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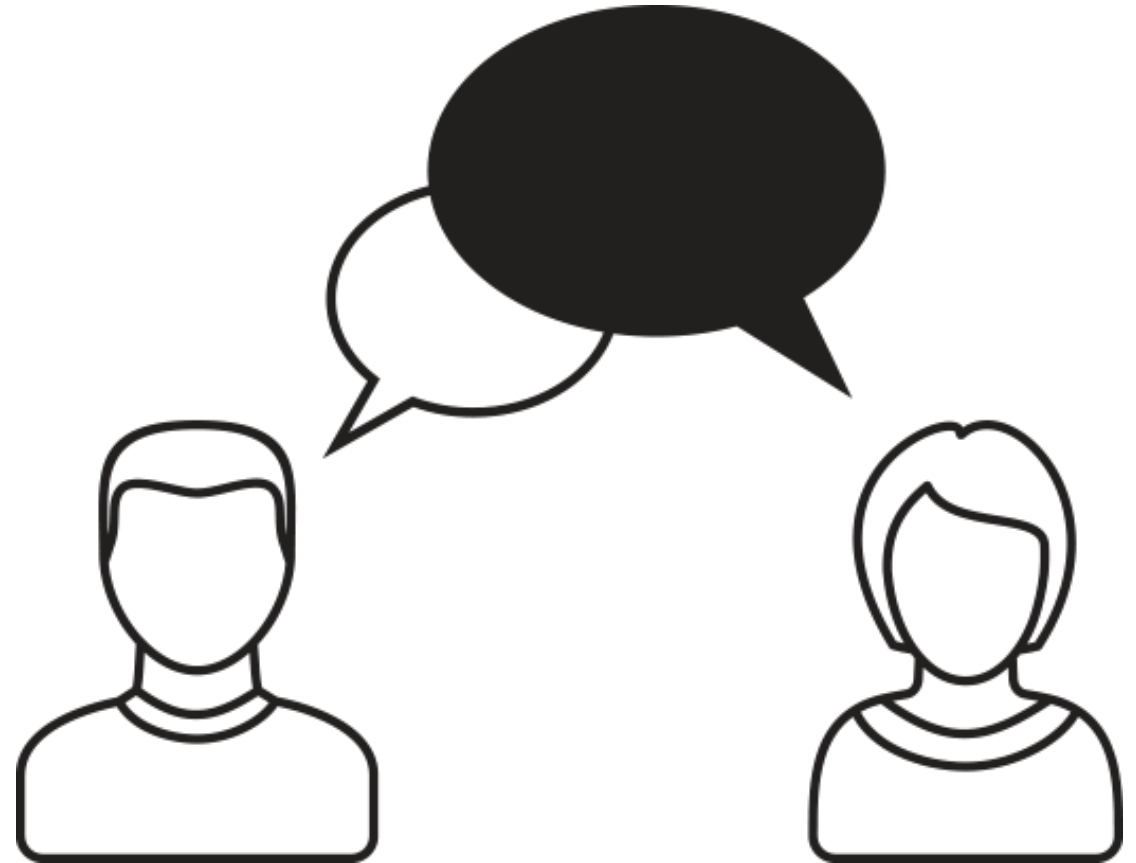
CA PPM Support Organization | Best Practices

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Introductions

- Take 5 Minutes
- Turn to a Person Near You
- Introduce Yourself



Agenda

- Open Mic – Challenges That You Face
- Components of Support
- Staffing and Support Model Options
- Reducing Support Demand
- Open Discussion – Prioritize Work Requests
- Keys to Successful Request Tracking
- Open Discussion

- APPENDIX

Introduction

- Information presented is based on Rego experience
- Volume, demand, number of users, company culture, structure, and PPM maturity all play a part in what support model works for you
- Understanding all aspects of CA PPM support, and implementing the proper support model is crucial to ensure that your CA PPM system is adding great value to your company

Open Mic – Challenges That You Face

- What support challenges are you currently facing? (List on Board)
- How many of you are happy with your current support performance and staffing levels?

Components of Support

Management – Overall Application and Process Leadership, Strategy, and Subject Matter Expertise

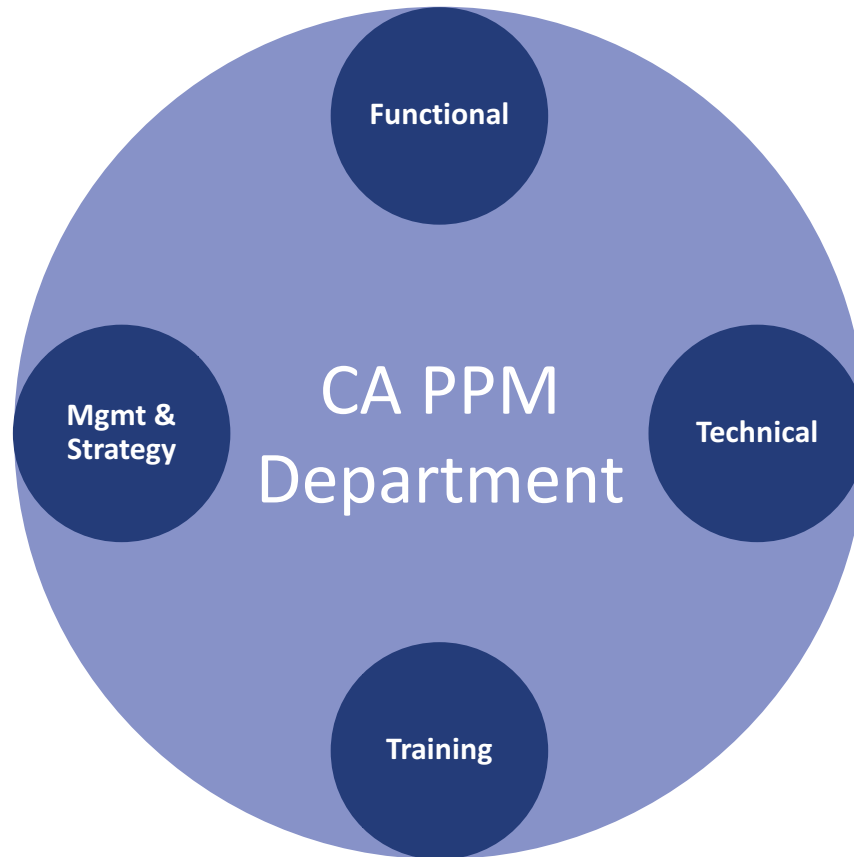
- Level 1 Support (Basic CA PPM knowledge)
 - Administrative Requests (access, security, timesheets, new users, OBS changes, lookup changes)
 - General Support (information, issues, reporting, how to)
 - Monitoring CA PPM Jobs & Processes (daily, weekly)
- Level 2 Support (Functional and Technical – Strong CA PPM knowledge)
 - Functional Roadmap and Release Planning
 - Best Practice Functional Consulting
 - Data Defects
 - Complex Reports, Portlets or Processes
 - Informal Training
- Level 3 Support (Strong PPM and Infrastructure knowledge)
 - Application Interface Issues / Critical Application Issues
 - Complex Enhancements
 - Technical Application of Upgrades and Performance Tuning
 - Infrastructure HW/SW Upgrades and Maintenance
 - CA handles much of this for on demand clients
- Project / Release Management – Upgrades, Releases
- SMEs & Trainers – Mentoring, Training Program

Sample Staffing Data – On Premise

Users:	50-100	100-400	400-1000	1000-2000	2000-5000
Basic System Support	.25 - .5 Tech .25 - .5 Funct .25 - .5 SME	.25 - .75 Tech .25 - .75 Funct .25 - .75 SME	.5 - 1 Tech .5 - 1 Funct .5 - 1 SME	1 - 2 Tech .75 - 1.5 Funct .75 - 1.5 SME	2 - 3 Tech 1 - 3 Funct 1 - 3 SME
ADD Time and Project / Resource Tracking	0 Tech 0 Funct 0 SME	0 Tech 0 Funct 0 SME	0 Tech 0 Funct 0 SME	0 Tech 0 Funct 0 SME	0 Tech 0 Funct 0 SME
ADD Project Mgmt: Scheduling (OWB/MSP), Issues/Risks/Status	0 Tech 0 Funct .10 - .25 SME	0 Tech 0 Funct .25 - .75 SME	0 Tech .25 - .5 Funct .5 - 1 SME	0 Tech .5 - 1 Funct 1 - 2 SME	0 Tech .75 - 1.5 Funct 2 - 3 SME
ADD Resource Mgmt	0 Tech 0 Funct .10 - .25 SME	0 Tech 0 Funct .25 - .75 SME	0 Tech .25 - .5 Funct .5 - 1 SME	0 Tech .5 - 1 Funct 1 - 2 SME	0 Tech .75 - 1.5 Funct 2 - 4 SME
ADD Financial Mgmt: Cost Plans, Rates, Transactions	.10 - .25 Tech 0 Funct 0 SME	.10 - .25 Tech 0 Funct 0 SME	.25 - .75 Tech 0 Funct 0 SME	.5 - 1 Tech 0 Funct 0 SME	.5 - 1 Tech 0 Funct 0 SME
ADD Demand and Portfolio Mgmt	0 Tech 0 Funct 0 SME	0 Tech 0 Funct 0 SME	0 Tech 0 Funct 0 SME	0 Tech 0 Funct .25 - .5 SME	0 Tech 0 Funct .5 - 1 SME
Total FTE Ranges :	1.05 - 2.25	1.35 – 4.0	3.25 - 6.75	10.5 - 12.5	10.5 – 21.0

- Technical resource requirements are estimated to be approximately 15% to 25% less for on demand clients
- Excludes major project work like upgrades or major functionality deployments
- Excludes some amount of consulting for architecture and project BA/Developer resources
- Figures will vary based on organization maturity and structure for monitoring and controlling with the organization

Support Model Options: Centralized



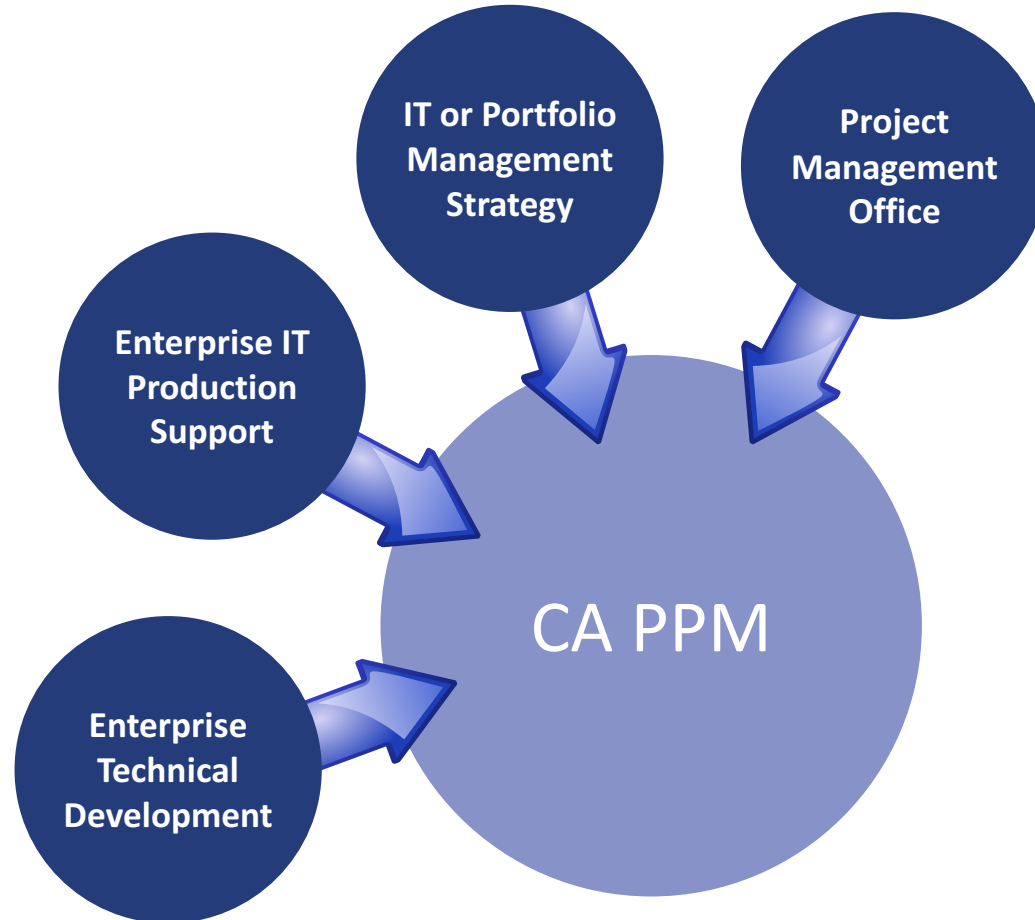
Advantages

- More efficient collaboration
- Cross training, multiple skills
- “One vision”

Disadvantages

- Too many hats
- Competing priorities
- Issue/Problem response time may suffer

Support Model Options: Distributed



Advantages

- Focused expertise
- Focused priorities
- Faster issue/problem response time

Disadvantages

- Limited collaboration
- Incorrect communication to user may occur
- Cross training may be challenging

Support Model Options – Internal/External

Area	Staffing Options
Management	<ol style="list-style-type: none"> 1. Internal PMO owns both process and tool 2. Internal PMO owns process and Internal IT group is the product owner of the tool
Functional – Level 1	<ol style="list-style-type: none"> 1. Outsourced to External vendor 2. Moved to Help Desk (rare) 3. Staffed within the internal PMO
Technical Development – Level 2	<ol style="list-style-type: none"> 1. Internal PMO performs this work 2. Internal IT product owner staffs technical resources 3. Outsourced to External Vendor
Functional – Level 2	<ol style="list-style-type: none"> 1. Internal PMO performs this work 2. Outsourced to External Vendor
Level 3 Support	<ol style="list-style-type: none"> 1. Move to On demand 2. Internal IT product owner manages 3. Internal IT product owner manages infrastructure, and some level 3 monitoring is outsourced to external vendor
Project / Release Management	<ol style="list-style-type: none"> 1. Internal PMO manages projects and releases 2. Internal IT product owner manages projects and releases 3. Outsourced to External Vendor
SMEs & Evangelists & Trainers	<ol style="list-style-type: none"> 1. Internal PMO performs this work 2. Outsourced to External Vendor (would not outsource SMEs– just trainers)

Reducing Support Demand

- Provide Self-Service Alternatives
 - Project requests
 - Resource requests
- Enhance and Re-Focus Training
 - Promote CAPA and/or training videos
 - Train and Empower Subject Matter Experts in area across the organization
 - “Lunch & Learn” sessions on the week’s most common request
- Automate Recurring Activities
 - Resource provisioning and removal
 - Project shutdown
 - Log maintenance
 - Time period maintenance

Open Group Discussion

- Do you have a well defined CA PPM roadmap and method to track and prioritize work requests?

Keys to Successful Request Tracking

- Tracking of Support Work
 - The ability to track and report on all support requests is a key building block for a successful support model
 - Recommendations:
 - Level 1 - internal ticket system or support email
 - Level 2 / 3 - Rego's CA PPM work request tracking module or a client internal tool and process
- Rego Work Request Tracking Module (Level 2 / 3 Requests)
 - Facilitates the support process by providing a more formalize method to track the status of all CA PPM work requests
 - Is a custom object delivered to the client's CA PPM environment with pre-configured lookups and views
 - Captures all key requirements information and acts as a real time work flow tool to assure adherence to process
 - The module is available for download on regoXchange for "Worx" clients

Open Group Discussion

- Do you have any additional thoughts regarding support that you would like to share with the group?

Keys to Successful Support

- Short Cycle Time
 - Let the users drive functionality quickly
 - If users believe their enhancements, defects, etc. take too long or do not meet their needs, they will look elsewhere to get their data or implement their process
- SMEs are a Critical Role
 - Having users constantly mentored and trained is very important; the organization constantly changes and people need a refresher
- Have a Vision and Stay Current
 - Identify targeted functionality or reporting each year
 - Always have a goal or vision for where you want the adoption of CA PPM to be next year
 - Part of this is also staying current with CA PPM; do not let the environment get too far behind in releases
- Staff a Solid Team
 - People are always the most important element
 - A few good people can keep you moving forward even on a shoestring budget
 - Outsourcing may make sense especially if you are concerned about turnover

Questions?



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Let Rego be your guide.

Thank You For Attending regoUniversity

Instructions for PMI credits

- Access your account at pmi.org
- Click on **Certification**
- Click on **Maintain My Certification**
- Scroll down to **Report PDU's**
- Select **Education-Category B-Continuing Education or Category C-Self-Directed Learning**
- 1 PDU per hour
- Class Name = **regoUniversity**
- Course Number = **Session Number**
- Date Started = **Today's Date**
- Date Completed = **Today's Date**
- Hours Completed = **1 PDU per hour of class time**



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Appendix

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Keys to Successful Support – Governance

- Application Owner
 - Works with Leadership to Define and Update Roadmap
 - Resolves Conflicts and Owns Priority
 - Ensures solutions are in best interest of the Organization
 - Communicates and champions change
- Core Application Team
 - CA PPM Functional & Technical expertise
 - Configuration / Development
 - Project Management
 - Solution Architecture
 - Nuts and Bolts
- Operating / Steering Committee
 - Steer Priority and Sequencing of Enhancements and New Functionality
 - Provide Context and Justification for Local Requests
 - Communication with Local Groups
 - Approval of Release Content

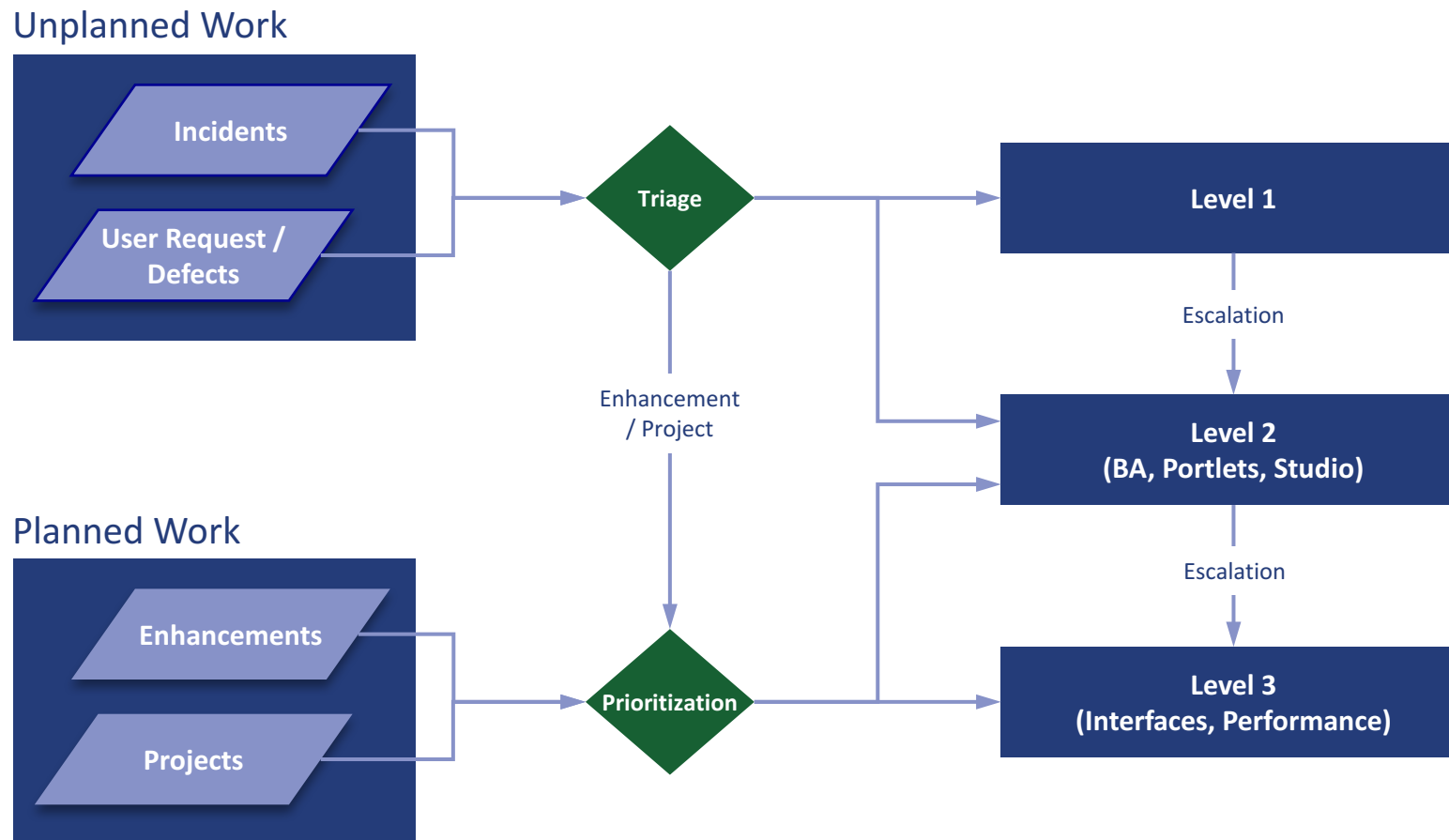
Typical Support Gaps – Roles

- Hosting & Database Administration (On Premise)
 - Performance monitoring
 - Support for upgrades and patches
- Training & Mentoring
 - Onboarding support for new RMs/PMs
 - Formal mentoring to share and collect real-world best practices
 - CA PPM Architecture
 - Roadmap creation and guidance
 - Portlet and report optimization
 - Best practice configuration guidance, FM and RM in particular
 - Managing process changes vs. tool changes
- Change Management

Support Gaps – Turnover

- How many have had support staff leave?
- How were they replaced?
 - Hire a CA PPM expert
 - Hire and train
 - Outsourced to a firm
- How do you retain staff?
 - Role rotations
 - Empowerment
 - Advancement path
- How do you mitigate the impact of turnover?
 - Cross-training
 - Formal back-up assignments
 - Strong documentation

Support Gaps: Request Process



Support Gaps – Internal Management

- In what tool is demand collected, prioritized, assigned, and managed through delivery?
 - Help Desk
 - Ticketing system
 - Support Email
 - Change requests – Excel, CA PPM WR object, other
- Who owns triage and prioritization?
 - Specified Level 1 Resource
 - Team Manager
 - PMO
- How do you balance the book of work to ensure enhancement do not take too long to implement, causing users to lose patience and confidence?
- How is progress communicated back to the requestors?
 - Reports, Portlets
 - Email

Support Gaps – Internal Management

- Example: Custom Work request object in CA PPM can be used to effectively manage Level 2 and 3 requests
- Enabled with auto-generated emails and background process that support task creation / time tracking

ID	Name	Clarity Team Owner	Numeric Ranking	Type	Requestor	Status	Progress / Phase	Target Date	Planned Release	Estimate (Hrs)	Last Updated Date	Updated By
ENH000013	Add new "Status Trend" attribute to BC	Wes McCoubrie		Enhancement	Norman, Andrew	Completed	Testing	5/11/12		2.0	7/30/12	McCoubrie, Wes
ENH000014	GIS, Scripts Not Executing in S1/S and DEV	Ben Rimeach		Support	Norman, Andrew	Completed	Implemented	5/9/12		2.0	7/30/12	McCoubrie, Wes
ENH000015	Update OCA Project Template			Enhancement	Barnson, Denise	Completed	Implemented	5/4/12		1.0	7/30/12	McCoubrie, Wes
ENH000017	Enhance KI Report with Original Budget	Mark Appleby Taylor		Reporting	Beltz, Jennifer	Completed	Implemented	5/11/12		4.0	7/30/12	McCoubrie, Wes
ENH000020	Resolve Project Cost Performance Bugs	Mark Appleby Taylor		Reporting	Beltz, Jennifer	Completed	Implemented	5/18/12		6.0	7/30/12	McCoubrie, Wes