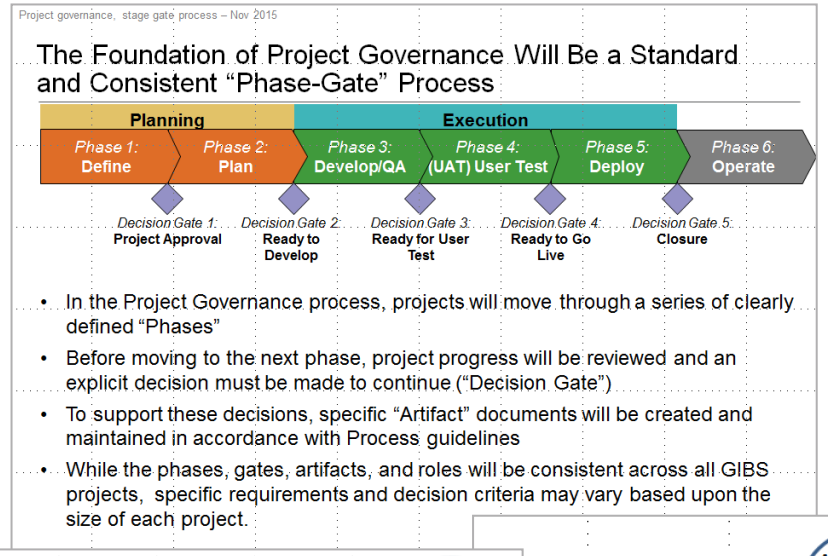
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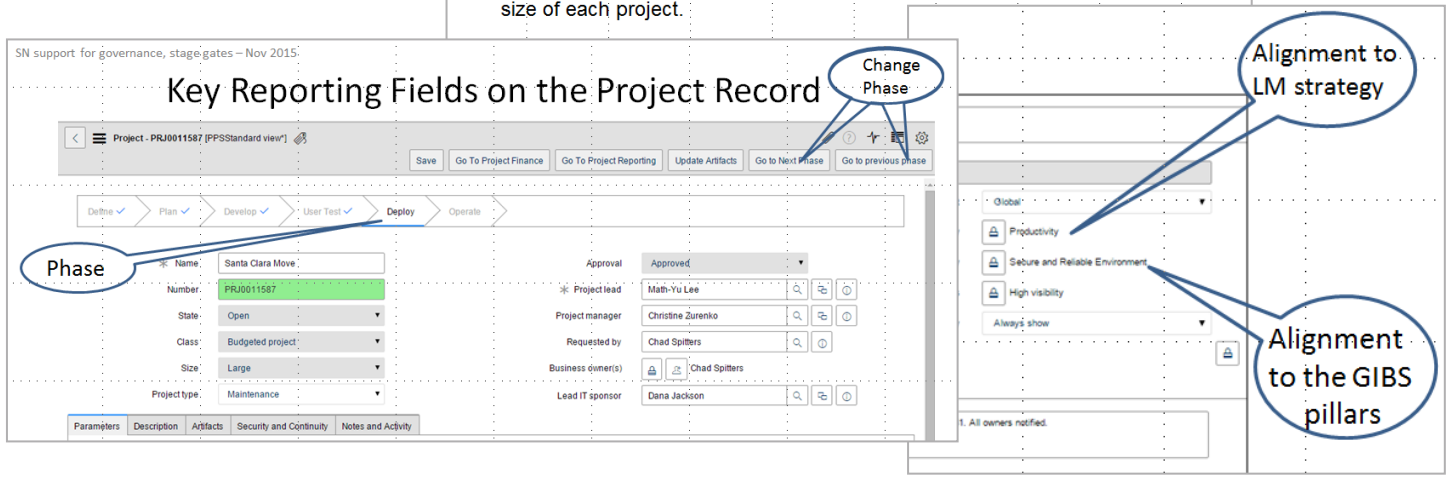
Staying on Process

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Process is Key

- Small process changes had large impacts
- We revamped the stage gate process, added reporting fields, and updated the workflows
- The goal was a leaner, lighter, more effective process
- Training for the project managers emphasized that their data was leveraged in reporting at many levels





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Project Review Board

- A weekly review of projects at decision gates, and those that need action

Hard Gates

- Project Proposal: none
- Ready to Develop: none
- Closure: Office 365 POC PRJ0011381

Soft Gates

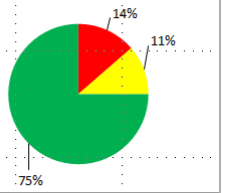
- Ready for User Test:
  - DST Add and Standardize New Core and pass-around record PRJ0011824
  - Social Media Management Software - Hearsay Implementation PRJ0011711
- Ready for Go Live:
  - Palo Alto/ISA Replacement
  - Core Equipment Refresh (both are ongoing / multiple rollouts)

Projects Past Start Date

Name / Number	Date starting	Date ending	Budgeted hours total	Budget total	Project manage
Bishopsgate Expansion PRJ0011844	2016-02-15	2016-04-29	60	22,278	Gary Bedford
Migrate SharePoint 2010 to 2013 PRJ0011555	2016-02-22	2016-10-07	1,324	283,098	Saikat Dasgupta

Large and Medium Projects

Performance: 6 | 5 | 33



Name / Number	Scope	Resources	Next milestone	Project risk	Cost	% Complete	Date ending	Heatmap go-to-green date	Project lead	Project manager	Weekly status
AL5.4 - Automate Advisor Updates from DST SalesConnect for US Sales PRJ0011755	Green	Yellow	Yellow	High	Green	80	2016-05-06	2016-03-14	Joan Grasso	John Armstrong	2016-03-07: Working on a refactor plan. Next high-level update will be provided late next week. Tuesday and Thursday projects meetings will continue.
Autosys DB Testing and Migration to New Hardware (12C) PRJ0011...	Green	Green	Green	Low	Green	60	2016-03-31		Eugene Ey	Eugene Ey	2016-02-26: Application teams finalizing testing. Planning for deployment SOE.
BDS - Fair Value Application Rewrite PRJ0011993	Green	Green	Green	Low	Green	79	2016-06-10		Joanne Barazzuol	Joanne Barazzuol	2016-03-07: QA testing and bug fixes continue; BO univ & rept devpt continues; updated busn & initial rept reqs to be sent next week.
Bishopsgate Expansion PRJ0011844	Green	Green	Green	Low	Green	35	2016-04-29		Gary Bedford	Gary Bedford	2016-03-07: Patch panels and cabling installed. New offices completed and populated.
CBI Site Redesign (Vespa) PRJ0011592	Red	Green	Red	Low	Red	60	2016-02-26		Alfredo Catalano	David Fink	2016-03-04: 016-03-04: PCR submitted to add hours to complete work and go-live date changed to 05-15-16 to accomodate Avanti.
Citrix Replacement - Horizon View PRJ0011662	Yellow	Green	Yellow	Moderate	Green	5	2016-04-29	2016-03-31	Math-Yu Lee	Chin Wang	2016-03-04: PCR will be needed to adjust dates, scope and possibly costs. Troy to present potential server cost increases to Bill.
ClearBridge product detail pages (AEM dependent) PRJ0011474	Green	Green	Green	Low	Green	90	2016-03-31		Alfredo Catalano	Senthil Subramanyam	2016-03-04: PCR submitted to add hours to complete work and change go-live date to accommodate Avanti. UAT testing to begin around March 11th.
CMS Platform - Implementation (Adobe / Avanti) PRJ0011696	Green	Green	Red	High	Red	93	2016-03-31	2016-03-10	Paul Autera	John Wolff	2016-03-07: UAT begins March 7. PCR submitted to true up.
Corporate Philanthropy Program PRJ0011817	Yellow	Green	Red	High	Green	10	2016-02-12	2016-02-25	Steven Tedeschi	Steven Tedeschi	2016-03-04: Completed project KO mtg w JK. Developing proj plan. PCR forthcoming.
CyberArk Password Vault PRJ0011641						1	2016-06-30		Christine Zurenko	Chad Spitters	2016-03-07: initial status.
Data Encryption At Rest PRJ0011558	Green	Green	Green	Low	Green	0	2016-09-09		Thomas Klimczyk	Thomas Klimczyk	2015-12-04: On hold until completion of the Oracle upgrade. Licensing already purchased.
DDPOC for Data Visualization Tool PRJ0011629	Green	Green	Red	Low	Green	70	2016-02-29		John Rohde	Philip Gobrecht	2016-03-04: "On Hold" while business tests Qlik product with target of 4-29-16 GIBS work complete.
DST - File format conversion OPA/DFA to DSP/DSA PRJ0011824	Green	Green	Green	Low	Green	25	2016-04-08		Ashu Goyal	Ashu Goyal	2016-03-07: development and unit testing in progress
EB38 - Web Services for Product/Document - AEM PRJ0011685	Green	Green	Green	Low	Green	90	2016-03-31		Alfredo Catalano	Senthil Subramanyam	2016-03-04: PCR to be submitted to add hours (200) to complete work.
Email Migration to Office 365 PRJ0011542	Green	Green	Red	High	Green	0	2016-04-08		Math-Yu Lee	Jeffrey Gibbs	2016-01-27: On hold due to SSO issues with Office 2010 client. Engineering researching
ForeScout PRJ0011688	Green	Green	Green	Low	Green	25	2016-04-15		Christine Zurenko	Chad Spitters	2016-02-29: Concurrently working on deployment of Client Deployment, Device Classification and NAC Policy Creation
Frankfurt build-out and move PRJ0011585	Green	Green	Green	Low	Green	95	2016-03-25		Jon Leaver	Gary Bedford	2016-03-07: : Internet and Wi-Fi workaround being looked at by engineering. Still no local Internet or Wi-Fi.
GRC - 2016 - Business Continuity Plans	Green	Green	Green	Low	Green	15	2016-		Geoff Ulrich	Geoff Ulrich	2016-03-04: Phase I (Plan Information Data Gathering) runs March 7 - 18

High Burn Rate

Name / Number	Go live date	Date ending	Budgeted hours total	Actual hours total	Burn rate	Resources	Phase	% Complete	Project manager
TAOS Implementation Phase 2 (Cleanup) PRJ0011755	2016-04-22 10:19:58	2016-05-02	1,501	2,847	3.22	Green	Develop	50	Ashu Goyal
Core Equipment Refresh PRJ0011230	2016-03-25 12:00:00	2016-03-31	600	1,377	2.47	Green	Develop	95	Troy Eggleston
CBI Site Redesign (Vespa) PRJ0011592	2016-02-12 12:55:33	2016-02-26	400	582	1.49	Green	Develop	60	David Fink
GPW WAM Daily Securities Load PRJ0011812	2016-03-31 13:00:30	2016-04-15	120	120	1.48	Green	Develop	40	Esther Wong
AL5.4 - Automate Advisor Updates from DST SalesConnect for US Sales PRJ0011087	2016-04-25 00:00:00	2016-02-12	11,258	15,646	1.39	Green	Develop	80	John Armstrong
CMS Platform - Implementation (Adobe / Avanti) PRJ0011696	2016-03-11 12:00:00	2016-03-31	41,151	52,299	1.37	Green	Develop	85	John Wolff

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Not Just Projects…OOB Apps, Custom Apps, Integrations with SN

Year	Update Sets	Customer Updates	Release	Key OOB Applications/Plugins	Major Customizations	Misc Notes	Project details
2010	5	4,824	Began instance build (Oct)	SSO integration	PeopleSoft automated user synch (Nov)	SN dev/admin team at 3 resources	
2011	210	14,979	Fall 2010 Go-Live (Feb) Winter 2010 (Mar) June 2011 (Jun)	Incident (Feb) Problem (Feb) Discovery (Feb) Reporting (Feb) Service Catalog (Feb) CMDB build (Mar-May) Project Management (May) Time Management (May)	Paging Center (Feb) Paid Time Off tracking (May) Data Security Request Wizard (Jun) Helpdesk integration table - user list (Nov)	Infrastructure and Helpdesk outsourced (Jun) ServiceCatalog deactivated (Jun) Problem deactivated (Jun) SN Team down to 1 resource (Oct) KTLO starts	Value Chain table added PSoft Project Code table added
2012	60	4,994	Aspen (Feb) Berlin (Nov)	Change Management (Mar)	SMS/Email Alerts (Dec)	Discovery cancelled (Jun)	
2013	57	20,851	Calgary (Sep)	Orchestration (Sep) SCCM Integration (Oct)	DSR(RITM) wizard overhaul (Mar) Incident/RITM bidirectional integration (Mar) Support Tasks (Jun) Project overhaul (Jun)	Patched B (Mar) Patched C (Nov)	Project v2 Reporting enhancements Resourcing enhancements
2014	77	11,741	Dublin (Mar) Eureka (Sep)	Content Management (Jul) High Security Settings (Sep) Service Catalog reset (Dec)	NonExempt employee time tracking (Jan) Change Management overhaul (Jan) ActiveDirectory groups, users, memberships (Jun) CMS Portal 1.0 (Jul) GL/Hyperion Chartfield requests (Dec)	SN Team expands to 2 resources (Apr) Patched D (Nov) Patched E (Dec)	Artifact tracking
2015	133	19,983	Fuji (Mar)	Project & Portfolio Suite (Mar) Test Management (Jul) MultiProvider SSO (Sep) Human Resources (Oct) ActiveDirectory LDAP Integration (Oct) Workday Integration (Oct) Service Catalog rebuild (Oct-present)	Legal Invoicing (Jan) CMS Portal 1.1 (Mar) Project Finances (Apr) Fiscal Year script include/table (Apr) AD temporary account tracking (May) Workday Projects outbound synch (Nov) Workday HR Profile inbound synch (Dec)	Patched E (Jan) Patched E (Feb) Patched F (Apr) Patched F (Aug) Patched F (Nov) Patched F (Dec) KTLO ends	Finance summary record Finance change control Finance / Project baselining Reporting enhancements (Burn rate, phase slip, over budget, missing documentation) Portfolio finance summary Programs Integration with Workday
2016	37	3,551	*Geneva (Mar)*	Managed Documents (Jan) Demand Management (Feb)	Workday Timecards synch (Jan) Workday bidirectional user synch (Jan) ActiveDirectory bidirectional synch (Jan) AD Orchestration tracking (Jan) Sharepoint integration table - user list (Jan) Internal Communications request (Jan) Building access requests (Jan) Tag integration with Incident categories (Feb) *Fiscal Year Project Planning (Mar)*	SN Team down to 1 resource (Feb)	Assessment questionnaire *Project Brief* *Demand Financing/Baselining*

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Top Takeaways

1. Process is harder than systems.

2. Focus on reporting needs to enhance delivery to the customers.

3. Our processes have developed over time, but we have been able to support each change with the ServiceNow platform.

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Top Takeaways

1. Process is harder than systems.
2. Value added metric reporting and time saved through automated workflow.
3. Improved partnership with departments outside IT.

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Thank You

Anthony Bongiovanni

Senior Developer

Legg Mason

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