knowledge17

WORK at LIGHTSPEED™

How Demand Management Feeds into Resource Capacity Management at Pacific Life

PAUL WYRICK
PROJECT MANAGEMENT CONSULTANT
Pacific Life Insurance Company

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servicenow

Agenda

- Introduction
- Who is Pacific Life?
- Goals of Demand & Resource Management
- Pacific Life's Demand Management Process
- Resource Capacity Management
- Tying Demand and Resource Management Together

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Speaker Introduction



NAME: Paul Wyrick

TITLE: Project Management Consultant

FUNCTION: CIT Project Management Office

COMPANY: Pacific Life Insurance Company

EXPERIENCE: 10 Years Demand & Resource Capacity Management, 15+ Years Project Management

EXPERTISE: Project Portfolio Management, Demand & Resource Capacity Management

ACHIEVEMENTS: Successfully Implemented the Demand, Resource & Project Modules of ServiceNow

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My Company

NAME: Pacific Life Insurance Company

INDUSTRY: Insurance and Financial Services

MARKET FOCUS: My company provides Life Insurance, Annuity & Mutual Fund products

COMPANY'S PRIMARY PRODUCTS/SOLUTIONS: Life Insurance, Annuities, Mutual Funds, Investment Products and Services

COMPANY BACKGROUND: Established in 1868, 145+ years of experience, Headquartered in Newport Beach, Ca, Pacific Life counts more than half of the 100 largest U.S. companies as its clients

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Known as the ‘Whale’ company



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Session Overview



Objectives

- Convey how Pacific Life has implemented and is using the Demand and Resource Modules of ServiceNow to help Prioritize new project demand and allocate resources to work on the prioritized Demand

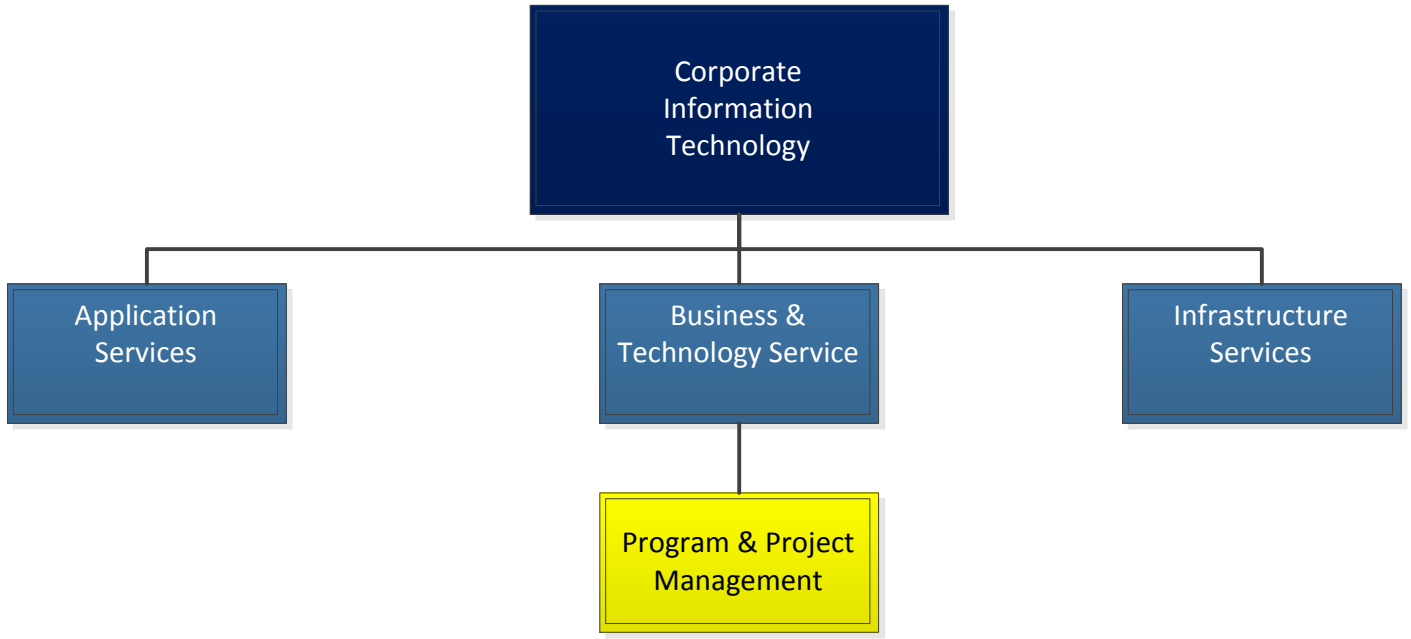


What You Will Learn

- Understand how Demand Management feeds into Resource Management at Pacific Life
- Learn about our implementation of the Demand and Resource Modules of ServiceNow
- Gather key lessons related to project demand sizing, prioritization and how resources are allocated to projects in ServiceNow
- Discuss how these lessons apply to any Project Management Office trying to implement key ‘best practice’ demand & resource management processes

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Corporate Information Technology Organization



- Supporting the following Business Groups:
  - Life Insurance Division
  - Retirement Solutions Division
  - Pacific Life Re
  - Pacific Asset Management
  - Aviation Capital Group

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Demand & Resource Management Pain Points

- Lack of understanding of Project Demand Priorities
- Inability to effectively prioritize New Project Demand vs Existing Project Demand
- The organization was being impacted by Constant Change
- The organization was constantly in Crisis Mode – always Reactive instead of Proactive
- Lack of Visibility into Resource Capacity and Current Resource Allocations
- Resources were being wasted working on the wrong projects
- Inability to understand which project(s) might need to be put On Hold in order for a new higher priority project to be started sooner rather than later
- Projects continually delayed or late because of constant "Project Churn"

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Goals of Demand & Resource Management

- Enable a Project Prioritization Process
- Enable how Projects are sized and high-level LOE Estimates are identified
- Enable how projects get sequenced and scheduled
- Enable more effective Project Resource Forecasting
- Streamline Resource Capacity Management Processes by implementing a Resource Capacity Management Model that benefits CIT Management and Service Area Managers
- Enable Service Area Managers to see graphically where their respective Resource Teams stand in terms of Resource Allocations, Utilization, and Availability to take on new work

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Solution at a Glance

The ultimate end goal is to understand what our Project Demand priorities are . . . . .

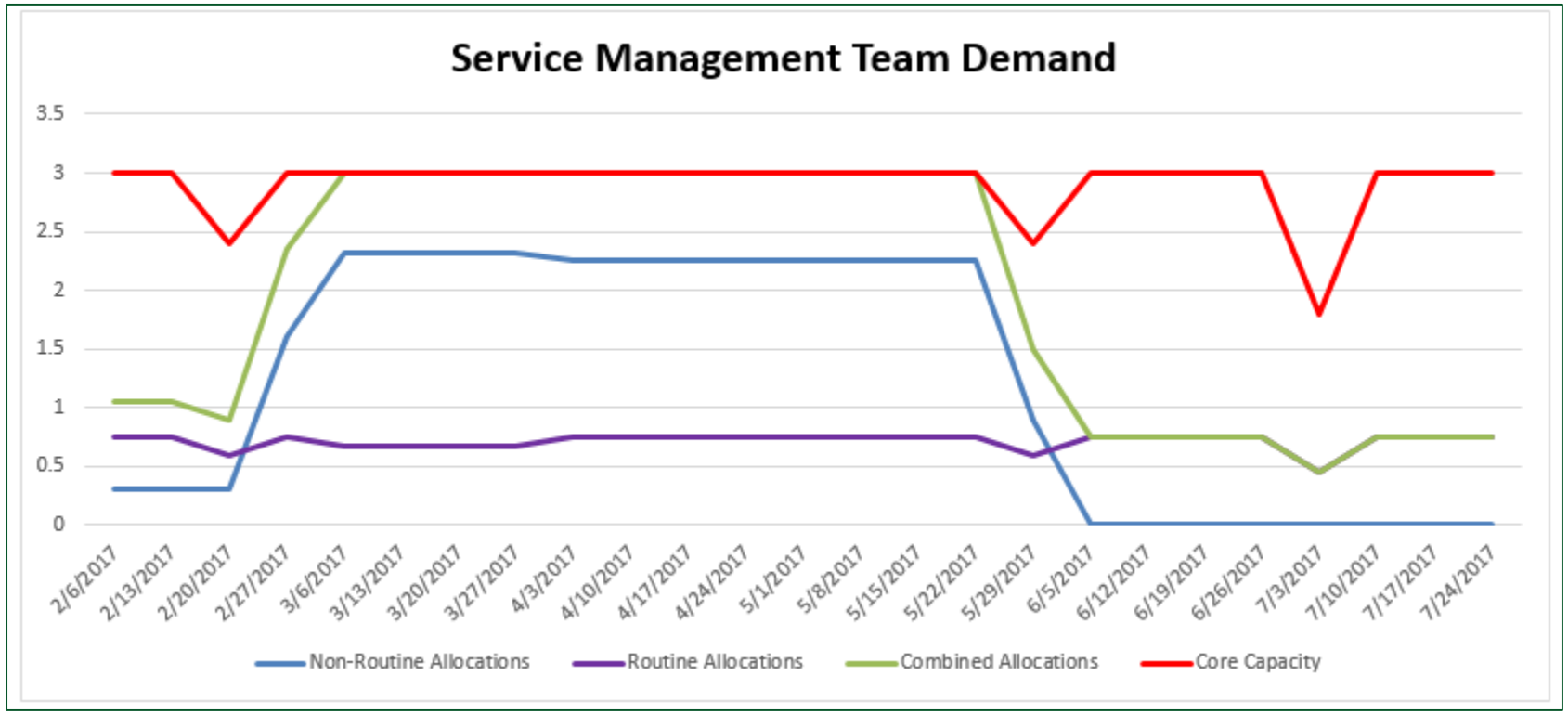
All > State = Approved

Number	Project	State	Risk	Value	Size	Overall Priority Score ▼	Target Start Date
Search	Search	=8	Search	Search	Search	Search	Search
DMND0001198	Remediate Compliance Functionality not i...	Approved	6.54	7.8	4	7.78	12-01-2016
DMND0001292	Wifi Enhancement (800 Building and Aksar...	Approved	8.2	6.88	2	7.65	03-01-2017
DMND0001229	Mainframe Virtual Tape System Additional...	Approved	7.6	6.55	2	7.23	01-03-2017
DMND0001195	Splash Replatform	Approved	7.75	7.5	8	7.21	01-03-2017
DMND0001231	OpenText Informant - Monitoring Program	Approved	8.6	5.6	2	7.16	01-16-2017
DMND0001252	Project Portugal Expansion	Approved	7.93	6.53	4	7.14	06-01-2017
DMND0001340	Cloud Migration Readiness Assessment	Approved	7.95	5.75	2	7.06	03-01-2017
DMND0001347	Maximis - Transition from legacy to Peop...	Approved	6.92	6.48	6	6.92	01-01-2017
DMND0001178	Implement streamlined de-provisioning wo...	Approved	6.65	6.7	2	6.87	01-03-2017
DMND0001336	ServiceNow Annual upgrade	Approved	7.1	8.5	8	6.78	03-01-2017
DMND0001241	EZEScan	Approved	4.35	8.15	4	6.63	11-15-2016
DMND0001269	TIDES - Redesign of Dynamic Data Masking...	Approved	5.4	8.3	8	6.62	12-01-2016
DMND0001266	Network security zones	Approved	6.49	5.47	2	6.45	01-01-2017

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Solution at a Glance

Then understand our Resource Allocations to the prioritized Project Demands



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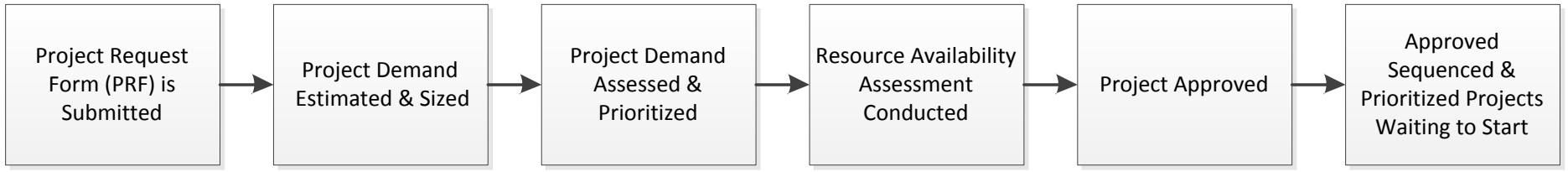
Demand Management

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High-Level Demand Management Process

Intake ➔ Screening ➔ Qualification ➔ Approval ➔ Sequence

Sizing ➔ Assessment



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Project Qualification and Assessment

- Project Assessment Categories:
  - Strategic Alignment / Value
  - Risk
  - ROI
  - Cost
  - Sizing Estimate
- Overall Prioritization Score – calculated by ServiceNow based on input from:
  - Project Sponsors
  - Project Requester
  - Key Service Area Managers

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Demand Management Demo

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Resource Management

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Setting the Context for Resource Management

- The type of Resource Capacity Management we are focused on
- Revisit our Organizational Structure
- How we Categorize Project and Non-Project Work

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Resource Capacity Management

Team-based Capacity

vs

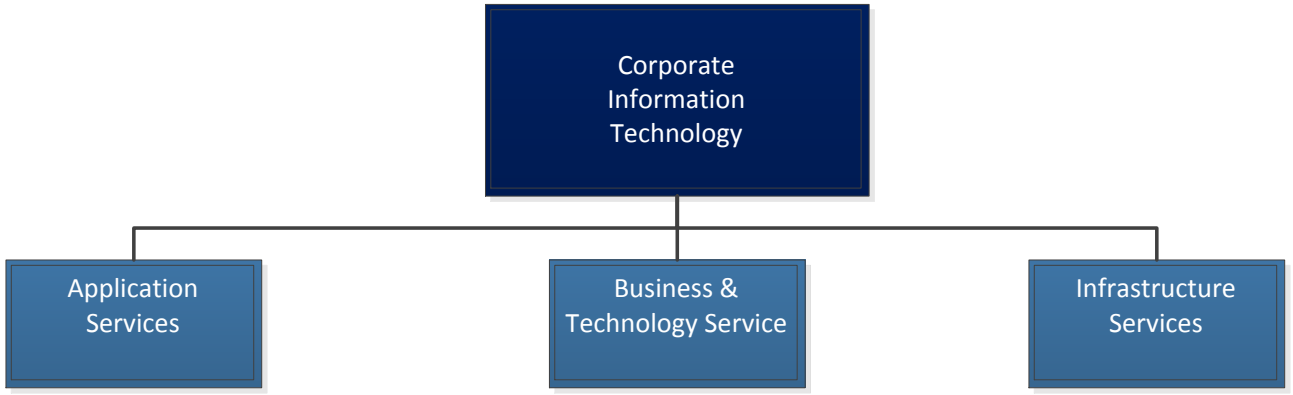
Roles-based Capacity

vs

Skills-based Capacity

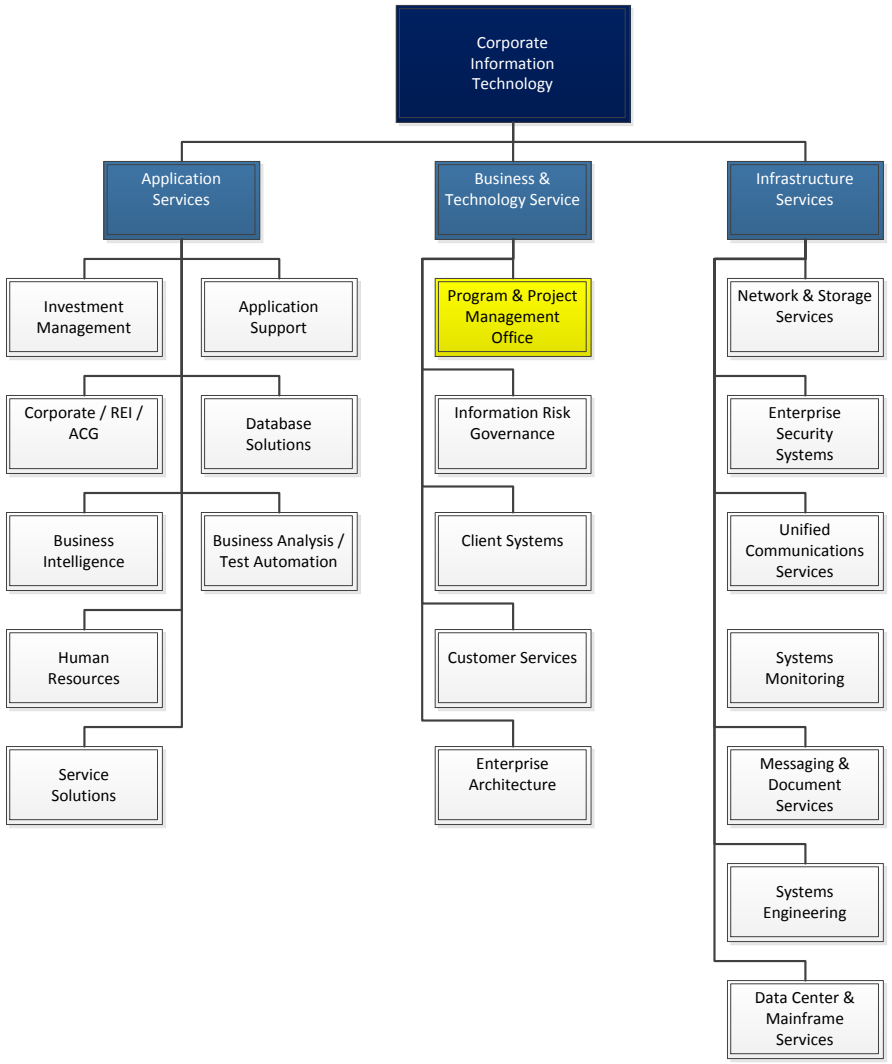
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Corporate Information Technology Organization



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Corporate Information Technology Organization



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Resource Capacity Management

Routine vs Non-Routine Resource Allocations

Routine Work:

- Work that is Routine in nature
- Includes LOE <=500 work hours
- Impacts 2 or fewer Service Areas
- Does not impact, or make a change to the Enterprise Architecture
- Limited impact to end user ‘Business’ customers
- Limited communication requirements
- Low Implementation Risk

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Resource Capacity Management

Routine vs Non-Routine Resource Allocations

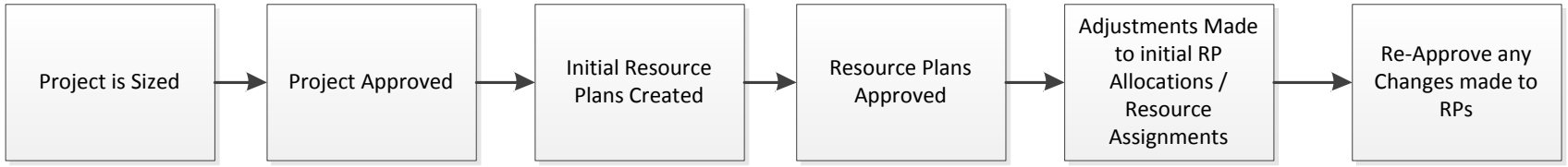
Non-Routine Work:

- Work defined and executed as a ‘project’
- LOE is estimated to be > 500 hours
- 3 or more Service Areas required to perform work
- Impacts the Enterprise Architecture by changing or introducing new hardware and/or software technology
- Requires purchase of hardware and/or software components needed for a project
- Deemed to be executed as ‘Project’ by Senior Leadership due to complexity, potential risk, or benefit of visibility to the organization

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High-Level Resource Management Process

Sized ➔ Requested ➔ Allocated / Approved ➔ Change



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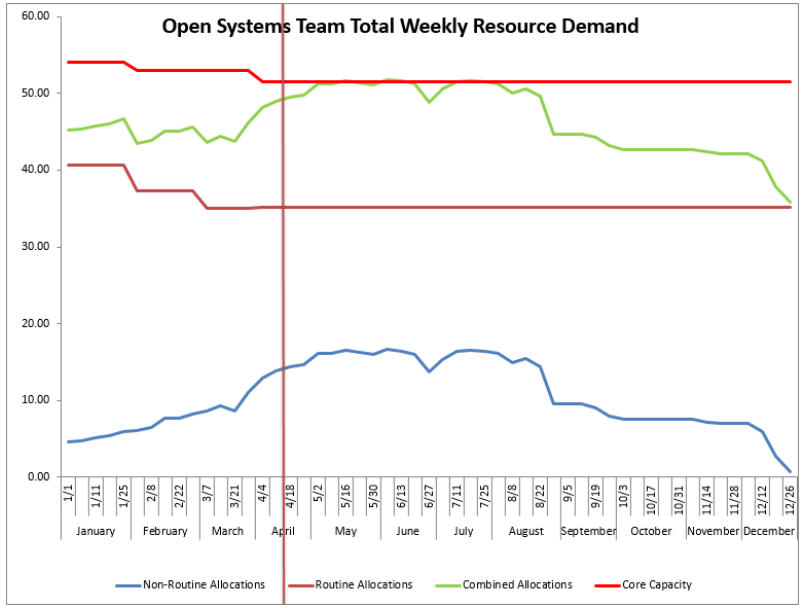
RESOURCE PLAN DATA INPUTS

OUTPUT

Non-Routine Allocations

Routine Allocations

Resource Model

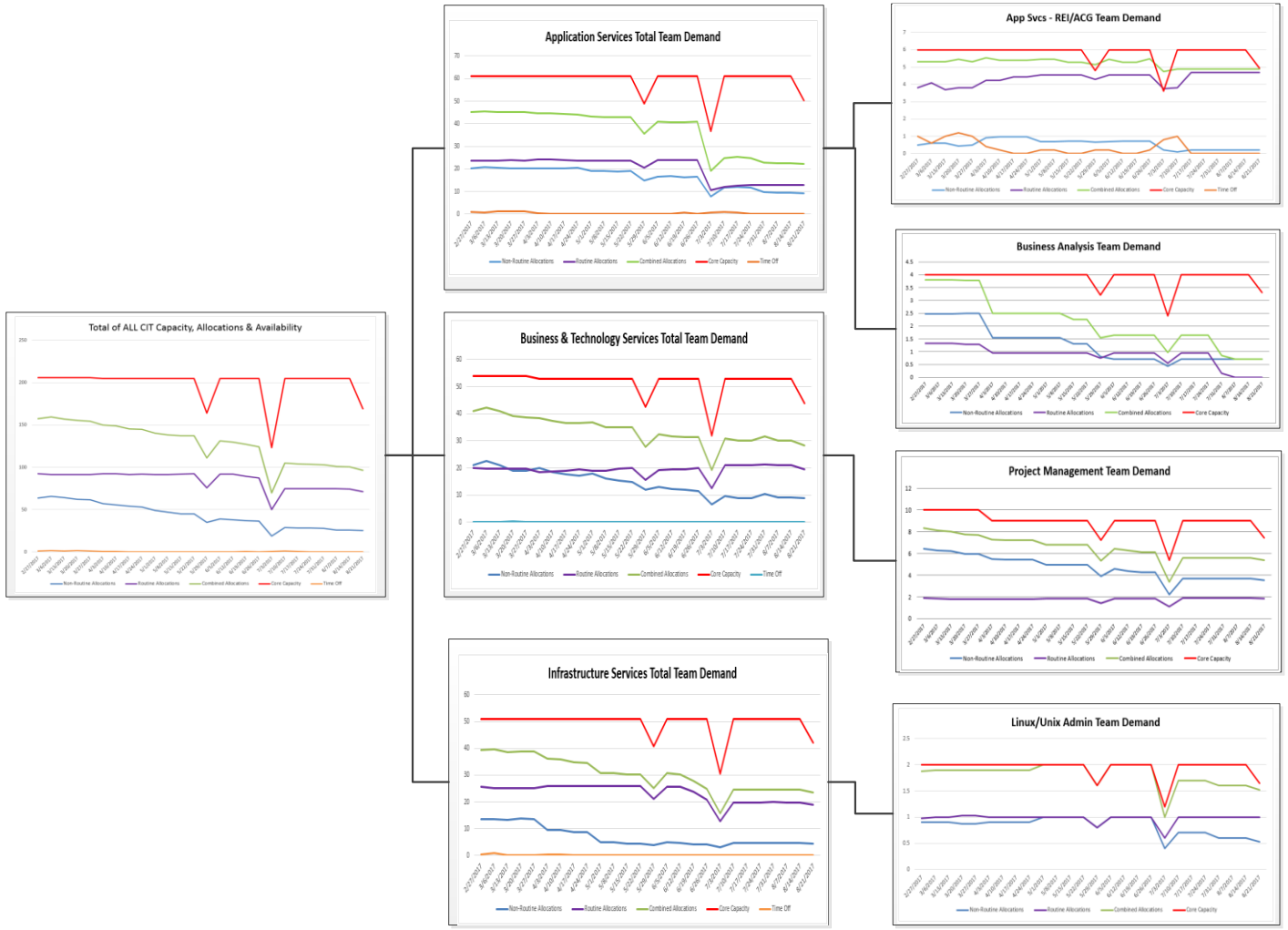


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Resource Management Demo

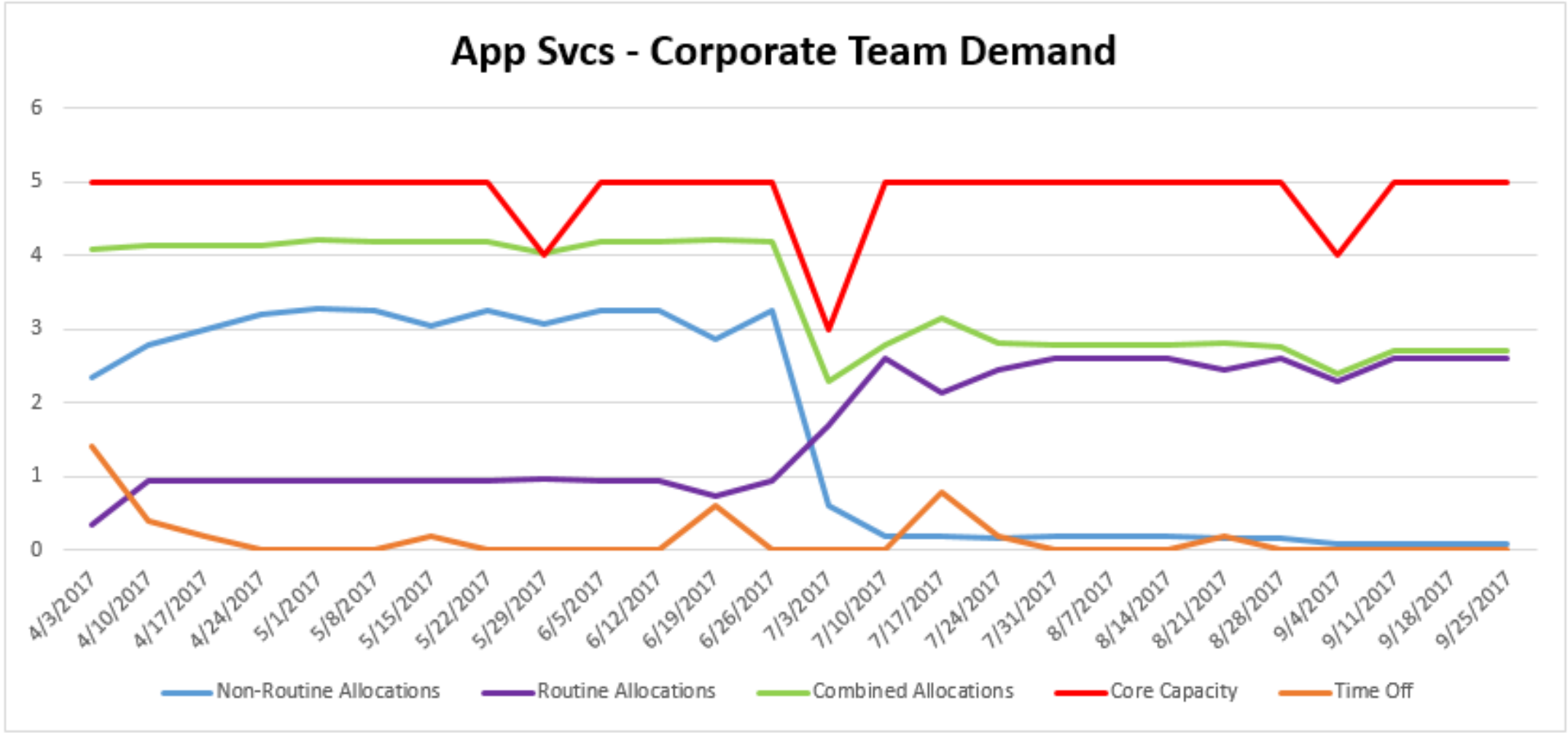
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Resource Capacity Management Model



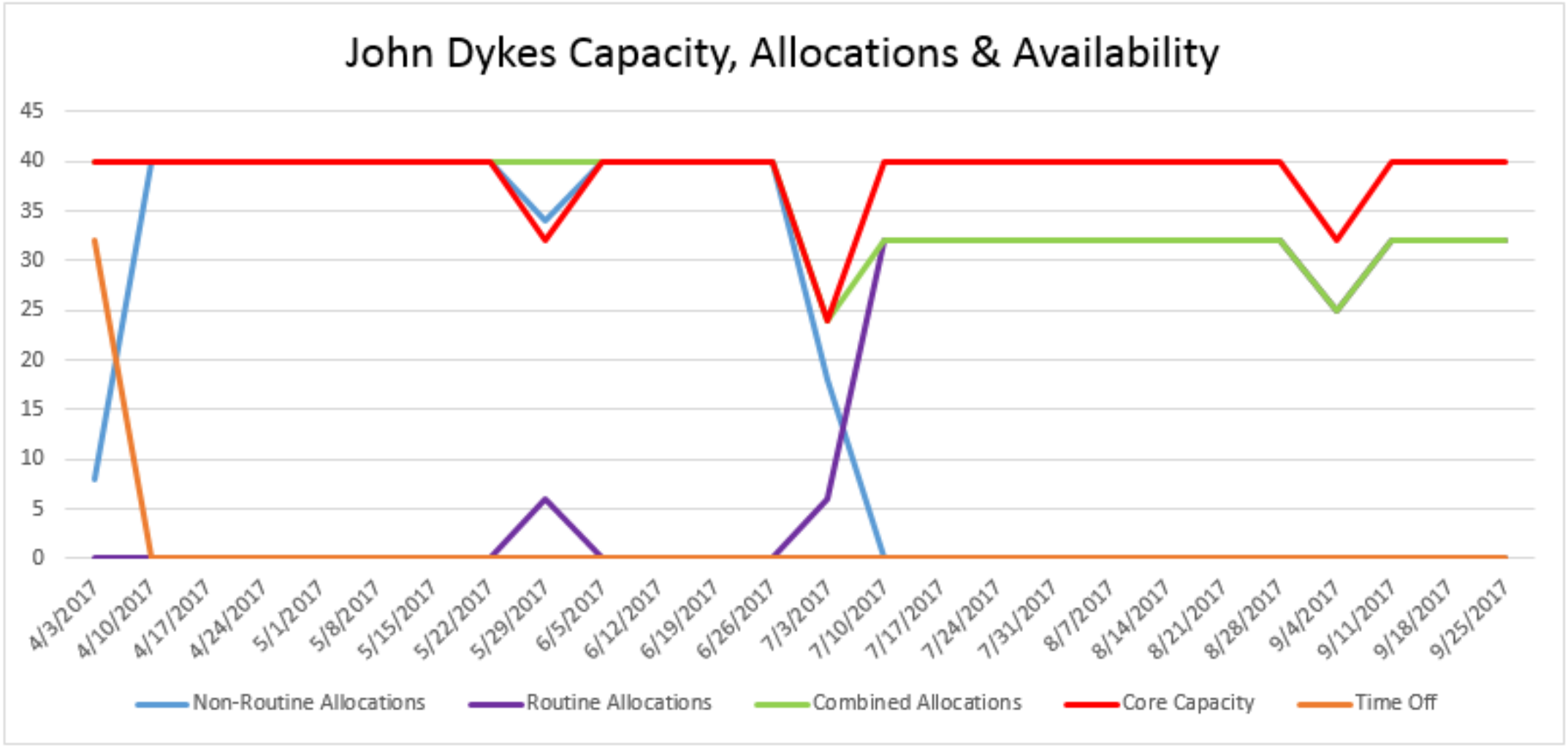
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Application Services Team Resource Capacity Management Chart



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Individual Resource Capacity Management Chart



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Top Takeaways

1

Increased Agility for our Corp IT Organization:

1. Non-subjective Approach for Prioritizing new Project Demand.
2. Good Understanding of current Resource Allocations & Availability
3. Good Understanding of how projects are currently sequenced

2

New High Priority Project Identified

Needs to be Delivered Sooner instead of later

3

1. We are able to quickly identify which projects are in flight and which resources are allocated to what projects
2. Provides Management with a mechanism for determining which projects may need to be put 'On Hold', or 'Delayed' in order to take on the new higher priority project.

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Q & A

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Thank You

PAUL WYRICK
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Pacific Life Insurance Company

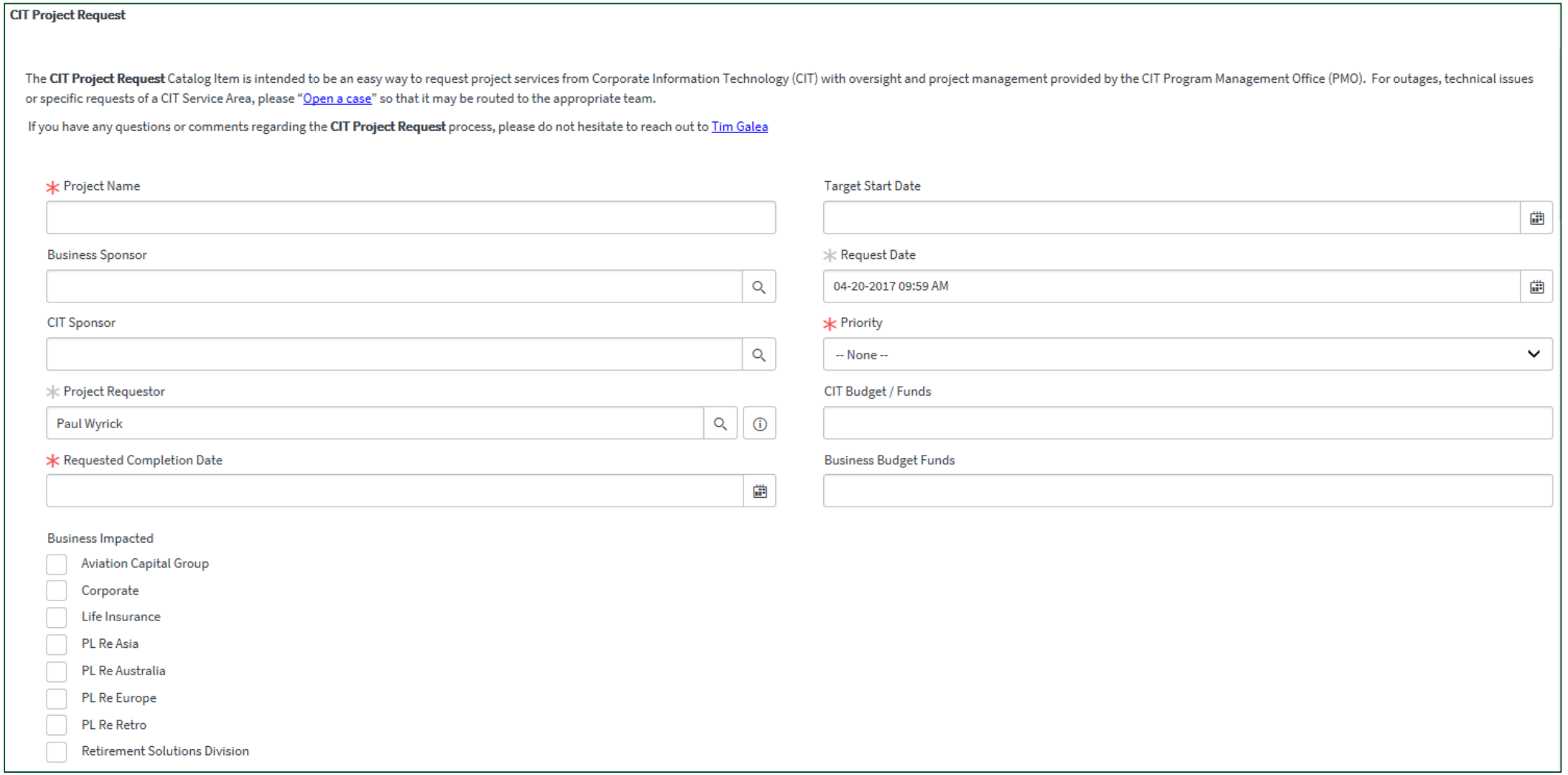
Paul.Wyrick@PacificLife.com | www.linkedin.com/in/paulrwyrick | #Know17

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Demand Management Screenshots

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Project Demand Request Form



CIT Project Request

The **CIT Project Request** Catalog Item is intended to be an easy way to request project services from Corporate Information Technology (CIT) with oversight and project management provided by the CIT Program Management Office (PMO). For outages, technical issues or specific requests of a CIT Service Area, please "Open a case" so that it may be routed to the appropriate team.

If you have any questions or comments regarding the **CIT Project Request** process, please do not hesitate to reach out to Tim Galea

* Project Name

Business Sponsor

CIT Sponsor

* Project Requestor

Paul Wyrick

* Requested Completion Date

Target Start Date

* Request Date

04-20-2017 09:59 AM

* Priority

-- None --

CIT Budget / Funds

Business Budget Funds

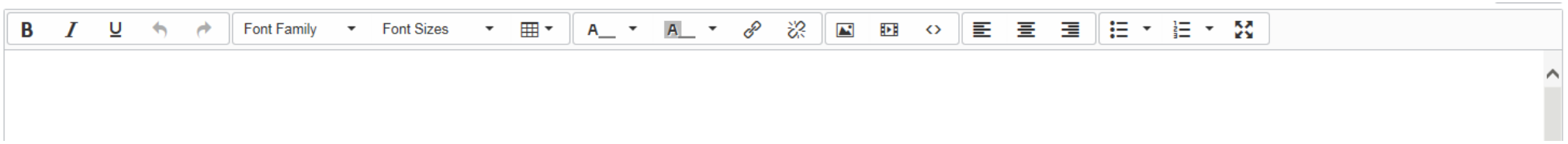
Business Impacted

- Aviation Capital Group
- Corporate
- Life Insurance
- PL Re Asia
- PL Re Australia
- PL Re Europe
- PL Re Retro
- Retirement Solutions Division

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Project Demand Request Form

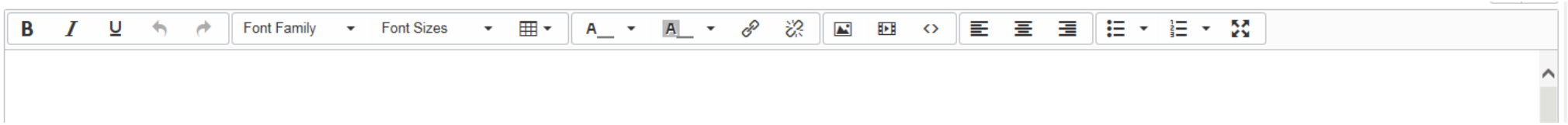
Vision: What is it that you want to accomplish with this project? Describe the future state?



Business Drivers: For each business reason that applies, select the appropriate choice below. Then, describe the implications for each (i.e. opportunities, threats, rewards, and consequences for doing or not doing the project)

- [ ] Compliance / Regulatory
- [ ] Business Value
- [ ] Risk Avoidance
- [ ] Process Efficiency

Business Driver Explanation

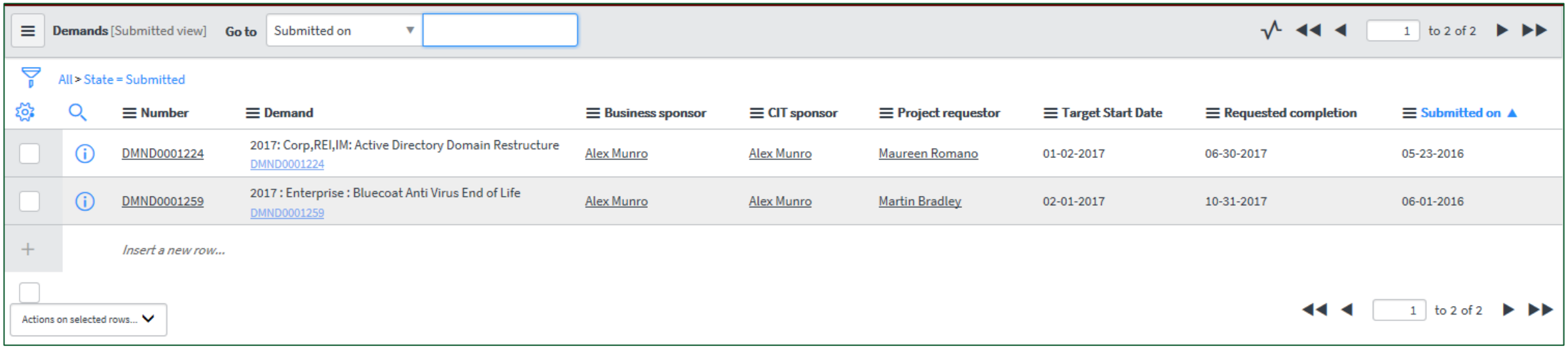


Goals Alignment: How does this project align with the VSEM goals of Pacific Life and/or your division?



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List of ‘Submitted’ Project Demand Requests



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List of Project Demand Requests in ‘Screening’

All > State = Screening

Demand	CIT sponsor	Risk	Value	Size	State	Overall Priority Score	Target Start Date	Requested completion
2017 : EIRG / BCO : Business Continuity Management System (BCMS) DMND0001218	Juan Martinez	5	5	6	Screening		01-01-2017	12-31-2017
Issuer Data Enhancements DMND0001354	Darlene Goodwin	5	5	4	Screening		03-01-2017	12-15-2017
DR Exercise - July DMND0001358	Juan Martinez	5	5	4	Screening	5.25	06-19-2017	08-04-2017
DR Exercise #2 - October 2017 DMND0001359	Juan Martinez	5	5	4	Screening	5.35	09-18-2017	11-03-2017
Corporate Action Capture Automation- EzeScan & Sharepoint DMND0001360	Alex Munro	5	5	2	Screening	5.07	04-03-2017	09-30-2017
Microsoft InTune Rollout DMND0001364	Juan Martinez	5	5	8	Screening		05-01-2017	11-30-2017
Paul's Demand Request to Test Business Sponsor Assessment Questionnaire Email & Response DMND0001367	Juan Martinez	5	5	2	Screening		05-01-2017	06-30-2017
Paul's Demand Request to Test Assessment Questionnaire Expiration After 3 Days DMND0001368	Juan Martinez	5	5	4	Screening		05-01-2017	06-30-2017

Insert a new row...

Actions on selected rows...

1 to 8 of 8

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Project Demand Assessment Questionnaire

DMND0001367

Paul's Demand Request to Test Business Sponsor Assessment Questionnaire Email & Response

Strategic Alignment

Business Valuation

* Priority of this project relative to other competing initiatives

-- choose --

* Is this driven by a business or IT need?

-- choose --

* How likely will this result in increased process consistency and /or efficiency?

-- choose --

* How would you describe the impact to business processes or services?

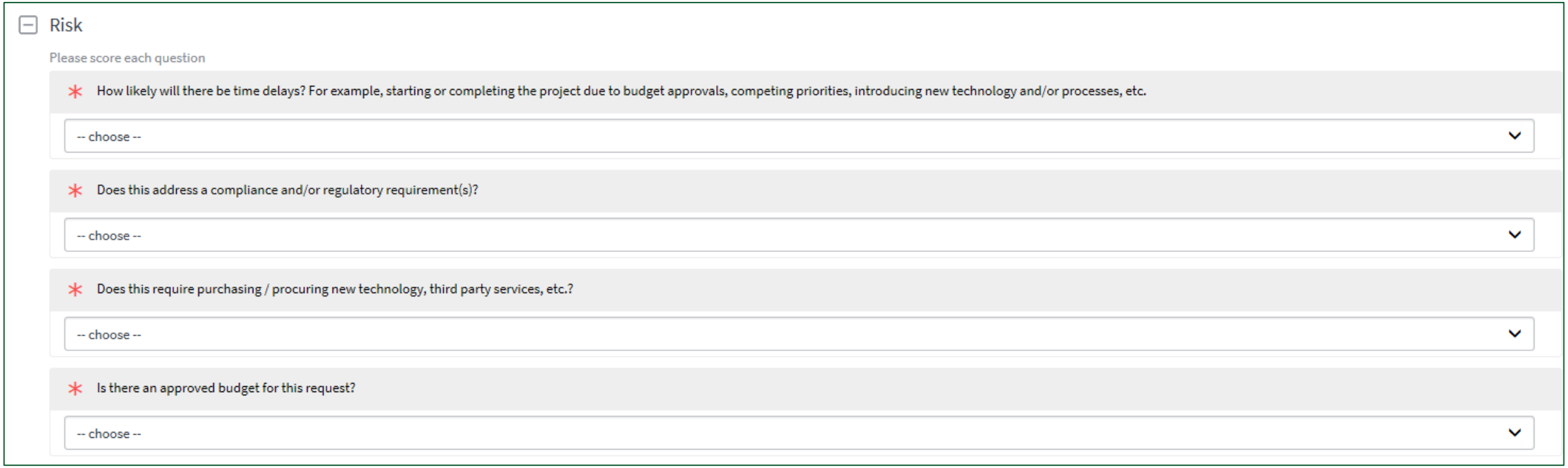
-- choose --

* Is this project aligned with a department or division's current vision and/or strategy?

-- choose --

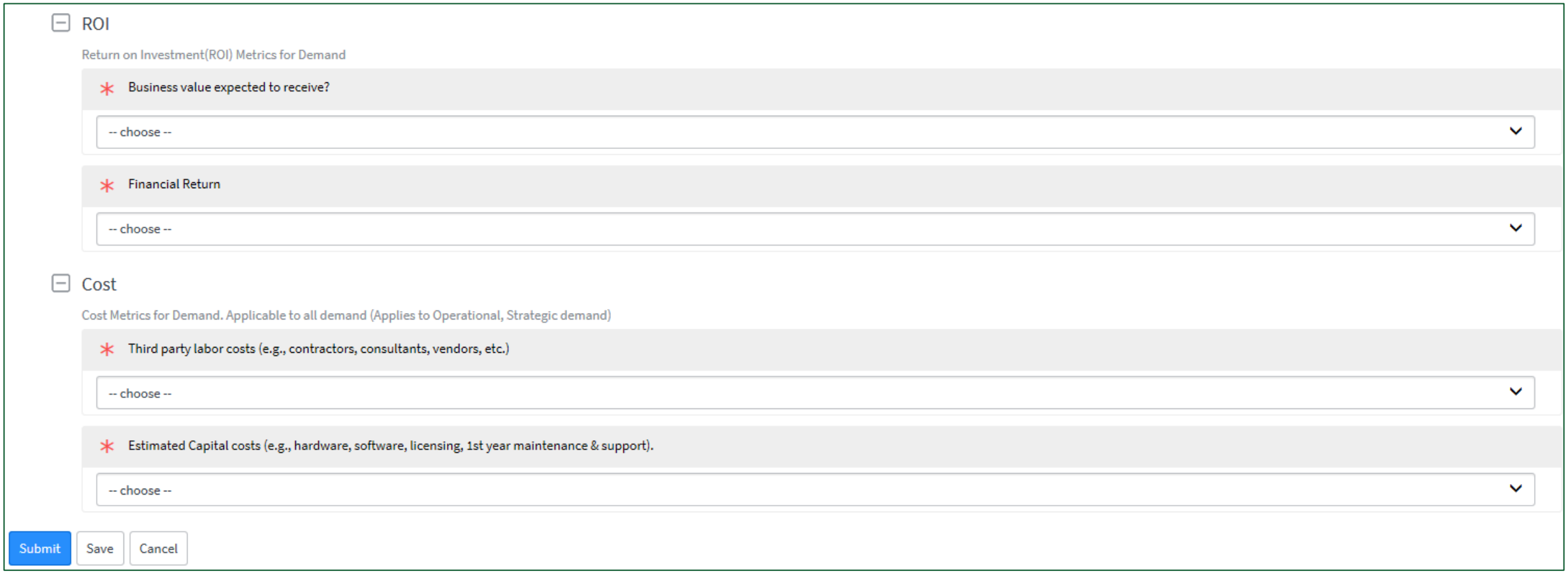
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Project Demand Assessment Questionnaire



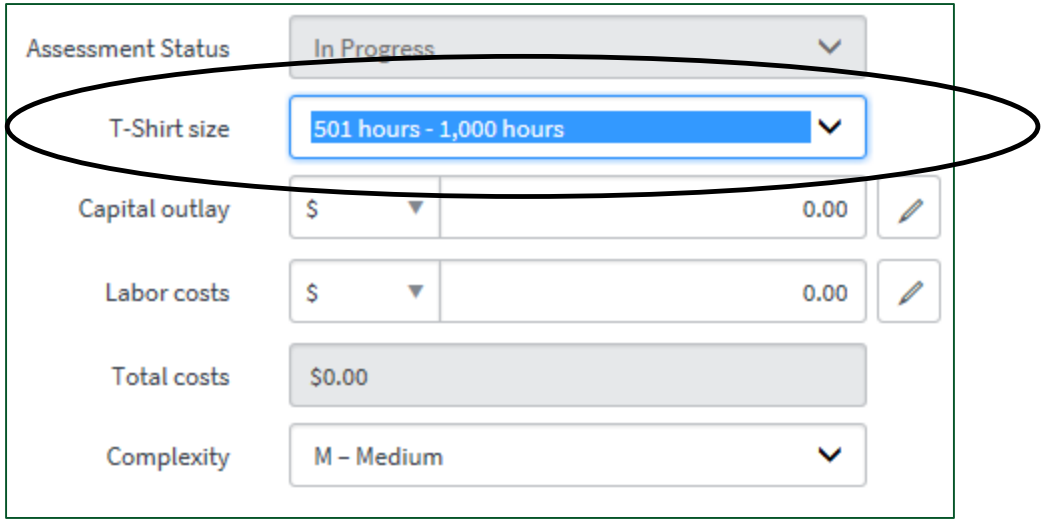
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Project Demand Assessment Questionnaire



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Demand Assessment Status & Sizing Information



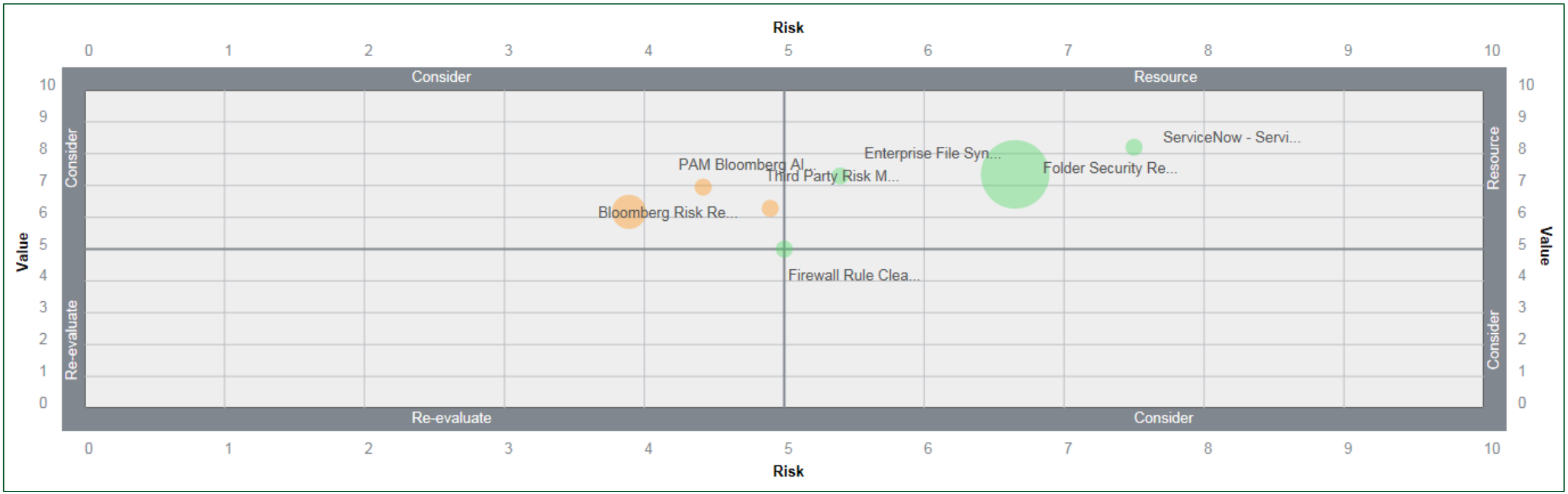
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Prioritized List of ‘Qualified’ Project Demand Requests

Demand	State	Risk	Value	Size	Overall Priority Score	Target Start Date	Requested completion
Search	=-4	Search	Search	Search	Search	Search	Search
ServiceNow - Service Portal Analysis phase DMND0001345	Qualified	7.5	8.2	2	7.71	12-12-2016	02-28-2017
Enterprise File Sync & Share NextGen Analysis DMND0001349	Qualified	5.4	7.3	2	7.06	01-02-2017	03-31-2017
Third Party Risk Management Gap Analysis DMND0001343	Qualified	4.9	6.28	2	6.3	02-01-2017	05-01-2017
Folder Security Remediation Project DMND0001350	Qualified	6.65	7.35	8	6.25	01-02-2017	06-30-2017
PAM Bloomberg AIM Database Separation DMND0001344	Qualified	4.42	6.95	2	6.06	12-15-2016	03-01-2017
Bloomberg Risk Remediation - DR solution DMND0001346	Qualified	3.89	6.17	4	5.56	12-08-2016	12-30-2016

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‘Qualified’ Demand Workbench – Value vs Risk View



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Prioritized List of ‘Approved’ Project Demand Requests

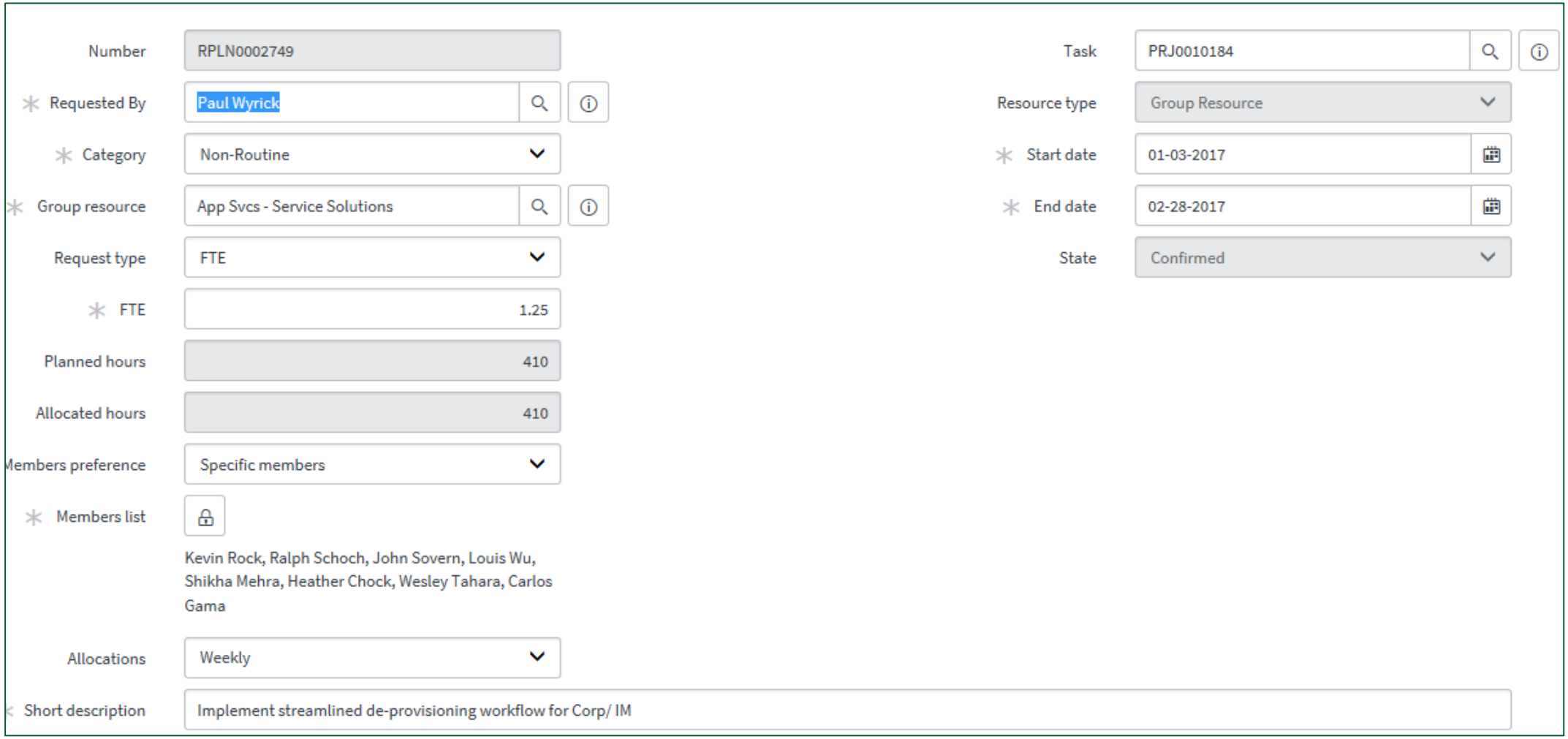
Number	Demand	Project	CIT sponsor	State	Risk	Value	Size	Overall Priority Score	Target Start Date
DMND0001366	Paul's New Demand Request DMND0001366	Paul's New Demand Request	Juan Martinez	Approved	8.5	9.5	4	9.1	05-01-2017
DMND0001198	Remediate Compliance Functionality not in HRXellence DMND0001198	StarCompliance	Darlene Goodwin	Approved	6.54	7.8	4	7.78	12-01-2016
DMND0001345	ServiceNow - Service Portal Analysis phase DMND0001345	ServiceNow - Service Portal Analysis phase	Juan Martinez	Approved	7.5	8.2	2	7.71	12-12-2016
DMND0001292	Wifi Enhancement (800 Building and Aksarben) DMND0001292	Wifi Enhancement (800 Building and Aksar...	Alex Munro	Approved	8.2	6.88	2	7.65	03-01-2017
DMND0001195	Splash Replatform DMND0001195	Splash Replatform	Darlene Goodwin	Approved	7.75	7.5	8	7.21	01-03-2017
DMND0001252	Project Portugal Expansion DMND0001252	Project Portugal Expansion	Alex Munro	Approved	7.93	6.53	4	7.14	06-01-2017
DMND0001340	Cloud Migration Readiness Assessment DMND0001340	Cloud Migration Readiness Assessment	Rick Vrieling	Approved	7.95	5.75	2	7.06	03-01-2017
DMND0001349	Enterprise File Sync & Share NextGen Analysis DMND0001349	Enterprise File Sync & Share NextGen Ana...	Juan Martinez	Approved	5.4	7.3	2	7.06	01-02-2017
DMND0001347	Maximis - Transition from legacy to Peoplesoft COA (Analysis Phase Only) DMND0001347	Maximis - Transition from legacy to Peop...	Darlene Goodwin	Approved	6.92	6.48	6	6.92	01-01-2017
DMND0001178	Implement streamlined de-provisioning workflow for Corp/ IM DMND0001178	Implement streamlined de-provisioning wo...	Juan Martinez	Approved	6.65	6.7	2	6.87	01-03-2017
DMND0001336	ServiceNow Annual upgrade DMND0001336	ServiceNow Annual upgrade	Darlene Goodwin	Approved	7.1	8.5	8	6.78	03-01-2017

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Resource Management Screenshots

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Resource Plan Form



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Confirmed “Soft Booked” Weekly Resource Allocations

Resource plan = RPLN0002749

Number	Start date ▲	End date	Requested hours	Allocated hours	Task	Resource	Booking type
RALLOC0183526	01-03-2017	01-08-2017	5	5	PRJ0010184	Shikha Mehra	Soft
RALLOC0183525	01-03-2017	01-08-2017	5	5	PRJ0010184	John Sovern	Soft
RALLOC0183521	01-03-2017	01-08-2017	5	5	PRJ0010184	Heather Chock	Soft
RALLOC0183523	01-03-2017	01-08-2017	5	5	PRJ0010184	Carlos Gama	Soft
RALLOC0183524	01-03-2017	01-08-2017	5	5	PRJ0010184	Kevin Rock	Soft
RALLOC0183519	01-03-2017	01-08-2017	5	5	PRJ0010184	Louis Wu	Soft
RALLOC0183520	01-03-2017	01-08-2017	5	5	PRJ0010184	Ralph Schoch	Soft
RALLOC0183522	01-03-2017	01-08-2017	5	5	PRJ0010184	Wesley Tahara	Soft
RALLOC0183532	01-09-2017	01-15-2017	6	6	PRJ0010184	Kevin Rock	Soft
RALLOC0183528	01-09-2017	01-15-2017	7	7	PRJ0010184	Ralph Schoch	Soft
RALLOC0183533	01-09-2017	01-15-2017	6	6	PRJ0010184	John Sovern	Soft

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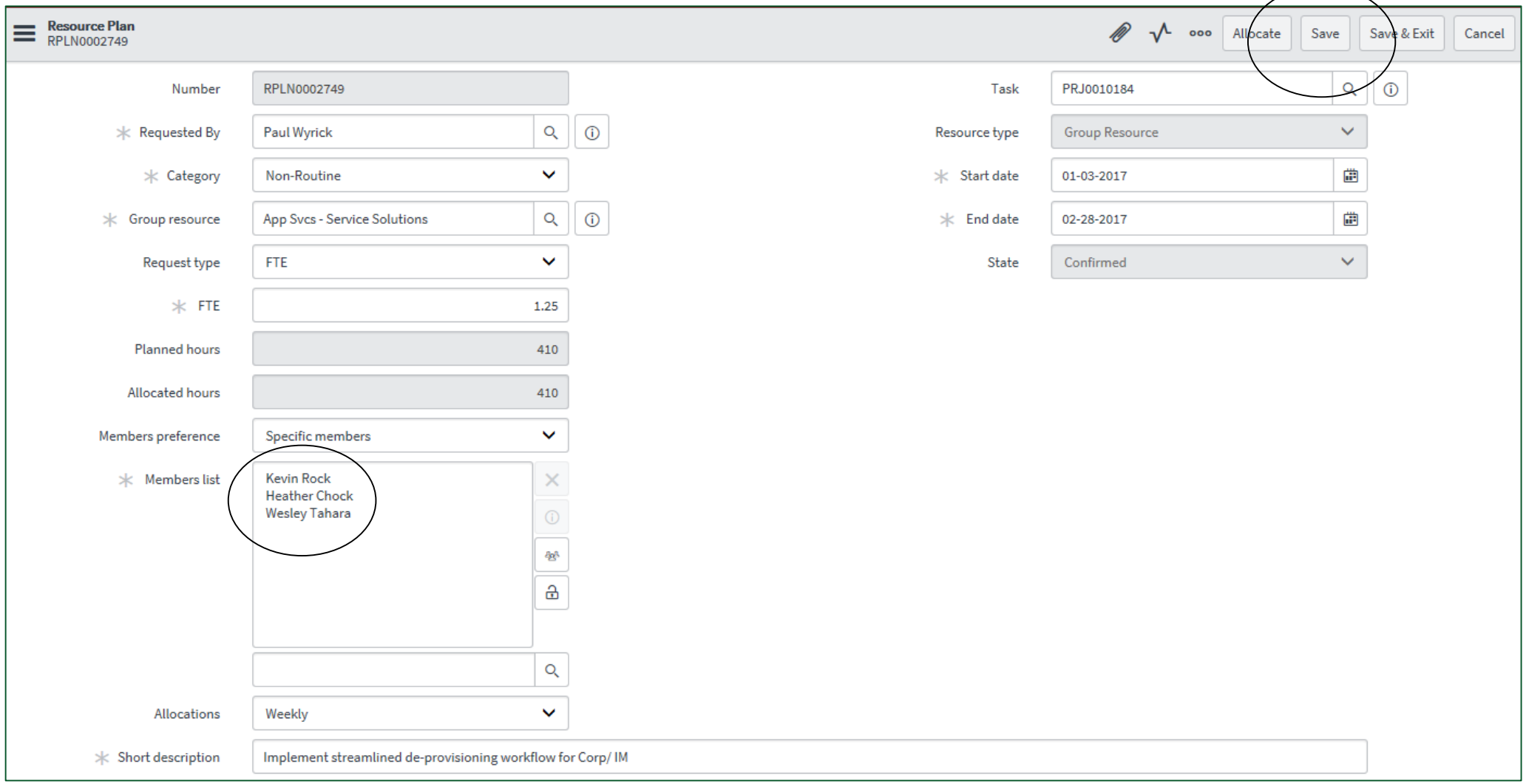
Review Current Team ‘Weekly’ Resource Allocations & Availability

Resource Name	1/1-1/7	1/8-1/14	1/15-1/21	1/22-1/28
Heather Chock	12 15 5	15 19 6	9 17 6	14 20 6
Louis Wu	10 17 5	13 20 7	6 19 7	12 21 7
Wesley Tahara	20 7 5	26 8 6	20 6 6	25 9 6
John Sovern	27 5	34 6	29 -3 6	34 6
Ralph Schoch	7 20 5	10 23 7	4 21 7	9 24 7
Shikha Mehra	27 5	34 6	29 -3 6	34 6
Ravneet Boparai	32	40	32	40
Kevin Rock	15 12 5	19 15 6	14 12 6	19 15 6

●	RPLN0002749	Implement streamlined de-provisioning wo...	Confirmed	App Svcs - Service Solutions	Non-Routine	FTE	1.25	01-03-2017	02-28-2017	410	410	Weekly	100% PRJ0010184

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Select Specific Resource(s) to Allocate



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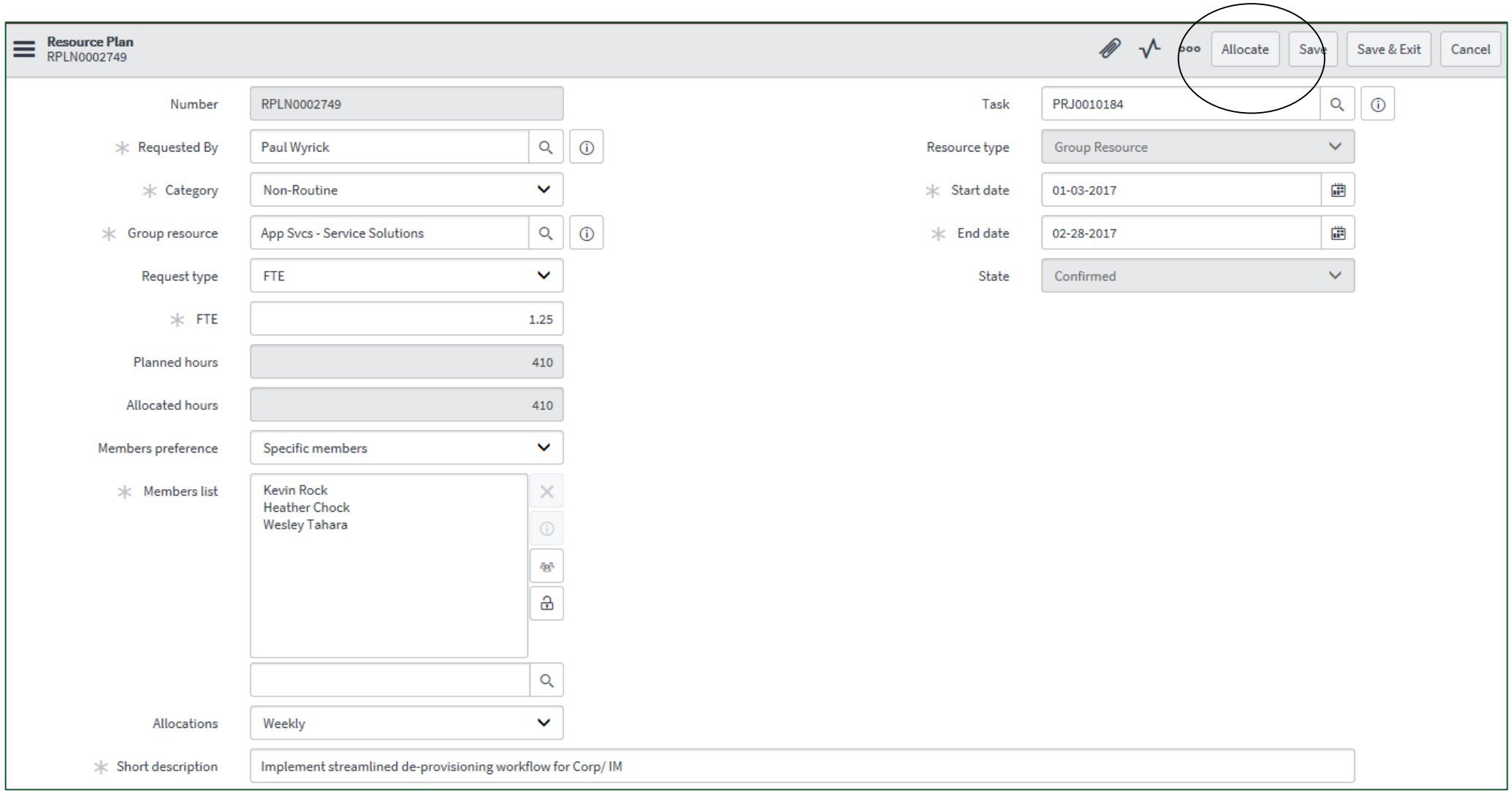
Double-check Selected Resources Allocations & Availability

Resource Name	1/1-1/7	1/8-1/14	1/15-1/21	1/22-1/28
Heather Chock	3 15 14	3 19 18	1 17 14	3 20 17
Louis Wu	15 17	20 20	13 19	19 21
Wesley Tahara	11 7 14	15 8 17	12 6 14	14 9 17
John Sovern	5 27	6 34	3 29	6 34
Ralph Schoch	12 20	17 23	11 21	16 24
Shikha Mehra	5 27	6 34	3 29	6 34
Ravneet Boparai	32	40	32	40
Kevin Rock	5 12 15	7 15 18	5 12 15	7 15 18

●	RPLN0002749	Implement streamlined de-provisioning wo...	Confirmed	App Svcs - Service Solutions	Non-Routine	FTE	1.25	01-03-2017	02-28-2017	410	410	Weekly	100% PRJ0010184

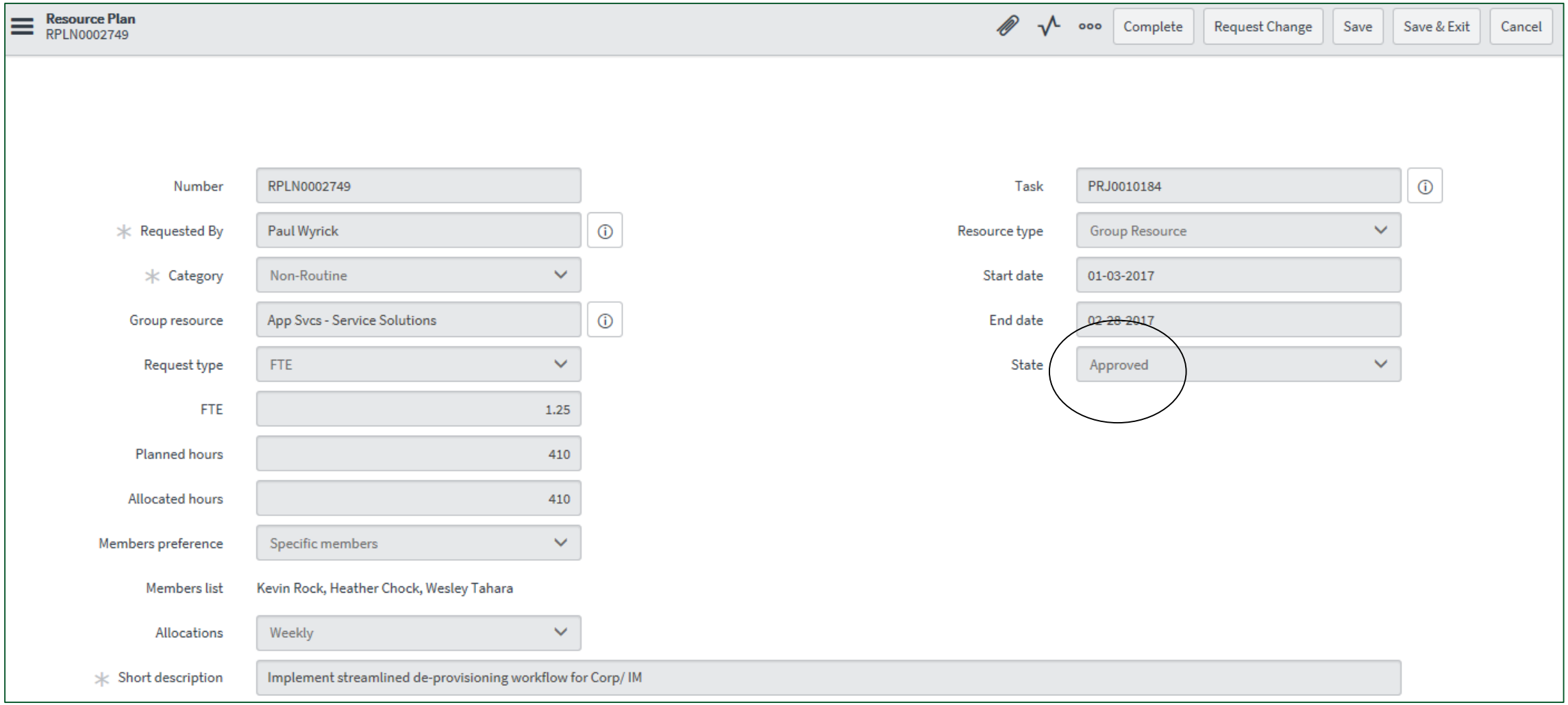
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Allocate & Approve Resource Allocations



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Approved Resource Plan



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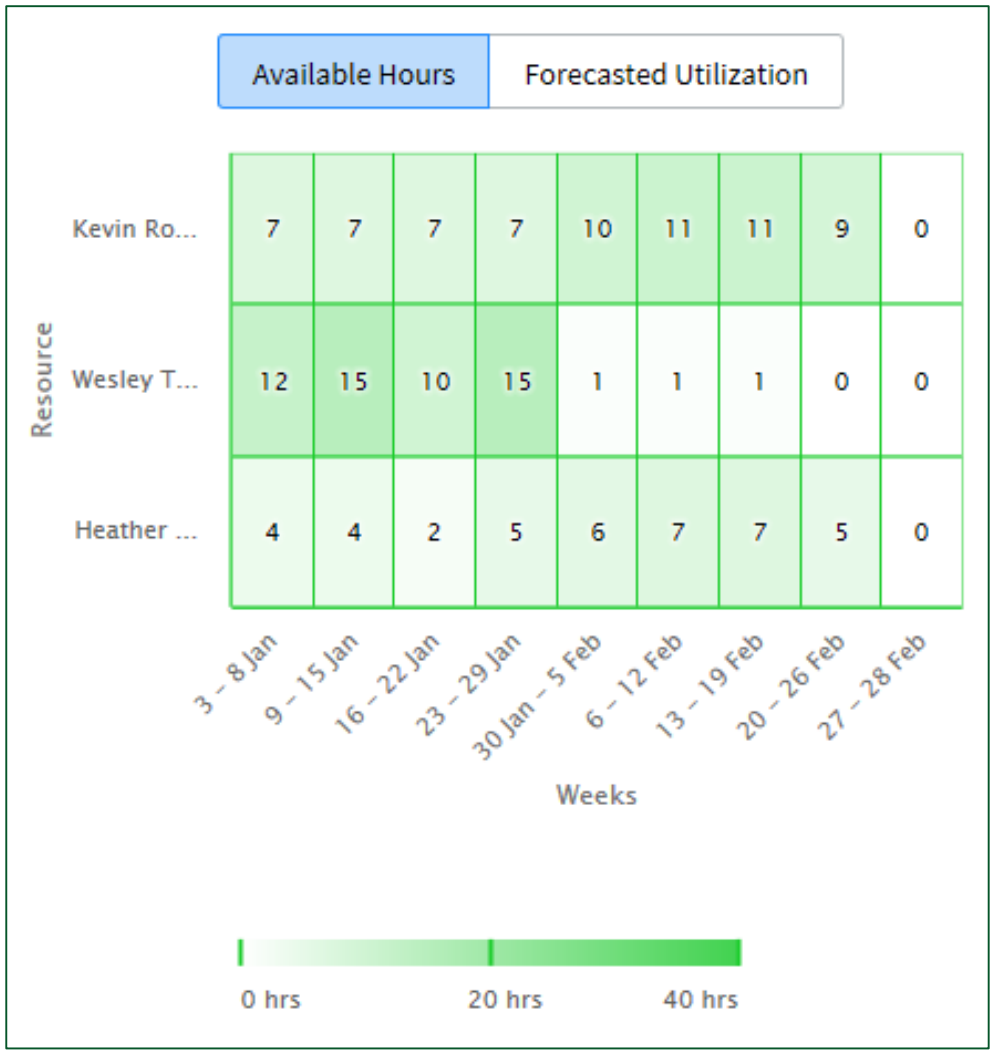
Approved “Hard Booked” Weekly Resource Allocations

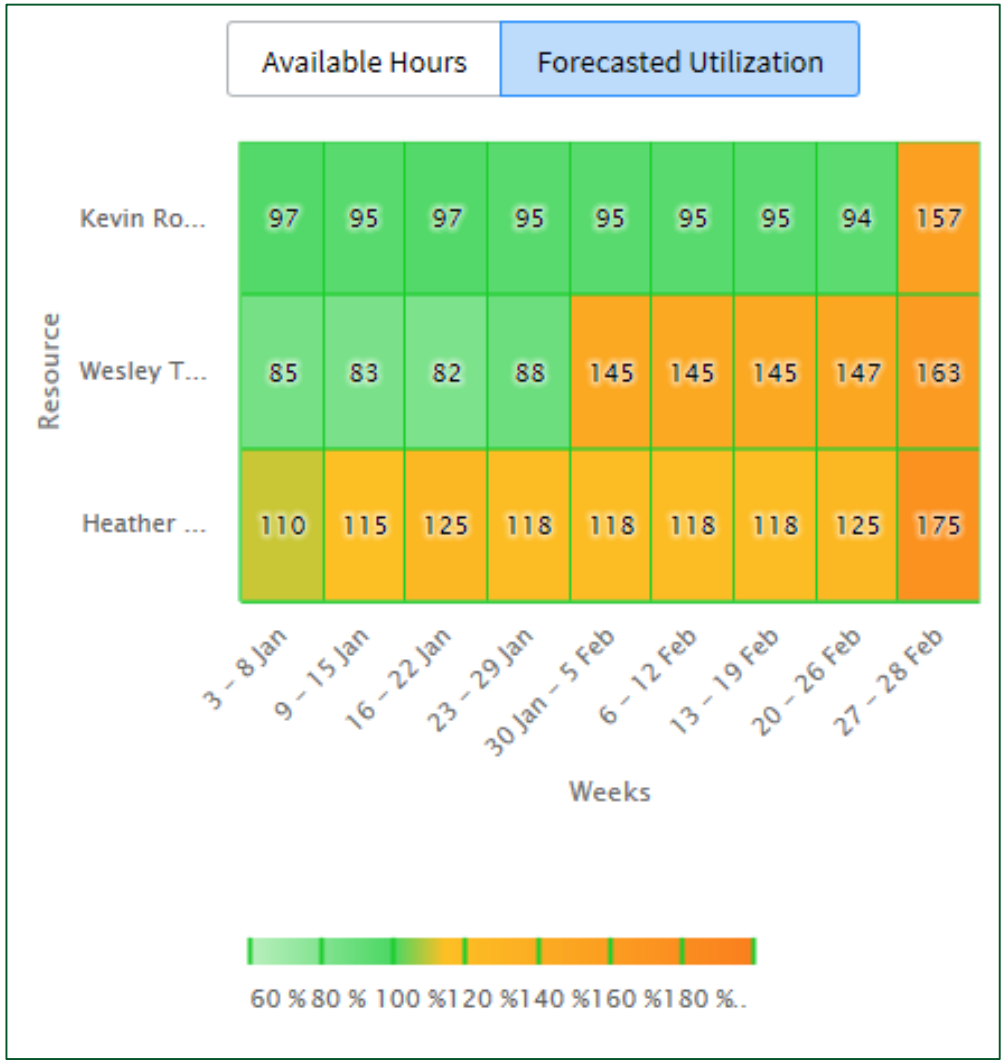
Resource plan = RPLN0002749

Number	Start date ▲	End date	Requested hours	Allocated hours	Task	Resource	Booking type
RALLOC0326830	01-03-2017	01-08-2017	14	14	PRJ0010184	Heather Chock	Hard
RALLOC0326839	01-03-2017	01-08-2017	14	14	PRJ0010184	Wesley Tahara	Hard
RALLOC0326821	01-03-2017	01-08-2017	15	15	PRJ0010184	Kevin Rock	Hard
RALLOC0326831	01-09-2017	01-15-2017	18	18	PRJ0010184	Heather Chock	Hard
RALLOC0326840	01-09-2017	01-15-2017	17	17	PRJ0010184	Wesley Tahara	Hard
RALLOC0326822	01-09-2017	01-15-2017	18	18	PRJ0010184	Kevin Rock	Hard
RALLOC0326823	01-16-2017	01-22-2017	15	15	PRJ0010184	Kevin Rock	Hard
RALLOC0326832	01-16-2017	01-22-2017	14	14	PRJ0010184	Heather Chock	Hard
RALLOC0326841	01-16-2017	01-22-2017	14	14	PRJ0010184	Wesley Tahara	Hard

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Resource Workbench ‘Availability’ & ‘Forecasted Utilization’





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Tying Demand and Resource Management Together

- Resource Sizing Data feeds into Resource Plans created in ServiceNow
- ‘Overall Priority Score’ data determines priority of each new Project Demand Request
- ‘Approved’ projects, anticipated ‘Start Dates’, and availability of Team Resources feed into how projects should be ‘Sequenced’
- The current ‘Sequencing’ of projects determines which project(s) should start next, based on the availability of Team Resources
  - Value: Complete end-to-end Demand Management & Resource Capacity Management Process Sizing ➔ Prioritization ➔ Resource Availability ➔ Approval ➔ Sequencing ➔ Project Starts
  - Value: A more accurate determination of when new projects can start and what order they will be able to be started
  - Value: CIT Management now has the ability to react to and adjust to potential Resource Over-allocations

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Tying Demand and Resource Management Together (cont.)

- Once a project starts, adjustments are made to Resource Allocations by adjusting originally created Resource Plans in ServiceNow
  - Value: Refinements are continual and on-going beyond the initial high-level resource estimates ensuring an up-to-date view of current Resource Allocations and Availability
- ‘Routine’ Resource Plans created to account for ‘Routine’ non-project related work
  - Value: The Resource Capacity Management Model contains a complete view of both ‘Routine’ & ‘Non-Routine’ Resource Allocations accounting for all types of work assignments

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Take the Survey

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

Thank You

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