knowledge17

WORK at LIGHTSPEED™

Utilizing ServiceNow's Flexible Platform to Extend PPM to Improve Portfolio Shaping at TriNet

DAVID LUDWIG
SENIOR PROGRAM MANAGER, PORTFOLIO
TriNet

© 2017 ServiceNow All Rights Reserved

servicenow

Agenda

- Portfolio Management at TriNet
- ServiceNow Customizations to Enable Portfolio Management
- Other ServiceNow Customizations

© 2017 ServiceNow All Rights Reserved

Speaker Introduction



NAME: Dave Ludwig

TITLE: Senior Program Manager, Portfolio

FUNCTION: Central Portfolio Team, Technology Organization

COMPANY: TriNet

EXPERIENCE: 30+ years in IT & Technology organizations

ROLES: Application Developer, Business Analyst, Project Manager, Program Manager, Portfolio Manager

CURRENTLY: Portfolio Manager at TriNet since January 2016

PREVIOUSLY: Managed HP's Global PMO, Dell Financial Services, Harcourt, Sierra Systems

FOCUS: Portfolio focus since 2006, using Spreadsheet, Daptiv, HP PPM, ServiceNow

© 2017 ServiceNow All Rights Reserved

My Company

NAME: TriNet

INDUSTRY: Human Resource Services

MARKET FOCUS: TriNet is a strategic partner to small and medium-sized businesses for HR, payroll, employee benefits, employment law compliance and risk mitigation.

COMPANY'S PRIMARY PRODUCTS/SOLUTIONS: TriNet helps more than 13,000 customers and their more than 337,000 employees focus on business success while we manage their critical HR needs
(As of 12/31/16)





Logos shown are trademarks or registered trademarks of their respective owners and not ServiceNow

© 2017 ServiceNow All Rights Reserved

Objectives

- Convey key Portfolio Management concepts and principles
- Show how the customizations we've made to ServiceNow facilitate our Portfolio processes

© 2017 ServiceNow All Rights Reserved

Portfolio Management at TriNet

© 2017 ServiceNow All Rights Reserved

Context – Setting the stage

TriNet first implemented ServiceNow in April 2016

We had two parallel configuration efforts in the three months leading up to go-live

- Help/Service Desk
  - Largely out of the box, with minor customization on our service portal
- Project/Portfolio
  - The focus of today's presentation

Since then, we have continued to enhance those products plus implemented solutions for

- New employee onboarding
- Software change control/move to production

© 2017 ServiceNow All Rights Reserved

Project Portfolio Management Principles at TriNet

Project Portfolio Management is a key process that drives:

- Alignment of portfolio to corporate goals and roadmaps
- Efficient, effective resource allocation
- Interlock plans and resources across teams
- Empower and enable stakeholder engagement
- Drive rigor and discipline in portfolio execution
  - Make commitments that can be kept
  - Communicate commitments to stakeholders
  - Monitor progress against commitments and adjust in a managed fashion
  - Measure and communicate performance against commitments



© 2017 ServiceNow All Rights Reserved

Portfolio Planning and Execution at TriNet

- We use ServiceNow Demands to represent desired or potential projects
- Our annual planning process is focused on identifying the “optimum” set of Demands that best meet the company’s strategic objectives, while fitting within resource and cost constraints
- At the end of the annual planning process, the selected Demands are promoted to become Projects. This is our Portfolio for the next year.
- Project managers execute the Projects, with ServiceNow as the system of record for dates, deliverables, R/Y/G status designation, weekly status reporting, On Time Delivery metrics, etc.
- Throughout the year, change control enables new projects to be added to the Portfolio, generally via tradeoff of an existing project

© 2017 ServiceNow All Rights Reserved

Three Overarching Phases of the Planning Cycle

- Confirm/adjust capacity and goals
  - Identify corporate and organization goals
  - Define Baseline and non-discretionary work
  - Account for carryover projects
- Advocate for projects that should be funded
  - Business articulate potential projects / investments
  - Make pitches of benefits that would be achieved if projects were funded
- Adjust the portfolio based on the budget received
  - Adjust plans and projects to fit within available funds and resources
  - Prioritize and make trade-offs
  - Finalize portfolio



© 2017 ServiceNow All Rights Reserved

2017 Portfolio Planning at TriNet

PPM Demand

Priorities/ Ideas gathered from CEO Staff

2017 Proposed Projects (Demands) to address priorities - created by Tech Team

2017 Project Candidates selected based on t-shirt size, value, risk and start timeframe

PPM Project

2017 Committed (Above the Line) Projects selected based on value, risk and overall workforce capacity



© 2017 ServiceNow All Rights Reserved

2017 Portfolio Planning Calendar

Week Ending	Baseline	Innovation Management	Existing Project Carryover	CPE + Ongoing + Business Non Discretionary	Tech Optimization	Business Innovation
5-Aug	Demands Created; T-Shirt Sizing					
12-Aug			Update Staffing			
19-Aug	Staffing Profile Created					
26-Aug	Staff Review		Staff Review	Demands Created; PDS & Benefit/Risk		
2-Sep	Executive Reviews		Executive Reviews	T-Shirt Sizing; Business Engagement (Review)		
9-Sep	Functionally Complete			Staffing Profile Created		
16-Sep				Staff Review	Executive Staff F2F	
23-Sep				Executive Reviews	Demands Created; PDS & Benefit/Risk	
30-Sep					T-Shirt Sizing; CTO Review (Filter)	
7-Oct						
14-Oct					Extended Leadership Team F2F	
21-Oct					Staffing Profile Created	
28-Oct					Staff Review	
4-Nov					Executive Reviews	
11-Nov	Portfolio Review and Rationalization					
18-Nov						
25-Nov	Reviews w/ CEO Staff – checkpoint on Staff F2F Results					
2-Dec	Move proposed portfolio to Interlocked state					
9-Dec	Final reviews of proposed portfolio w/ Business + final changes					
16-Dec	All data cleanup and validation; Final Financial plan					
23-Dec	Move projects Above The Line (Create Projects from Demands)					

© 2017 ServiceNow All Rights Reserved

Primary Project Categorization

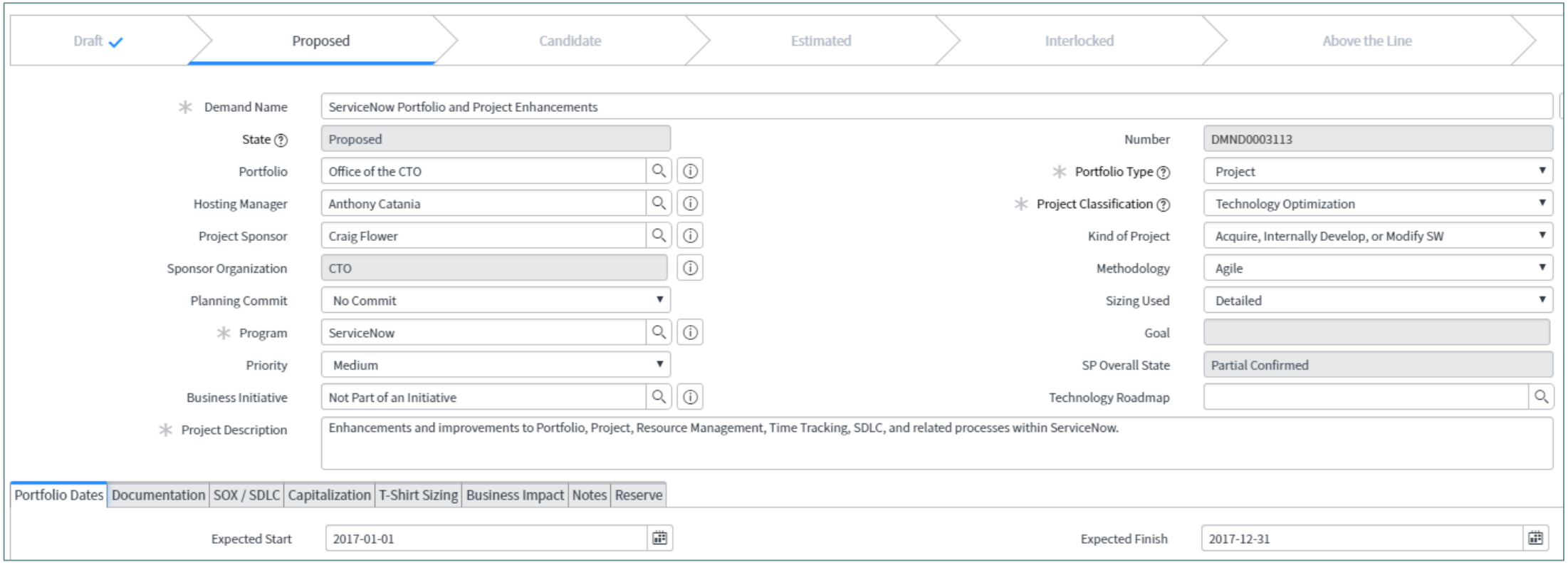
Portfolio Type	Project Classification	Description	Discretionary
Activity	Baseline	Keep the lights on (e.g. Help desk, dedicated support)	☒
	Innovation Management	Management & non-project-specific (e.g. VP/Director, Manager of Managers, DBA pool, Portfolio planners)	☒
Project	Business Innovation	Innovation requested by the business	☑
	Technology Optimization	Innovation requested by IT (“IT for IT”)	☑
	Business Non-Discretionary	Must-do (e.g. SOX, Fiscal Year Start/End)	☒
	CPE	Current Product Engineering (similar to “Small Investment Projects”; planned by level of effort not scope)	☑
Carryover	(multiple)	Projects that started last year and are currently in-flight	☒

© 2017 ServiceNow All Rights Reserved

ServiceNow Customizations to Enable Portfolio Management

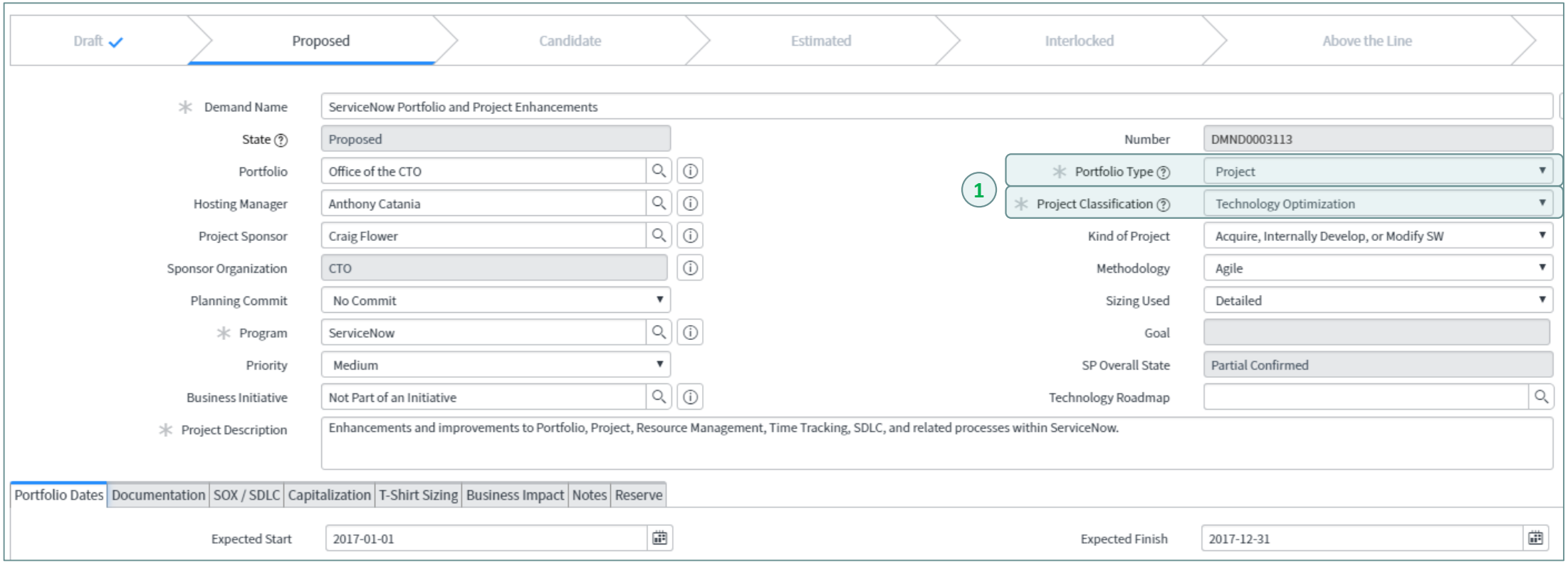
© 2017 ServiceNow All Rights Reserved

Demand / Project Customizations



© 2017 ServiceNow All Rights Reserved

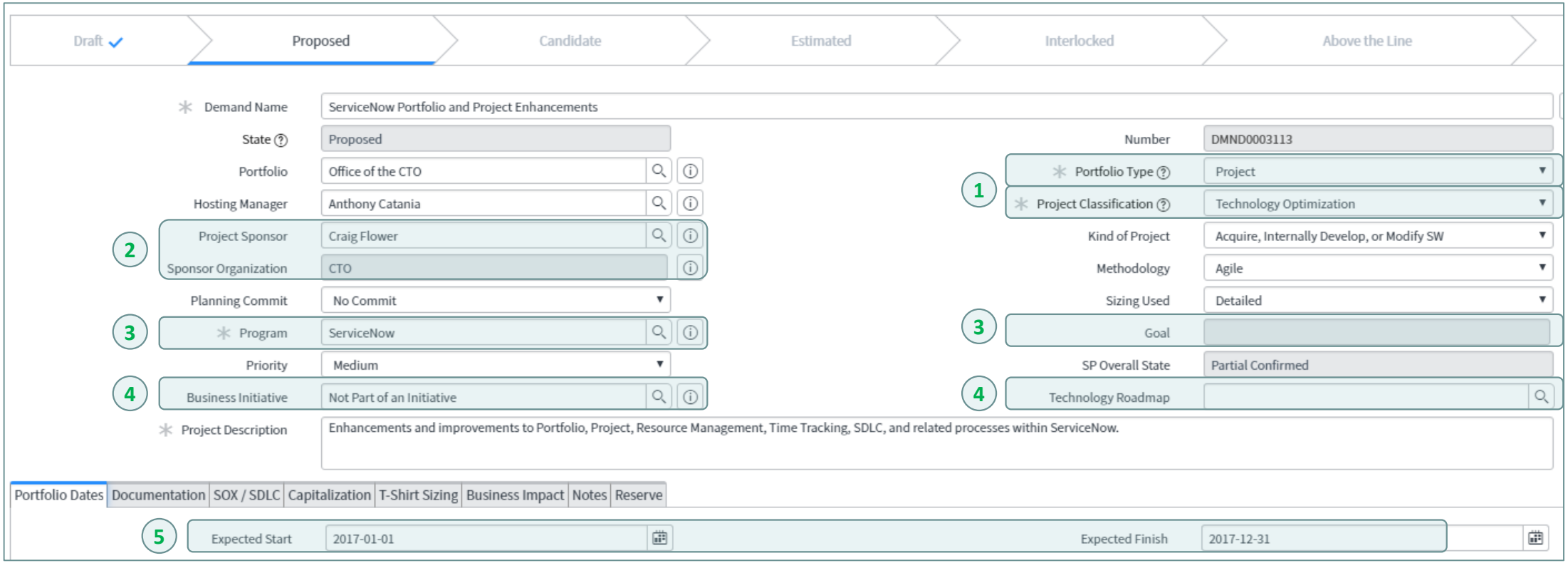
Demand / Project Customizations



Portfolio Type	Project Classification	Description
Activity	Baseline	Keep the lights on (e.g. Help desk, dedicated support)
	Innovation Management	Management & non-project-specific (e.g. VP/Director/Mgr of Mgr, DBA pool, Portfolio planners)
Project	Business Innovation	Innovation requested by the business
	Technology Optimization	Innovation requested by IT (“IT for IT”)
	Business Non-Discretionary	Must-do (e.g. SOX, Fiscal Year Start/End)
	CPE	Current Product Engineering (similar to “Small Investment Projects”; planned by level of effort not scope)

© 2017 ServiceNow All Rights Reserved

Demand / Project Customizations



1 – These are our primary classifications of project type. Discussed on previous slide.

2 – Who is the sponsor if this demand/project. Select an individual, automatically displays their organization.

3 – Programs are groupings of related initiatives; Goal ties these to published corporate and organizational goals.

4 – Initiative and Roadmap are additional groupings of demands/projects.

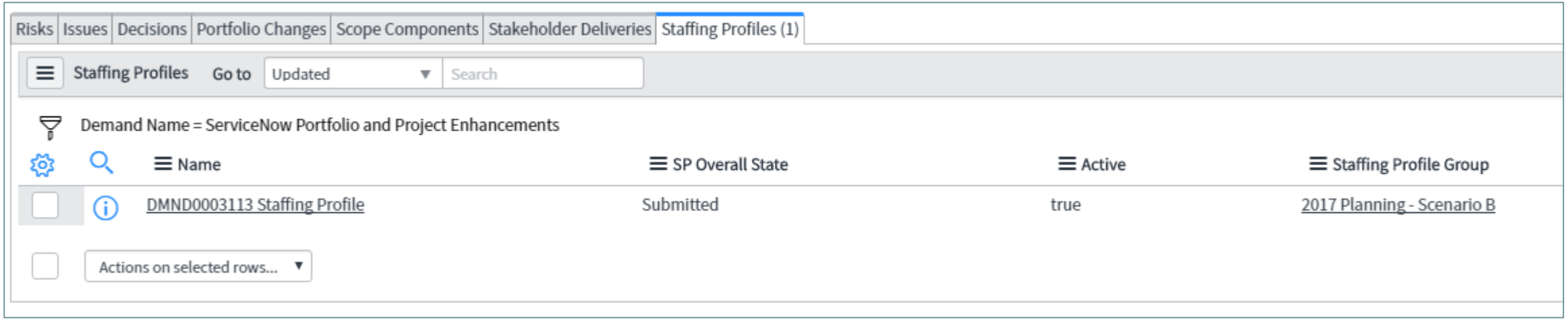
5 – Portfolio Dates: when the demand/project is “approved” or “authorized” to execute. Planning view, not execution.

© 2017 ServiceNow All Rights Reserved

Staffing Profile

We created a custom “Staffing Profile” table, which can attach to a Demand/Project

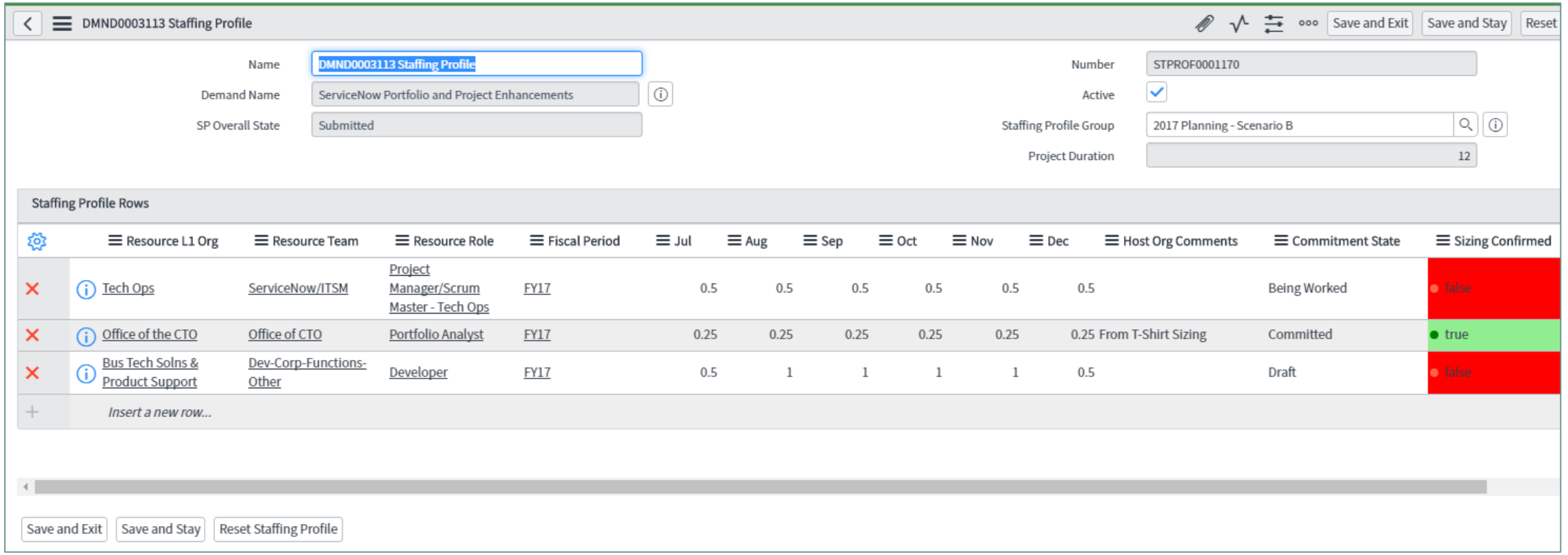
- Staffing profiles provide a planning (not execution) view of anticipated project resources
- They are created by planners fairly early in the planning cycle, and refined throughout
- They are a primary determinant of a Demand/Project’s forecasted cost
- They drive short term capacity discussions
  - “This project’s costs are reasonable, but the demand is against a very constrained team….”
- They also drive longer term resource analysis
  - “Six months from now we’re going to need a lot more Mobile developers….”



© 2017 ServiceNow All Rights Reserved

Staffing Profile

- Resources are planned at the “per team, per month” level.
- “Named resources” are not defined – just demand against Org / Resource Team / Resource Role



© 2017 ServiceNow All Rights Reserved

Other ServiceNow Customizations

© 2017 ServiceNow All Rights Reserved

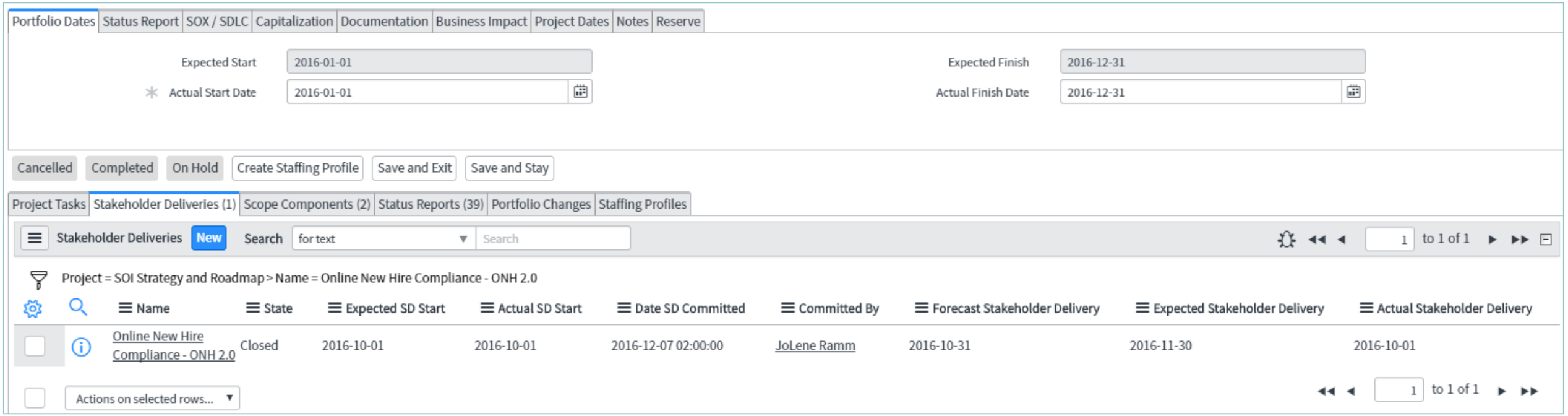
Other ServiceNow Customizations at TriNet

Other Customizations

- Stakeholder Deliveries
- Capitalization Tracking
- Status Reporting
- “Reserve” fields

© 2017 ServiceNow All Rights Reserved

Stakeholder Delivery Tab

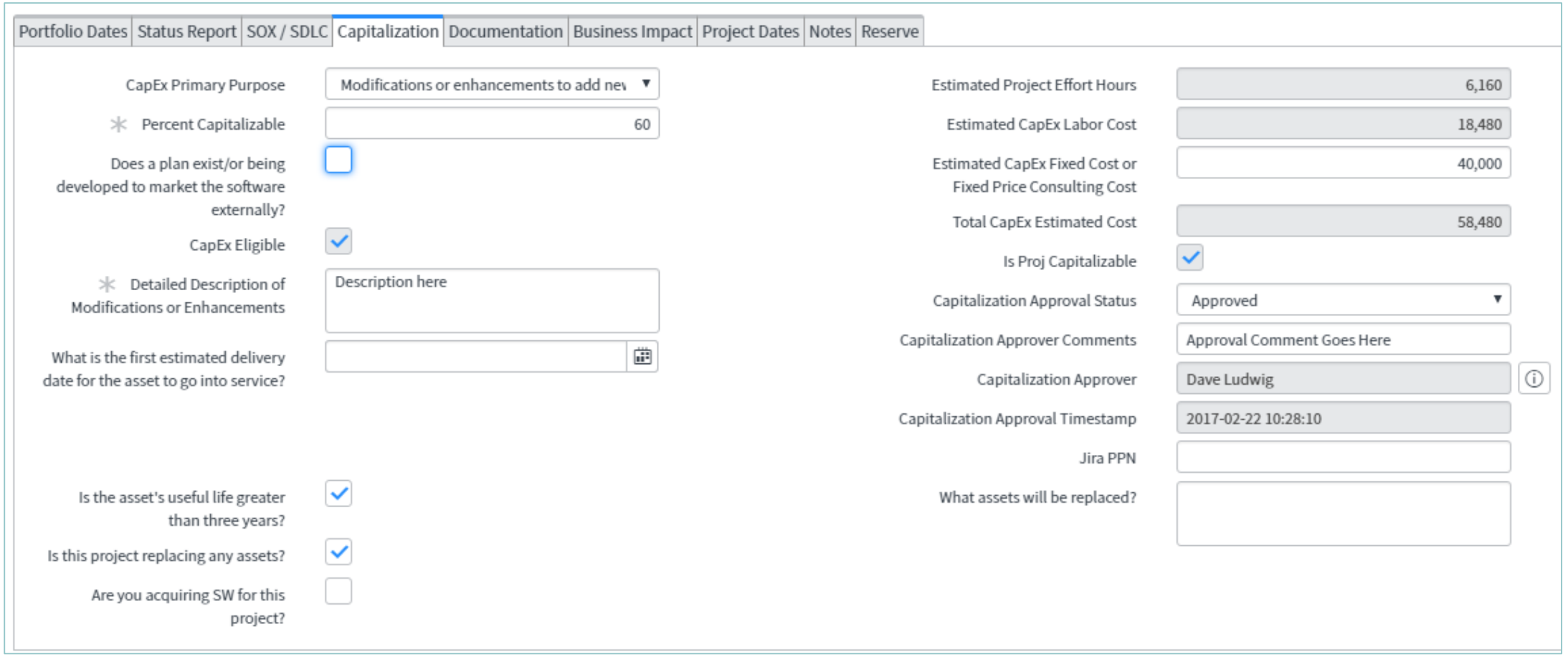


Stakeholder Deliveries are our primary means of describing project deliverables

- Business-friendly language
- Basis of our “On Time Delivery” metric
- Basis of our executive reporting of work completed / value added

© 2017 ServiceNow All Rights Reserved

Capitalization Tab

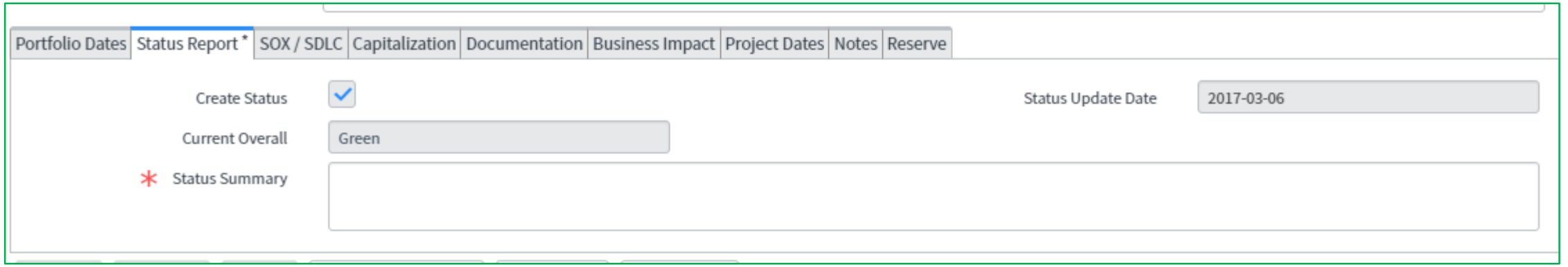


Series of questions and incorporated logic (decision tree) related to asset capitalization

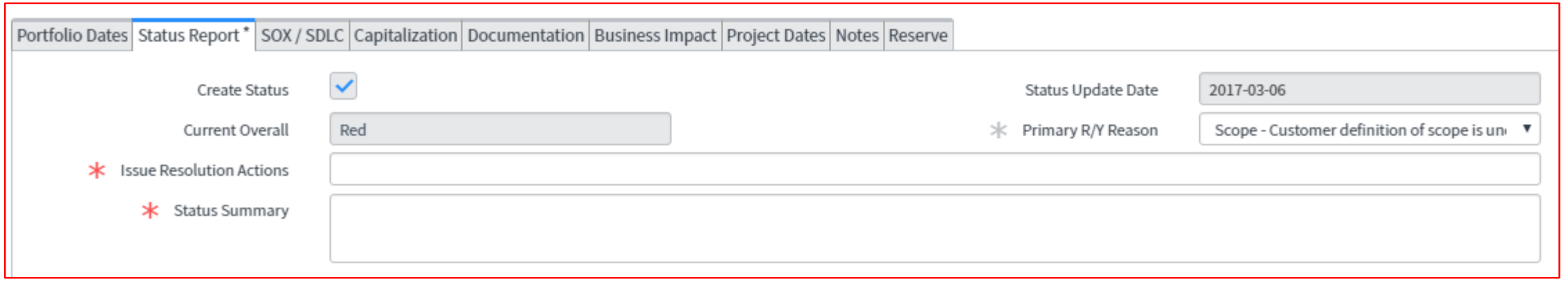
- Developed in conjunction with Finance and Internal Audit

© 2017 ServiceNow All Rights Reserved

Status Reporting Tab



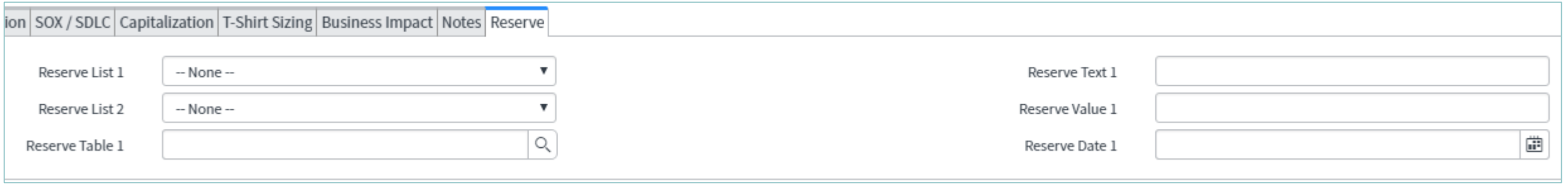
Simple status reporting if Green



Additional fields and description required if project is Yellow or Red

© 2017 ServiceNow All Rights Reserved

“Reserve” Fields



The “Reserve” tab contains a set of “currently undefined” fields of various types

This enables us to rapidly implement any new requirement, without needing to wait for development

- These fields are already incorporated into our reporting/data warehouse process, so reporting can start immediately upon use

List and Table values can be easily updated. When needed, field names can be changed to a “permanent” value via later development

© 2017 ServiceNow All Rights Reserved

Wrap Up

© 2017 ServiceNow All Rights Reserved

Implementation of these Customizations Took







- Implementation of the customizations described here was completed in three releases of two-to-three developers each, over a duration of four months
- We used a consulting firm for the first two releases, and moved development in-house for the third release and going forward

© 2017 ServiceNow All Rights Reserved

Lessons Learned

1. Our portfolio planning process continues to evolve, but we achieved our FY17 planning objectives: we have a portfolio that is strategically aligned with company objectives, and fits within available capacity with acceptable risk

2. We are very pleased with the flexibility provided by the ServiceNow platform

3. We use out-of-the-box functionality extensively, but also have the ability to configure / customize to meet our unique requirements

4. Platform upgrades have not been an issue
   - We went live with Geneva
   - The upgrade to Helsinki was a “non event”
   - Our in-progress evaluation of Istanbul indicates no concerns

© 2017 ServiceNow All Rights Reserved

Top Takeaways

1

Portfolio Management can help an organization ensure alignment with corporate goals and execute effectively

2

Out of the box ServiceNow provides an excellent and powerful set of core capabilities in the portfolio/project management space

3

ServiceNow customization capabilities are powerful and relatively simple

© 2017 ServiceNow All Rights Reserved

Thank You

DAVE LUDWIG
SENIOR PROGRAM MANAGER, PORTFOLIO
TriNet

dave.ludwig@trinet.com

© 2017 ServiceNow All Rights Reserved

Q & A

DAVE LUDWIG
SENIOR PROGRAM MANAGER, PORTFOLIO
TriNet

dave.ludwig@trinet.com

© 2017 ServiceNow All Rights Reserved

Take the Survey

Please take a moment to complete a session survey in the Knowledge17 app.

Thank You

Dave Ludwig

Senior Program Manager, Portfolio

TriNet

dave.ludwig@trinet.com

© 2017 ServiceNow All Rights Reserved