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ResultsPositive SPM Implementation Best Practices Webinar

Agenda

- Introductions
- SPM Implementation Best Practices
- Top 5 SPM Starting Points & Roadmap Examples
- Reporting & Resource Mgt Keys to Success
- Post Initial SPM Implementation Roadmap Examples
- Question & Answers

ResultsPositive Overview

About Us

We are a Business Technology Solutions consulting firm specializing in creating impactful “right sized” solutions that create positive business outcomes.

We assist organizations in planning, building, deploying, and managing their business technology solutions.

Strategic Partners

servicenow

Strategic Portfolio Mgt

Visualize strategies and targets, monitor objectives and make investment decisions with confidence.

Application Portfolio Mgt

Rationalize applications to support critical business capabilities and optimize business outcomes.

Service Management

Streamline technical service requests to improve asset uptime and operational compliance.

Analytics & Reporting

Enable senior executive with visibility into project and portfolio demands, investments, & roadmaps.

ResultsPositive Service Offerings

Assessments & Roadmaps

Conduct as-is assessments and Roadmap engagements

Strategic Implementation Roadmap Workshops

Each offering includes SPM Best Practices from our experience with over 400 SPM customers

Advisory & SPM Implementations

Strategic Advisory Services for Ongoing Process and Product Implementations

SPM Product Implementation Engagements

ResultsPositive Executive Reporting Report Portals

Managed Services & Reporting Solutions

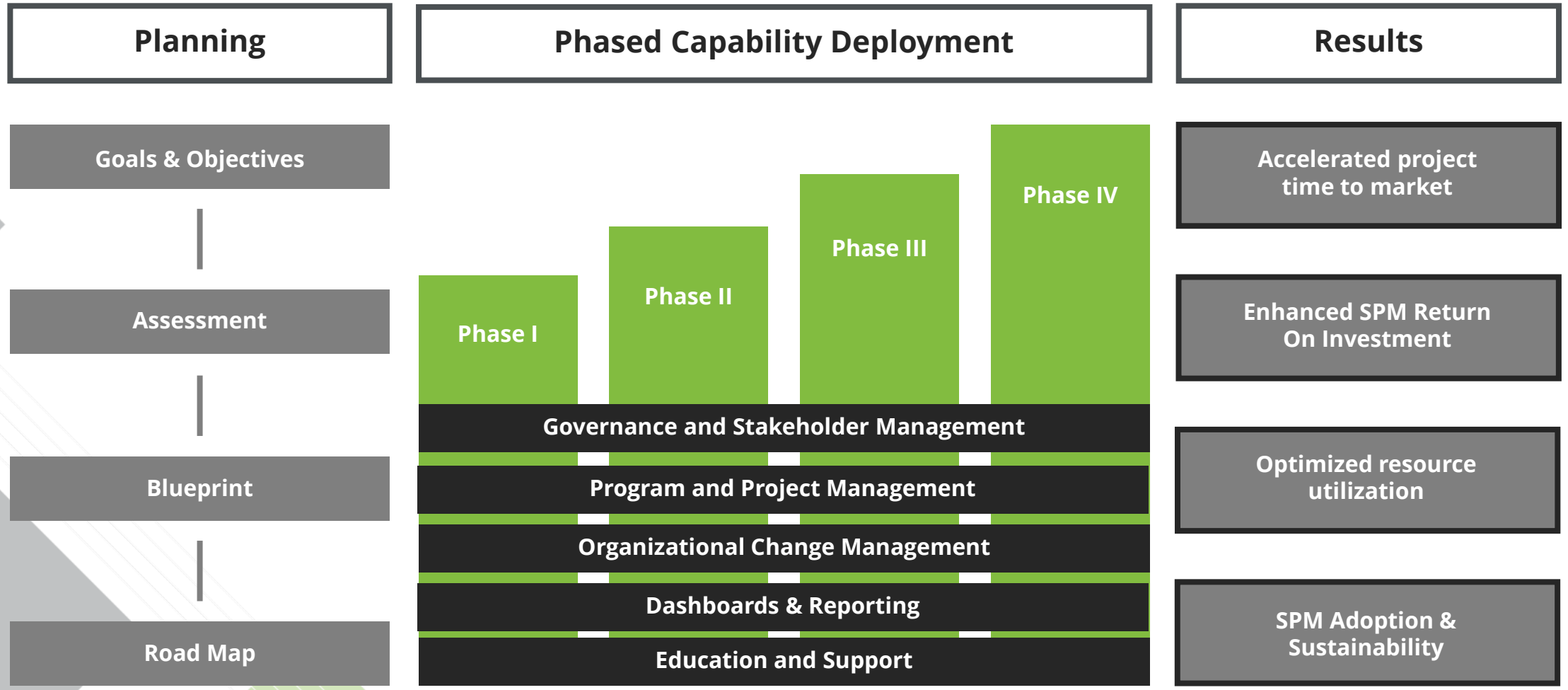
SPM Managed Services
- Advisory
- Technical Support

ResultsPositive Executive Reporting Solutions

Executive Resource and Work Mgt Dashboards

Program and Project Status Reports

SPM Implementation Best Practices



Implementation Critical Success Factors

1. Start with customer goals and objectives – business outcomes
2. Don’t over automate processes, simplify & follow 80/20 rule
3. Implement key performance metrics and reports with initial release
4. Baseline key performance metrics and enhance over time
5. Provide hands on training, communications, and role-based forums
6. Strong leadership reinforcement, organizational change program

Improve business outcomes through simplification and automation of business processes resulting in enhanced performance and business results.

Organizational Change Management Approach

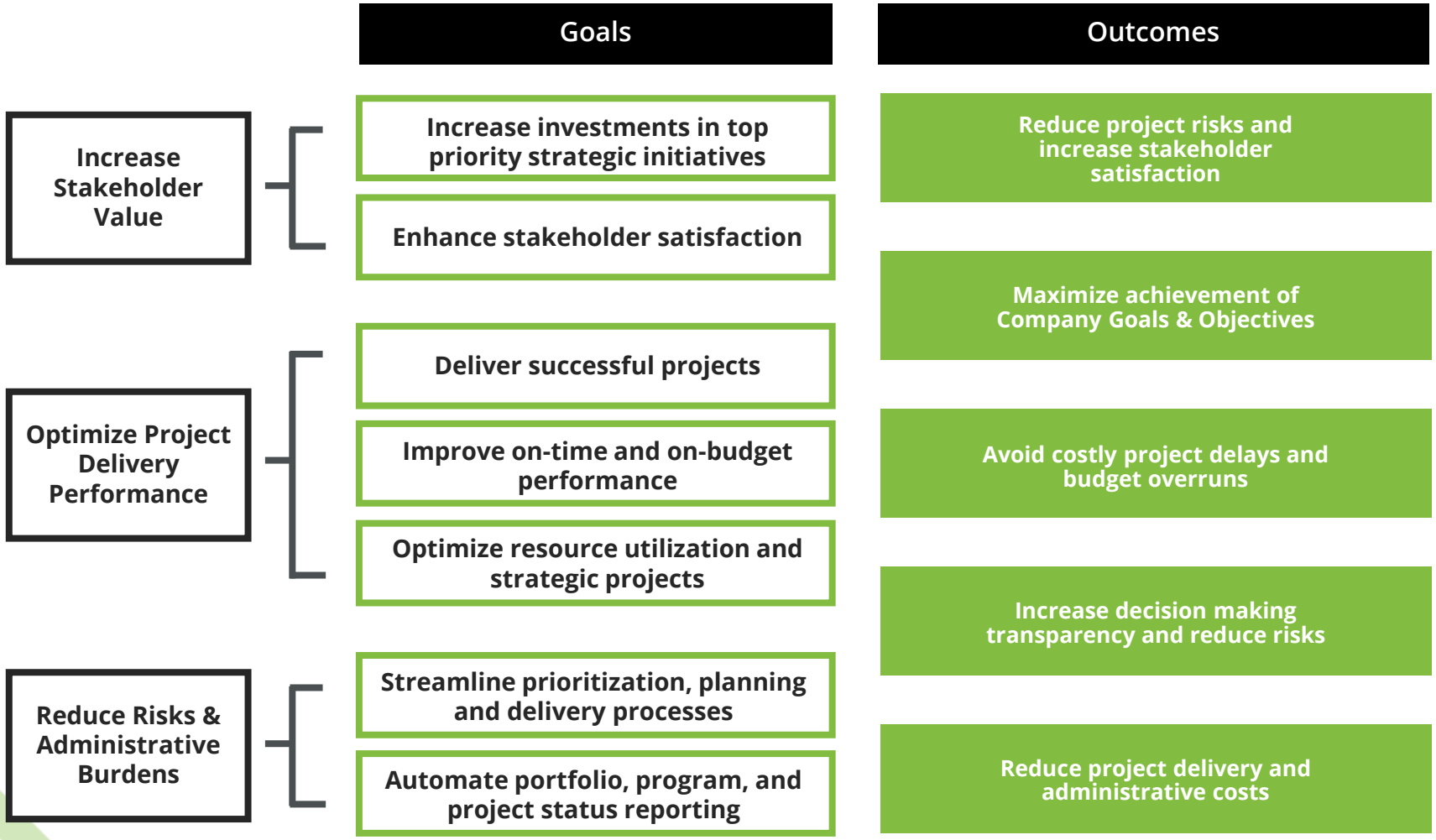
Top 5 Most Common SPM Starting Points

Demand Management	• Ideation • Project Intake, Business Case, Demand Forecasts • Prioritization, Categorization, Value & Risk Ratings • Resource and Financial Forecasts
Project Management	• Agile / Hybrid Project Management • Project Controls, Project Schedule and Execution, Status Reporting • Project Budget, Financials, Resource Management
Resource Management	• Capacity Management • Resource Estimates / Forecasts – Demands, Projects, EPICs • Resource Assignments / Allocations – Demands, Projects, EPICs • Roadmap Capacity Planning
Project, Resource & Time Management	• Agile / Hybrid Project Management • Project Controls, Project Schedule and Execution, Status Reporting • Resource & Time Management
Strategic Planning	• Strategic Plans • Strategic Planning Priorities, Goals / OKRs • Initiatives and Strategic Programs

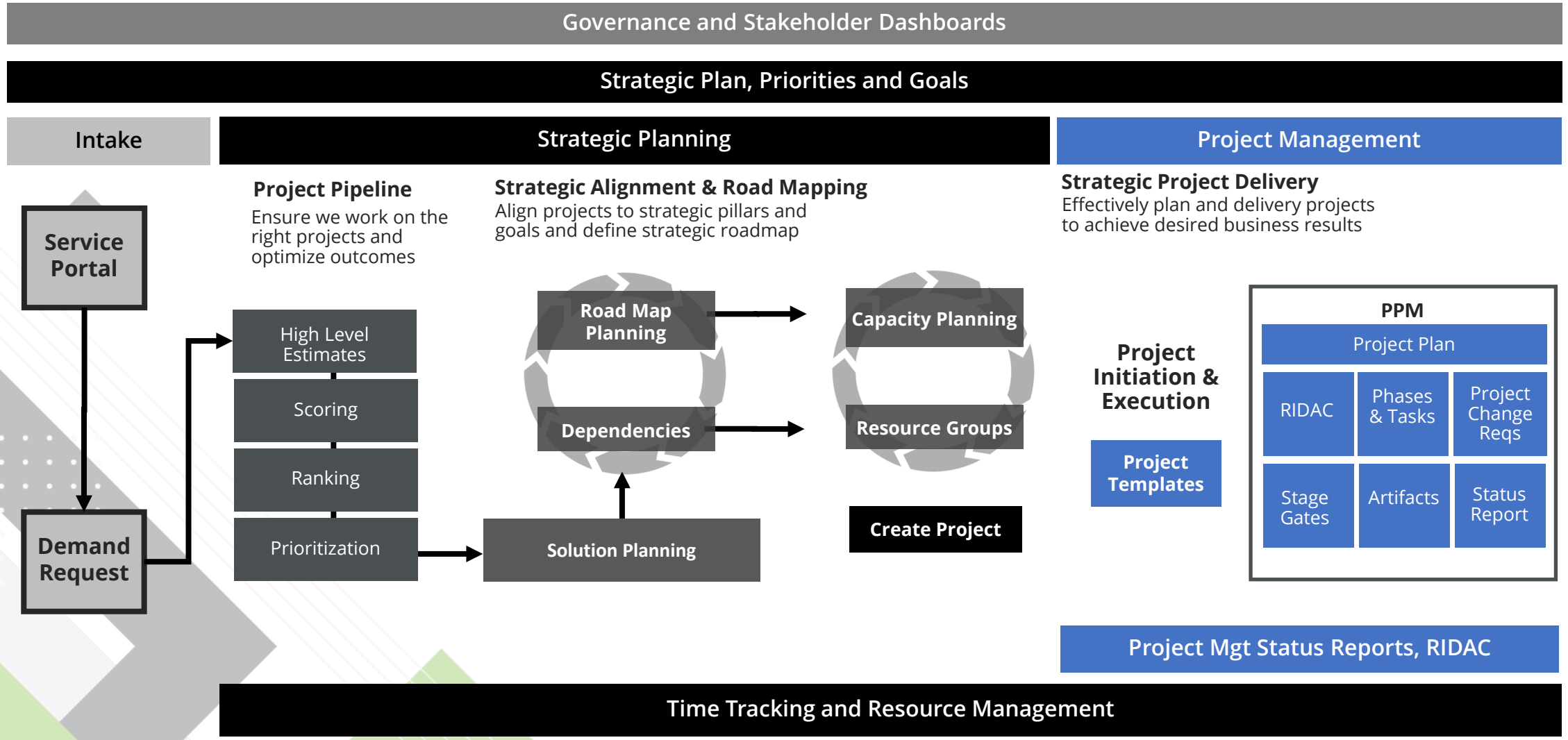
SPM Goals and Objectives Example

Maximize Business Value

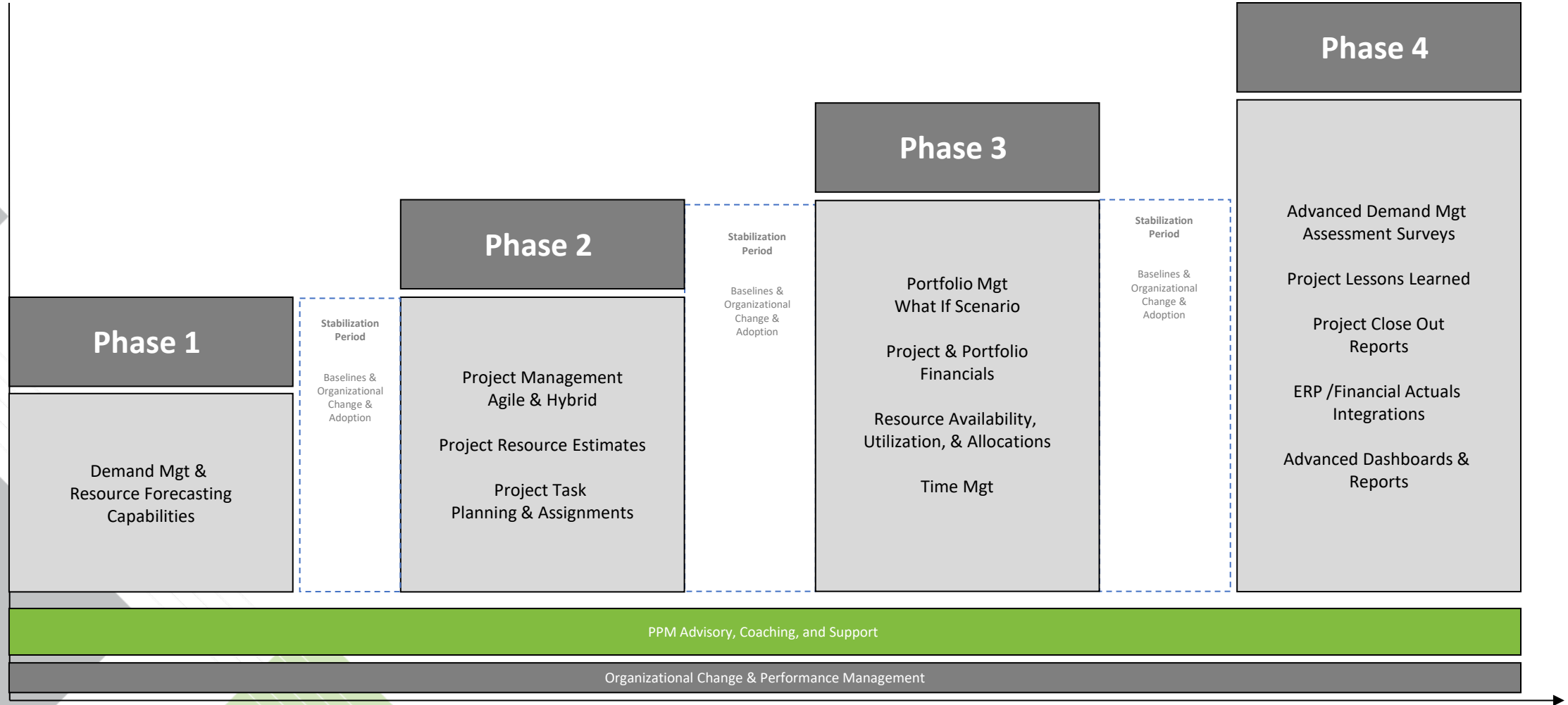
Achieve strategic business value, reduce risk, enhance project delivery success through proven planning and delivery frameworks.



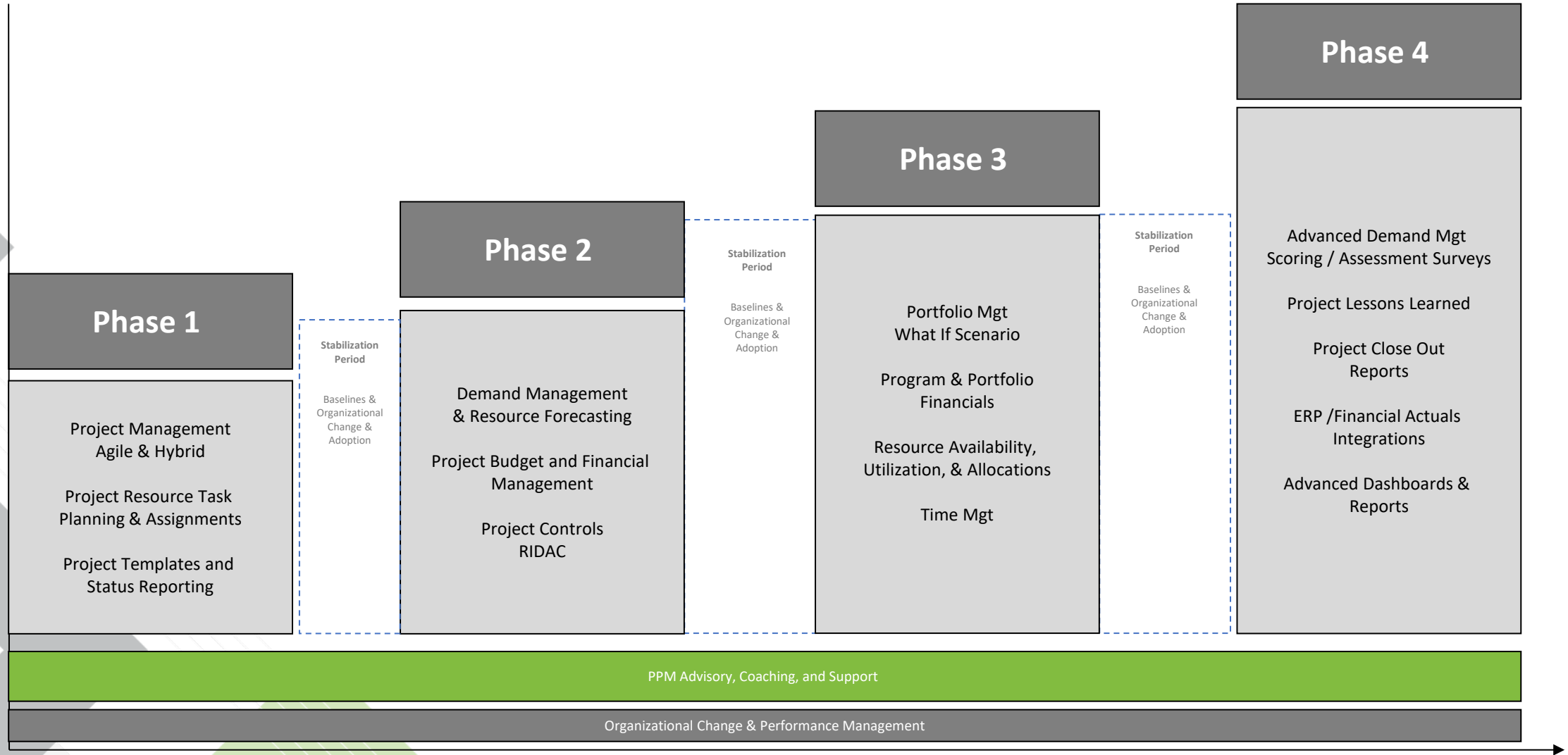
SPM Solution Blueprint Example



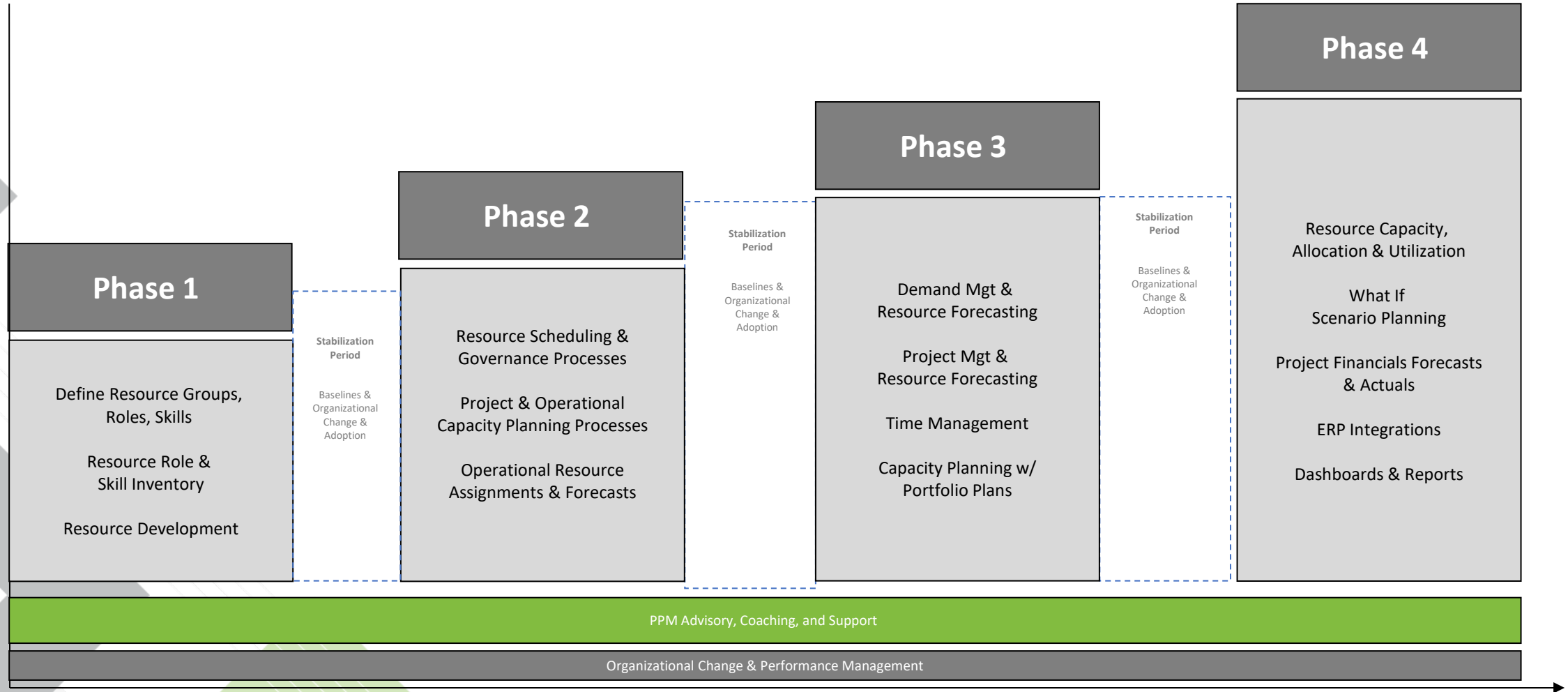
Demand Management Roadmap Example



Project Management Roadmap Example



Resource Management Roadmap Example



Resource Mgt Implementation Keys to Success

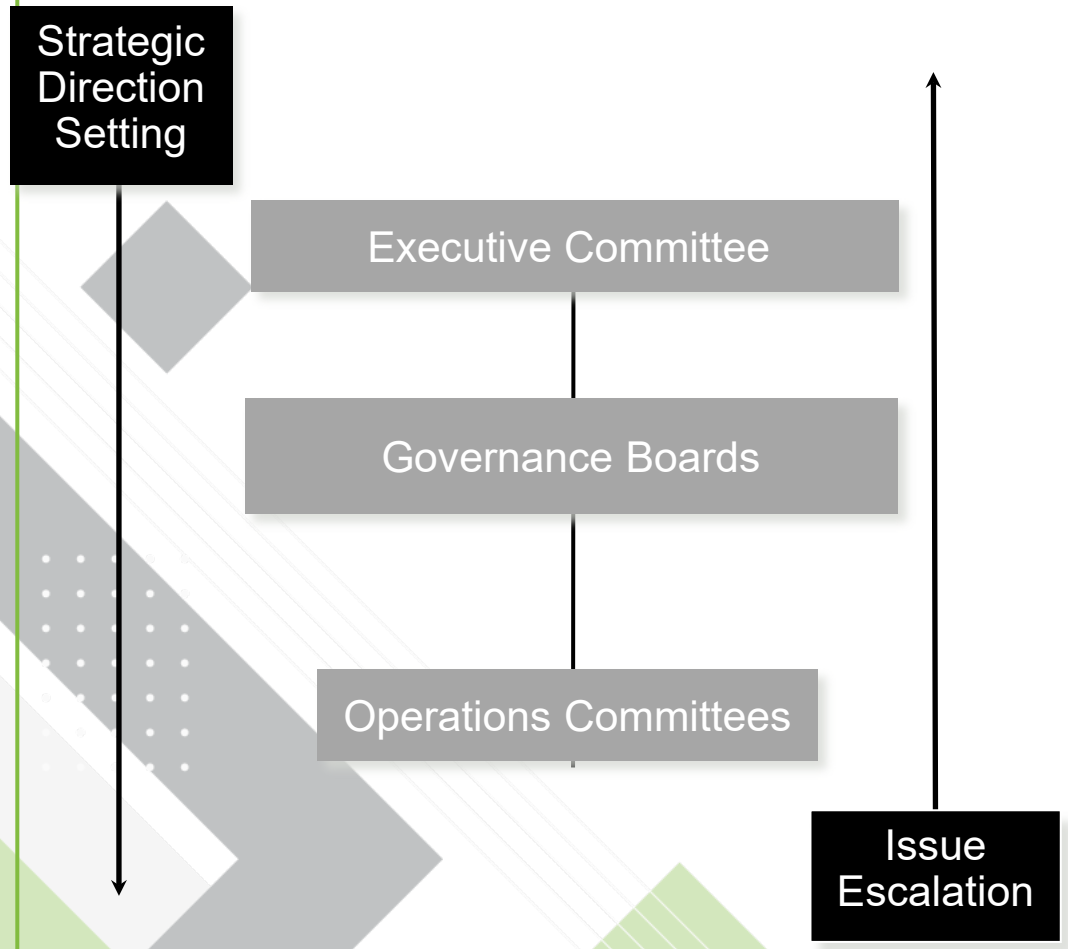
Capacity & Commitment	• Resource Managers must commit and spend time planning and allocating resources • Projects Managers must communicate project resource assignment plans with Resource Managers • Resource Managers must have the capacity to perform key resource management activities
Communication	• Resource Management is all about communication • Project Managers must communicate with Resource Managers when assigning project resources • Resource Managers must communicate with Project Managers when planning and allocating resources
Governance	• Demand -> Project Approvals must be based on resource capacity availability • At a minimum Project Initiation and Scheduling must be based on resource availability • Approve portfolio-based Capacity Planning availability to deliver portfolio roadmaps
Organizational Change Management	• Comprehensive Organization Change Mgt is required to overcome natural team objections • Simplify resource management processes and tool usage – reduce maintenance activities • Establish centralized Resource Mgt Process & Support Specialists

Resource Management Activities

Activity	Role	Ad-hoc (As Needed)	Weekly	Bi-Weekly	Monthly	Annual
Create and Update Resource Assignments Estimates for Demand - Projects	**Demand Mgr, Project Mgr, Resource Mgr**	X	X	X		
Review & Allocate New Project Resource Assignments	**Resource Mgr**	X	X	X		
Manage Resource Assignment Allocation Changes (Adds or Replacements)	**Project Mgr, Resource Mgr**	X		X		
Create Operational Resource Assignments	**Resource Mgr**					X
Manage and Maintain Operational Resource Assignments (Resource Group Adds or Replacements)	**Resource Mgr**	X			X	X
Review and Monitor Resource Availability	**Resource Mgr**			X	X	X
Review and approve Roadmaps and Resource Capacity Plans	**Portfolio Mgr Resource Mgr**				X	X

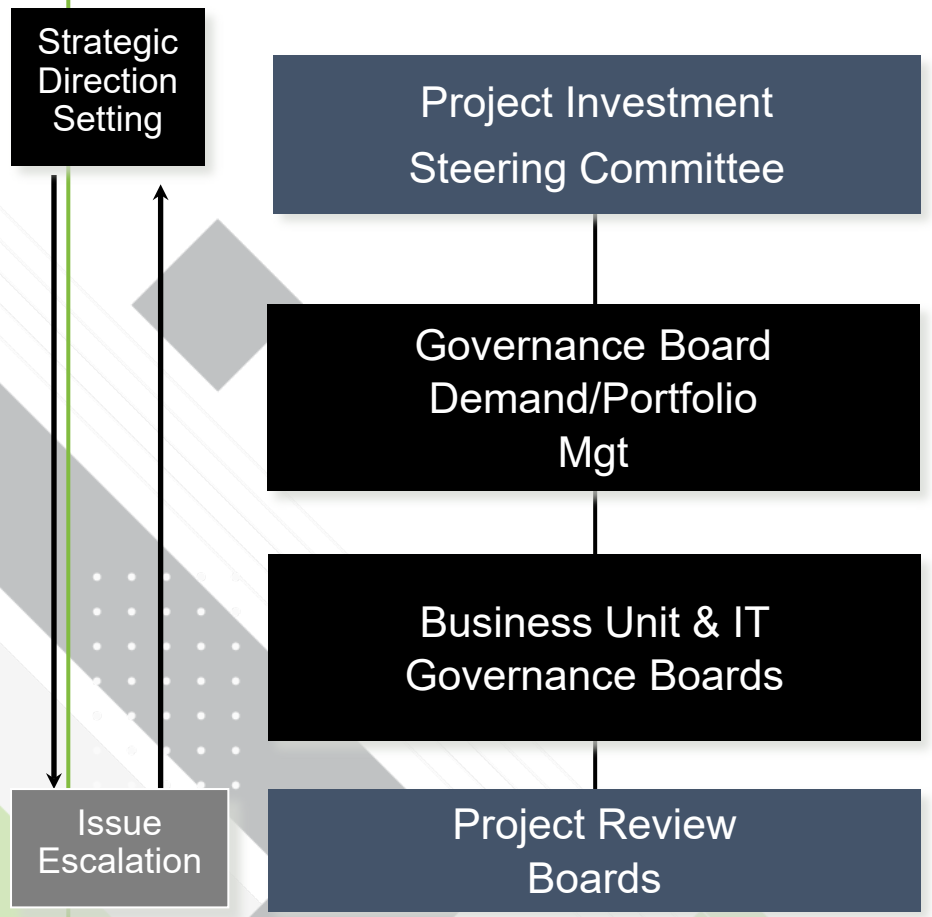
Please Note: Non bolded X items are optional

Resource Management Governance Model



Timing	Resource Management
Quarterly to Annual	▪ Set and manage the long-term resource plans ▪ Review overall resource & program performance ▪ Address external or significant sourcing strategies and organizational changes
Monthly	▪ Manage contractual relationships ▪ Review resource performance against plans ▪ Review resource demands vs commitments ▪ Review, approve and schedule resources
Weekly to Daily	▪ Monitor and maintain resource plans ▪ Review and approve resource demand estimates ▪ Plan and agree to actions to resolve issues ▪ Monitor performance and continuous improvement activities

Strategic Project Portfolio Management Governance Model

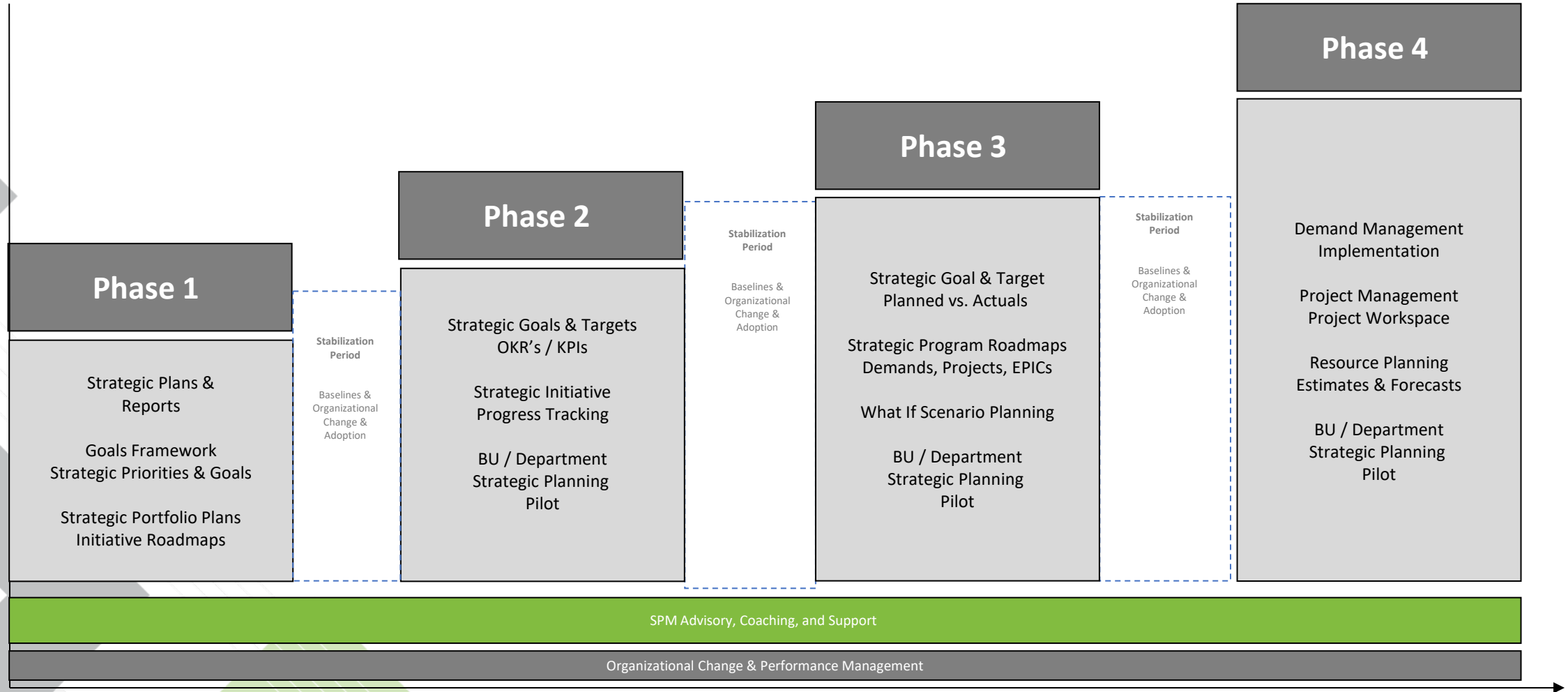


Timing	Project Portfolio Management Responsibilities	Function
Quarterly to Annual	▪ Set and manage the long term investment plans ▪ Address external or significant investment strategies and strategic goals and objectives ▪ Monitor strategic portfolio optimization and outcomes ▪ Review overall project portfolio performance	Strategic Planning
Monthly	▪ Review project requests and make business case **assignments** ▪ Review project business cases, prioritize, and **approve** projects based on budget, schedule, and resource constraints ▪ Review and **approve** project change requests ▪ Monitor portfolio, program, and project portfolio performance	Portfolio Management
Semi-Monthly to Monthly	▪ Review and **validate** project requests ▪ Review project business cases and **prioritize** projects based on budget, schedule, and resource constraints ▪ Review and **validate** project change requests ▪ Monitor portfolio, program, and project portfolio performance	Demand Management
Weekly to Daily	▪ Monitor and maintain project plans ▪ Review and confirm project change requests ▪ Plan and agree to actions to resolve issues ▪ Monitor project performance & continuous improvement activities	Project Management

Most Common Resource Mgt Starting Points

Resource Groups, Roles, & Capacity	• Basic Resource Management Setup • Setup Resource Groups, Roles, Skills, and Resource Management Schedule • Operational Plans for operational capacity allocations
Resource Estimates & Forecasting	• Resource Demand through Demand & Project Management • Resource Assignments by Group/Role for resource estimates and forecasts • Operational Resource Assignments for operational work allocations
Project Resource Planning & Assignments	• Project and Sprint Planning • Resource assignments at project, phase, or project task level • Work assignments: Story and Task planning and assignments
End to End Resource Management	• Roles, Groups and Capacity • Estimates and Forecasting • Capacity, Availability, and Utilization Management • Resource Assignments & Allocations • Project Resource Planning and Assignments

Strategic Planning Roadmap Example



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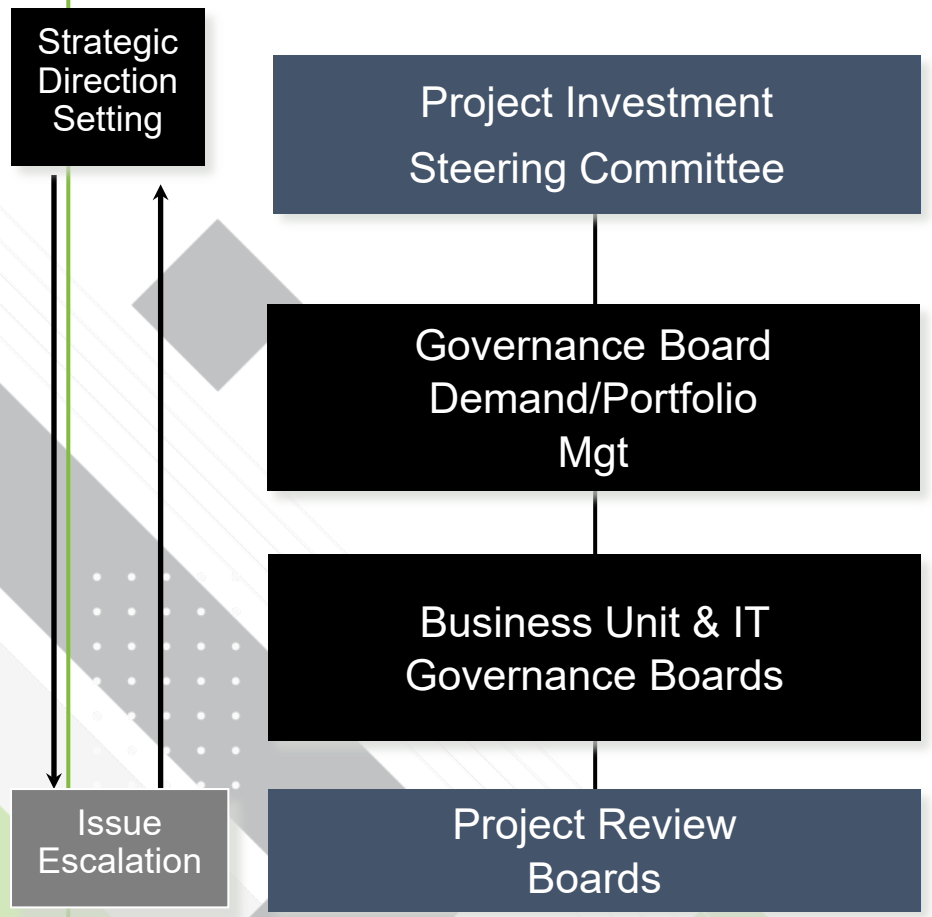

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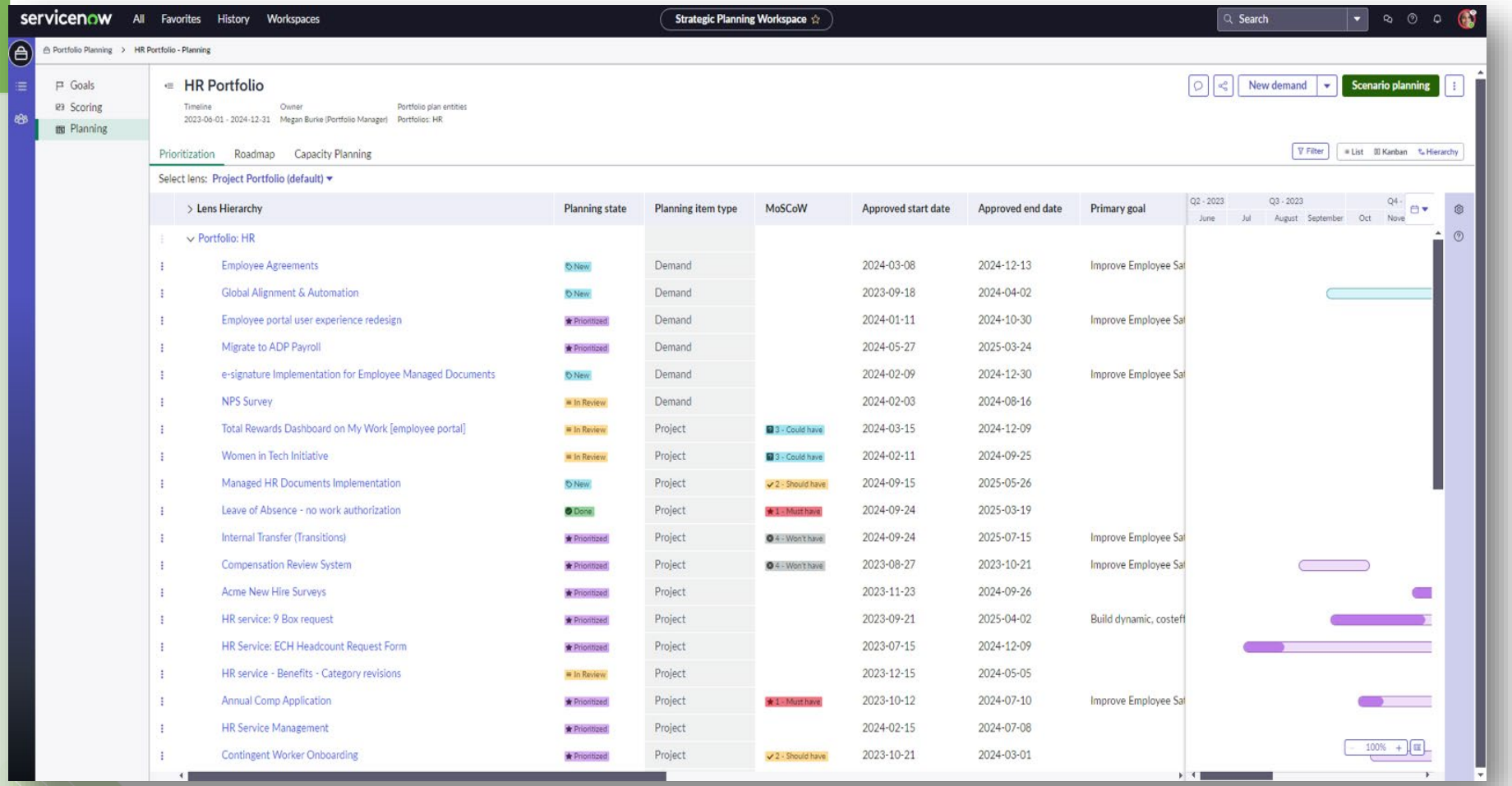
Strategic Planning (Scoring and Prioritization)

Strategic Planning Workspace

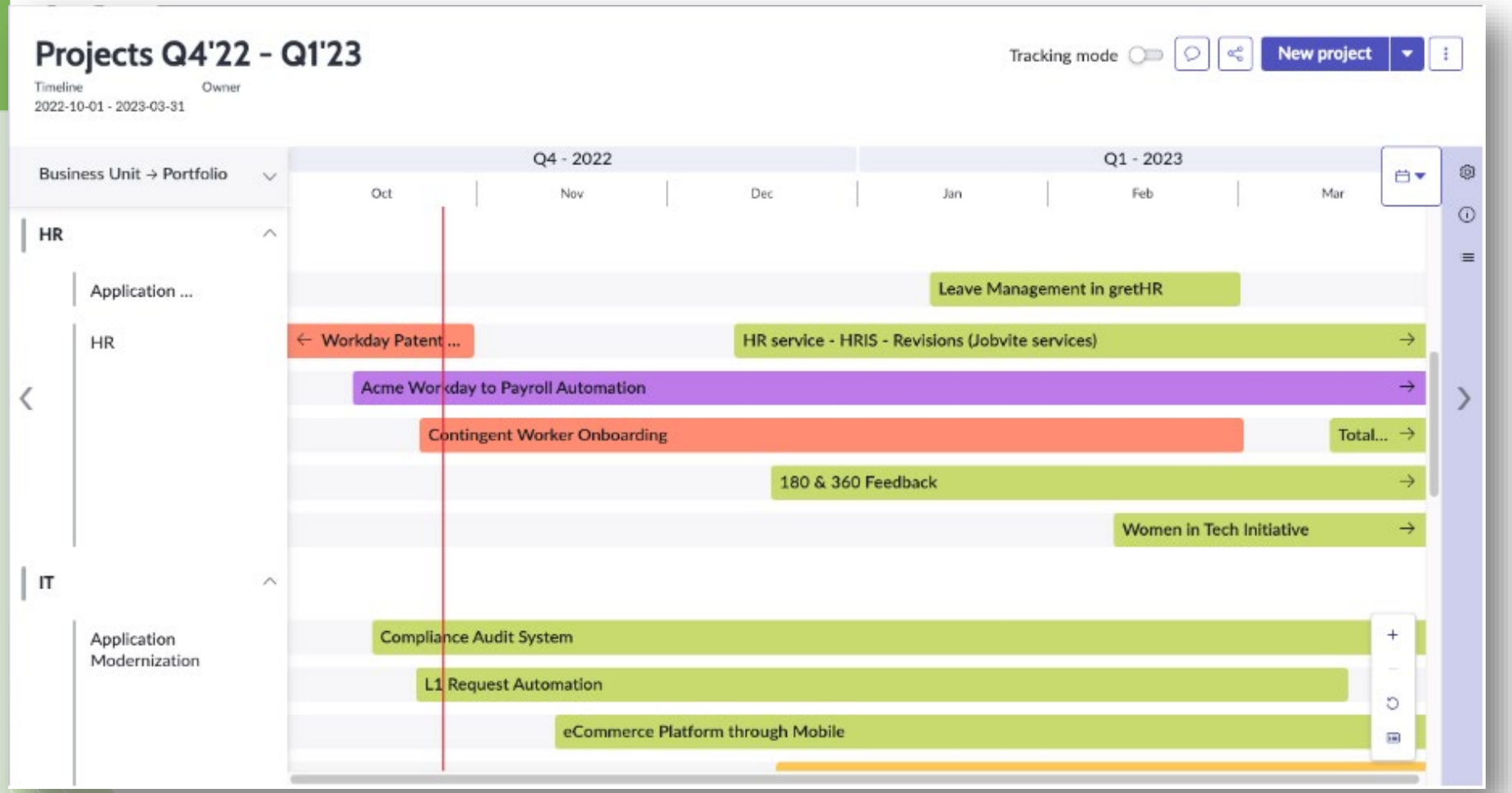
- Demand requests can be groomed, scored, and ranked against other Requests and In-Flight Projects.
- Score Demands using the Scoring Framework
- Rank and prioritize requests
- Prepare for Governance Committee reviews



Strategic Planning (Roadmap Planning)

Strategic Planning Workspace

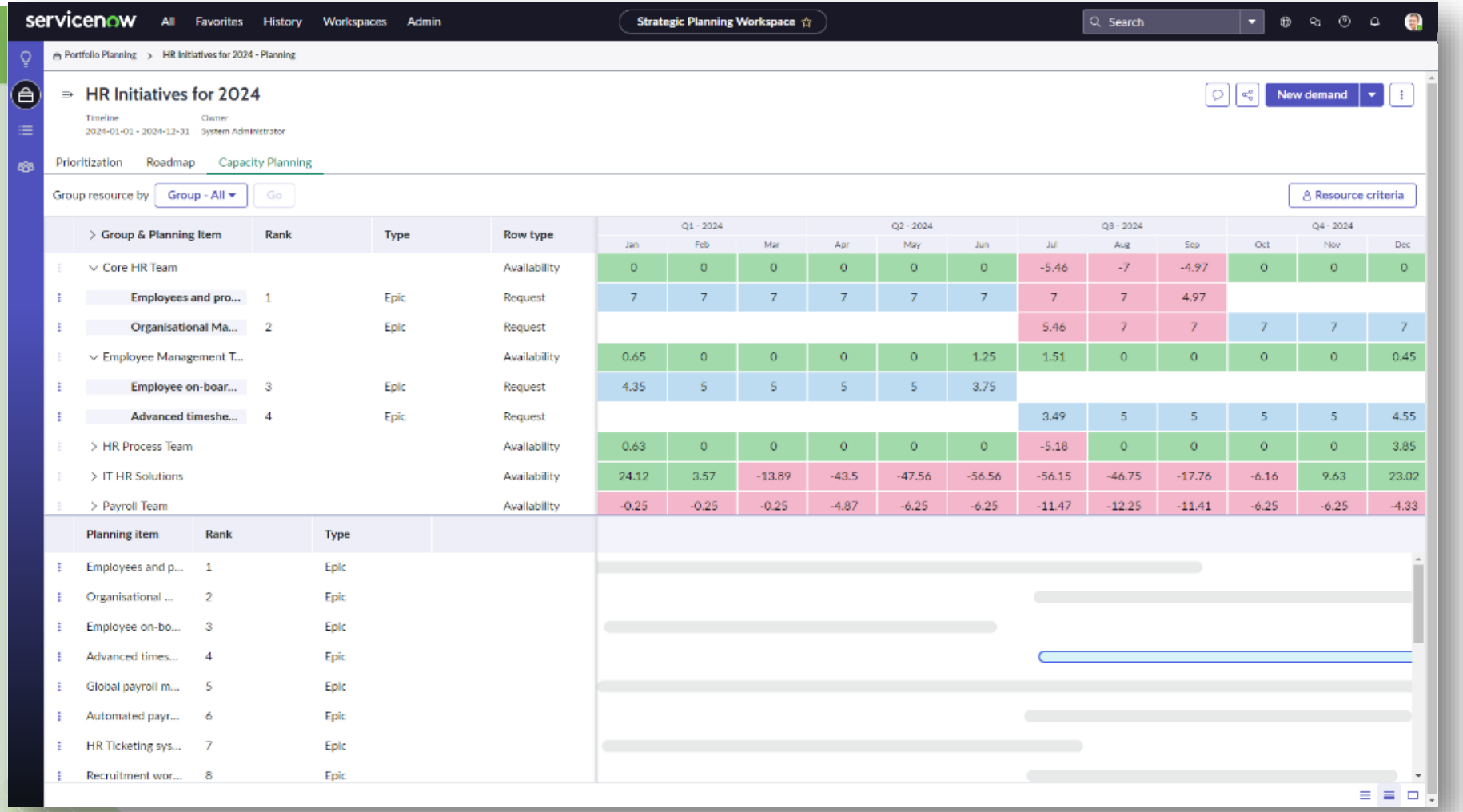
- Prioritized Demands and Projects are displayed on the Roadmap
- Portfolio Managers can review and update roadmaps to avoid project dependencies
- Roadmap planning items can be grouped and aligned to Strategic Priorities and Goals



Strategic Planning (Capacity Planning)

Strategic Planning Workspace

- Visualize available resource capacity to deliver approved strategic roadmap
- Easily identify resource capacity gaps for replanning or acquisition of additional resources



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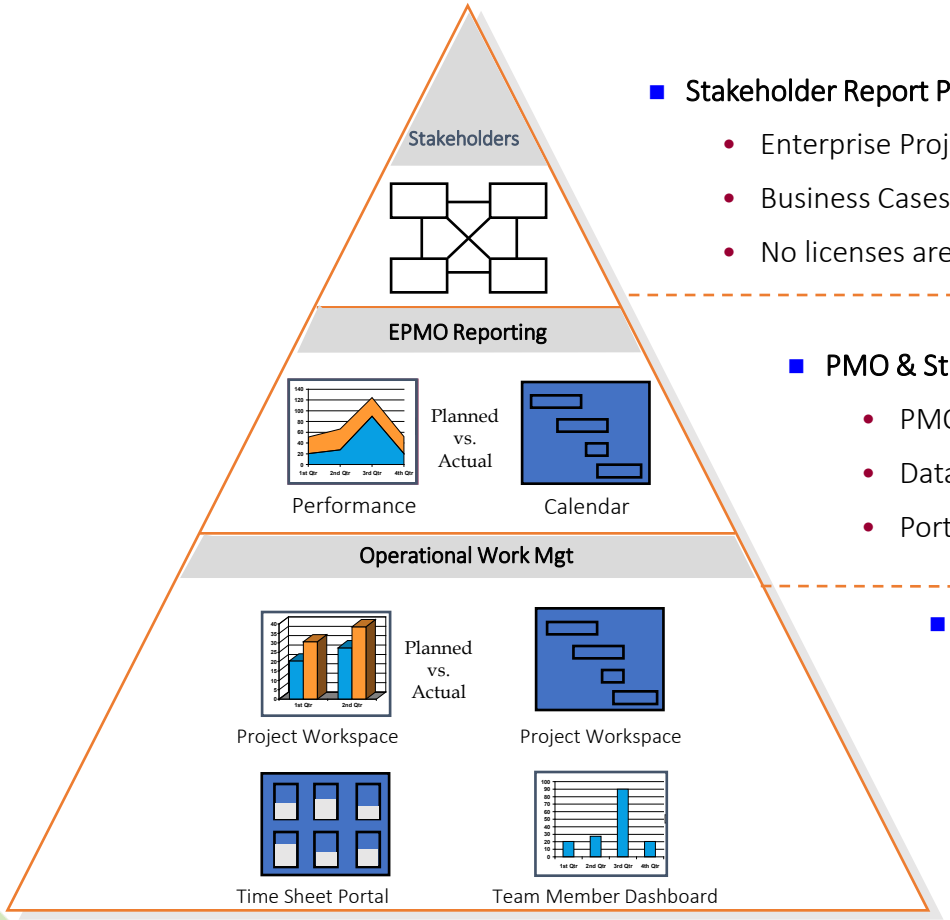
SPM
Reporting Solutions

SPM Analytics and Reports

Analytics and Reports

- Stakeholder visibility for Demands and Project Status Reports
- Strategic Planning: Portfolio Plan resource capacity
- PMO Dashboard Reporting on project delivery health, data quality, and milestone calendars
- Project and team member dashboards and portals for managing daily operational activities



- **Stakeholder Report Portals (ResultsPositive)**
  - Enterprise Project Portfolio Portal with links to:
  - Business Cases, Project Charter, and Project Status Reports
  - No licenses are required for access and visibility
- **PMO & Strategic Planning Reporting**
  - PMO Project Delivery Performance, Key KPI's
  - Data Quality, and Project Milestone Calendars
  - Portfolio Planning – Roadmaps and Resource Capacity
- **Daily Operations**
  - Project Analytics & Project Plans
  - Team Member Dashboard, My Projects / Tasks
  - Time Sheet Portal, Weekly Time Sheets

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ResultsPositive Reporting Solutions

ResultsPositive Reporting Solutions

Pre-built Solutions

Pre-build ServiceNow Reporting solutions that can be tailored to meet customer specific requirements

Graphical Reports

Provides impactful graphics for online, export to PDF, PowerPoint, and printing

Provides executives, stakeholders and customers with real-time visibility

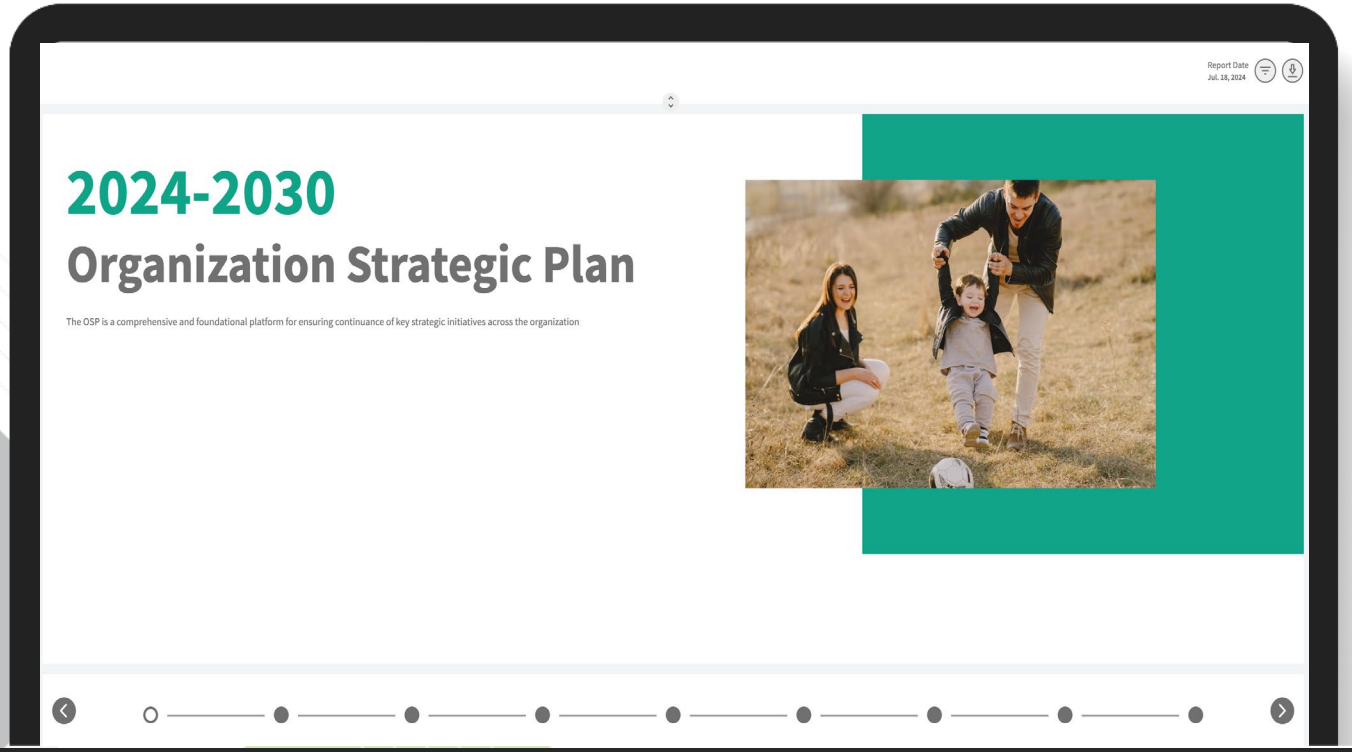
Calculate and display real-time key performance indicators and performance trends

Easy one-click access to supporting data and reports

> *Our solutions provide customers with the graphics, analytics and visibility to share with executives and all stakeholders in real-time.*

Enhance Outcomes with Strategic Plan Visibility

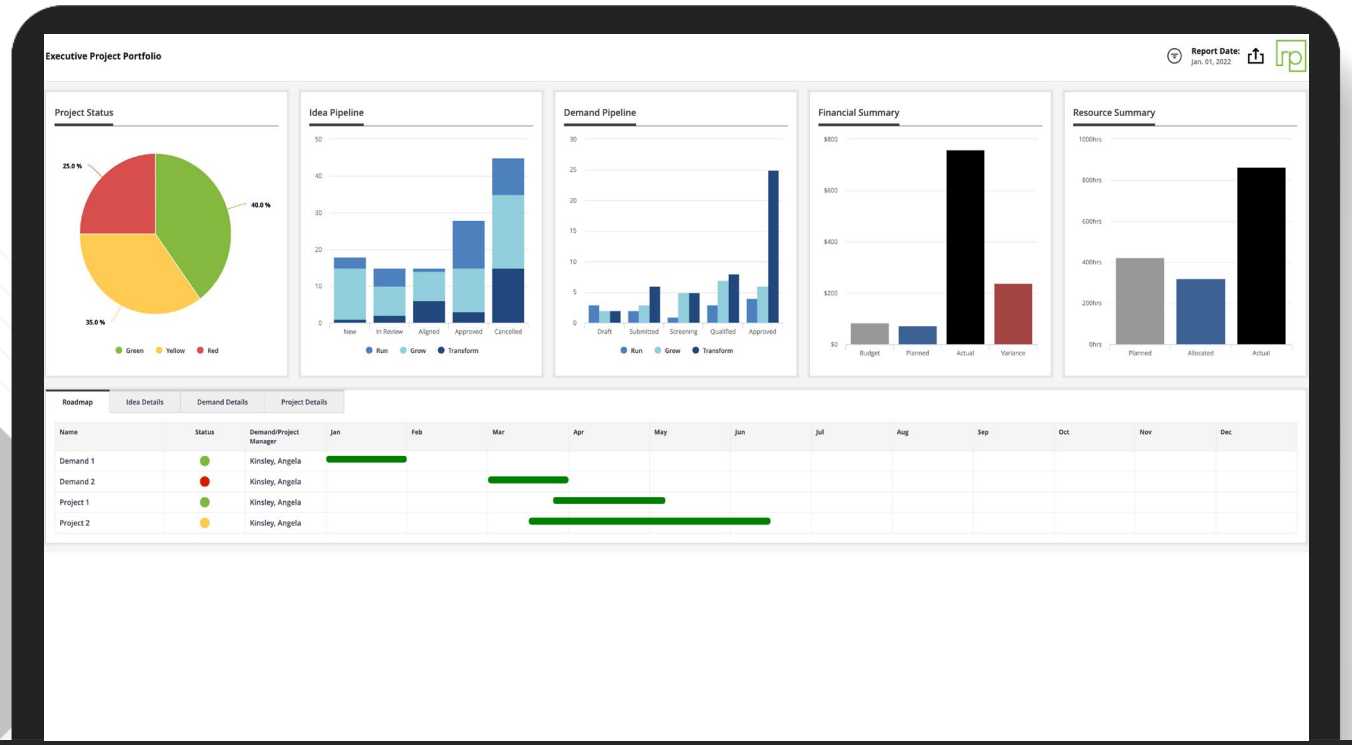
Provide stakeholder visibility to Strategic Plans, Goals, OKR's, Roadmaps



- Stakeholders can easily view strategic plans and priorities
- Easily view Strategic Initiative Roadmaps
- Maintain alignment and commitment to strategic priorities and goals
- Export report to PDF or PowerPoint

Accelerate Adoption with Organizational Visibility

Provide all stakeholders visibility to Project Intake and Delivery Roadmaps



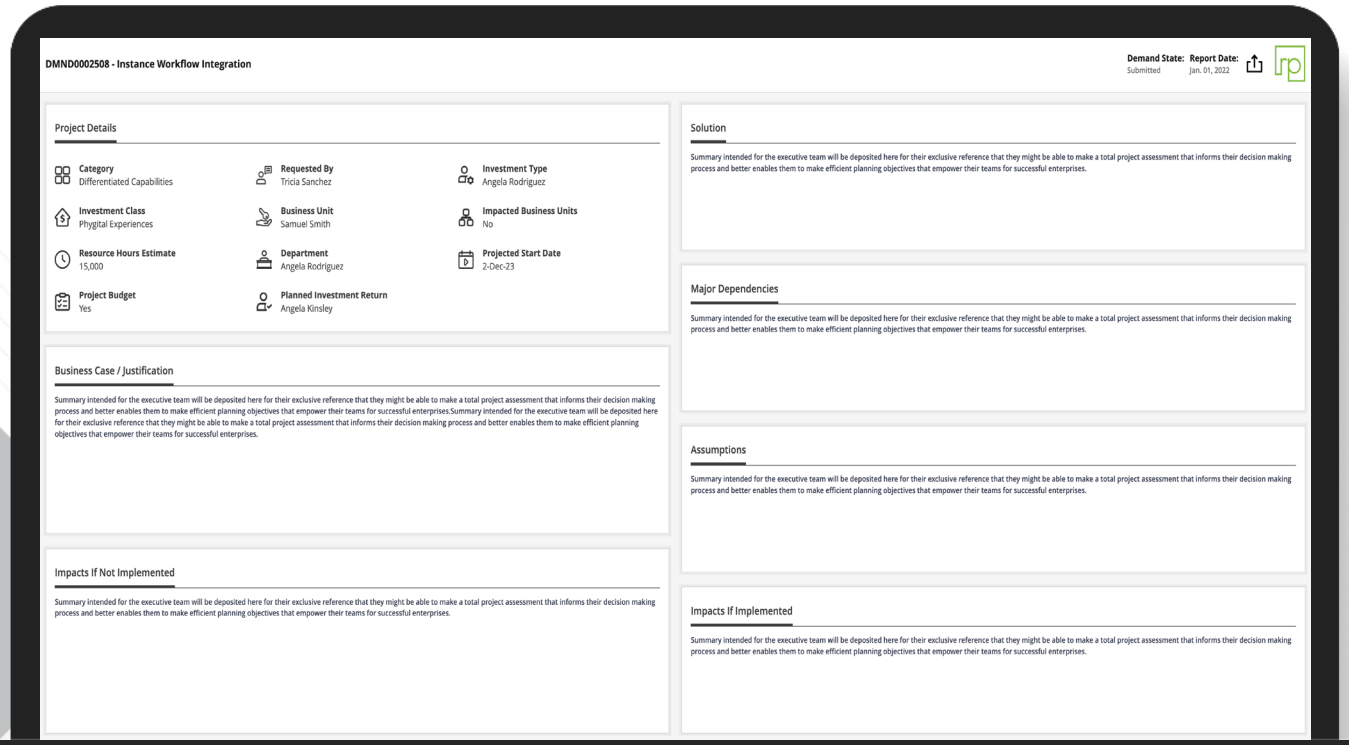
Stakeholders can easily view project portfolio statuses

Easily view Portfolio, Demand, and Project Roadmaps

Export report to PDF or PowerPoint

ResultsPositive: Business Case

Push-button creation, printing, and distribution of business cases



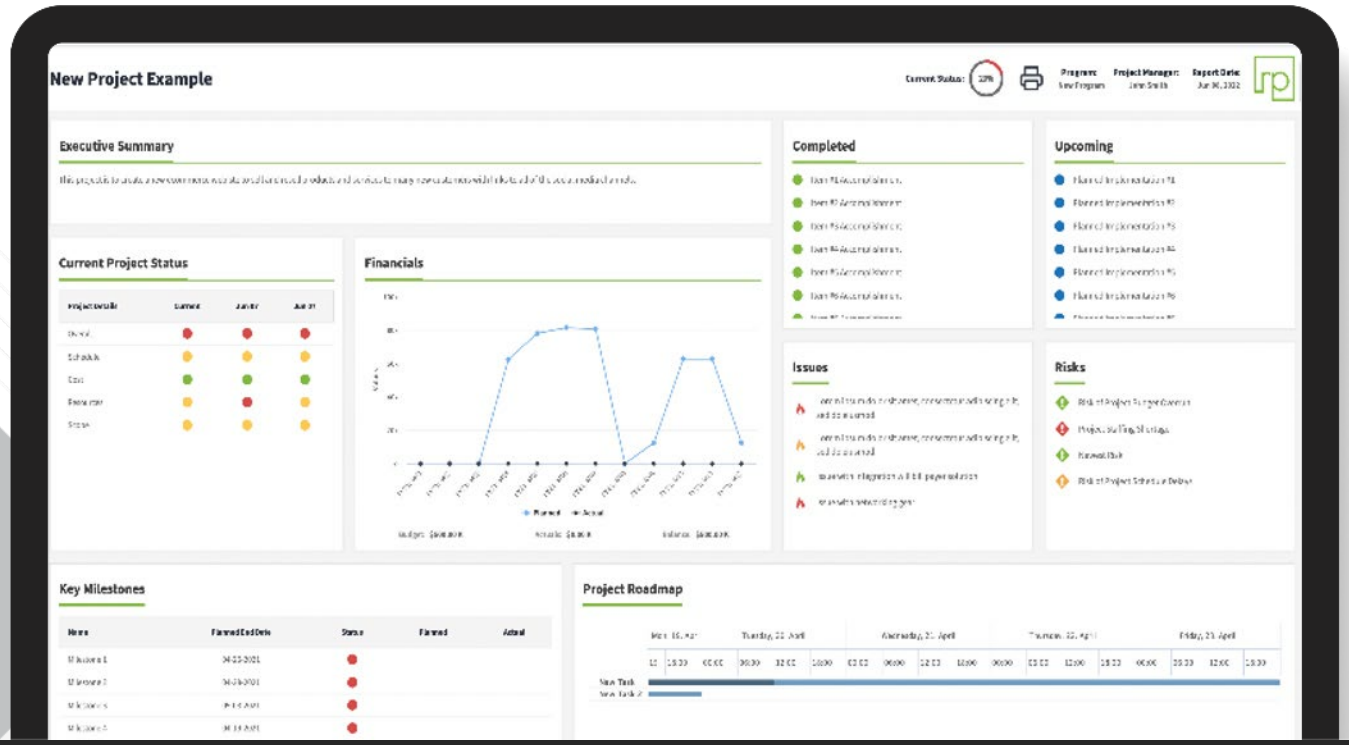
Capture all business case information in a single solution

Manage business case reviews and approvals with demand workflow

Print and save Business Case pdf files for distribution

ResultsPositive: Project Status Report Portal

Provide stakeholder visibility to 1-Page Project Status Report



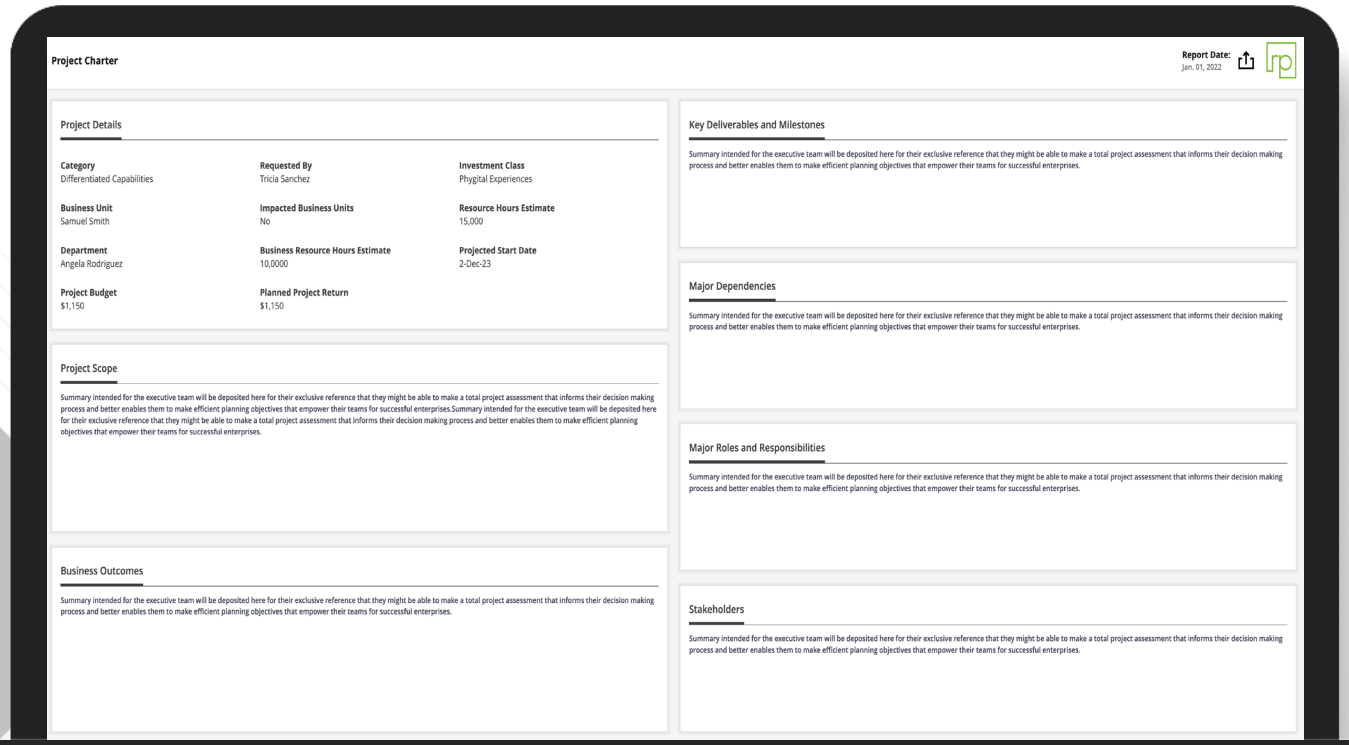
Stakeholders can easily view project statuses

Easily view Project Listing, 1-Page and 2-Page Project Status

Export report to PDF or PowerPoint

ResultsPositive: Project Charter

Provide stakeholder visibility to 1-Page Project Charter



- Stakeholders can easily view project charter
- Consistent format and layout for project charter governance reviews
- Export report to PDF or PowerPoint

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Post Initial Implementation Roadmap Examples

ResultsPositive Assessment & Roadmap Offering

1. **Assess current SPM processes and ServiceNow implementation**
2. **Discuss and present SPM best practices and customer examples**
3. **Develop and provide near and long-term recommendations**
4. **Develop high-level and detailed phased implementation roadmaps**

Data Sheet

Assessment & Roadmap

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Mission

The mission of ServiceNow Assessment & Roadmap engagement is to provide insights and actionable take aways to assist you in realizing strategic SPM goals with greater assurance, speed, and agility by leveraging our experiences and best practices.

ServiceNow Partner

ResultsPositive is a leader in Strategic Portfolio Management solutions for medium sized and Fortune 500 companies. ResultsPositive has been providing SPM solutions and services for 18 years with over 400 customers.

As both a ServiceNow Technology and Services Partner, ResultsPositive has the experience, best practices, and services necessary to turn complex processes into tangible business solutions.

What Is It?

The ServiceNow Assessment and Roadmap engagement is series of discovery workshops delivered by ResultsPositive consultants to present common SPM practices and business benefits coupled with a series of sessions to assess current and desired end state processes, capabilities, and tools. Following the discovery sessions we provide our analysis and deliverables.

What do I Gain?

ResultsPositive will provide actionable recommendations toward helping your team improve SPM practices and technologies to increase value realization on your current software investments. As part of this engagement, we will provide the following deliverables:

- **Findings**

ResultsPositive will provide assessment findings that includes demand intake, portfolio, program, and project, resource, and finance management domains. We will assess your current environment against industry-wide benchmarks.

- **Recommendations**

We will provide short and long-term recommendations to increase operational efficiencies through proven practices and by leveraging existing technology investments.

- **Roadmap**

ResultsPositive roadmaps define a phased approach over a period of time. Our goal is to help you realize value early and within each phase along a prescriptive journey designed to meet your goals and objectives.

- **Actionable Next Steps**

We will provide actionable next steps toward quick value realization.

Get Connected

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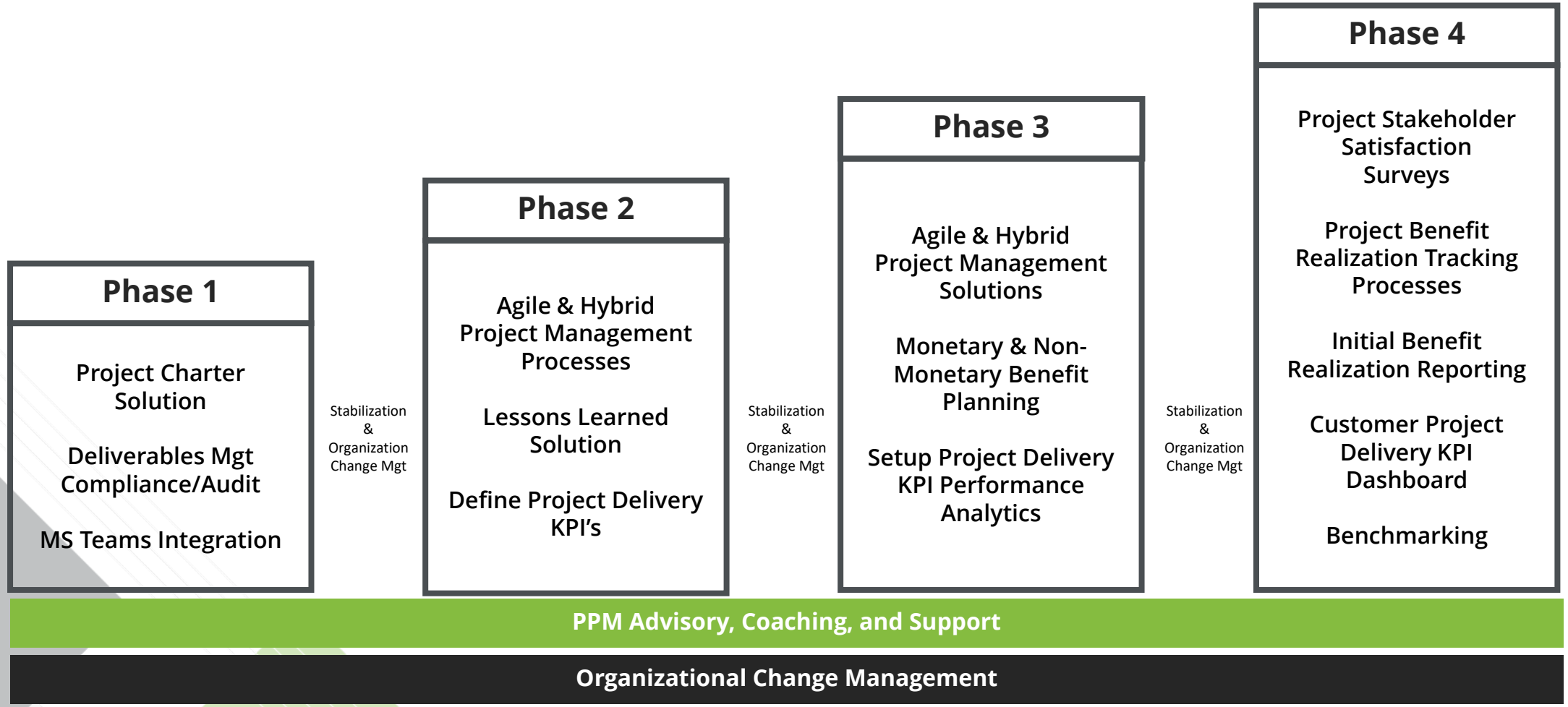
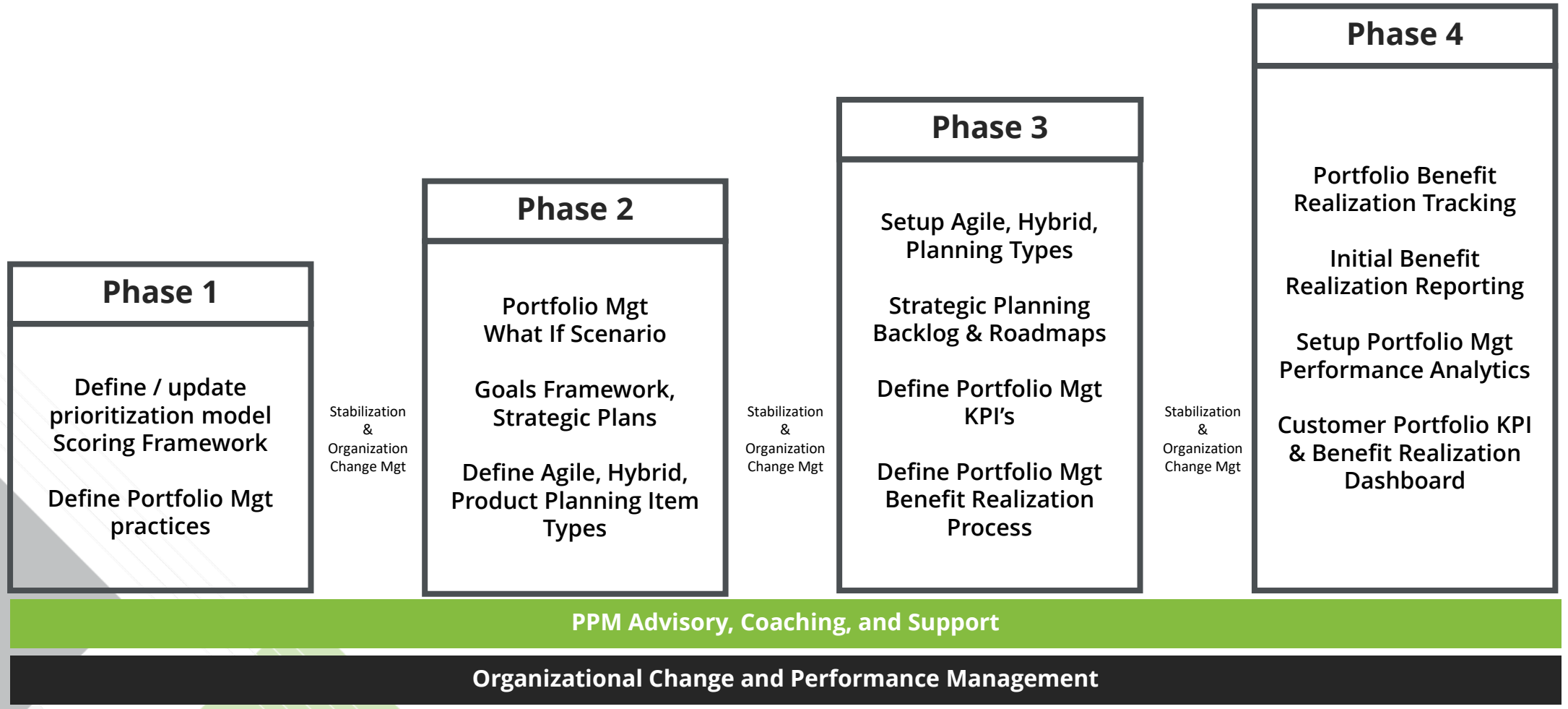
Make a Difference

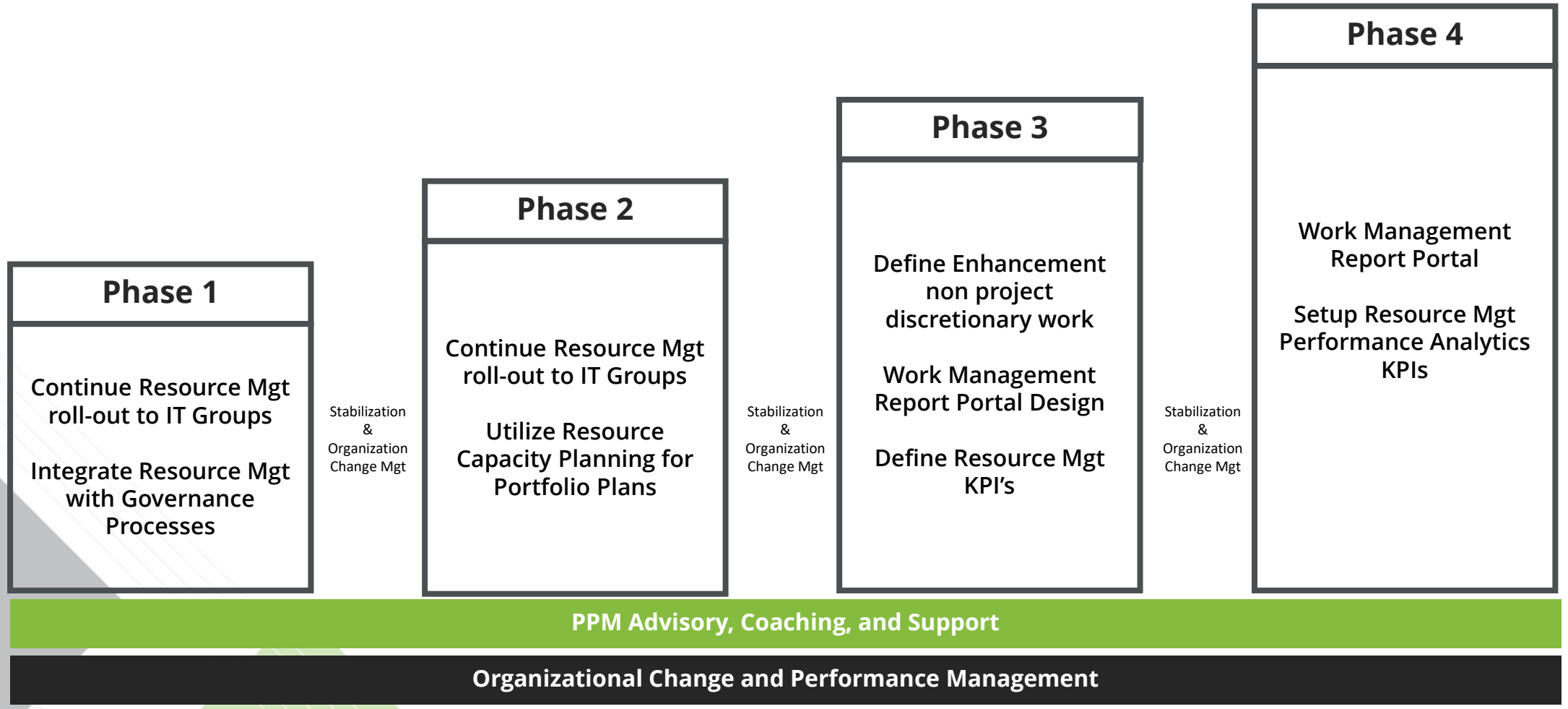
Post Implementation: Project Delivery Roadmap



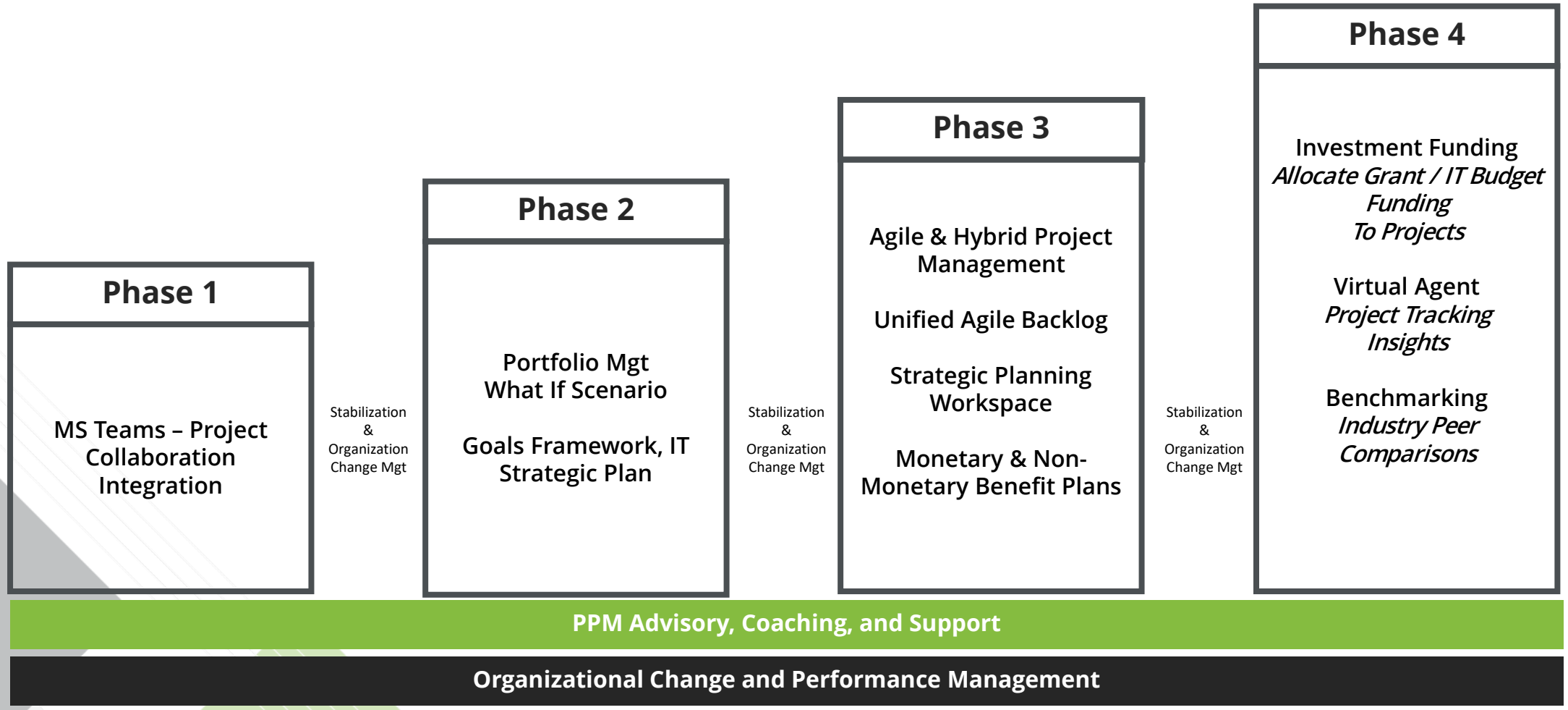
Post Implementation: Strategic Planning Roadmap



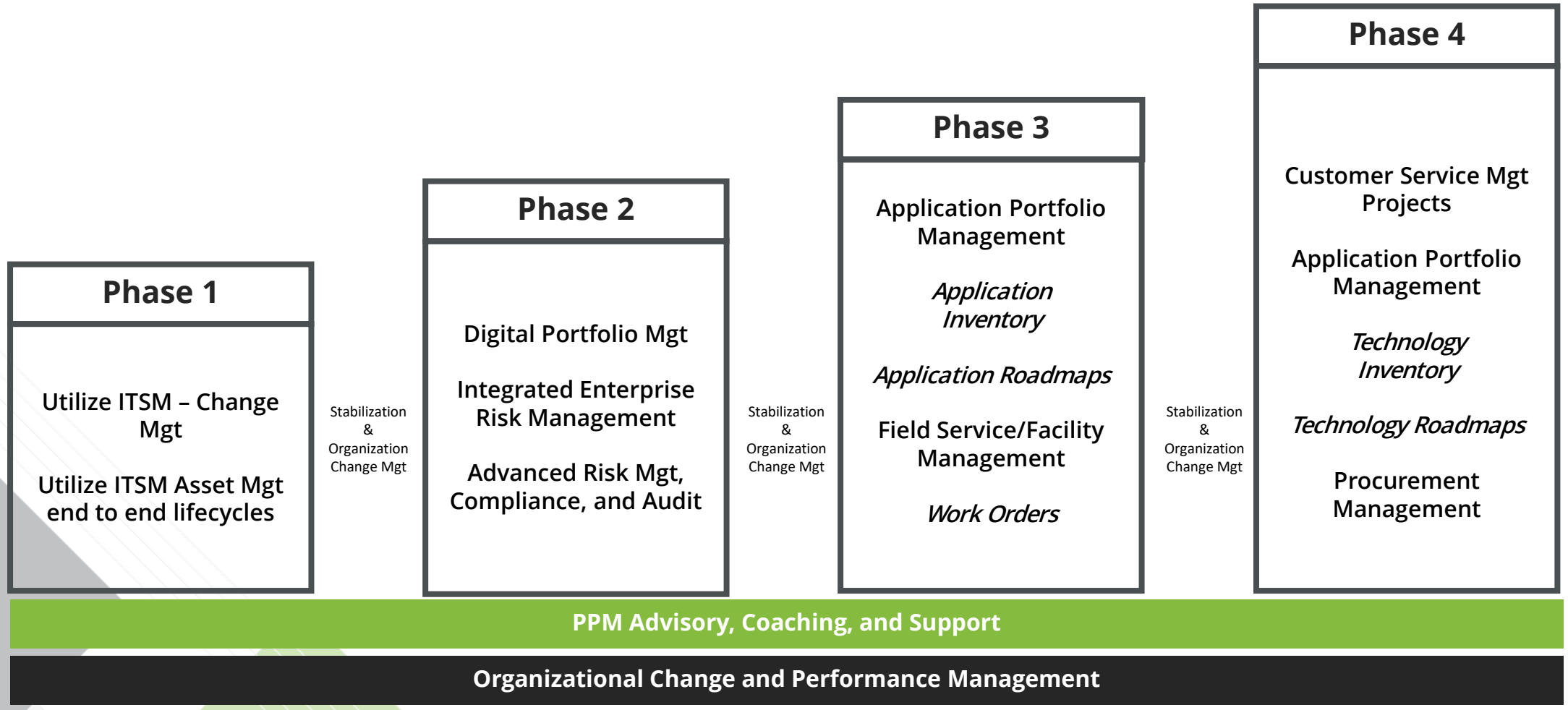
Post Implementation: Resource & Work Mgt Roadmap



Post Implementation: SPM Product Roadmap



Post Implementation: SPM + ServiceNow Platform Roadmap



Schedule Your SPM Roadmap Discovery Workshop

1. Assess current SPM processes and ServiceNow implementation
2. Discuss and present SPM best practices and customer examples
3. Develop and provide near and long-term recommendations
4. Develop high-level and detailed phased implementation roadmaps

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Questions & Answers

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Thank You