knowledge16

Experience the Service Revolution



Using PPM and SDLC to Deliver a Holistic PM Solution

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Agenda

Grand Challenge - Establish Project Management Office (PMO) with tailored, Agile processes in a “Hostile Environment”

PMO (1.0) Design - with right-sized rigor

Enter ServiceNow SDLC and PPM applications…mostly out of the box

Scrum, Schedules and Earned Value Management (EVM)!

Conclusion and Q&A

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Grand Challenge

Setting the stage

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Setting the Stage and Establishing the Playing Field

- Perception = Problem: “IT Services Division can’t Deliver Projects”
- Challenge: Deliver initiatives on time, within budget with agility and provide transparency
- Solution: Stand up a PMO with a tailored approach to project rigor; focus on Agility.
- First things first
  - What is the portfolio of projects?
  - What is the current process?
  - Most importantly – What is the political landscape?

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Portfolio, Process and Landscape

- Strategic Initiatives
  - Insufficient Reporting
  - Guided by a committee
    - Split Sponsorship
      - Budget ~$7M
      - 10 Strategic Initiatives
- Tactical and Operational Projects
  - Redirected labor
  - No established or unified process for managing and tracking

- US and Them
  - Applications Groups have an established SQA process
  - Infrastructure has no established process or definition of what constitutes an ITSD project

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Pre-Decided ServiceNow Would Be the New Platform Tool (Dublin)

Analysis not included!

- SN had excellent post production capabilities
  - Incident Management (was being misused)
  - Problem Management (was not being used)
  - Change Management (was being used inconsistently)
  - Service Catalog (was not being used)
- Pre-Production – less sophisticated
  - Project Management – Not acceptable
  - SDLC – Interesting!!!

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Gap(s)

Some tool gaps and some business gaps

- Tool gaps
  - Import project files – Not capable without significant time investment
- Process Gaps
  - Project cost accounting wasn't available for all priority projects
    - Organization was strong, functional and resistant to project cost data needs
- Culture
  - Little knowledge and/or understanding about "governance"

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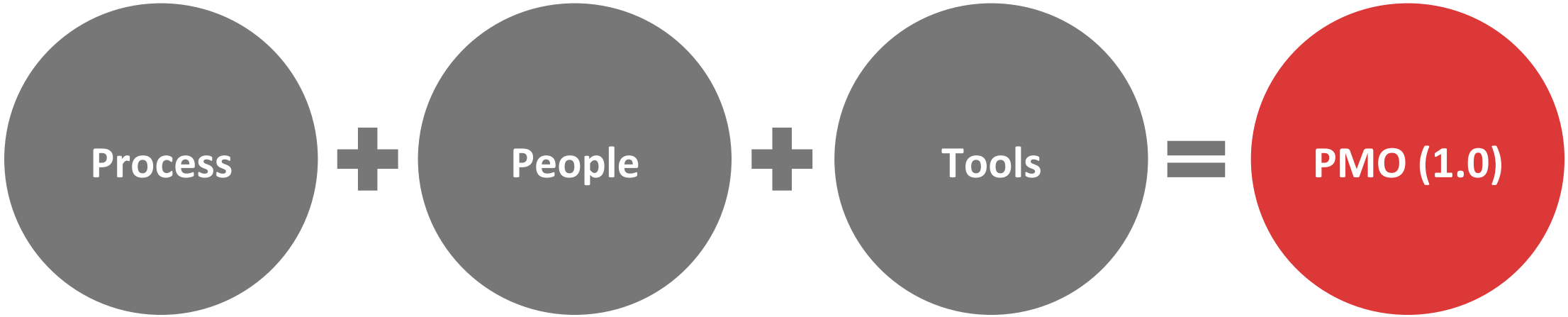
PMO (1.0) Design

ServiceNow to the rescue

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Creating the desired PMO

- The approach for standing up the PMO was to define future-state then:
  - Build a roadmap
  - Get quick wins
  - Enhance as often as possible



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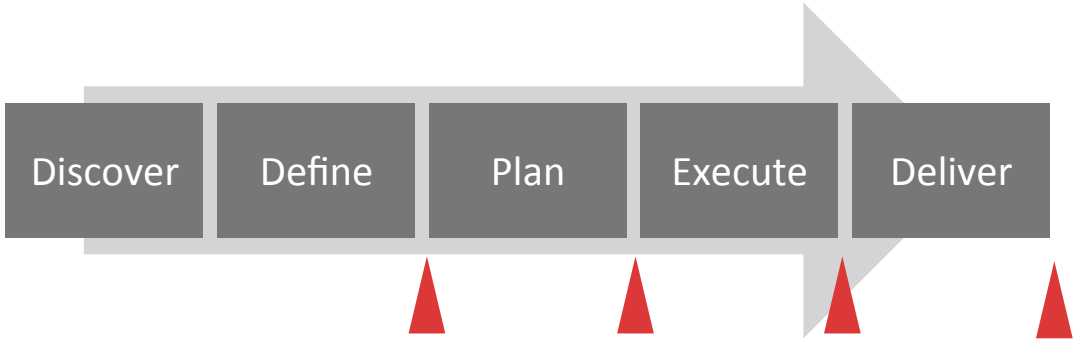
Stand up a PMO in an environment resistant to rigorous processes

- Define what constitutes a project
- Lightweight SDLC with approval gates is required
- Rigor must be right-sized and tailored consistent to the size of the project
- Agile is a new concept that must be introduced and used as much as possible
- Reporting must accurately represent project health
- By the way, this has been tried before three times!

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Robust SDLC

- A lightweight stage-gate model for projects is created.
  - Projects are efforts that have a Rough Order of Magnitude of > 160 hours (effort)
- Projects will be placed in 1 of 3 portfolios
  - Tier 1 – Lab funded/directed
  - Tier 2 – ITSD initiative
  - Tier 3 – Group Leader/Operational



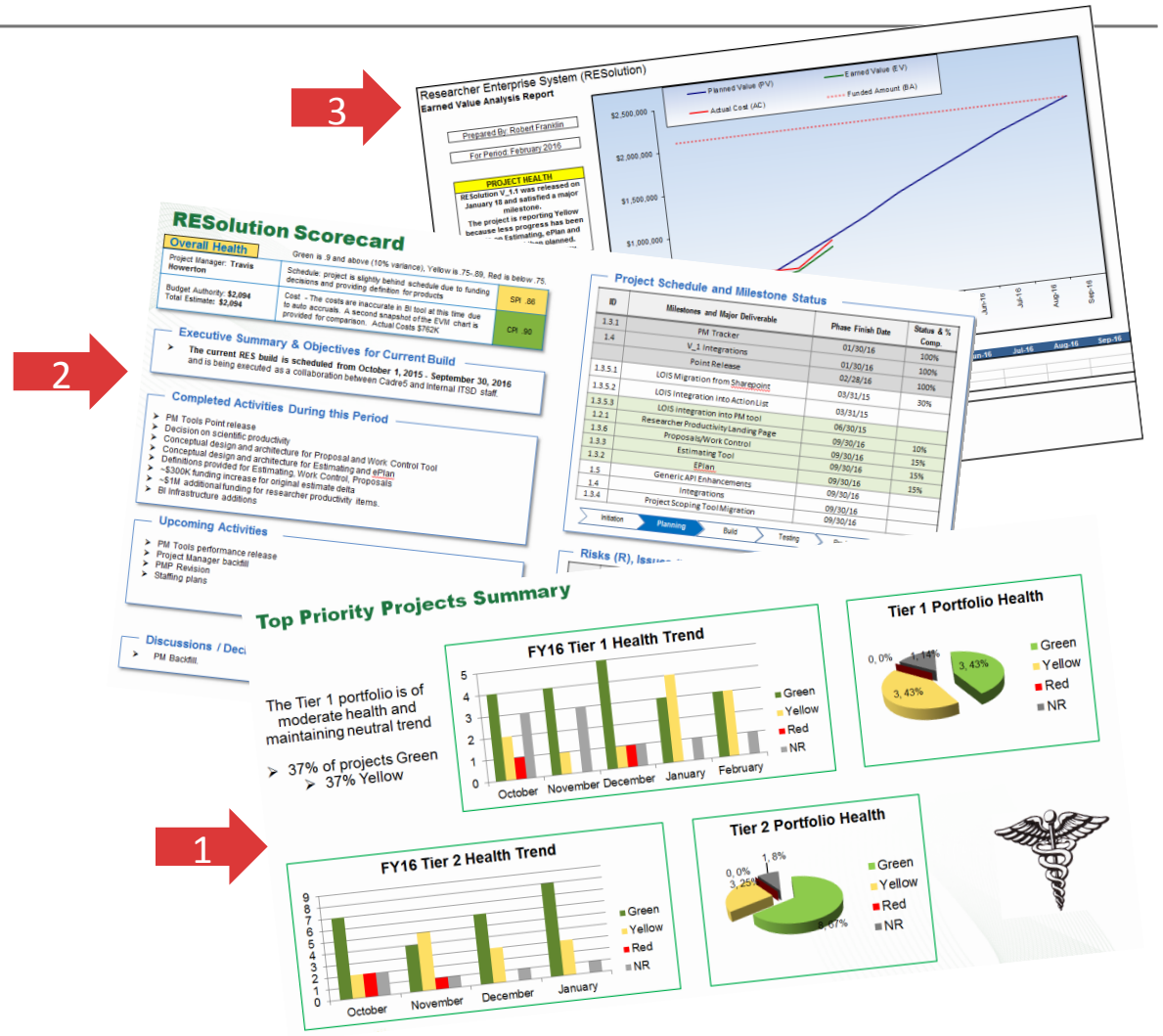
1. Request is vetted by the Investment Review Board (IRB)
2. Project Plan is approved by IRB
3. Project team submits a Change request to Change Advisory Board (CAB) and/or Production Readiness Review (PRR)
4. Sponsor Acceptance

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Rigor

- Tier 1 and 2 projects will have:
  - An assigned Project Manager and official Project Management Plans (PMPs)
  - Project Cost Accounting
  - For project requiring full rigor
    - Earned Value Management is required, deployed

1. Portfolio report with metrics
2. Project "scorecard"
3. Project EVM



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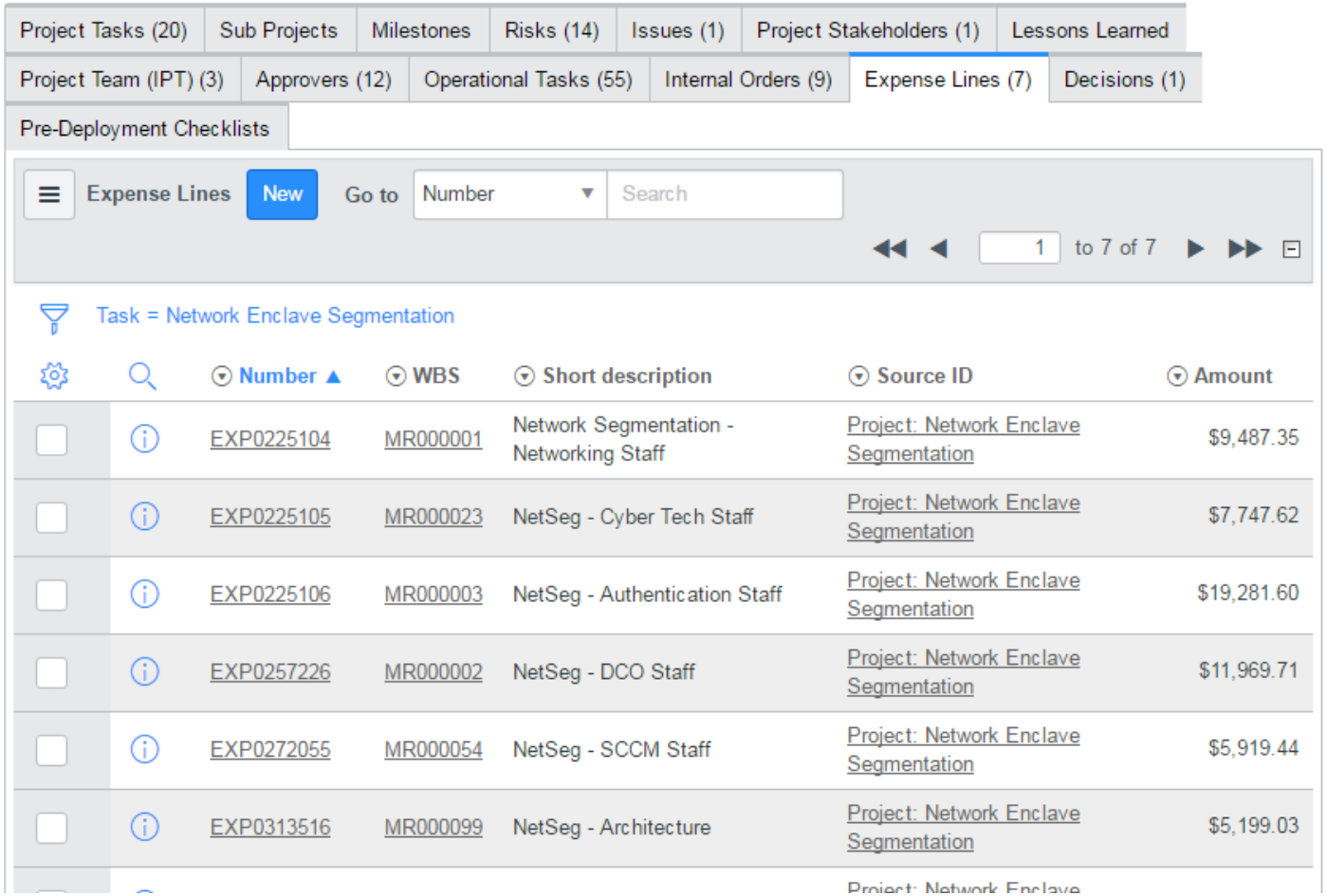
Enter ServiceNow SDLC and PPM Applications

Scrum Schedules and Earned Value Management

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PPM Application

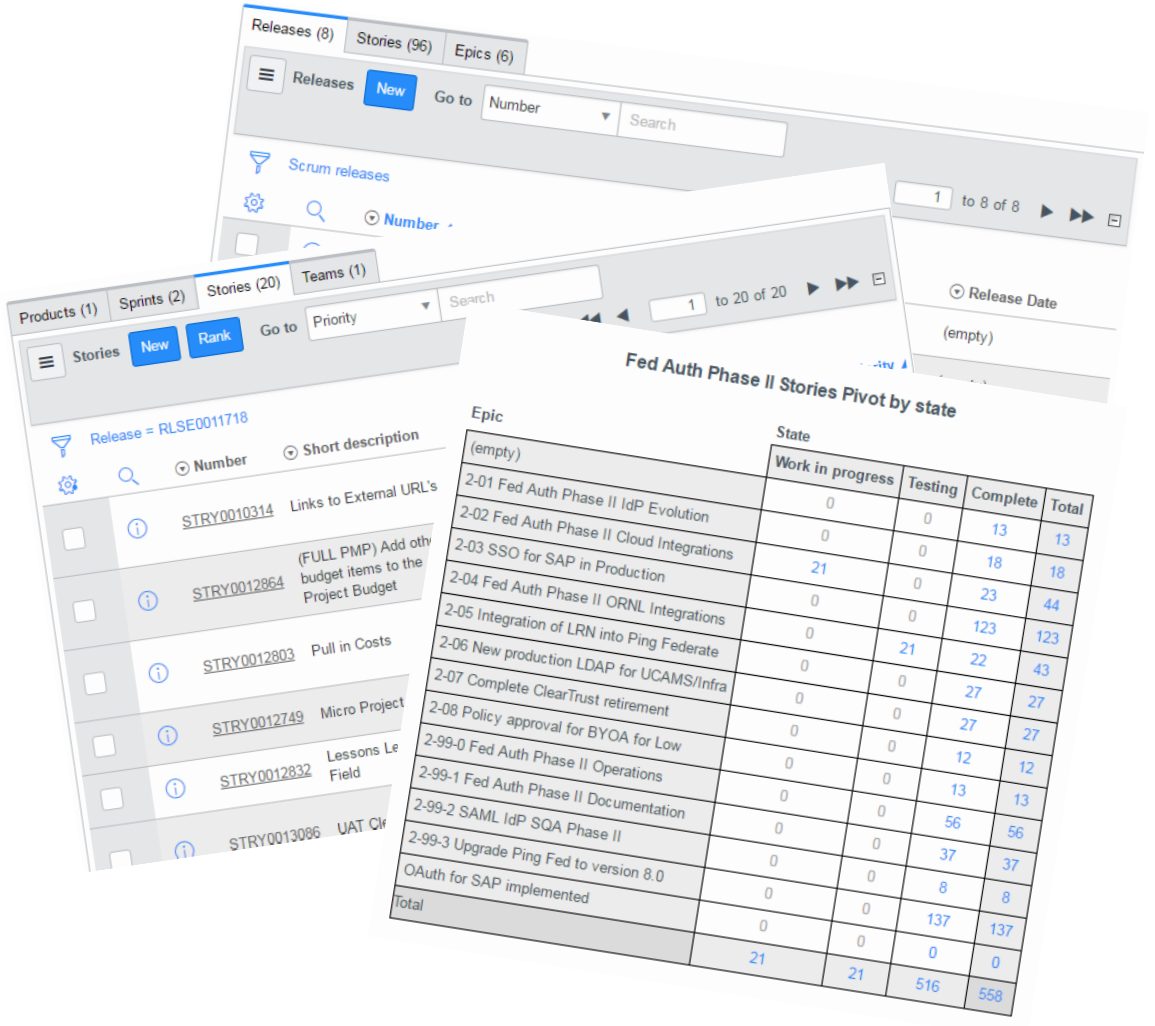
- ✓Tracking
- ✓Team collaboration space
- ✓Project Cost Accounting
- ✓Decisions
- ✓Approvals
- ✓Risks
- ✓Issues
- ✓Lessons Learned
- ✓And more…



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SDLC Application

- ✓Executing
- ✓Tracking
- ✓Team collaboration space
- ✓Schedule
- ✓Reporting

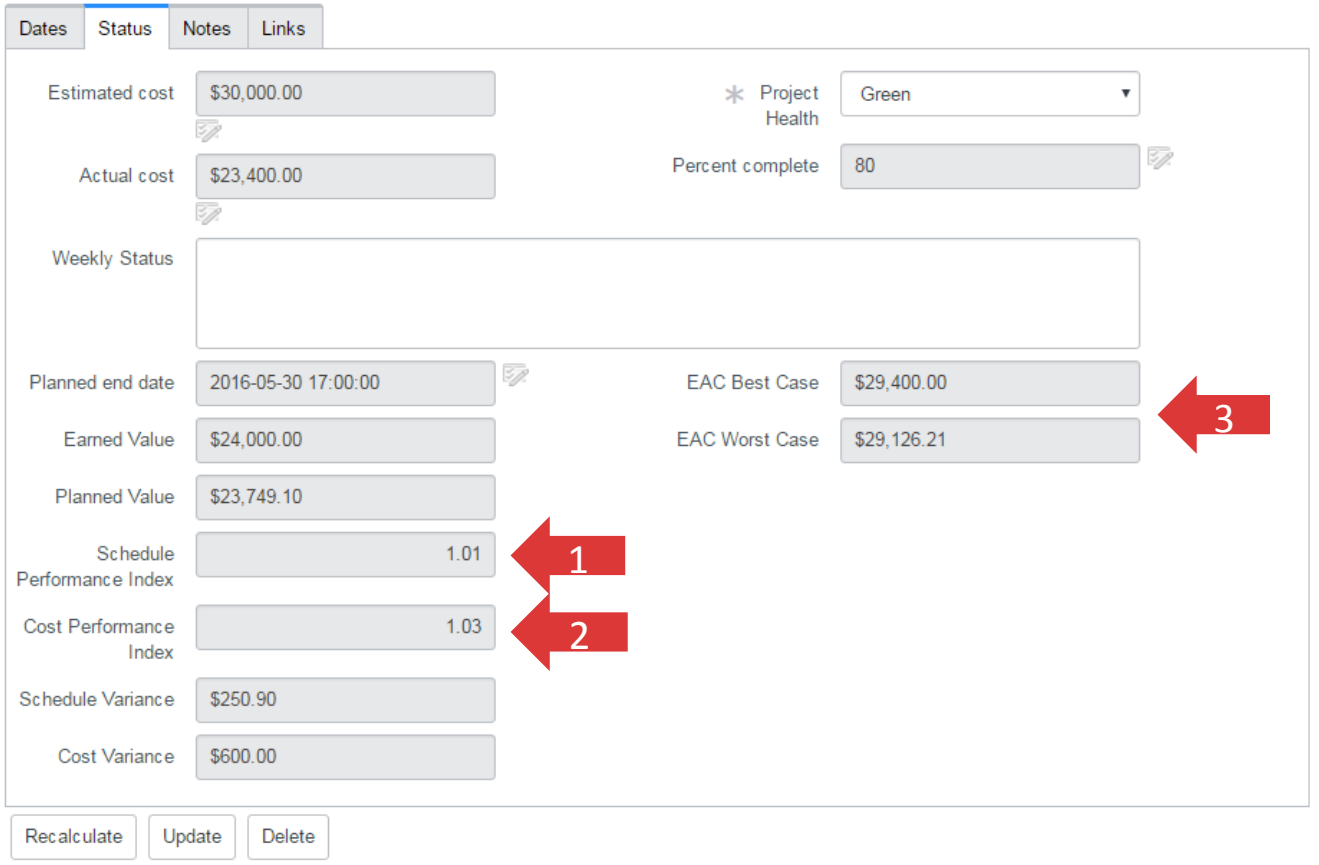


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Automated EVM in PPM Application

- By applying Start and Finish Dates, Cost Estimates and Percentages Complete at the task level
- Add cost data at the project level
  - Automated or manual entry
- EVM Data is calculated

1. SPI – this project is behind schedule
2. CPI – and the work performed is costing too much
3. Estimate at completion range is well above the original estimate



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Automated EVM in PPM Application

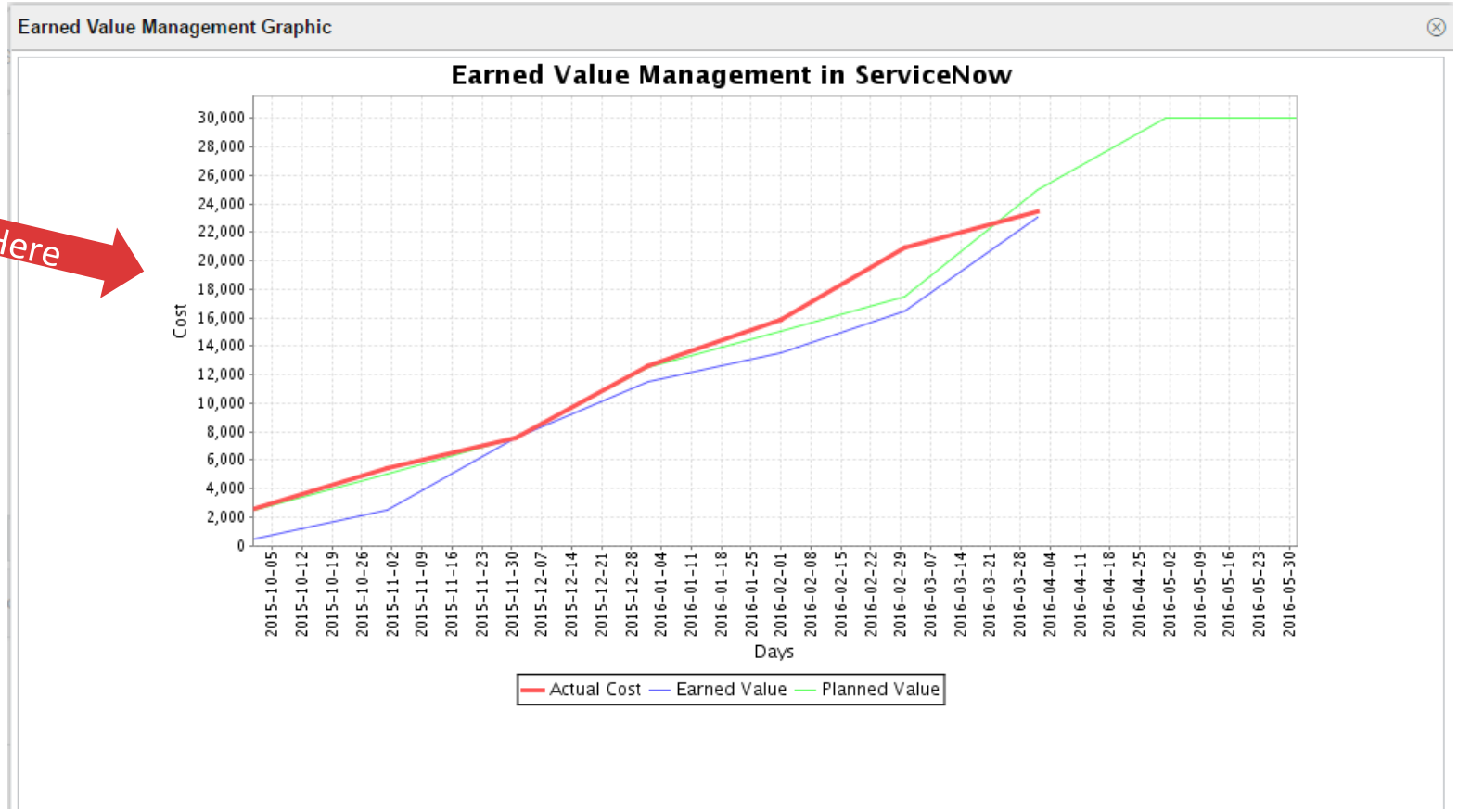
- Then the data is plotted on a typical Earned Value Management graph!

Monitor Here

Press Here

Related Links

Recalculate
WBS List
Resource Timeline
Gantt Chart
Project Workbench
Manage Stories
Create Baseline
View Story Points by Sprints
Save as New Template
Earned Value Management Graphic



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Results

Combined SDLC and PPM to create a robust end-to-end project tool

- We gained insight into project efforts
  - Started with 1 portfolio of 7 projects
  - Now we have 3 portfolios, tracking the top 2 of up to 25 project efforts.
  - Tracking project health and performance and are able to apply early corrections as well as market how well we are delivering on projects
    - Tier 1
      - 75% Green up from 35% year over year
      - 0% Red
    - Tier 2
      - 53% Green, up marginally from a year ago
- We are actually tracking the PMO roadmap in ServiceNow
- Thanks for the Award, ServiceNow!

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Summary

Combined SDLC and PPM to create a robust end-to-end project tool

- Use PPM Module to for project tracking and reporting space
  - Risk and issues management
  - Task and Milestone Management
  - Decision, Integrated Project Team, Stakeholders (custom forms)
  - *Project Costing through Internal orders and expense lines (custom functionality)
  - *Earned Value Management data and graphics (custom functionality)
- SDLC
  - Execute day to day project work using a Scrum framework

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Top Takeaways

1. PMO with Agility – it can be done.

2. Understand that incremental maturity is acceptable and required where culture change is involved.

3. ServiceNow can be used in creative ways to create a robust PPM system and be successful in Project Management.

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Take the Survey

Please take a moment to complete a session survey in the Knowledge16 app.

Thank You

Robert Franklin

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Oak Ridge National Laboratory

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