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WORK at LIGHTSPEED™

Business Services Request Management

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Agenda

- Introductions
- Implementation Background and Current State – Nishi Jawa
- Business Processes Review– Bryan Ackerman
- Technical Process Review – Sandesh Kafle

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Introductions

- Nishi Jawa – ServiceNow Project Manager
- Bryan Ackerman – ServiceNow Business Lead
- Sandesh Kafle – ServiceNow Tech Lead

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A Brief History of T. Rowe Price

1937

Founded in Baltimore by Thomas Rowe Price, Jr., a pioneer in growth stock investing, as an investment counsel firm for private clients. His credo: “If you take care of clients, your clients will take care of you.”



1950

Introduces first mutual fund, the Growth Stock Fund, to meet growing demand from individual investors.

1960

Introduces the New Horizons Fund, one of the first funds focusing on small-cap stocks.

1971

Starts fixed-income division.

1979

Launches joint venture with Robert Fleming Holdings to introduce international portfolios to US investors.

1982

Forms Retirement Plan Services division for clients in nascent defined contribution plan and 401(k) retirement market.

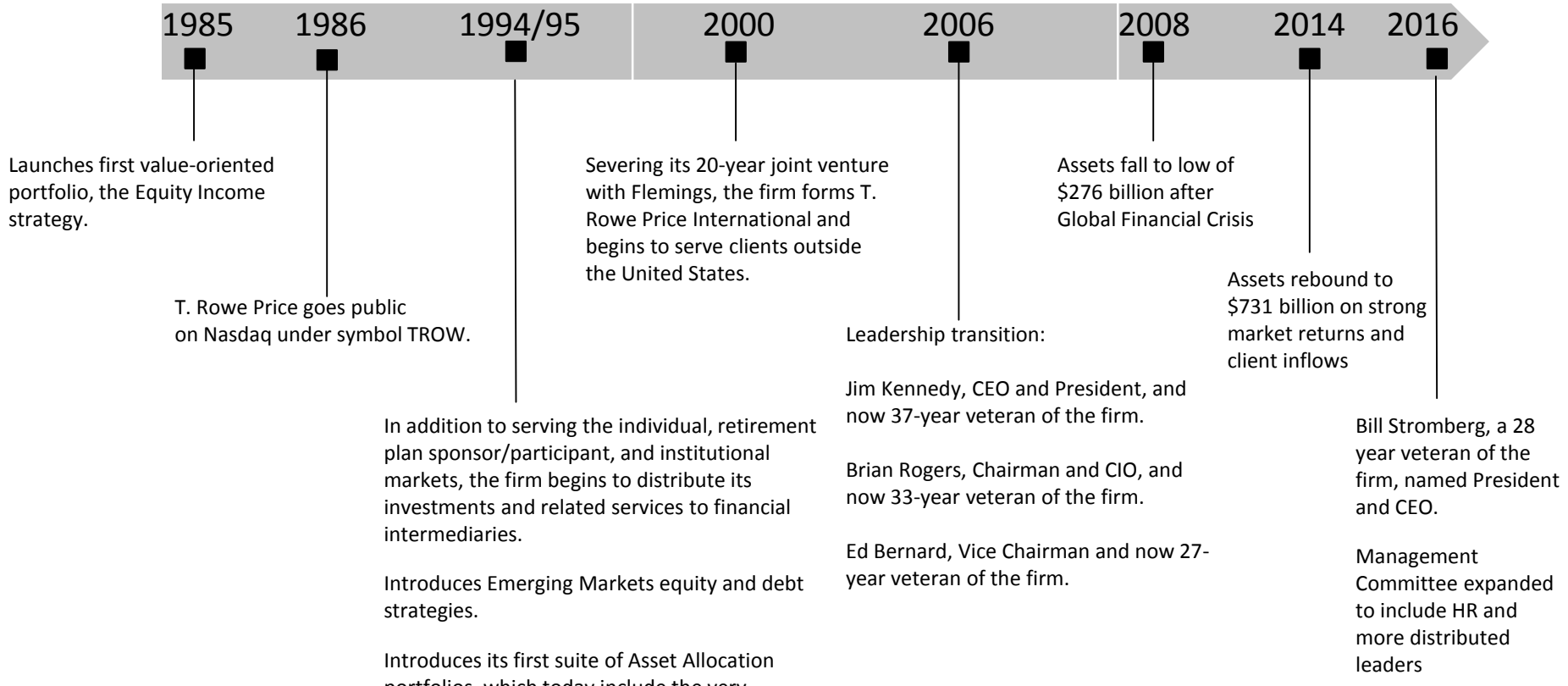
1983

Holds first Market Outlook press briefing in New York. Last year, in its 31st consecutive year, the event drew some 60 journalists.

The Rocky Mountain Big Horn Sheep becomes a centerpiece of the T. Rowe Price logo.

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A Brief History of T. Rowe Price



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Our Firm Today

- A global investment management firm with $810.8 billion in assets under management as of 31 December 2016
- Offices in 16 countries across the Americas, Europe, Asia, and Australia. Serving clients in 43 countries
- Strong global research platform. 508 investment professionals. 248 research analysts of which one-third are based outside the United States. Long-tenured investment and distribution professionals
- Enduring investment approach with a focus on long-term orientation, rigorous fundamental research, ruthless collaboration and healthy debate of ideas
- Deep investment expertise and experience across all major asset categories: global equity and fixed-income, asset allocation strategies, high yield, emerging market equity and debt, frontier markets, growth and value orientated portfolios, small-, mid- and large-cap, and customized portfolios
- Diversified distribution: global institutions, intermediaries, individual direct, retirement plans

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Session Overview



Objectives

- Using ServiceNow beyond ITIL applications



What You Will Learn

- Using ServiceNow as a custom application development platform
- Understand the environment and challenges faced
- Learn about adoption by business.
- Gather key lessons learned

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Background – How We Got Here

- The Needs
  - Many groups across the firm are struggling with general request and work management
  - Most use E-mail/SharePoint/Excel/etc. to receive, track and do work
  - We had a BPMS tool, but was complex and required a significant effort to make usable; Impractical for wide usage across the enterprise
- The RFP Process
  - Solicited Seven Vendors; 3 made it to final round of presenting to TRP internally
  - Developed a RFP review scoresheet for all internal parties to evaluate vendors
    - 30 Internal business customer
    - 15 Internal IT staff

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Current State – Where We Are Today

- Enterprise Request Management (ERM)
  - Forms – Capture Request
  - Workflow – Task Management and Approvals
  - Reporting – Data Metrics and Dashboards
  - Being used Enterprise wide – 25 Intake systems in Production
  - Continued demand
- Beyond ERM implementations
  - Vendor Management
  - Marketing Resource Management
  - Customer Service Management

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Customer Testimonials

"Volume of requests increasing by 39%, making it difficult to manage manually. Now having all our work in one place, makes triage and capacity analysis straightforward"

'We were tracking 5000 payments and filings per year in Excel, getting something wrong meant significant impact, now we can easily track the payments and use defined SLAs to mitigate any impacts"

"Able to replace Email – Mailboxes with a centralized work queue – higher visibility and data to help improve business process"

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Business Process – Bryan Ackerman

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ServiceNow @ T. Rowe Price

Our Request Management ServiceNow Platform Offers

Centralized intake system

Lower development cost for custom applications

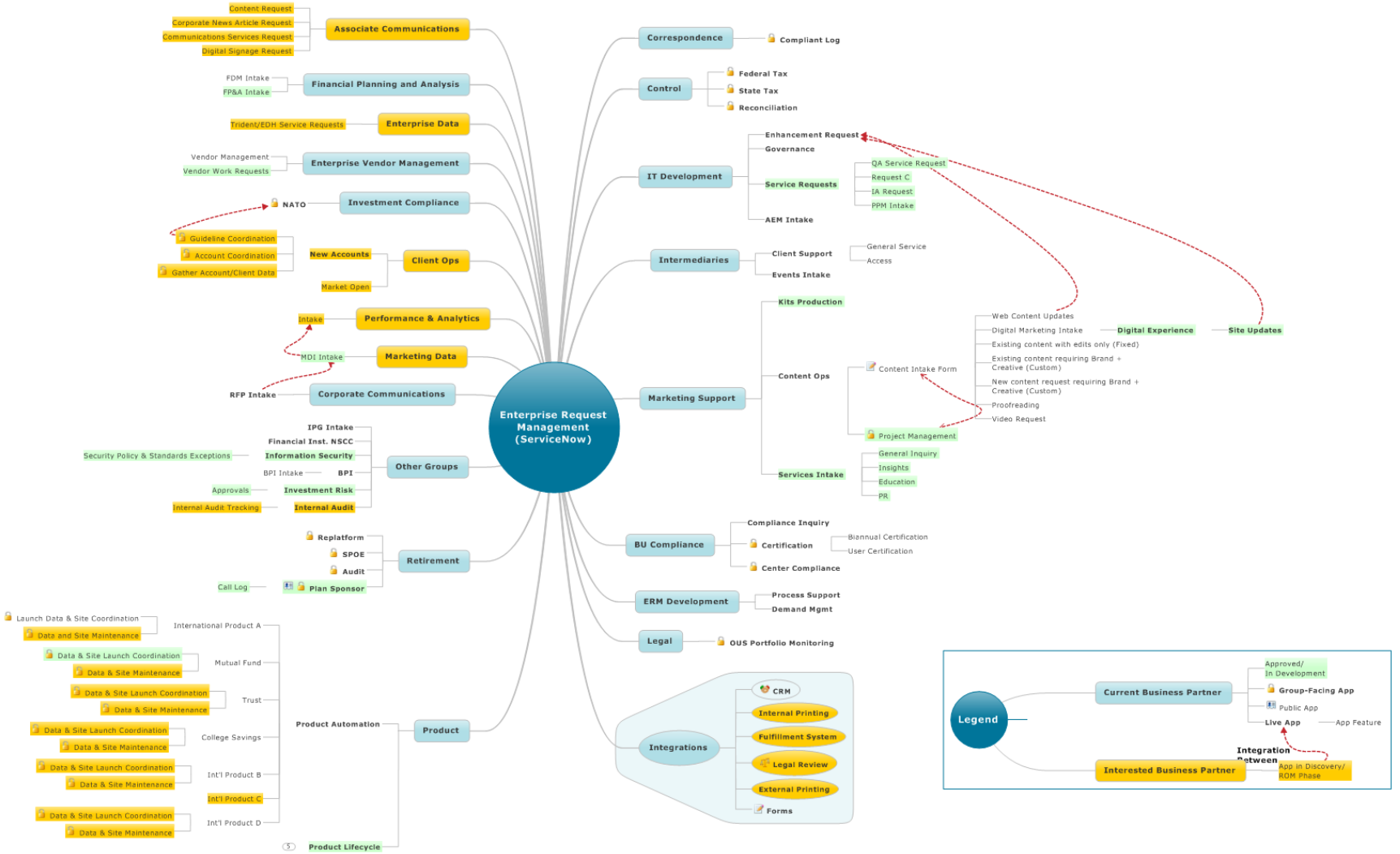
Visibility and Tracking for requests across teams, groups and enterprise

Common, reusable integrations with other systems

Support for technology goals for cost reduction, less technical debt

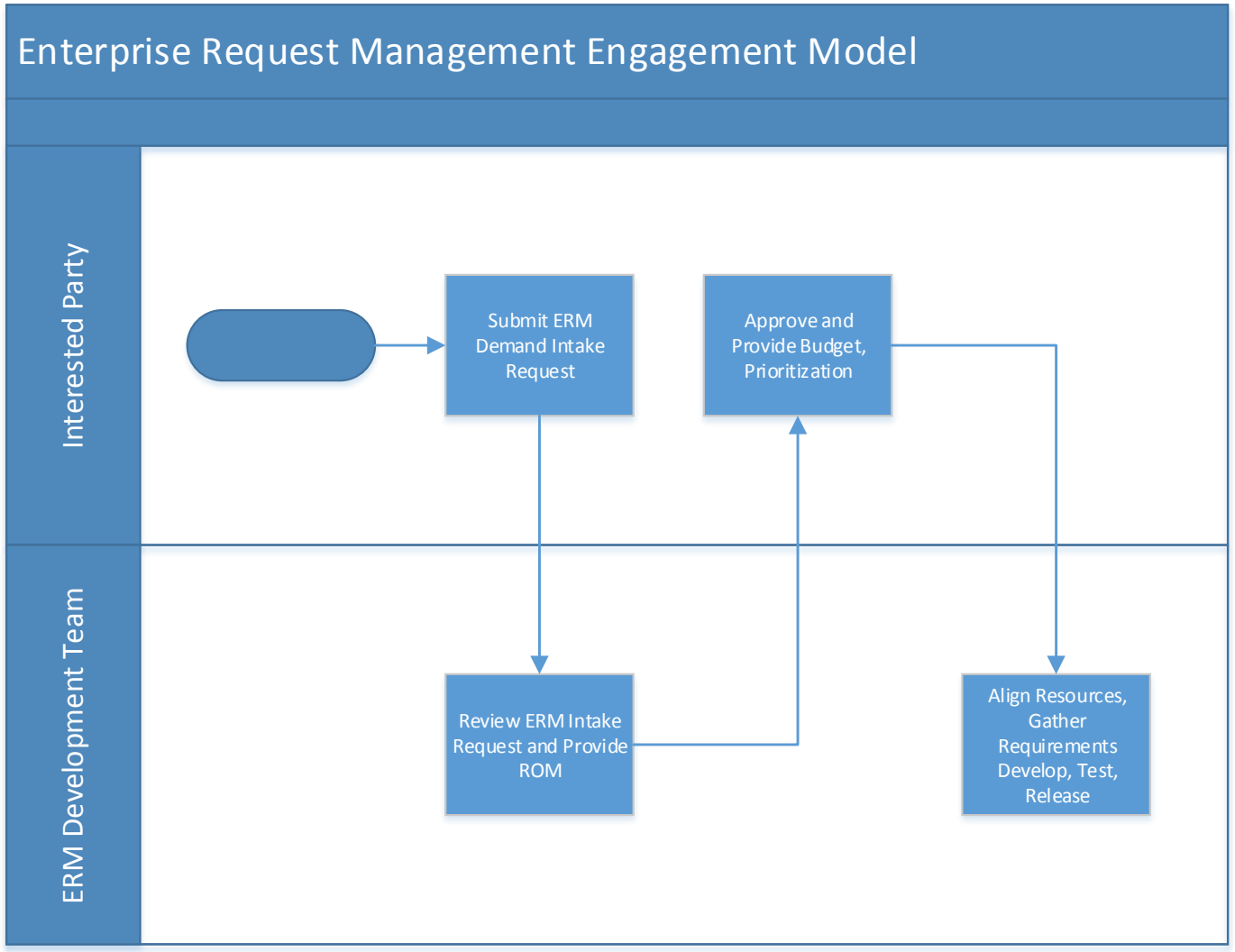
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T. Rowe Price ServiceNow Custom Application Ecosystem



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Adoption Model



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Easy-Sizing of Applications for ROM/Estimation

Basic	Intermediate	Advanced	Uber
<20 Fields	20-50 Fields	50+ Fields	Multiple Complex Forms
No Custom Scripts	No Custom Scripts	Simple Scripts	Complex Scripts/PDF Generation
3-5 Roles	<6 Roles	10-15 Roles	10-15 Roles
Basic Workflow/Routing	Advanced Routing	Custom Task Forms	Custom/Complex Task Forms
1-2 Months	2-4 Months	4-8 Months	8+ Months

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Technical Process – Sandesh Kafle

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Technical Engagement

- Centralized Core Team
- Weekly knowledge transfer/ technical review meeting to assess the current technical limitation and remediation
- Majority of the application built in scoped-application
  - Mandatory application design review process in place before development and application framework creation is controlled.
- Upgrade to the latest stable version
- Access/ Authorization handled through enterprise security access management tools
- Support through a simple-custom application
- Controlled access in production
- Governance, Governance, Governance !!

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Integration(s)

- Leverage all major integration methods.
- Periodic data synchronization process in place to well defined gold-source.
- LDAP
- JDBC
  - SQL Server, DB2
- REST
  - Custom T.Rowe Price applications, Alfresco, Adobe etc
- File
  - Attachments, SFTP, FTP

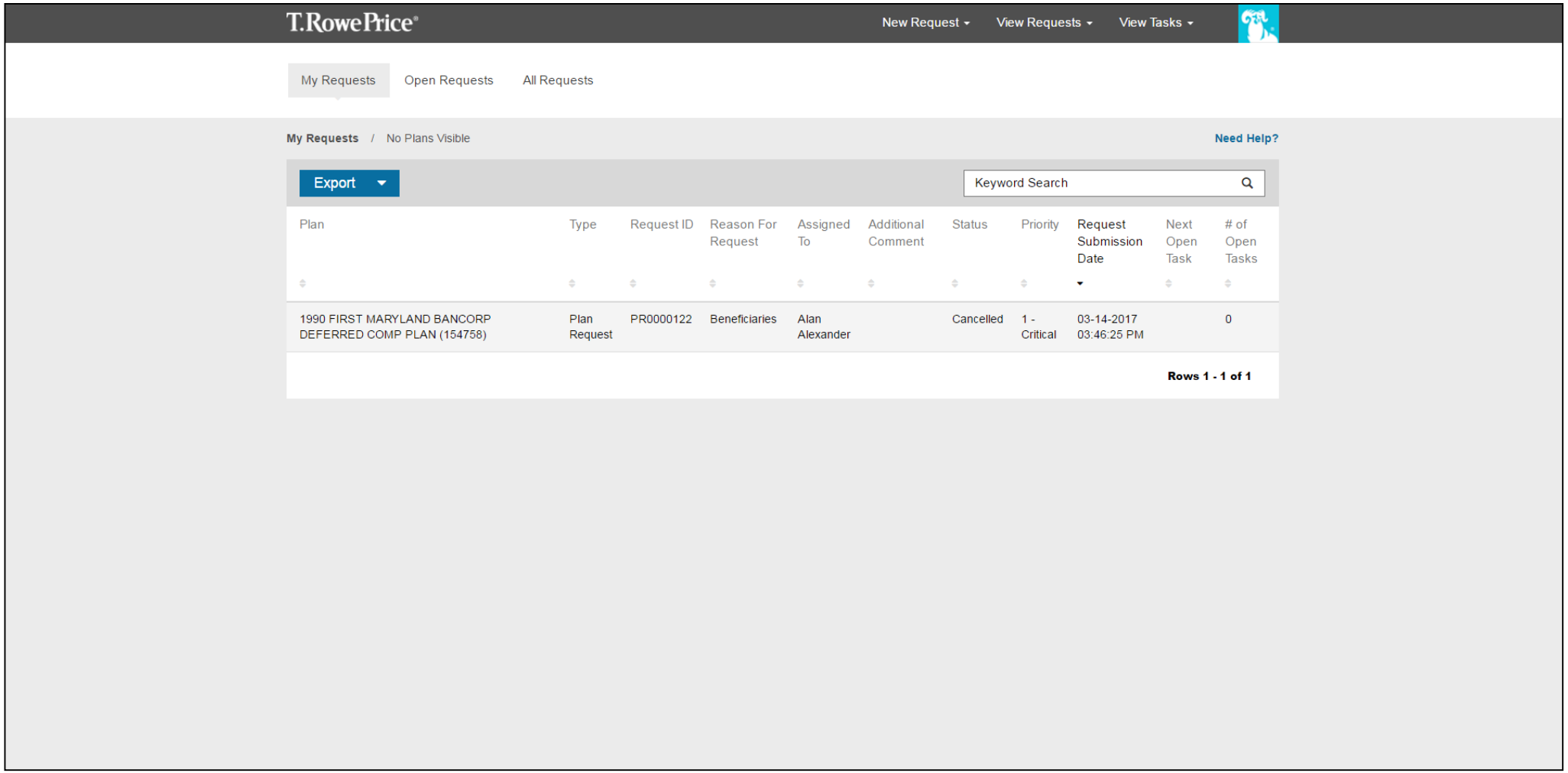
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Essential Plugins / Review Process

- Customer Service Portal ,Integration - Multiple Provider Single Sign-On Installer, Project Management TeamSpace (s) etc.
- Well defined review-process for plugins
  - Identify the business case
  - Identify the need for the specific plugins.
  - Core team review.
- Peer review, code review checkpoints to ensure quality, traceability.
- In process to utilizing source control repository i.e. to facilitate code scanning.

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Service Portal – CSM (Example)



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Top Takeaways

Business Services Request Management

1

GET THE RIGHT RESOURCES (SERVICENOW EXPERIENCE NOT NECESSARY)
Good Analyst and Developer capabilities more important than specific ServiceNow knowledge

2

MANAGEMENT SUPPORT FOR CENTRALIZED SERVICENOW DEVELOPMENT TEAM
Provides governance, engagement models and technical standards

3

KEEP IT SIMPLE!
Use a tool for what it is meant to do and avoid customizations (Costly to Support)

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Thank You

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Q & A

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Thank You

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