knowledge17

WORK at LIGHTSPEED™

Resource Management for the IT PMO

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Speaker Introduction



NAME: Michelle Wenning

TITLE: Director, IT PMO

FUNCTION: Design/Administration/IT

COMPANY: AAA Club Alliance

EXPERIENCE: 21 years with AAA, 5 years PMO

EXPERTISE: IT Business Management

ACHIEVEMENTS: Full implementation of PPM, Demand, Resource Management, Agile

CURRENT PROJECTS: Project Change Management Customization, Resource Management BI Reporting, Demand and Project Enhancements

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About AAA Club Alliance



NAME: AAA Club Alliance

INDUSTRY: Membership organization offering road service, car care, travel, insurance, financial services, safety

MARKET FOCUS: Membership based organization with a focus on road service providing additional member benefits

COMPANY DETAILS: Serve 13 states, including D.C., over 6 million members, 5300 associates

COMPANY-WIDE INITIATIVES: Member satisfaction, member retention, New Member acquisition, increased revenue with improved member benefits

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Agenda

- From Demand to Project
- Time Tracking
- Reporting
- Live Demo
- Q & A
- Top Take-Aways



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Goals

- Create a workflow to seamlessly move from demand to project
- Create a seamless process for resource plan changes
- Provide reports to effectively manage the process
- Be sensitive to the cultural change for team members
- Fully engage all team members from resource to resource manager

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Challenges

- Considering the use of appropriate states as moving from demand to project
- Working the limitations of the allocated state and the abilities to change – at first go live consider avoiding allocated state
- Managing the resource plan change process and insuring visibility into hours for pre and post Project Governance meetings
- Engaging resource managers in the automated process and instilling ownership
- Working with ServiceNow OOB reporting to provide an acceptable view for CIO
- Insuring buy in from resources and addressing the “policing your time” feelings

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From Demand to Project

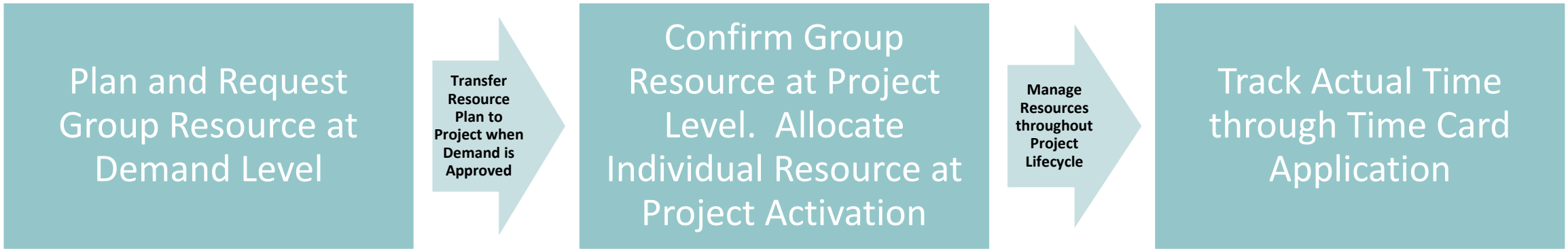


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High Level Process Flow

"If you can't describe what you are doing as a process, you don't know what you're doing."

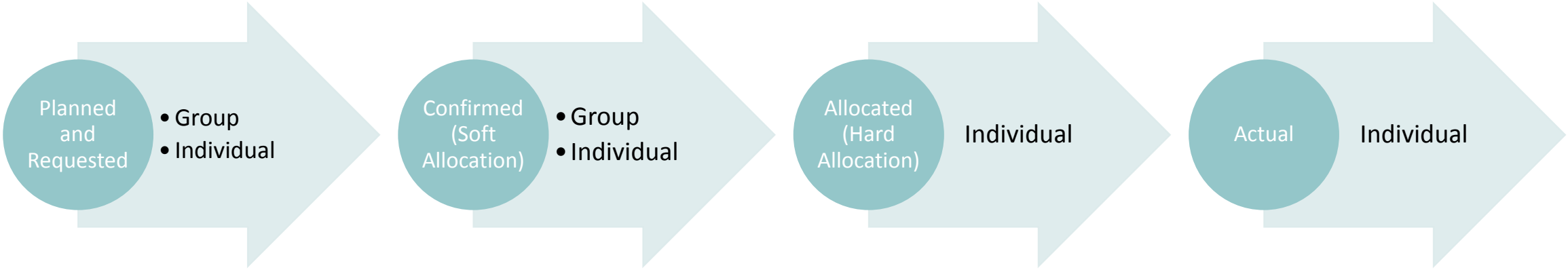
~ W. Edwards Deming



*Istanbul introduces the Confirmed state

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Resource States



Planned is used for planning the demand and forecasting changes to project. Requested is used at demand level and for project changes

Confirmed when the demand is approved and pending project is created.

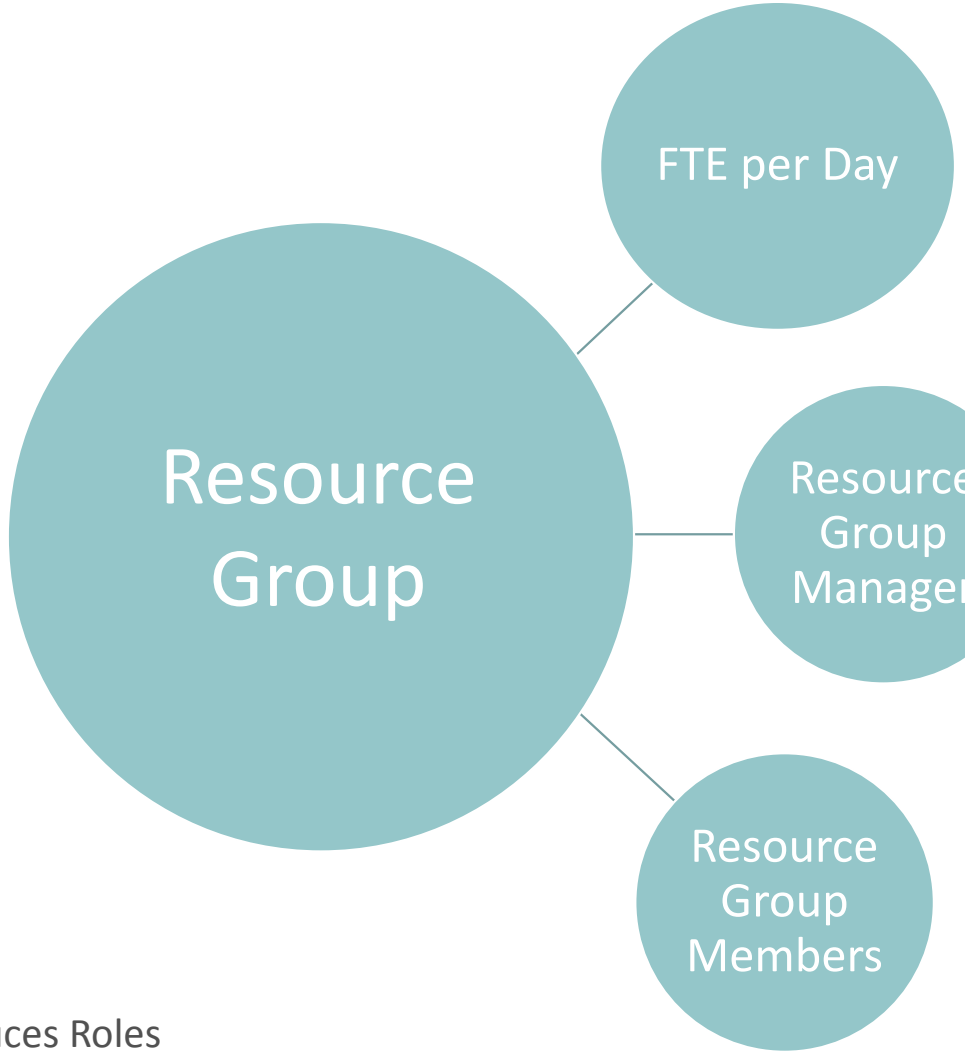
Allocated in the Project when the project is activated.

Reported in the Time Card application.

*Rejected can be used during confirmation process. Cancelled is also available. Completed at project close.

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Resource Groups and FTE



- This will be used in determining overall availability.
- Should be your total availability for project, non-project, and PTO.
- Determined from Resource Management Schedule

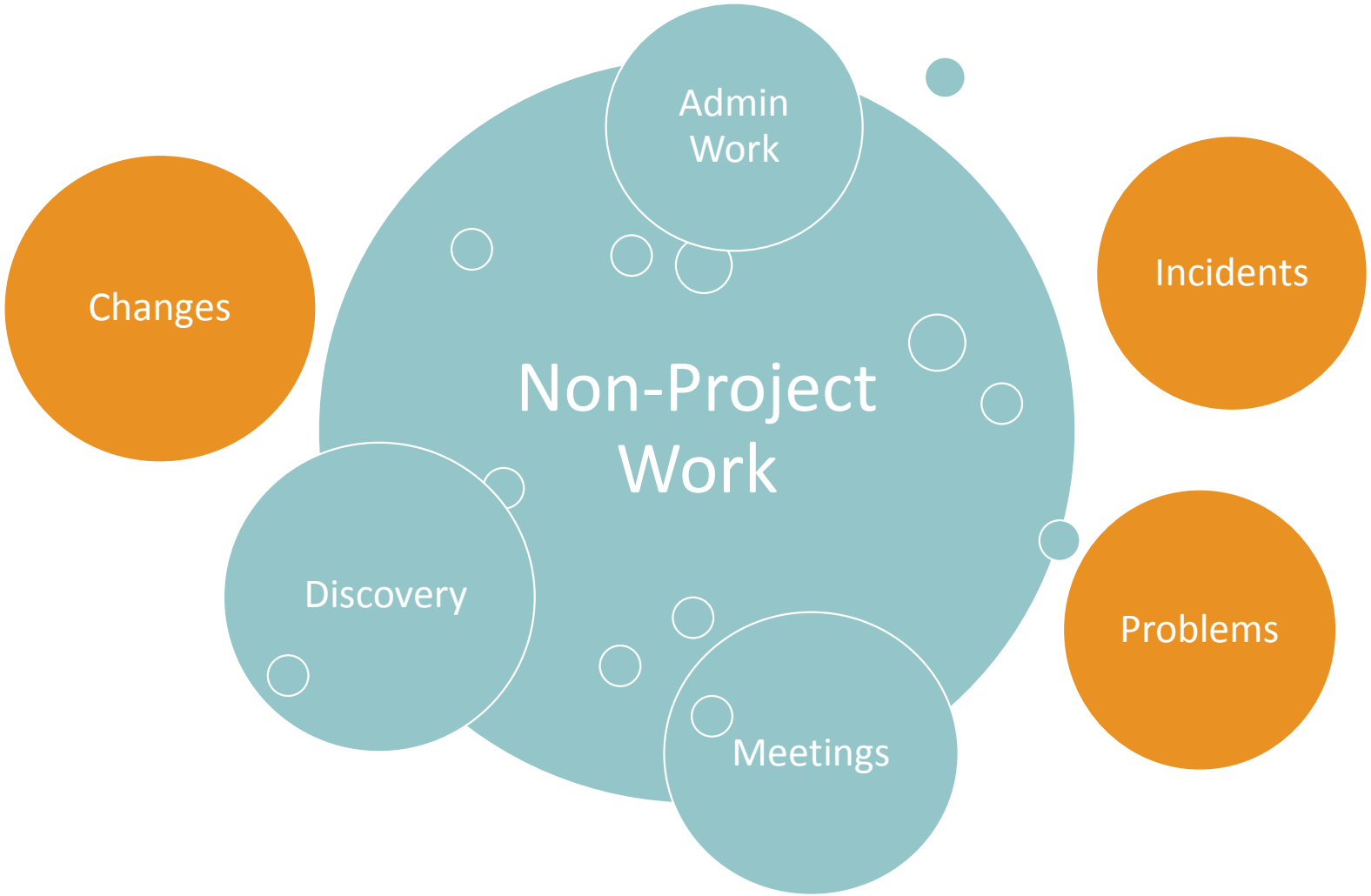
- Will be responsible for approving resource plans.
- Will receive notifications when action is required on a resource plan.

- The individuals with the skill sets particular to the resource group.
- Resource plans will be created for these individuals at the project level.

**Istanbul introduces Roles

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Non-Project Work

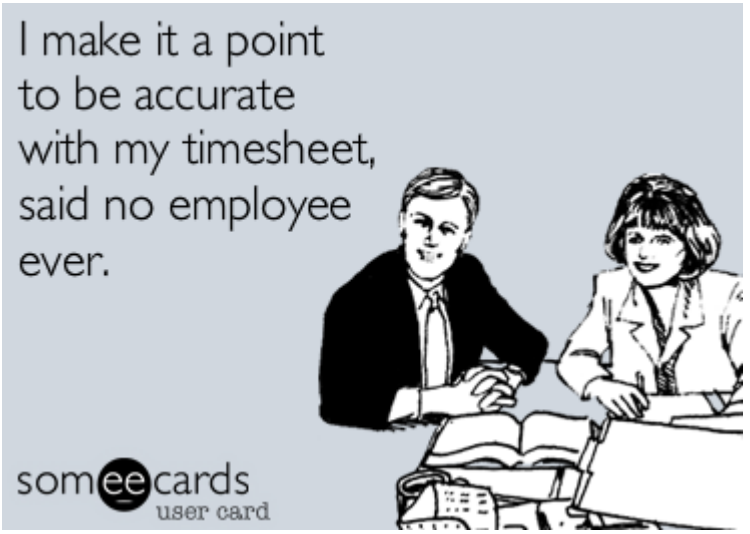


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Time Tracking

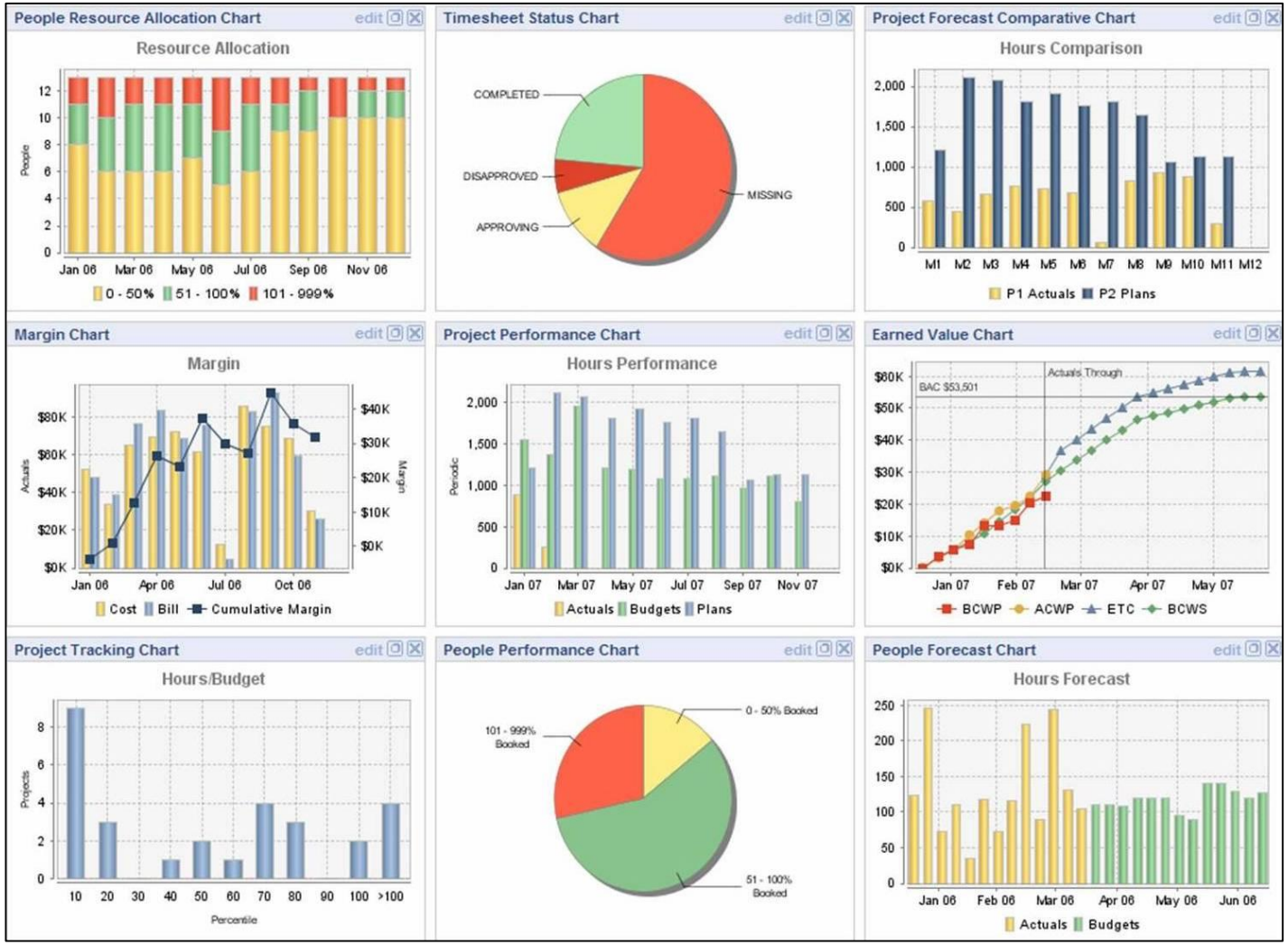






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Reporting



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Final Thoughts for Success

- You Must be committed to the process from CIO down to resource
- Realize that the technology does not replace the required communication
- Resource Management is time intensive, embrace it and allow the necessary time
- Project Managers have to own and validate their resource plans
- Resource Managers have to provide the initial estimates
- Resources have to be diligent with time cards
- Be aware of the changes from Helsinki to Istanbul
- Use the data! Find out what you are doing right and what you are doing wrong ADJUST!

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Top Takeaways

1

When upgrading from Helsinki to Istanbul allow for appropriate time to understand resource management enhancements

2

Define a resource management change process that works for your organization

3

Pay attention to the cultural shift that comes with time tracking and be sensitive to the effect of the change

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Take the Survey

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

Thank You

Michelle Wenning, PMP
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