knowledge17

WORK at LIGHTSPEED™

Enabling Complimentary Module Integration for the PM Lifecycle

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servicenow

Agenda

- Introductions
- Demand and Project Management
- Resource Management and Time Cards
- Q&A

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Speaker Introduction



NAME: Jared Van Doorn

TITLE: VP, IT Service Desk Operations

FUNCTION: IT

COMPANY: Consulate Health Care

EXPERIENCE: 17 years in IT, 8 years management

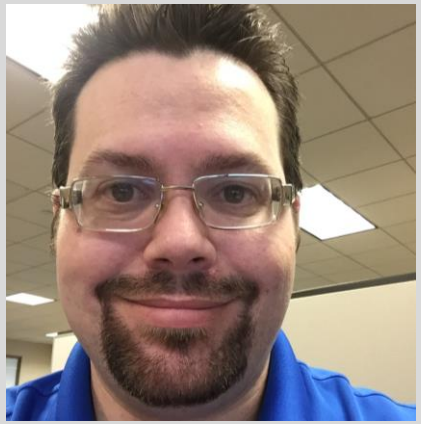
EXPERTISE: ITSM, ITIL, Support

ACHIEVEMENTS: Quadrupled number of utilized ServiceNow modules in 2 years

CURRENT PROJECTS: Biannual updates, Service Level Management, Service Portal redesign

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Speaker Introduction



NAME: Jim Taylor

TITLE: IT Service Desk Administrator

FUNCTION: IT

COMPANY: Consulate Health Care

EXPERIENCE: 20 years IT experience, 3 years ServiceNow administration/design

EXPERTISE: Support, ServiceNow

ACHIEVEMENTS: Successful rollout of numerous ServiceNow modules, successful updates from Calgary to Istanbul

CURRENT PROJECTS: Biannual updates, Service Level Management, Service Portal redesign

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My Company



NAME: Consulate Health Care

INDUSTRY: Healthcare

MARKET FOCUS: Long Term Care, Skilled Nursing, Assisted Living

COMPANY'S PRIMARY PRODUCTS/SOLUTIONS: Skilled Nursing Facilities, Assisted Living Facilities

COMPANY-WIDE INITIATIVES: People, Financials, Clinical Outcomes, Growth

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Session Overview



Objectives

- Using and complimenting modules within ServiceNow
- Transition from disparate systems into a centralized tool for Project and resource management



What You Will Learn

- How Project Lifecycle modules interact with each other
- A great way to control the chaos of projects
- Tailoring modules to your business need

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Context: Where we were

- Decentralized ingress of work/projects
  - Email, service desk calls, internal initiatives, IT leadership
- Inability to measure utilization
  - Frequent concern of burnout and overworking resources
  - Couldn’t prove without labor intensive time tracking in spreadsheets
  - Difficulty justifying net new positions
- Departmental drivers and goals
  - Focus on people and quality
  - Need to structure and prioritize demands

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Challenges and Goals

- Centralize intake process using current toolset
  - Demand Management
- Prioritize, authorize, assess demand
  - Demand Management with Assessments
- Apply PMI project management methodology to projects centrally
  - Reduce Project and Excel usage by using Project Management module
- Avoid overutilization, enable scheduling cadence based on availability
  - Resource Management
- Track budget to actual time usage
  - Time Cards
- Use modules we pay for to solve business problems

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Solution at a Glance

Two phase approach

- Phase One: Demand and Project
- Phase Two: Resource and Time Card

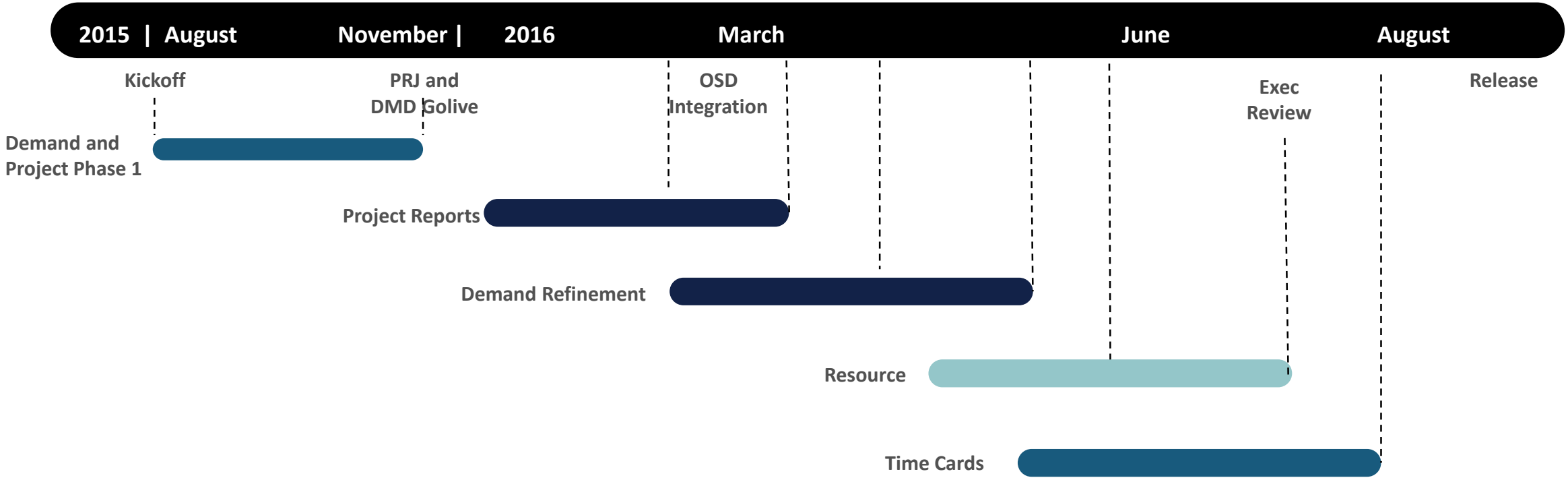
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Solution – Strategy or Approach or Methodology

- Multiple team involvement
  - PMO, Business Intelligence, Business Relationship Managers, Service Desk, Business Analysts
  - Who will be heavy user of the module?
  - Solicited volunteers
- Initial plan was Demand and Project
  - Needed to categorize, prioritize, and track all projects and business asks
- Resource and Time Card came 6 months later
  - Module research, proposal to IT, design and implement in about 3 months
  - Rollout carefully planned- entire IT department affected

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Solution – Timeline



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Solution – Relevant Data

- Project Cover Sheets
- Assessments/Bubble chart
- Reports for time cards
- Projects without resource plans banner

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Demand Management Design

- How, why, who
  - Stakeholder begins process
  - Assessments to discover scope and resource need
  - Approvals required
    - Exception: Tier 3 IT projects
  - Weekly Demand Management review with IT Vice Presidents and Project Managers
    - Stakeholders invited, demands discussed and approved/rejected
- Outputs to
  - Project
  - Incident
  - Agile Development (Defect or Enhancement) handled in sprints and stories

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Project Management Design

- How, why, who
  - PMO heavily involved
  - Kept to PMI PMBOK
  - Structured with PRJTASKs sent to IT teams
- Tier definitions
  - 1: IT Steering Committee
  - 2: IT PMO managed, multiple teams required to complete
  - 3: Self managed initiatives
- Outputs to Resource module, various IT personnel, and stakeholders

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Resource Management Design

- How, why, who
  - IT Management, Business Analysts, Project Managers
  - Linked resource plans to project
  - IT only- customers not involved
- Output to Time Cards
- Group vs User resource plan type
  - Group: Specific members vs All members
  - Divides hours equally amongst assignees
- Manager analyzes utilization report, hour request, approves or rejects
- Approved goes to time cards, logged time reflected in PRJ

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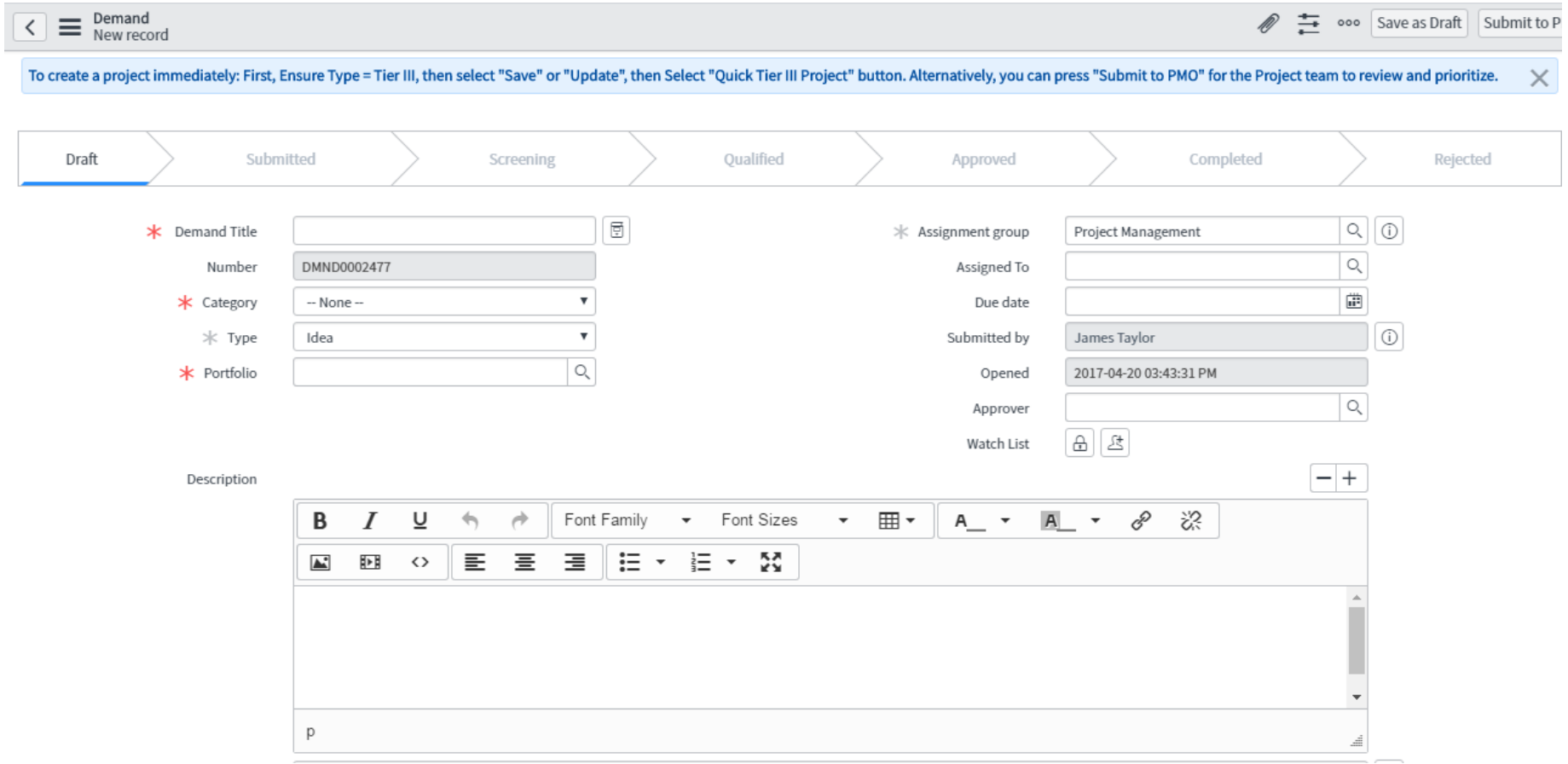
Time Card Design

- How, why, who
  - All of IT
  - One month of Early Life Support (ELS) and quick fixes after golive
- Output: Returning data to Projects, utilization reports
- Define manual entry categories
  - OOB are 6-8 selectable, we disabled all but KTLO, Meeting, Time off, and Training
  - Define and be clear about what KTLO means- incident management, request fulfillment, nonproject change management, preventative maintenance, problem management
- Weekly generation and submission by all staff
  - Managers approve/reject on Mondays
- Key reports: Unsubmitted time cards & users not creating time cards
- Close checks on usage to look for problems

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Solution – Demo

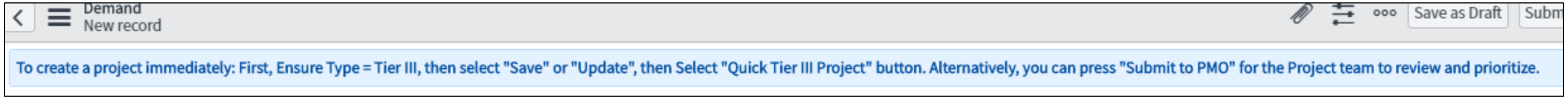
The point of entry for project is the demand



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Solution – Demo

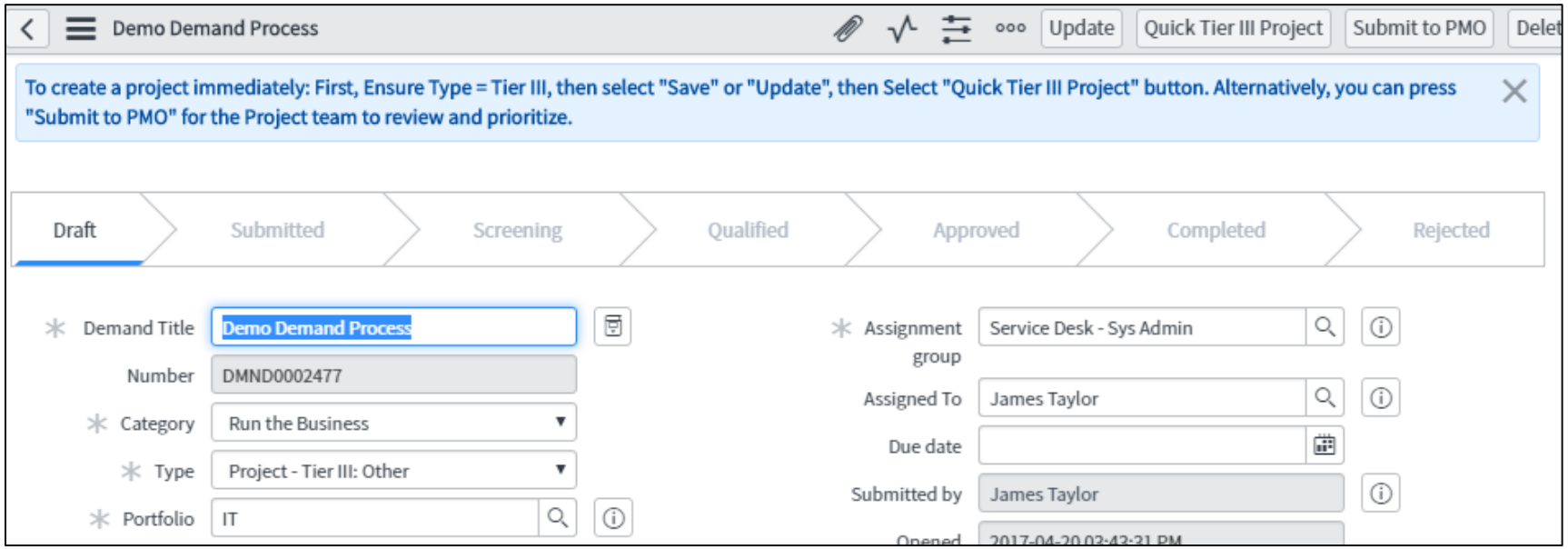
Demands are sorted by project type; Tier 1, 2, and 3. Tier 1 projects involve significant capital expense and are overseen by a steering committee. Tier 2 projects are managed by the PMO and may have resources from multiple teams in IT. Tier 3 projects are managed by IT resources and usually involve only a single team. Because Tier 3 projects are more agile, we needed the ability to quickly convert those demands to projects.



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Solution – Demo

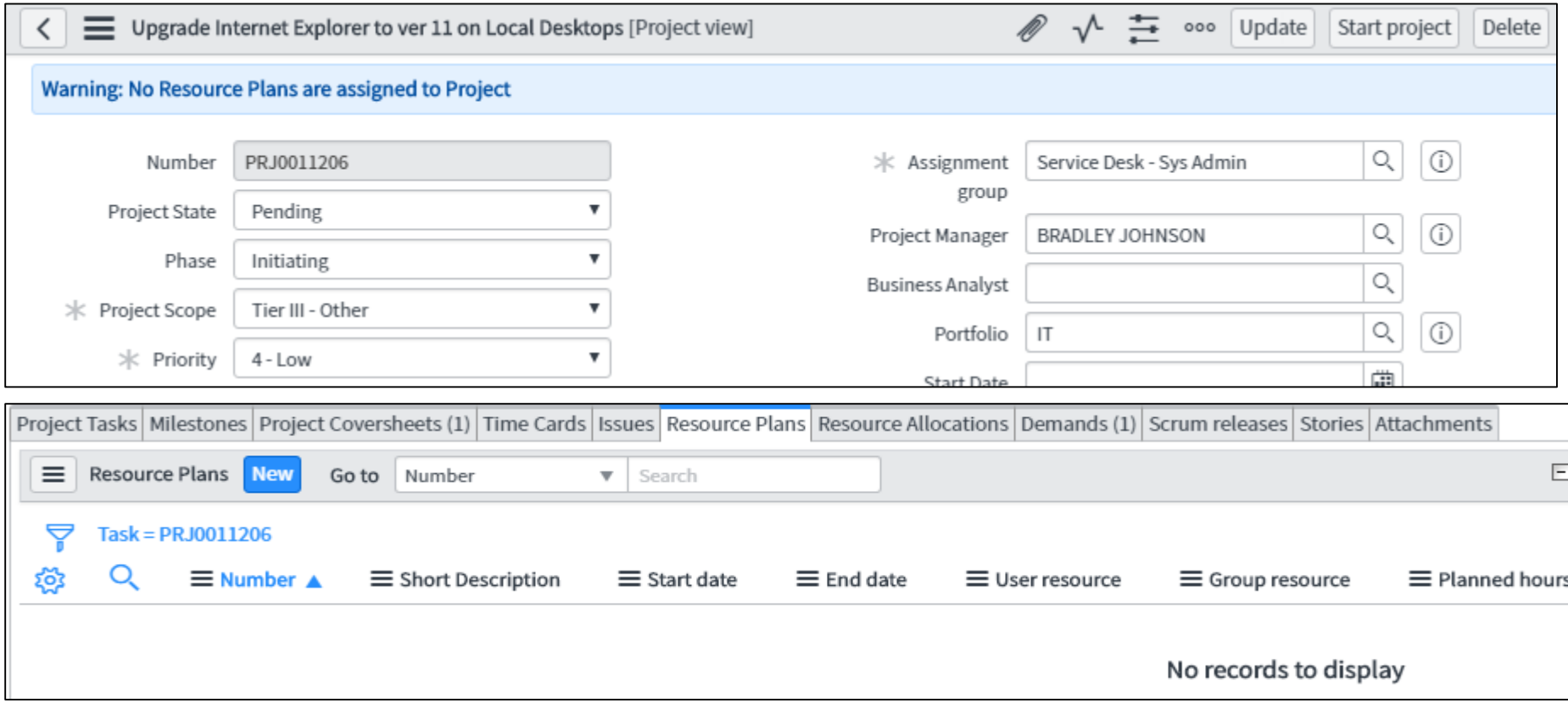
We created two UI Action buttons to allow a Demand to progress: Submit to PMO and Quick Tier III Project. Submit to PMO moves the Demand to Screening to assess the demand. Quick Tier III automatically approves the demand and creates the project. This is only available to Internal demands in IT.



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Solution – Demo

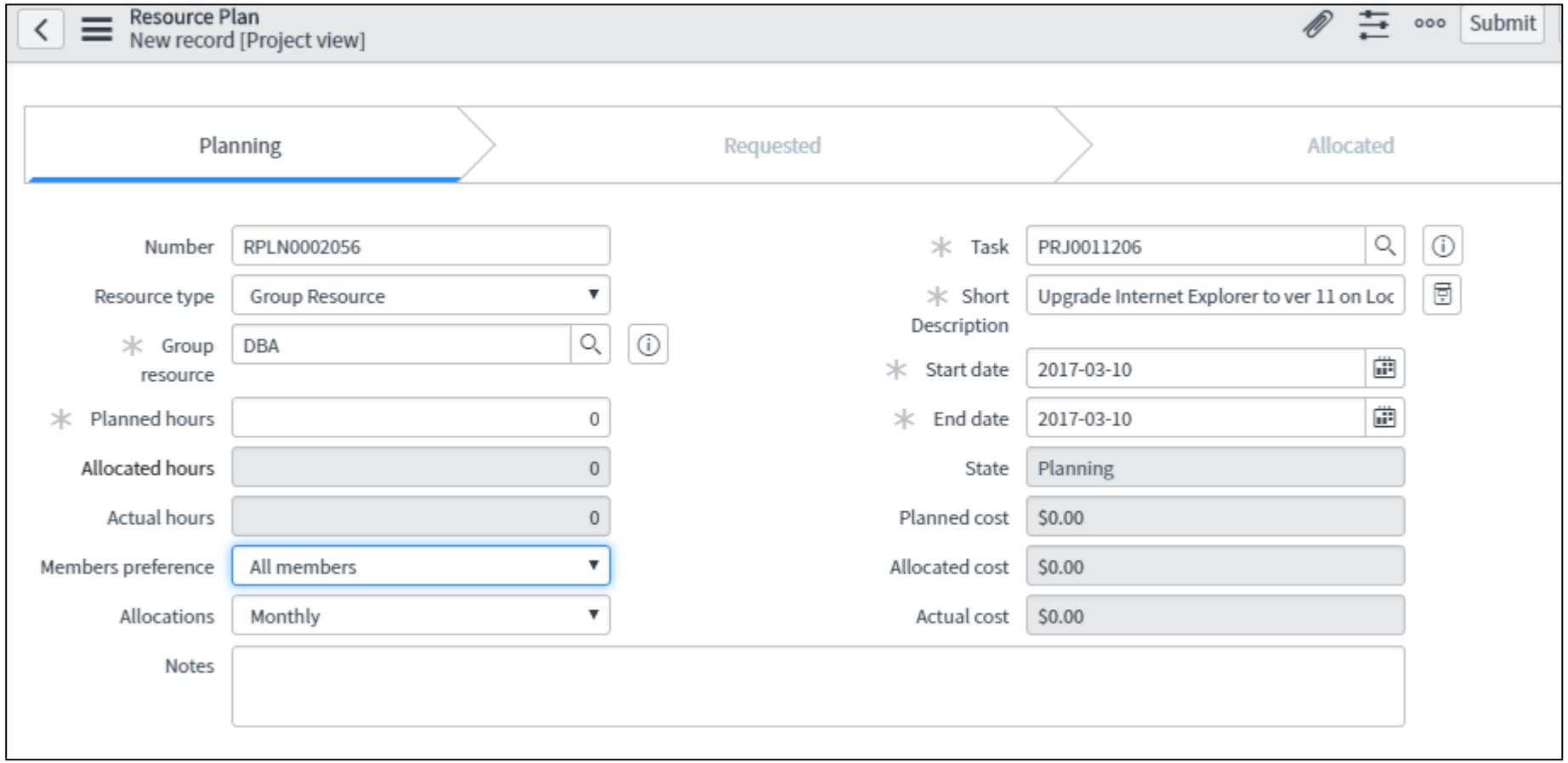
To enforce plans, we created banner alert to warn if no plan was assigned.
We use a related list to allow PMs to create a plan directly from the project.



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Solution – Demo

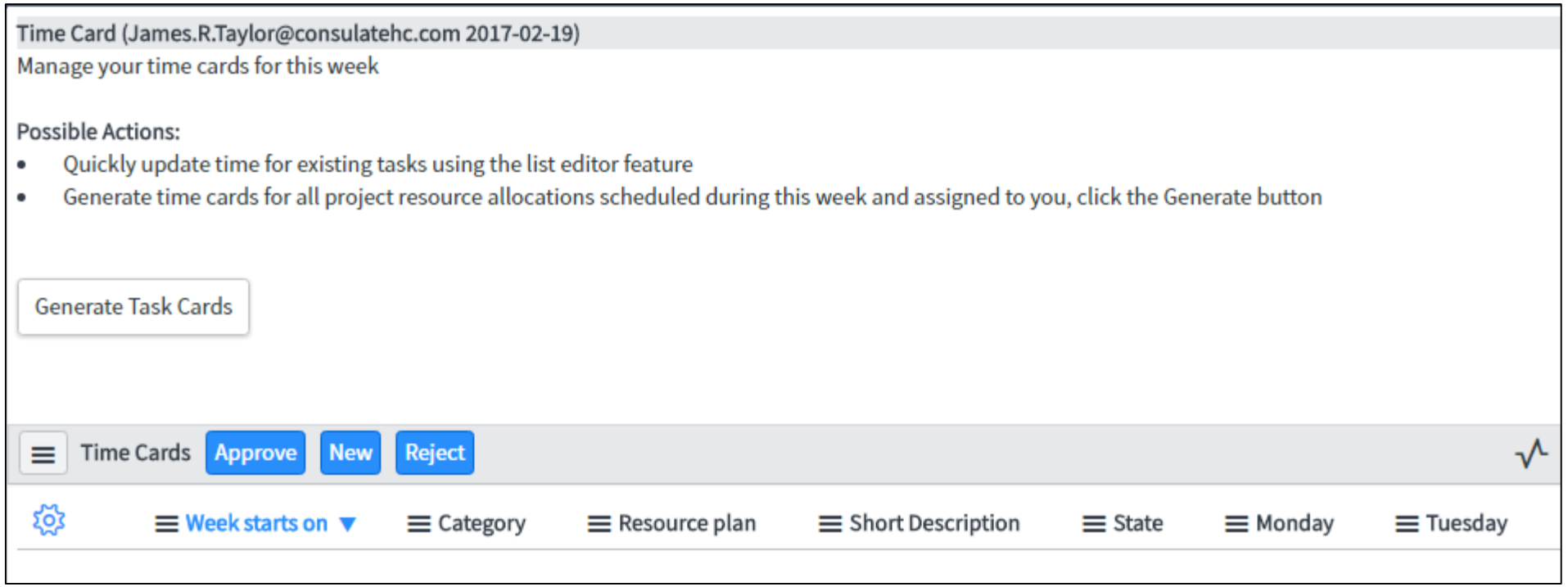
Resource Plans are kept OOB, allowing us to select group or user resources



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Solution – Demo

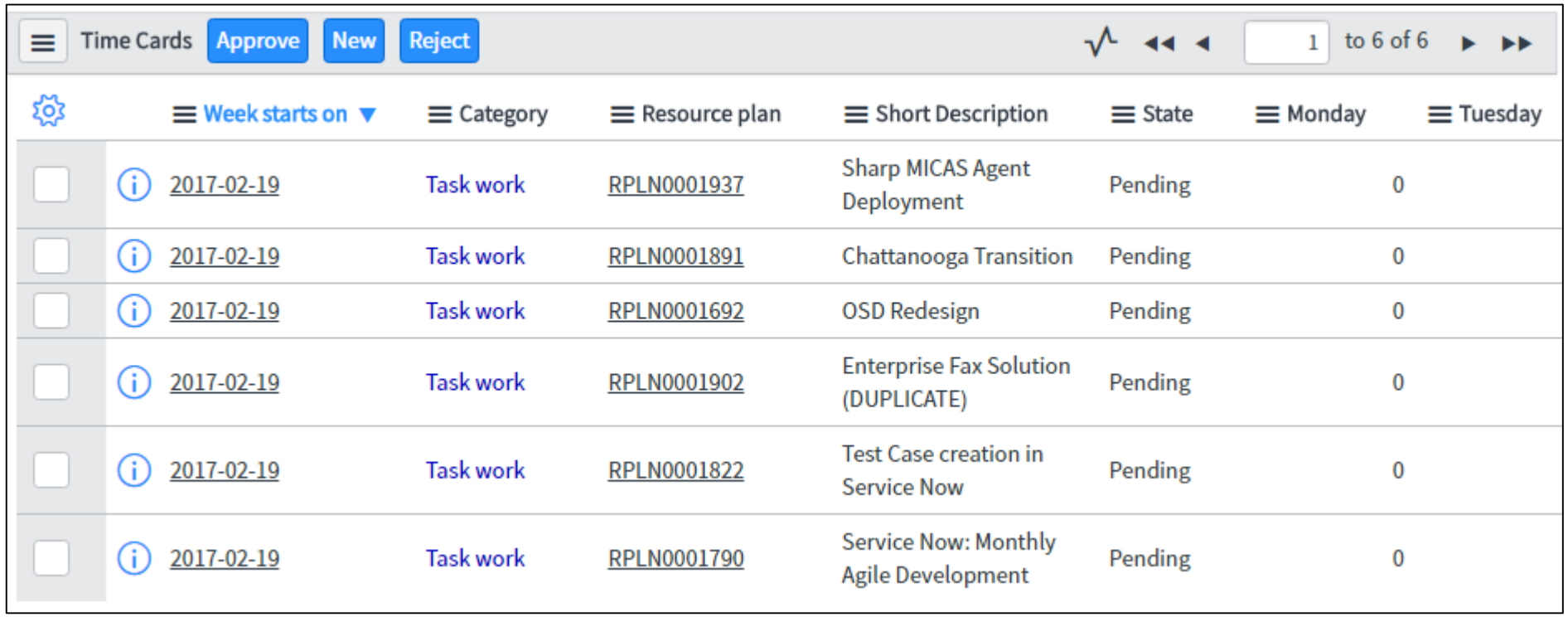
Generate Task Cards is an OOB UI Action and Script Include that will create time cards on all Tasks assigned to a user



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Solution – Demo

The goal is to report time against projects, so we limited the generate Task Cards button to only generate time cards for Resource Allocations



Week starts on	Category	Resource plan	Short Description	State	Monday	Tuesday
2017-02-19	Task work	RPLN0001937	Sharp MICAS Agent Deployment	Pending	0	
2017-02-19	Task work	RPLN0001891	Chattanooga Transition	Pending	0	
2017-02-19	Task work	RPLN0001692	OSD Redesign	Pending	0	
2017-02-19	Task work	RPLN0001902	Enterprise Fax Solution (DUPLICATE)	Pending	0	
2017-02-19	Task work	RPLN0001822	Test Case creation in Service Now	Pending	0	
2017-02-19	Task work	RPLN0001790	Service Now: Monthly Agile Development	Pending	0	

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Solution – Demo

To accomplish this we updated the TimecardAjax Script Include to select Resource Allocations instead of Planned Tasks. To ensure only allocated plans were returned, we added a filer to only allow hard booked plans.

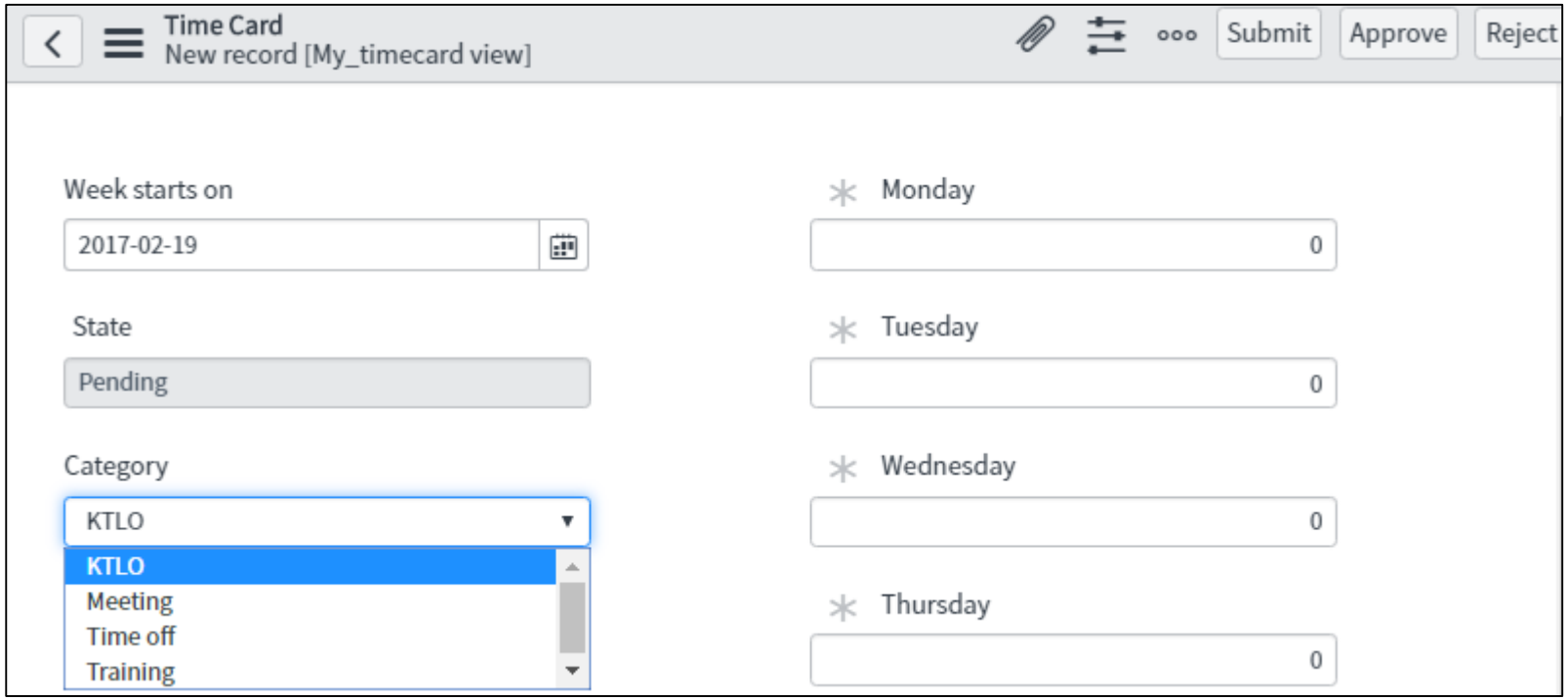
Script

```
44      },
45
46      _getPlannedTasks: function(){
47      if (this.user == "")
48              return;
49
50  //        var tasks = new GlideRecord("planned_task"); //original entry
51          var tasks = new GlideRecord("resource_allocation");
52  //      tasks.addQuery("assigned_to", this.user);//original entry
53          tasks.addQuery("user", this.user); //edit
54          tasks.addQuery("booking_type", 1); //edit
55          tasks.addQuery("start_date", "<", this.weekEnd);
56          tasks.addQuery("end_date", ">", this.weekStart);
57          tasks.query();
58          return tasks;
59      },
60
```


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Solution – Demo

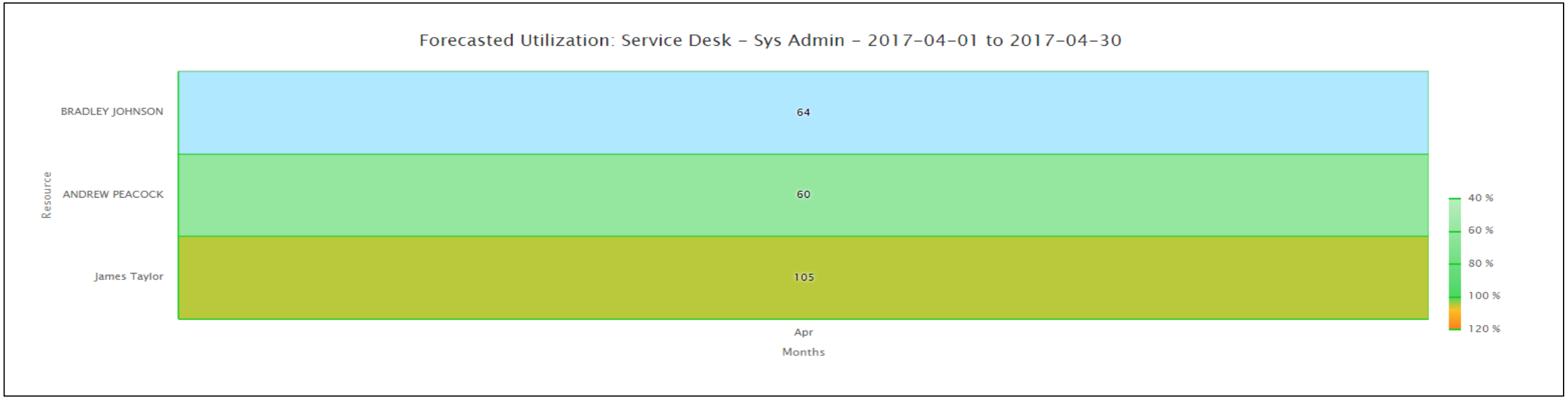
Non-project work, meetings, time off, and training are handled via manual entry. All non-project task work such as incidents, requests, routine changes, and so on are simply placed under the KTLO (Keep the lights on) category.



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Solution – Demo

Sample utilization report- Out of box reports



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Value Outcomes

	BEFORE	AFTER
Utilization of staff	No way to measure accurately-estimates were 90-110% handled in spreadsheets	80-85%; measuring is easy based on available hours and logged hours reported in time cards
Project Budget and Actual hours	Guesswork based on estimated hours added monthly to a spreadsheet	Complete accuracy due to Project-Resource Plan-Time Card integration
Way to ask IT for project	Chaotic, multichannel, decentralized	Single point, fill out forms, formalized and structured
Time tracking simplicity	Guessing and entering hours monthly into a complex spreadsheet	Simple, fast way to enter hours daily or weekly into time card, classified correctly, reviewed by managers every week

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Lessons Learned

1. Time cards: Disable options that aren't necessary for manual timecard entry
2. Time card: Level of granularity matters. Go only as granular as necessary for reporting.
3. Demand: Have a place for requestor to provide approval by their leadership
4. Project: Watch your business rules to avoid any technical issues

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Our Next Steps

- Continual service improvement cycle
- Improvement by enhancement stories/sprints
- Reevaluate annually- review new features added to implemented modules

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Top Takeaways

1

Inclusion is vital- do not design in a vacuum

2

Solicit, encourage, and act on feedback during your early life support period

3

Get only as granular as there is value to get

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Q & A

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Thank You

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