regoUniversity 2019

SAN DIEGO

Demand Management| Best Practices

Your Guides: Emma Terzian and Krupa Shah

Introductions

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

Agenda

- Rego Best Practices: Demand Management
- Rego Best Practices: Using Incidents

Open Mic

- What does Demand Management mean to you?
- The goal of identifying and implementing best practices is to have a successful demand management implementation. What do you think success looks like?
- What prevents success?
- For those that have a successful implementation of demand management – what are some of your best practices?

Some Rego Thoughts…

What is Success?

- ✓ Accurate data
- ✓ Complete date
- ✓ All demand captured in PPM
- ✓ Demands map to strategic objectives
- ✓ Objective scoring
- ✓ No other tools used to evaluate demand (Excel, SharePoint)

Stumbling Blocks

- ❑ Accurate financial and resource data in projects
- ❑ Goldilocks for demand – what is the right amount of data
- ❑ Business users are not in CA PPM
- ❑ Over-engineering demand process
- ❑ How do you decrement Idea demand once converted to a Project?

Format of This Session

- In the next set of slides, Rego has compiled a set of best practice points related to functionality.
- It may seem choppy, because it is
- Each slide is a different best practice point, so there is not a “flow” between slides in many cases.
- All attendees are encouraged to ask questions, provide examples, and make this a collaborative working session.

Some Rego Best Practices | Demand Management

regoUniversity 2019
SAN DIEGO

Let Rego be your guide.

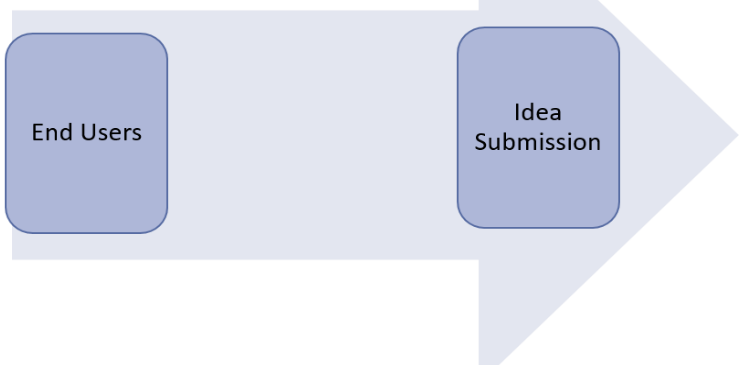
Gathering Demand Best Practices

- Implementing Annual Planning Drives Standardization of Forms and Required Data Points.
- Defining standard idea formats will help capture the required reporting requirements from idea to project and even portfolio.
- Two main methods exist for gathering demand:

<u>All User Entry Model</u>

Pro
- Transparent Disposition of All Ideas

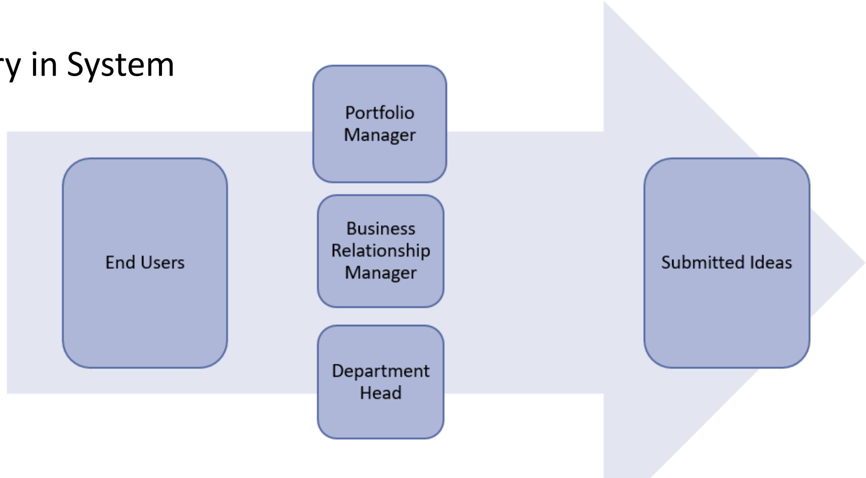
Con
- Duplicate Ideas
- Frivolous Entries
- Effort to Review/Reject



<u>Moderated Entry Model</u>

Pro
- Ideas are Vetted before Entry in System
- Reduced Duplication
- Reduced Effort

Con
- No Direct Access to System
- Delays in Entry



Idea Data Entry Best Practices

- Categorize Work to Differentiate Annual Planning from Standard Idea Intake: Utilize “Type” Fields (Annual Planning, Project, Application, Service, Support Project)
- Utilize Simple “Create Screen”
- Simplify Screens
  - If using Classic UX, define Available Subpages by Idea Type (limit fields by type)
  - If using New UX, define Available Blueprints by Idea Type (limit fields by type)
- Put fields common between Idea and Project on Investment object –recommend all fields be put on investment in case you want to use in Ideas later
- Leverage the Action Item Responder to facilitate quicker, easier workflow decisions
- If using Portfolios or Roadmaps:
  - Use the OOTB portfolio categorization fields, goal, strategy, and OBS
  - Capture additional fields that would assist in portfolio planning (e.g., Target Start – Fiscal Year / Quarter)

Food for Thought:

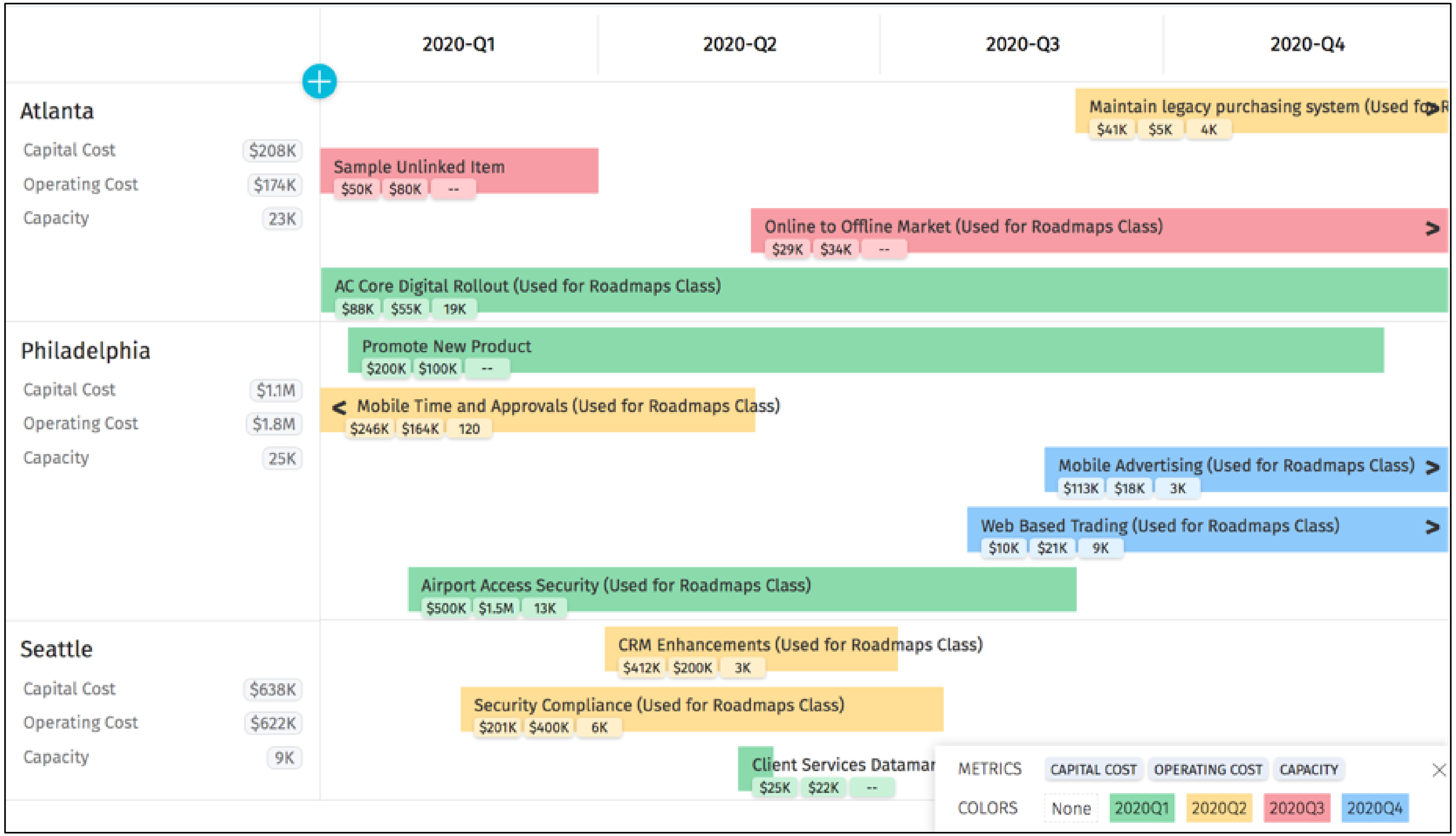
Utilize SharePoint as your intake form and integrate data into Clarity when ready to move Idea forward

Idea Financial Estimate Best Practices

- Keep it light – you do not have enough information at this stage to have accurate costs – remember the estimate is typically +- 100% at this stage
- Don’t try to fully mimic finance business case excel sheet – maybe import?
- Be consistent on the types of costs you plan to forecast (i.e. labor/non labor)
- Be consistent at the level you capture estimates
  - “T-shirt sizing” is commonly used at the Idea stage.
  - Gain agreement on standardized sizes and have them built into the system

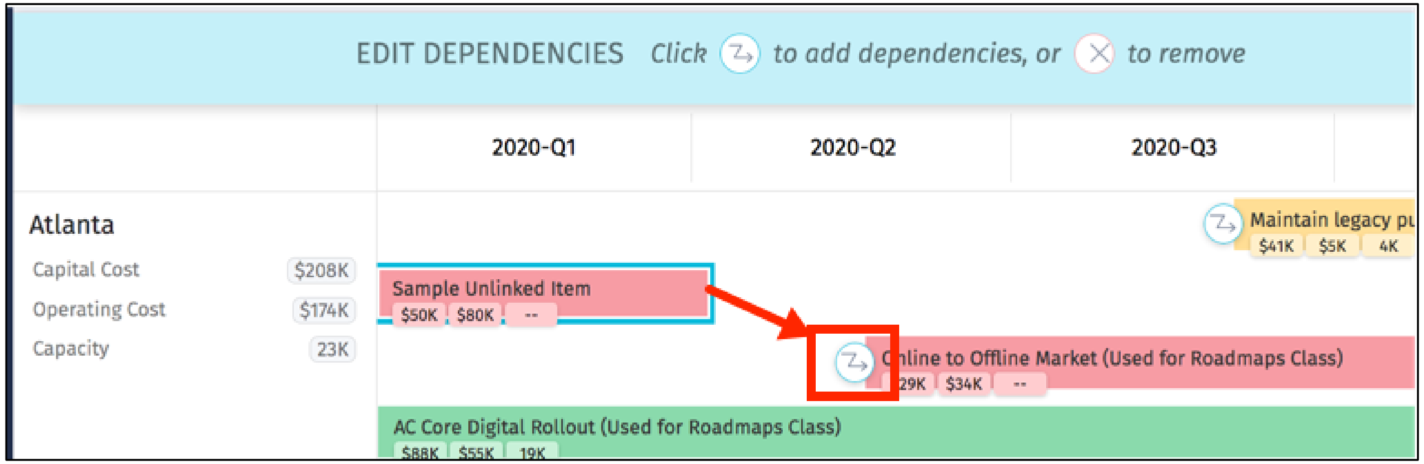
Use Roadmaps (New UX) for Planning

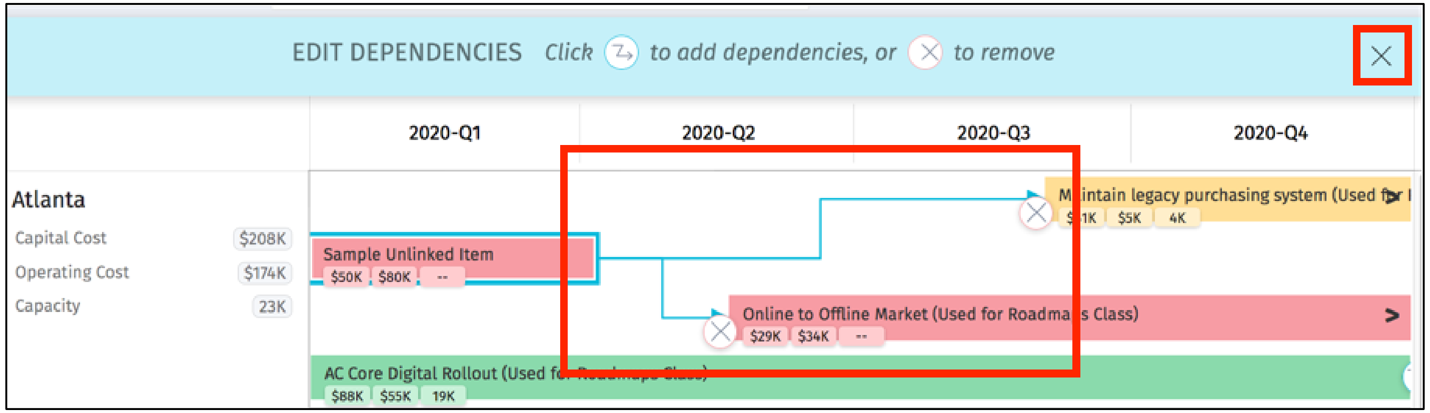
- Ideas can be vetted against or planned with each other in the New UX Roadmap feature
- Item duration, start, and/or finish may be updated as well.
- Pull in already in-flight projects for complete planning



Use Roadmaps (New UX) for Planning

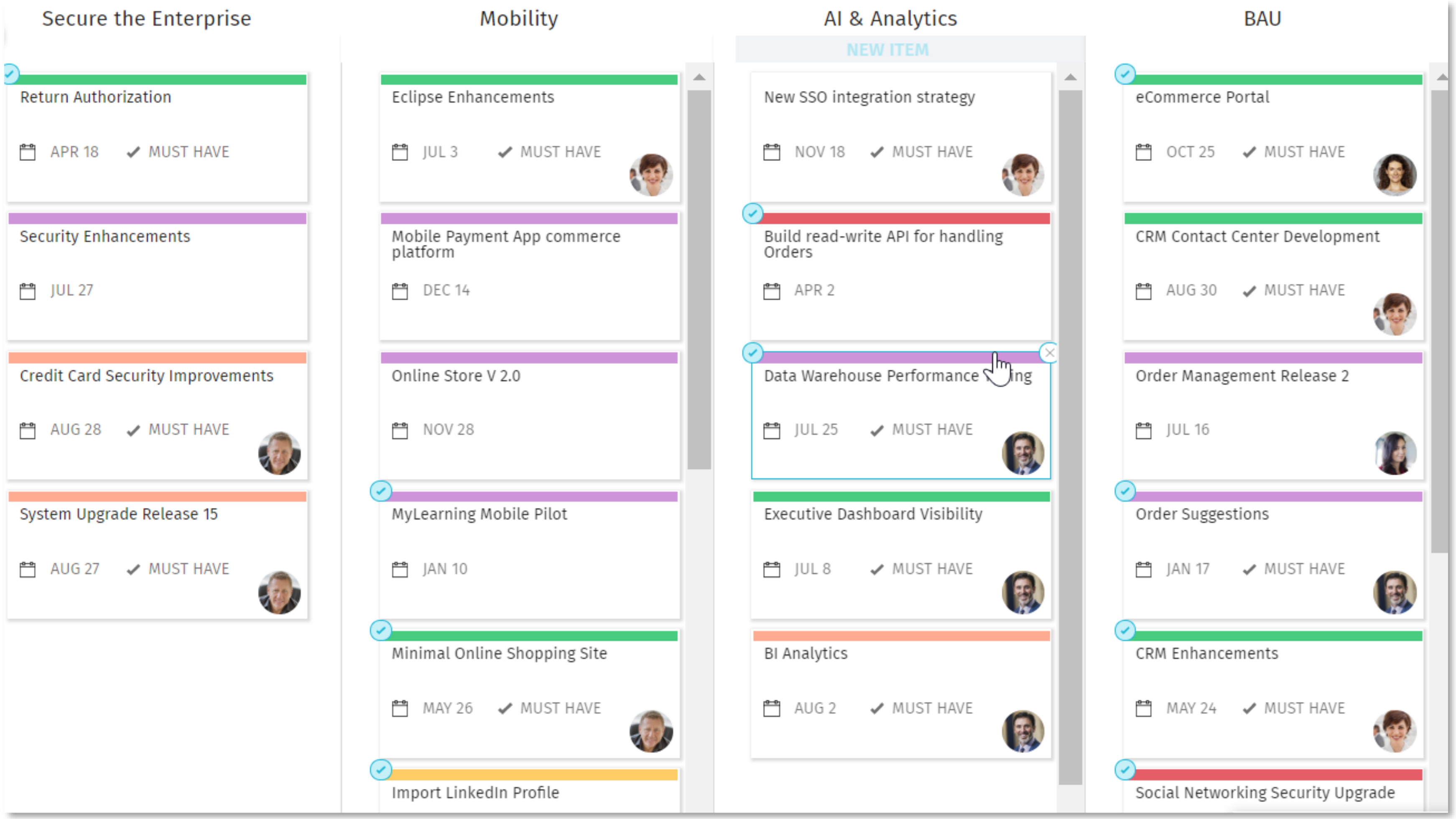
- You may create dependencies between items in the roadmap, either single or many, from the same item.





Use Roadmaps (New UX) for Planning

- Utilize the Kanban board to organize and strategically plan work by dragging and dropping
- Manage product development (i.e Clarity enhancements)



Use Roadmaps (New UX) for Planning

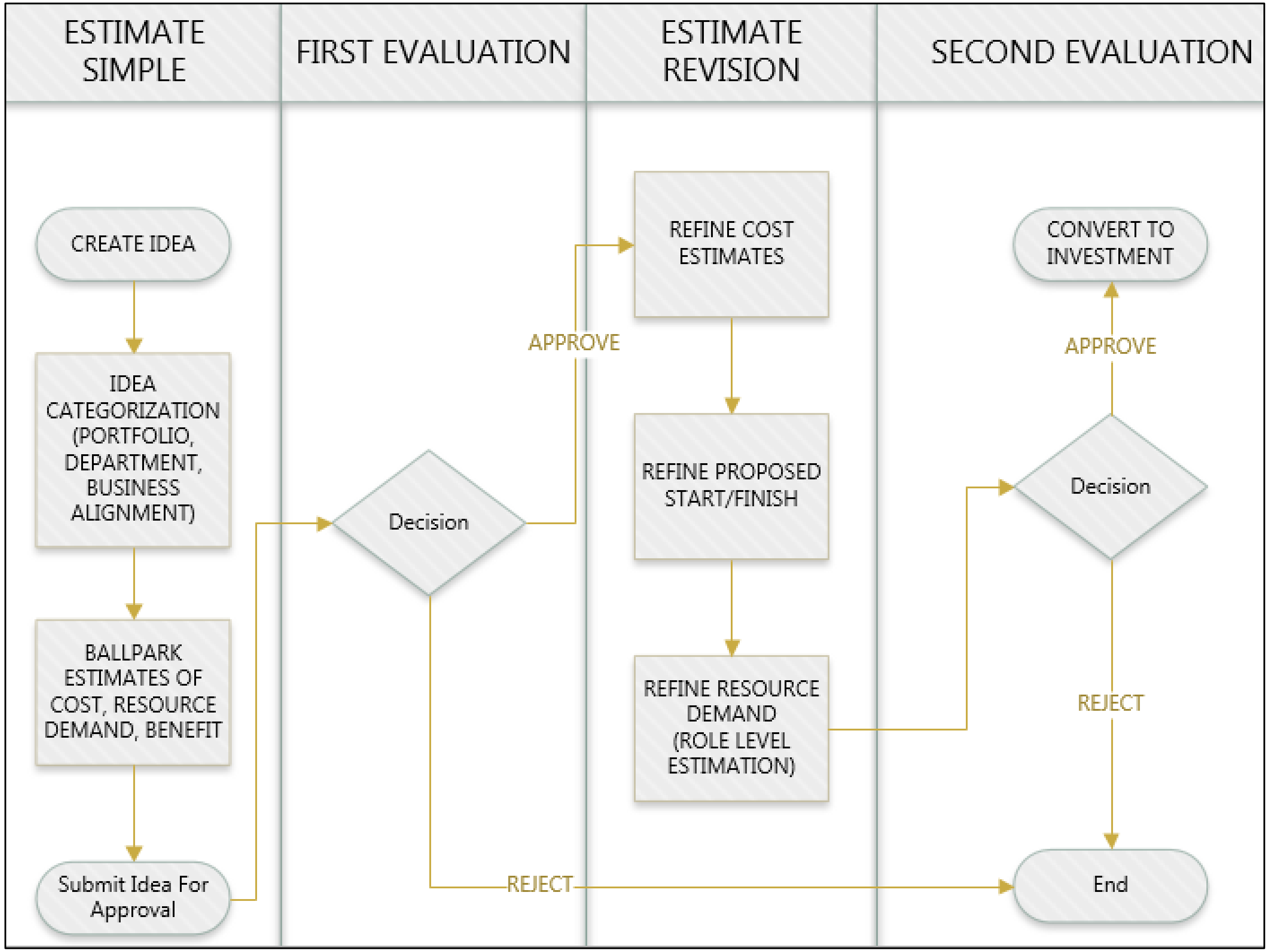
- Use Grid View to manage work against targets
- Dynamically create and manage targets

	Benefit	Capital Cost	Operating Cost	Consumption Units	Capacity
TARGET	7,000,000	2,600,000	3,500,000	100	25,000
IN PLAN	7,343,771	2,194,872	3,191,706	22	30,588
VARIANCE	(343,771)	405,128	308,294	78	(5,588)

Roadmap Item*	In Plan 3	Rank 1	Stakeholder	Must Have	Strategy	Launch State	ROI 2	Totals Total Cost	 Benefit
Return Authorization	✓	1	Nikki	Carryover; Re...	Secure the Enterprise	In Progress		0	
Order Suggestions	✓	2	Sanjay	Carryover	BAU	New Opportunities	1,022%	51,397	576,923
Pay by Phone	✓	3	Angela	Top Choice	Mobility	In Progress	(100%)	900,000	0
Import LinkedIn Profile	✓	4	Greg	Top Choice	Mobility	Pending Approval	636%	169,920	1,250,000
eCommerce Portal	✓	5	Sanjay	Required	BAU	In Progress	20%	494,800	600,000
Eclipse Enhancements		6	Angela	Top Choice	Mobility	In Progress	24%	233,876	290,000
Minimal Online Shopping Site	✓	7	Dom	Top Choice	Mobility	In Progress	(100%)	1,080,269	0
Data Warehouse Performance Tu...	✓	8	Sanjay	Top Choice	AI & Analytics	New Opportunities	41%	348,200	500,000
Credit Card Security Improvements		9	Dom	Required	Secure the Enterprise	Completing	37%	435,000	612,000
BI Analytics		10	Greg	Top Choice	AI & Analytics	Completing	77%	250,640	450,000
Executive Dashboard Visibility		11	Greg	Top Choice	AI & Analytics	In Progress	30%	264,400	350,000
System Upgrade Release 15		12	Sanjay	Top Choice	Secure the Enterprise	Completing	16%	730,600	850,000
Social Networking Security Upgra...	✓	13	Angela	Top Choice	BAU	Completed	158%	134,040	350,000
Order Confirmations	✓	14	Nikki	Top Choice	BAU	Pending Approval	550%	192,400	1,250,000
CRM Contact Center Development		15	Nikki	Top Choice	BAU	In Progress	143%	420,800	1,000,000

Idea Approval Best Practices

- Build a custom process to align to your organizational needs, but remember, simple approvals work best.
- Try to weed out ideas that should not move forward quickly
- When converting to a project, inactivate the idea – no duplication of financials or allocations in portfolios
- Use a template when converting to maintain consistent data among projects



Custom Investments (New UX)

- Can be leveraged to capture different types of demand
- Name investments according to your organizations terminology
- Compatible with Roadmaps
- Same as other NPIOs (non project investment objects)
- Includes *planned* simple budget financial fields on both the grid and the Details page
- Limitations:
  - Not available for use in the Classic UX
  - Financial Plans and Staffing functionality is not yet available in New UX
  - Not compatible with timesheets, you cannot put time to a custom investment

Some Rego Best Practices | Using Incidents

Incident Best Practices

- Leverage Incidents to perform tasks that you typically need creator license to do:
  - Self-Add to team
  - Make changes to fields on projects
- Leverage Incidents to manage Clarity enhancement requests and break fix
  - Allows users to enter CA PPM based requests directly in the application
  - CA PPM admin team can manage updates within CA PPM and use for communication back to requester

Questions?

regoUniversity 2019
SAN DIEGO

Let Rego be your guide.

Thank You For Attending regoUniversity

Instructions for PMI credits

- Access your account at pmi.org
- Click on **Certifications**
- Click on **Maintain My Certification**
- Click on **Visit CCR's** button under the **Report PDU's**
- Click on **Report PDU's**
- Click on **Course or Training**
- 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**
- Training classes = **Technical**
- Click on **I agree** and **Submit**

Let us know how we can improve!
Don't forget to fill out the class survey.

Phone
888.813.0444

Email
info@regouniversity.com

Website
www.regouniversity.com