knowledge17

WORK at LIGHTSPEED™

Reducing Overall Service Delivery cost/time by Streamlining Demand Management

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Agenda

- What is Demand Management?
- Challenges and Goals
- Solution at a Glance (before and after)
- PIR vs. MyPruIT comparison
- Solution Approach
- Value Outcomes
- What We Learned
- Next Steps

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Speaker Introduction



NAME: David Campaña

TITLE: Vice President, Information Systems

FUNCTION: System Delivery

COMPANY: Prudential Financial

EXPERIENCE: 23-year System Delivery and Organizational Leader

EXPERTISE: System Delivery, Enterprise Architecture, Business Process Re-engineering, Program Management, Strategic Planning and Execution

ACHIEVEMENTS: Completed the re-platform and integration of our Demand Management and Service Catalog systems used enterprise-wide (domestically)

CURRENT PROJECTS: Enterprise Demand Management, additional ServiceNow projects in pipeline

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My Company



NAME: Prudential Financial

INDUSTRY: Financial Services

MARKET FOCUS: Individual and institutional financial services company

COMPANY'S PRIMARY PRODUCTS/SOLUTIONS: With operations in the United States, Asia, Europe and Latin America, we provide customers with a variety of products and services, including life insurance, annuities, retirement-related services, mutual funds and investment management. We strive to create long-term value for our stakeholders through strong business fundamentals, consistent with our mission guided by our vision and directed by our company's core values

COMPANY-WIDE INITIATIVES: Overall efficiencies, Speed of development/deployment/quality, Responsiveness to customers/partners/other teams, Regulatory Compliance

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Session Overview



Objectives

- How Prudential focused on streamlining process demand to gain overall efficiencies



What You Will Learn

- Understand the challenges our business and IT partners were having with demand management
- Simplifying the Demand Management process
- The importance of the demand engagement model
- What we learned, how it may apply to you for your initiatives/projects

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What is Demand Management?

- Initiating Demand
  - People and organizations create demand for efficiency (support), effectiveness(improve) and transformation(innovate)
  - Understanding demand requests made by customers
- Understanding and Aligning Demand
  - Ability to understand customer requests / requirements
  - Understand overall capabilities and capacity of service delivery organization
  - Align and validate incoming requests / requirements to the proper service providers(s)
- Implementing and delivering demand
  - Identified service provider(s) review requirements and plan for implementation
  - Validate delivery of request



Goal: Increasing overall business value by leveraging IT services to implementing business needs

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Our Challenges

- Legacy System
  - PIR (Project Initiation Request) built on technology identified to be sunset
  - Manual intensive system with minimal integration
  - Limited reporting capabilities
- Process Atrophy
  - Cumbersome process
  - Low Transparency
- Relationship Managers play a tactical role
- Skillset harder to retain



Users were frustrated

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Our Goals

- Re-platform system to Service.NOW
  - Leverage platform to greatly improve the overall functionality
  - Integrate catalog and demand request systems
- Make substantial improvements to the user interface
- Increased Transparency
- Improved Reporting
- Identify, create and introduce streamlined Catalog Services
  - Non-automated, predefined services
- Relationship Managers play strategic / partner role



Mandate: Deliver a new Demand Management system with Service Catalog integration by EOY 2016 (10 months)

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GBTS Project Initiation Request (PIR) Home Page

1. Domino based
2. Text-based cumbersome User Interface
3. Limited personalization and customization
4. Very limited search
5. Very limited customization
6. Email integration only

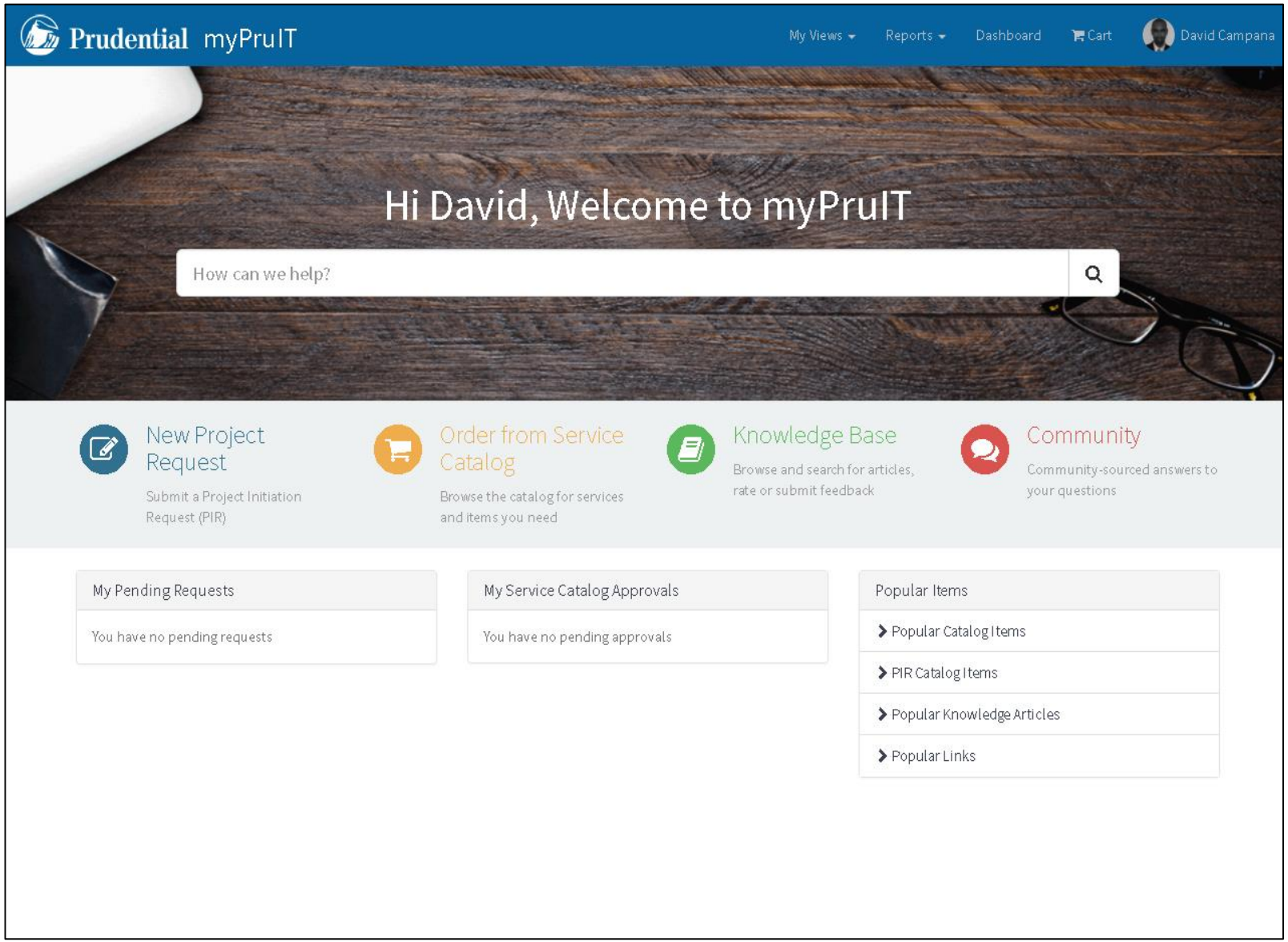


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MyPruIT with Service Catalog and PIR Integration

1. Custom Service.Now application
2. Service Catalog integration
3. Reuse of out of box functions
   - Knowledgebase
   - Community
4. Personalization
5. Universal Search

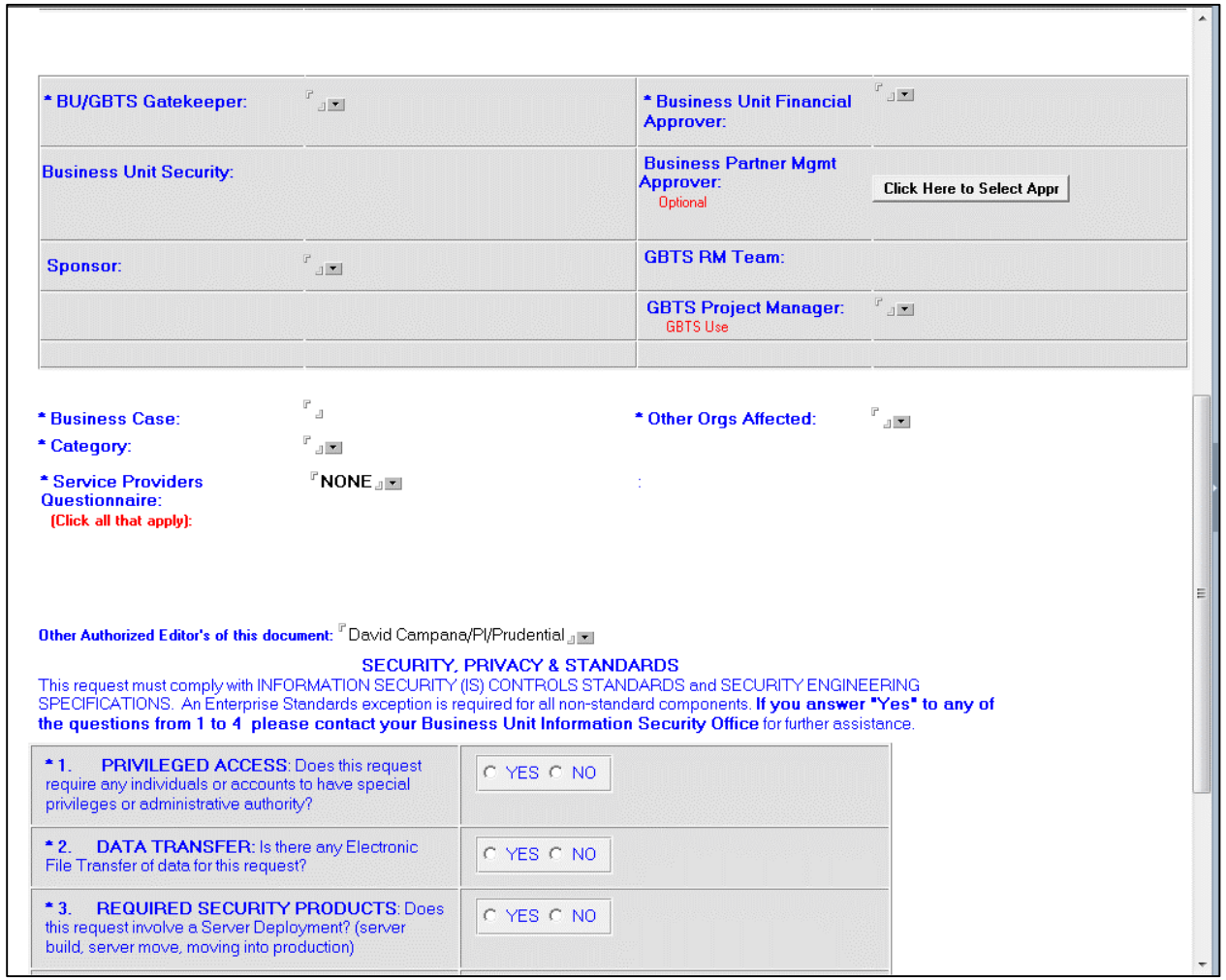


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GBTS PIR Request Form



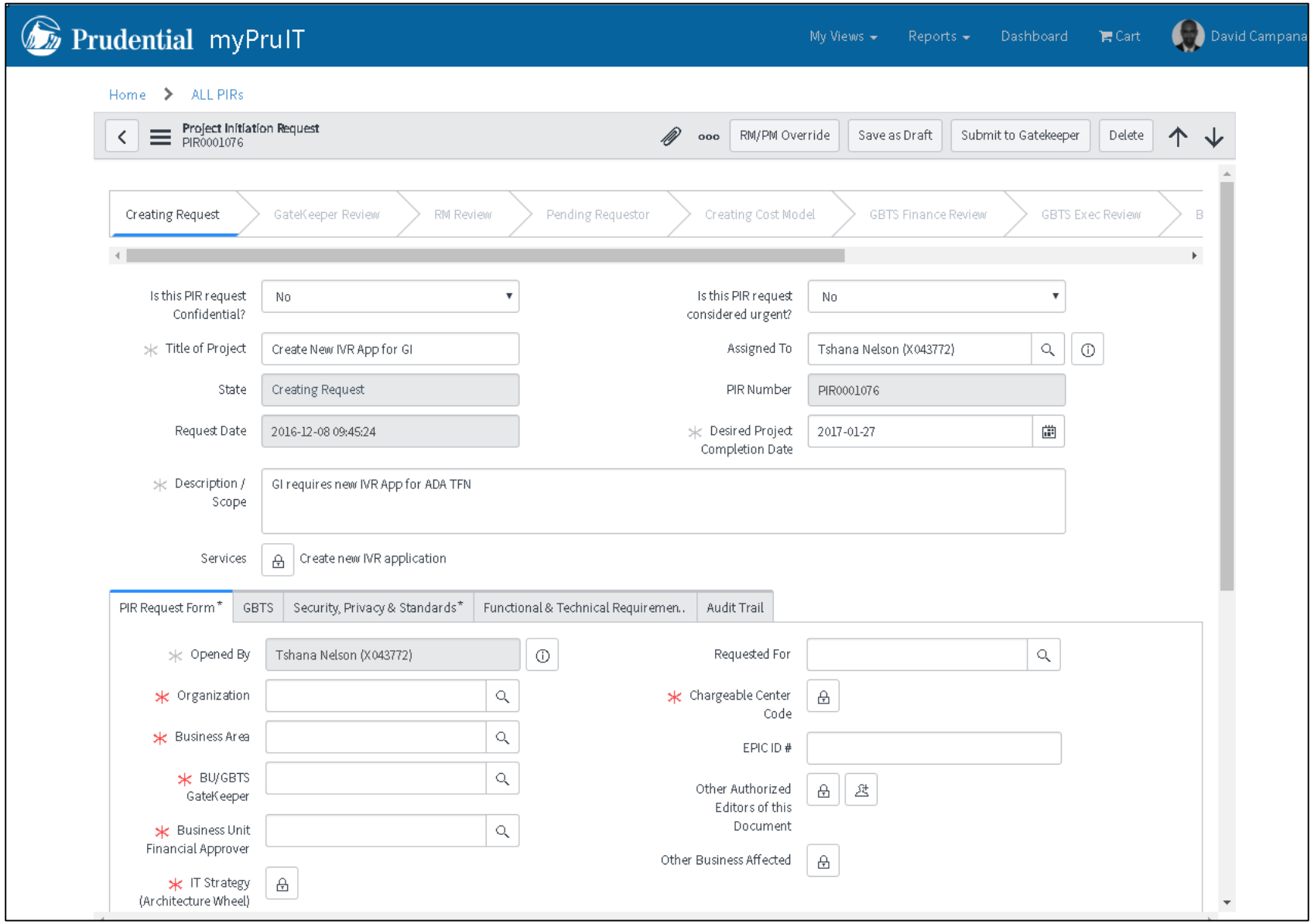


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MyPruIT PIR Request Form

1. Streamlined Interface
2. Process flow highlighted on top
3. Use of tabs for sections reduced scrolling
4. More use of drop down fields
5. Pre-populated based on persona

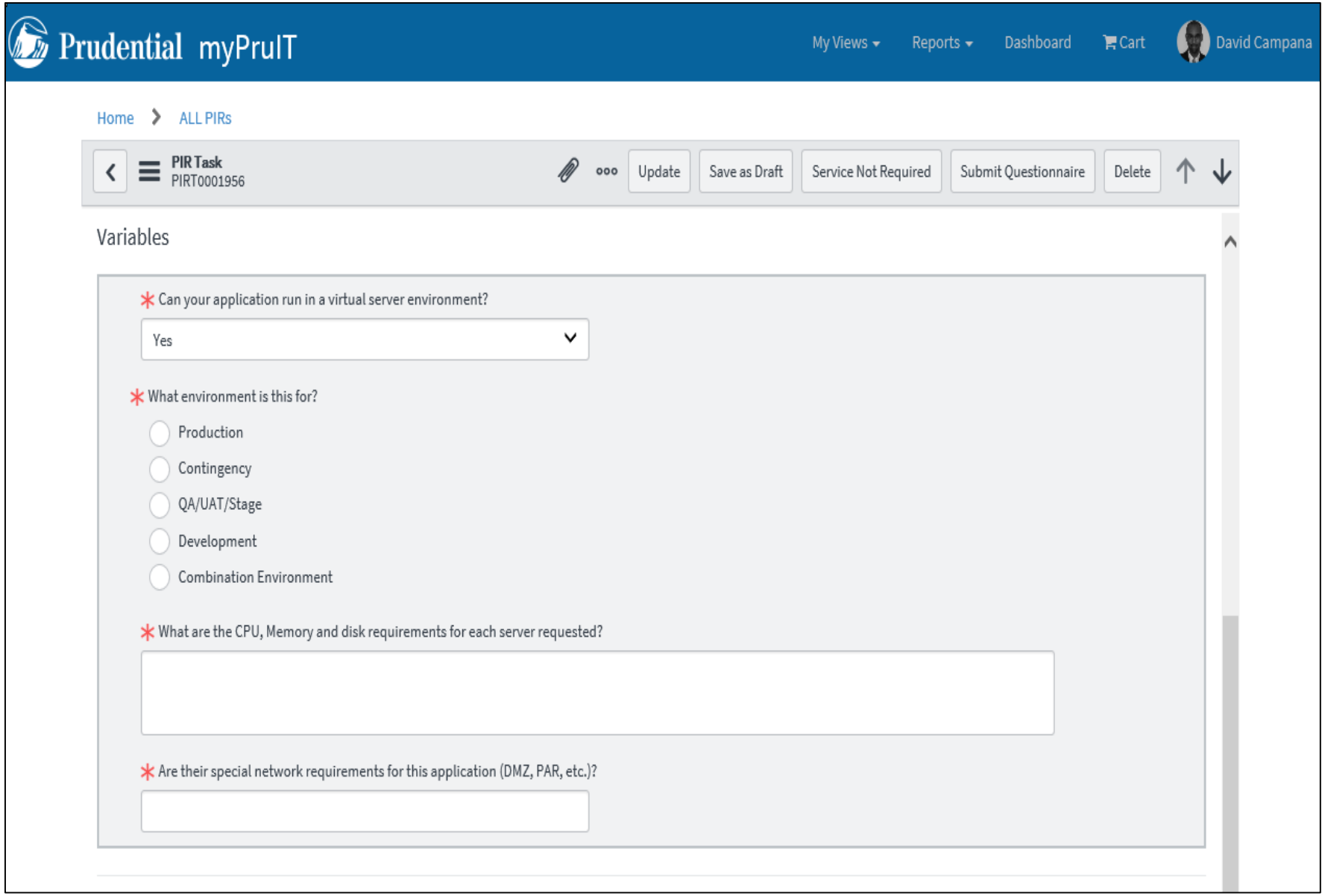


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PIR Questionnaire

- Provide requestor targeted / specific questions about predefined request
- Services with questionnaires have quicker implementation times than those without
- Allows the requestor to fully understand request

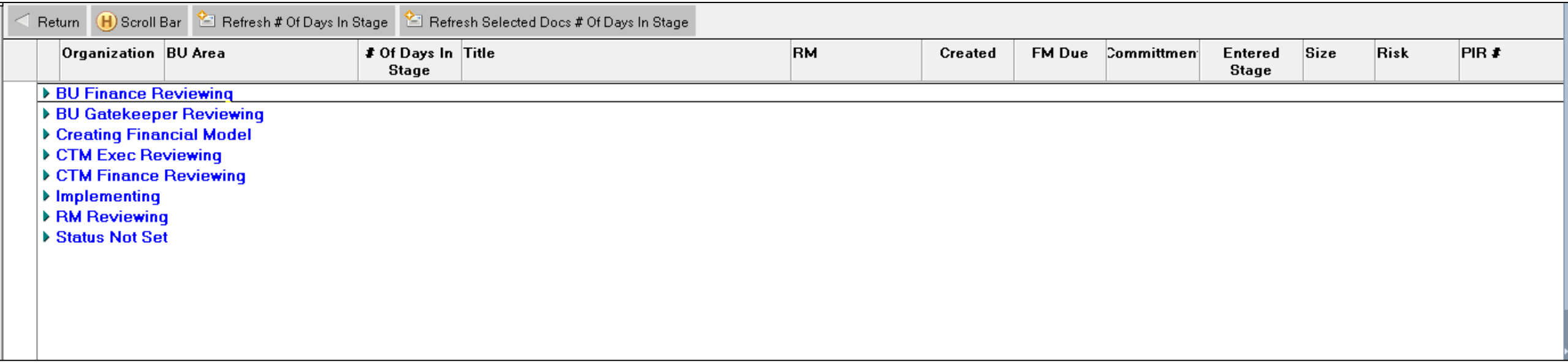


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GBTS PIR Views

1. Hard to configure views
2. Data export difficult
3. Cumbersome reporting

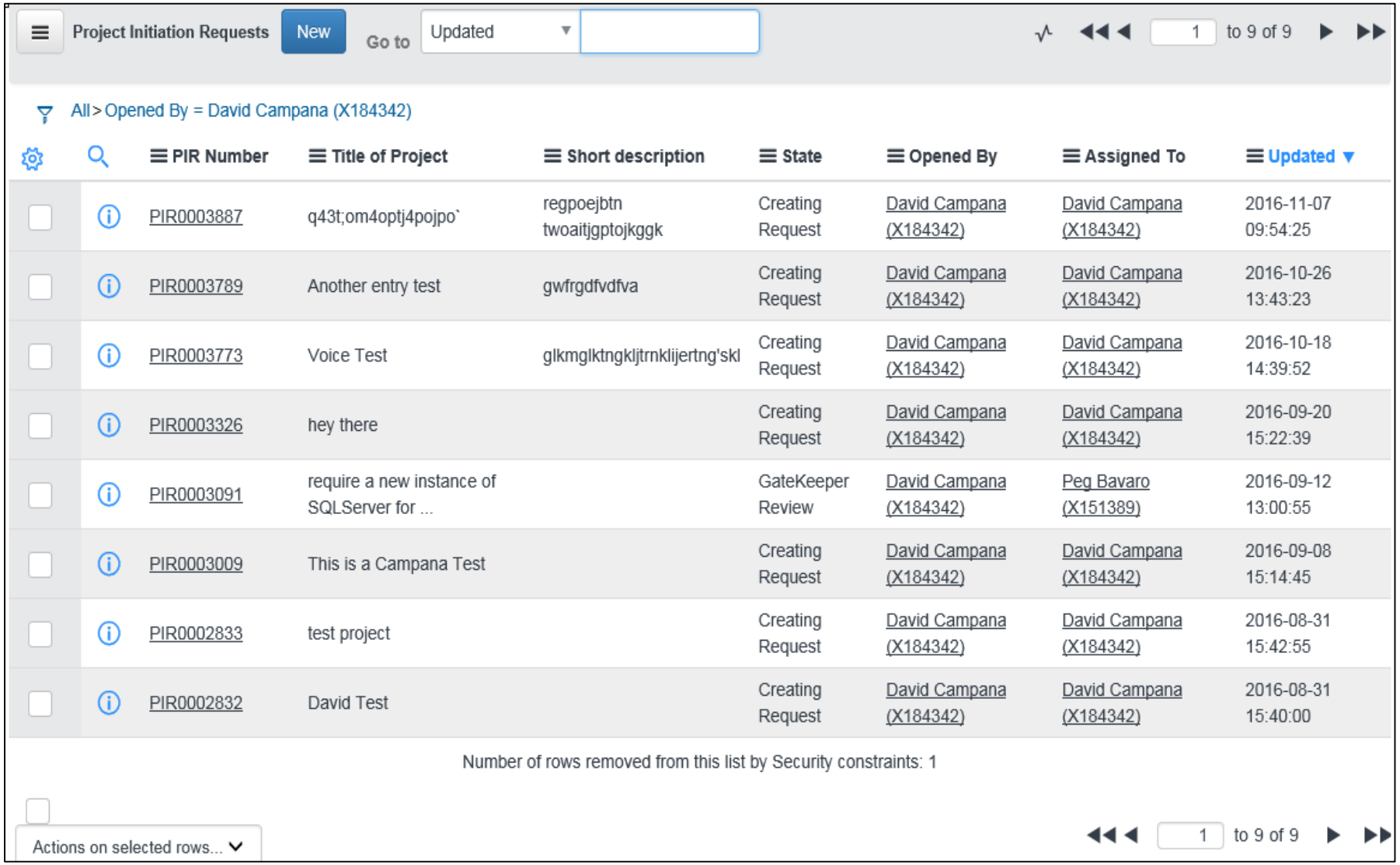


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MyPruIT Views

1. End-user configurable views
2. More detail information available in views
3. Data extract into excel, CSV, etc.
4. Simple SQL query tool to further filter data



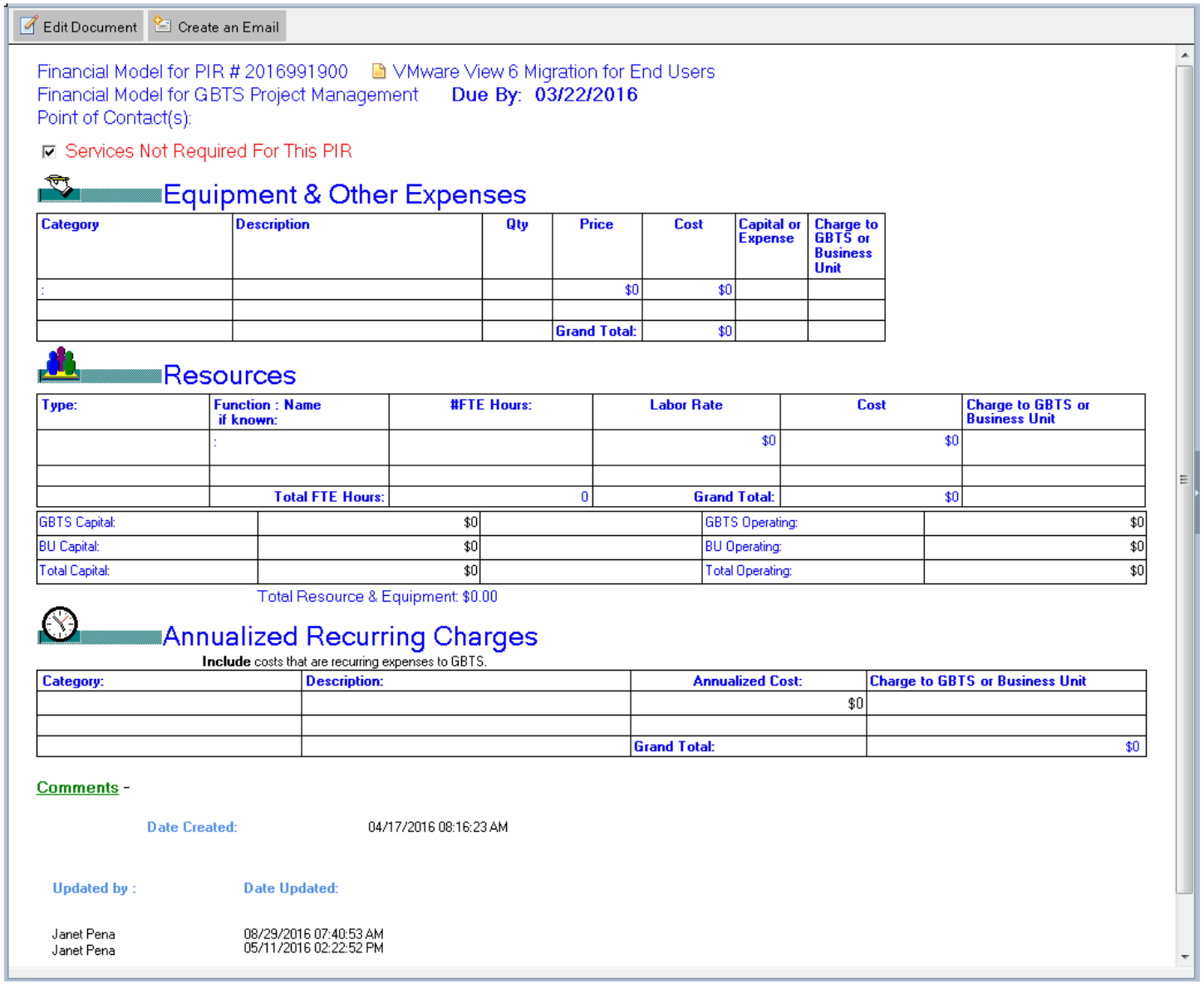
PIR Number	Title of Project	Short description	State	Opened By	Assigned To	Updated
PIR0003887	q43t;om4optj4pojpo`	regpoejbtn twoaitjgptojkggk	Creating Request	David Campana (X184342)	David Campana (X184342)	2016-11-07 09:54:25
PIR0003789	Another entry test	gwfrgdfvdfva	Creating Request	David Campana (X184342)	David Campana (X184342)	2016-10-26 13:43:23
PIR0003773	Voice Test	glkmglktngkljtrnklijertng'skl	Creating Request	David Campana (X184342)	David Campana (X184342)	2016-10-18 14:39:52
PIR0003326	hey there		Creating Request	David Campana (X184342)	David Campana (X184342)	2016-09-20 15:22:39
PIR0003091	require a new instance of SQLServer for ...		GateKeeper Review	David Campana (X184342)	Peg Bavaro (X151389)	2016-09-12 13:00:55
PIR0003009	This is a Campana Test		Creating Request	David Campana (X184342)	David Campana (X184342)	2016-09-08 15:14:45
PIR0002833	test project		Creating Request	David Campana (X184342)	David Campana (X184342)	2016-08-31 15:42:55
PIR0002832	David Test		Creating Request	David Campana (X184342)	David Campana (X184342)	2016-08-31 15:40:00

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GBTS PIR Financial Model

- Fixed model where user needs to have all information
- Cumbersome to extract financial data into other systems
- No fixed financial information available



Edit Document | Create an Email

Financial Model for PIR # 2016991900 VMware View 6 Migration for End Users
Financial Model for GBTS Project Management **Due By: 03/22/2016**
Point of Contact(s):

☑ Services Not Required For This PIR

Equipment & Other Expenses

Category	Description	Qty	Price	Cost	Capital or Expense	Charge to GBTS or Business Unit
:			$0	$0		
			Grand Total:	$0		

Resources

Type:	Function : Name if known:	#FTE Hours:	Labor Rate	Cost	Charge to GBTS or Business Unit
	:		$0	$0	
	Total FTE Hours:	0	Grand Total:	$0	

GBTS Capital:	$0	GBTS Operating:	$0
BU Capital:	$0	BU Operating:	$0
Total Capital:	$0	Total Operating:	$0

Total Resource & Equipment: $0.00

Annualized Recurring Charges

Include costs that are recurring expenses to GBTS.

Category:	Description:	Annualized Cost:	Charge to GBTS or Business Unit
		$0	
		Grand Total:	$0

Comments -

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Updated by : Date Updated:

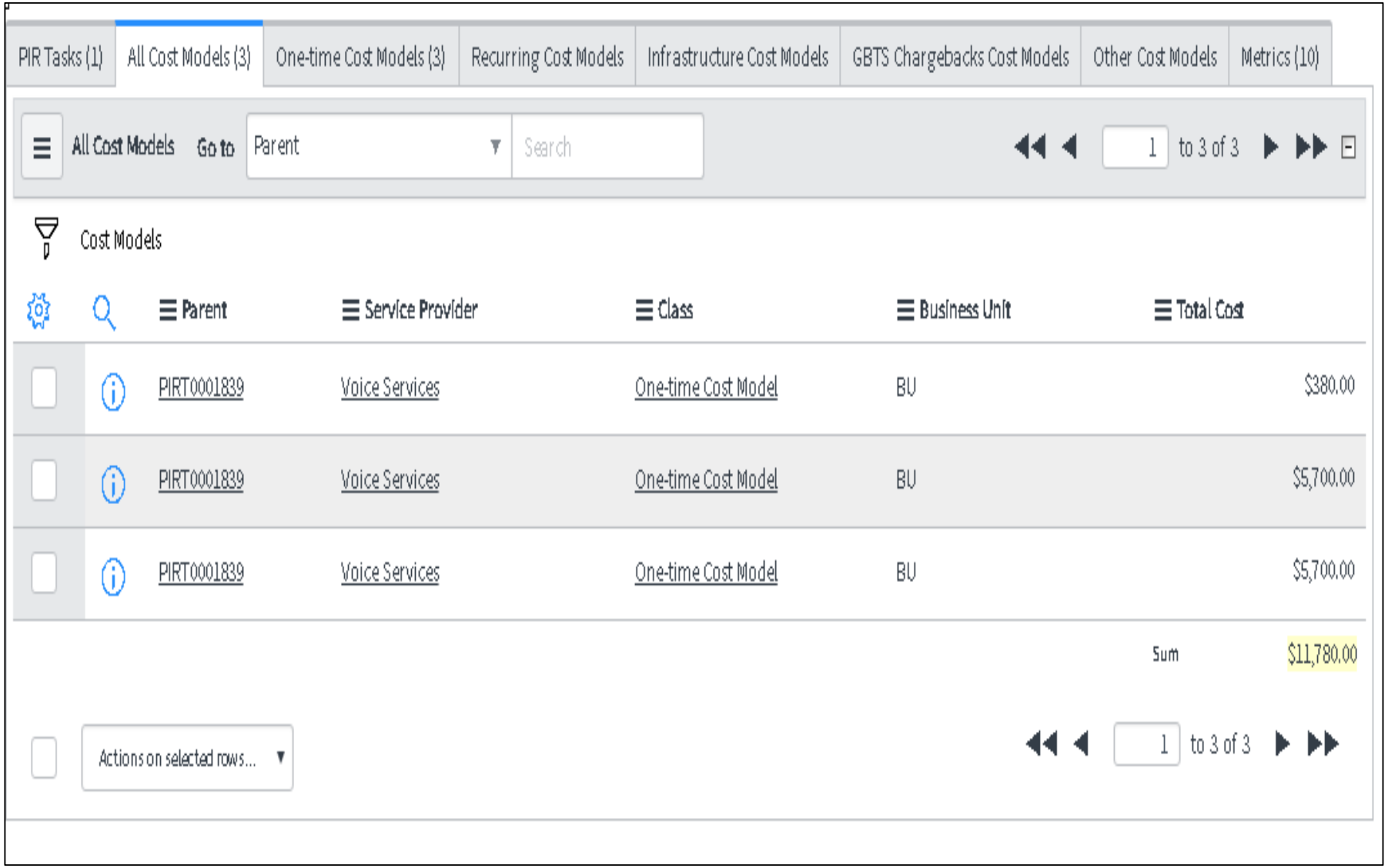
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MyPruIT Financial Model

1. Used Tasks to separate work from financials
2. Centralized process for all service providers to enter information
3. Pre-populated rate card and roles
4. Configured for CAPEX, OPEX, One time and recurring charges
5. Simplified integration into finance organization

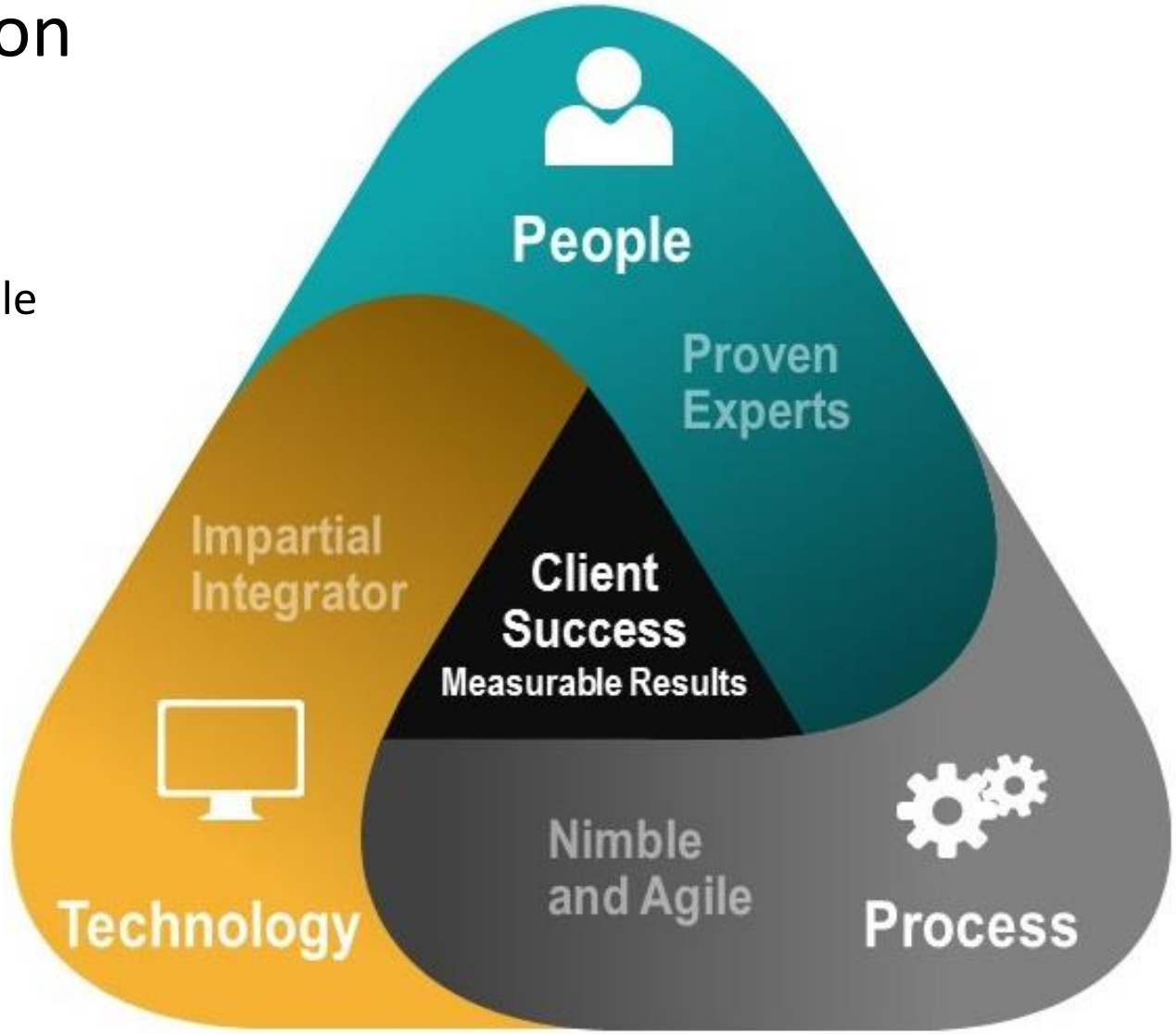


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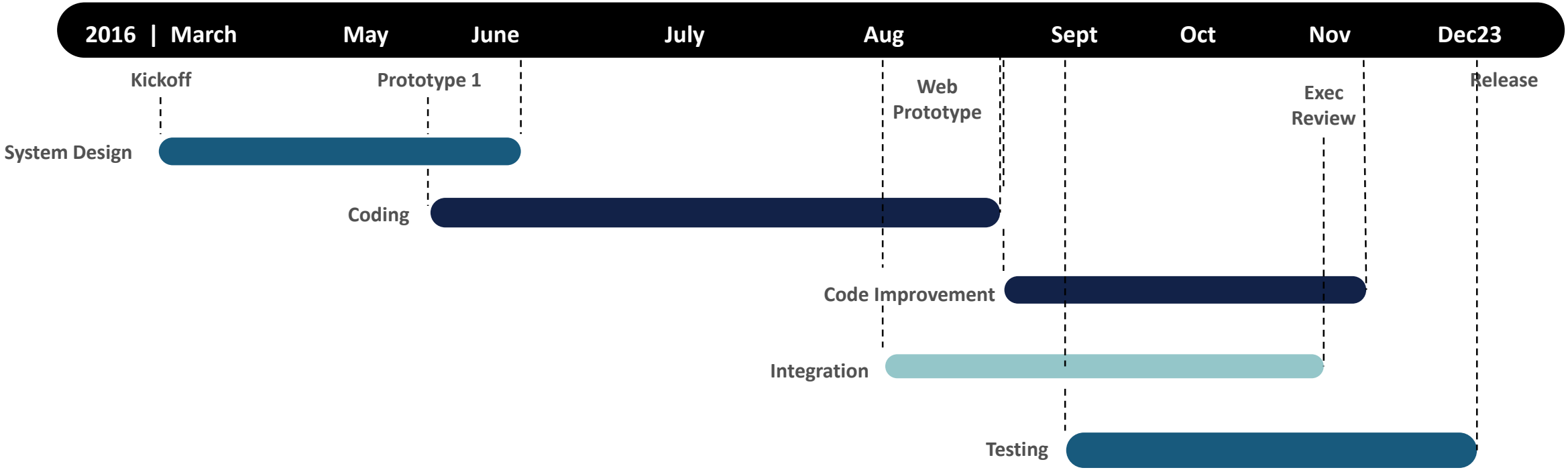
Solution – Continuous Collaboration

- People
  - Evolution not revolution, keep users engaged
  - Keep things familiar, standardize whenever possible
  - Empower power users, shift left
- Process
  - Enhance whenever possible
  - Allow for flexibility
  - Focus on efficiencies, orchestration, automation
- Technology
  - Transformation exercise
  - Leverage / Maximize the platform
  - Measure, identify bottlenecks, solution, repeat



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Solution – Timeline



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Value Outcomes – Quicker Delivery Through Process Efficiencies

Current # OF

621

PIR Requests

Service Catalog

25%

PIR Consumption

% of all PIR's now using at least one Service Catalog Item

Up to a

60%

PIR Completion Time Reduction

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Value Outcomes – Efficiencies Driving Higher Quality Results

Total Number

104

Of Rescope
(2016)

Number of PIR's which require a rescope due to changing of the requirements for PIR

An increase

4X

Service Catalog Use

Consumption Rate for Service Catalog used services went from 10% to 42% in four months

An decrease

89%

Rescope
(2017)

Number of PIR's which require a rescope due to changing of the requirements for PIR

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What We Learned

- Understanding how peoples roles can be translated into the process
- The process in your head is not so great in code
- Not everything can be automated (nor should it)
- Don’t underestimate the preplanning and business process analysis. Evolve
- Don’t let your consumer force you to QA forever. Even 80/20 is not realistic 60/40 is great
- Make sure you have great UX designers not just workflow and process folks. Looks matter…a lot
- Do not look for broad buy in. Start small. Find a challenge and chip away. Iterate a lot!
- Engage with users early and often

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Top Takeaways

1

Start with a well defined application

2

Engage your users and partners early and often

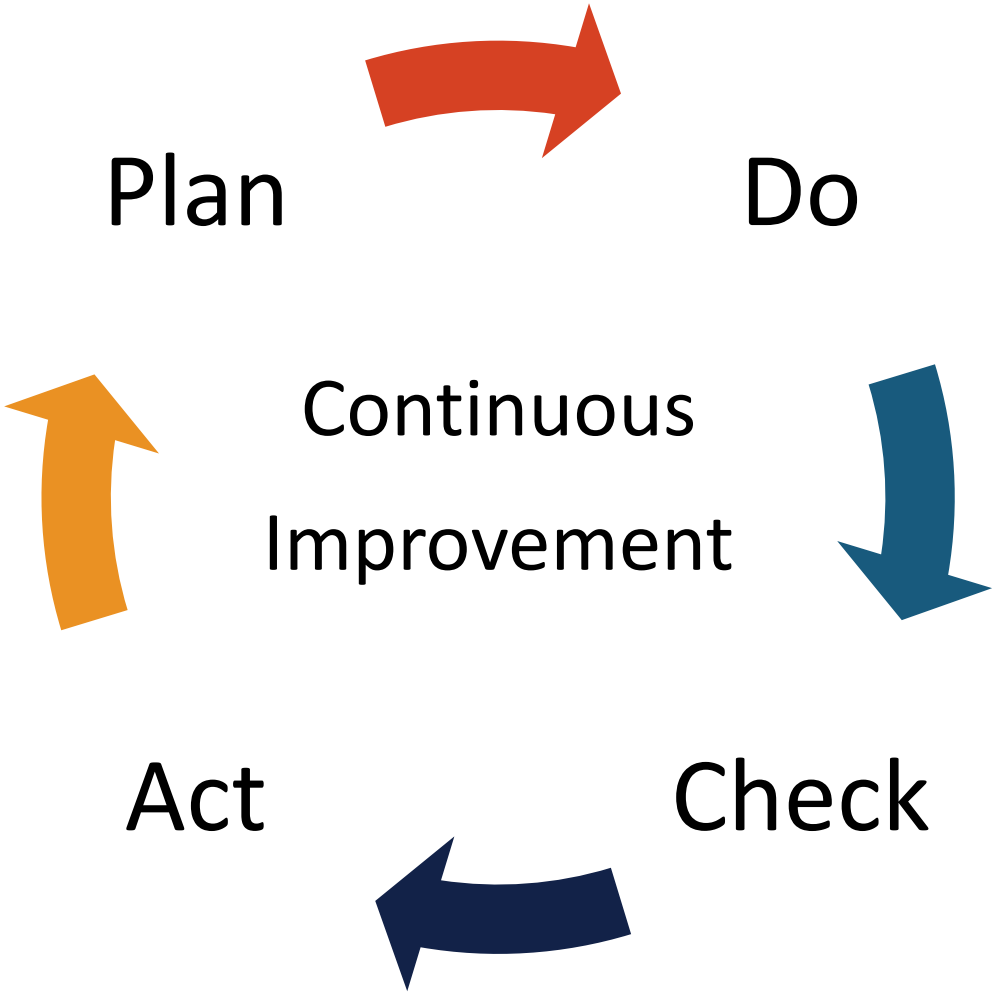
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Set Expectations

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Next Steps

- Dashboard and Reporting
- Alternate workflows
- Automation
- Orchestration
- Service Provider Capacity Management
- Integration into other corporate systems
- Robust SLA implementation



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Thank You

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Q & A

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Thank You

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Vice President, Information Systems

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