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How Chipotle
Takes Automation to a Different Level
Your Guide:
Mason Ingalls
Director, Organizational Change Management & Operations EPMO
Sponsored by
ValueOps
Clarity
Rally Software
BROADCOM
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Agenda

- Introduction
- Our Future Preparation Thought Process
- Leveraging Our Clarity and Rally Investments
- Outcomes and Values Driven
- Q & A

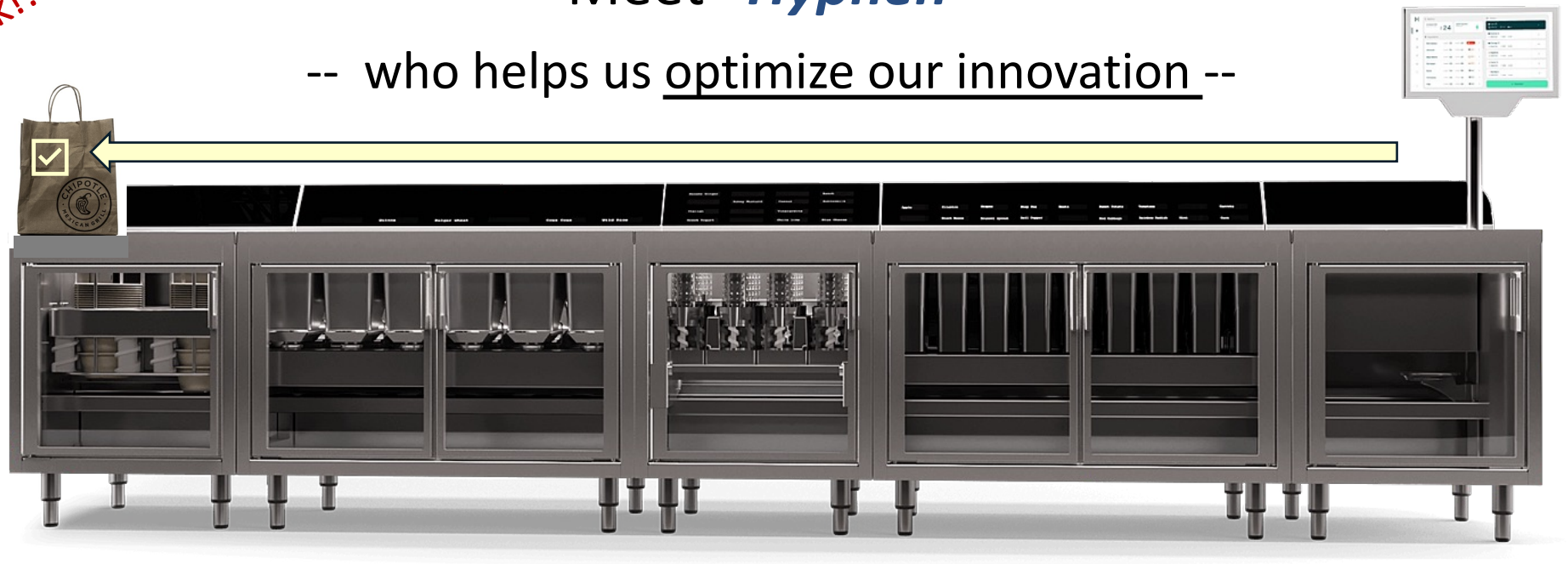
Mason Ingalls
Director,
Organizational Change Management
& Operations EPMO

Our Future Preparation Thought Process

How we think!!

Meet *"Hyphen"*

-- who helps us optimize our innovation --



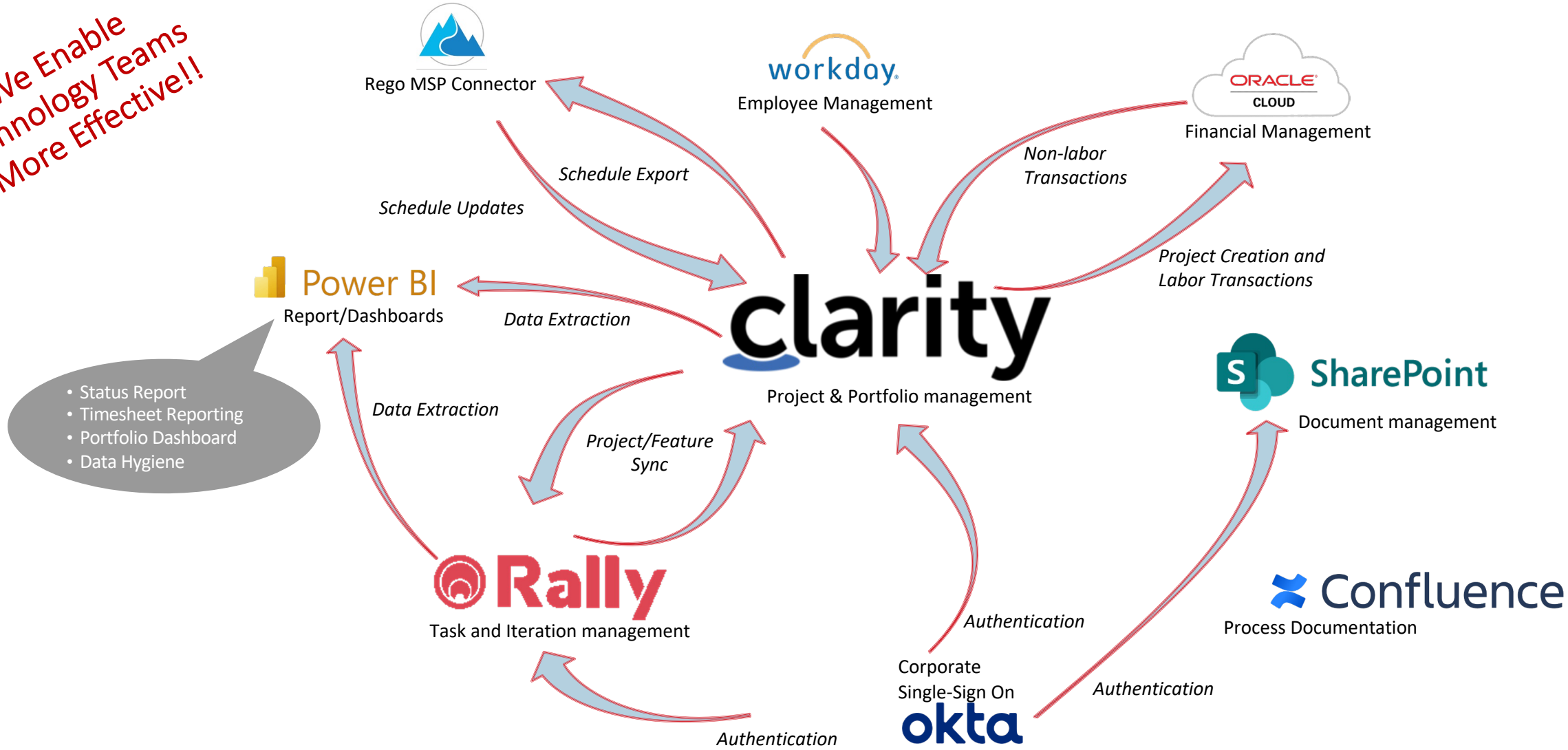
- ☑ Bowl
- ☑ Rice Type
- ☐ Beans
- ☑ Meat
- ☐ Toppings
- ☑ Guacamole
- ☐ Etc.

- Smart, safe, and ready to serve
- Innovative features eliminate waste, reduce returns, and ensure every meal is accurate.
- Modules are designed to grow with our business.

Leveraging our Clarity & Rally Investments

CHIPOTLE MEXICAN GRILL

How We Enable Our Technology Teams to be More Effective!!



Outcomes and What's Next

- **Outcomes**
  - Increased capitalization (50% YoY)
  - Increased R&D tax credit (25% YoY)
  - Status Reporting – formerly hours spent formatting a status slide
  - Single point of truth – portfolio planning status (ideas)/project schedules, RAID
  - Maintained system administrative overhead via integrations

- **What's next**
  - Project TCO
  - Road mapping Rally data via Clarity
  - NRT Rally connection to PowerBI

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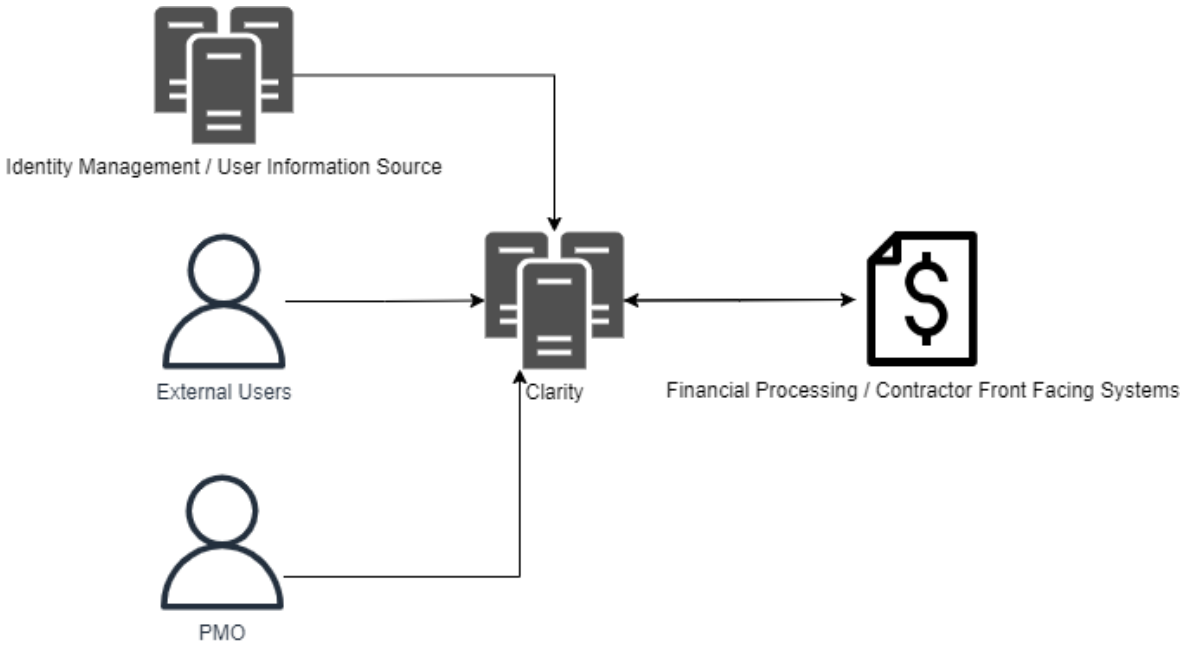
Data Integrity
Your Guides:
Sarika Bhowte

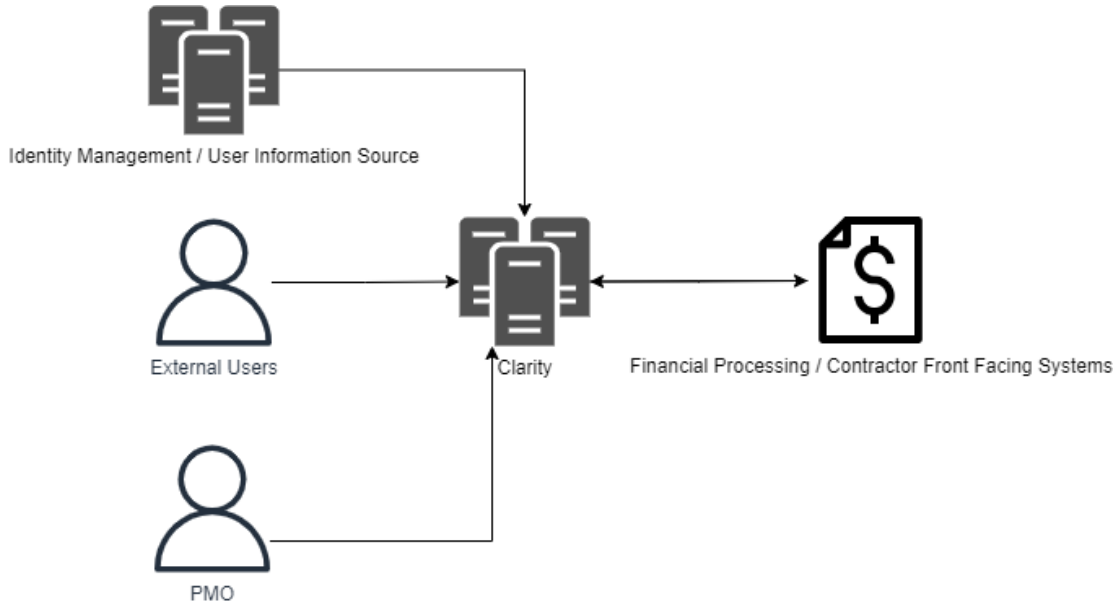
Introduction to Loblaw

- Clarity is mainly used for Project Management, Labor/Time Tracking and CapEx/OpEx Forecasting
- Community is composed mainly of external IT contractors, who will track time or manage projects
- Resource information is fed from the IDM solution, which only contains base information
- All data is eventually sent over to several financial applications and extracts for stakeholder reporting
- PMO Team is in charge of handling the high amount of data and need to ensure its quality and accuracy, while facing the challenges of:
  - Incomplete data coming in
  - Diverse and rotating user community



Introduction

- This architecture causes a series of challenges:
  - PMO Team needs to supervise and guarantee resources are fully configured before providing access
  - PMO Team needs to ensure PMs are following the business processes for multiple modules like financial plans, status reports, etc.
  - Ensure financial processing is up to date, as reports and external financial systems are fed periodically with Clarity data



Data Integrity

Importance of Data Integrity and Quality

- Data Integrity and Quality monitoring helps organizations:
  - Ensure data is being properly entered into the system
  - Ensures data is consistent, accurate and completely filled out
  - Can aid data security and governance by validating the processes followed to enter data into the system
  - Helps identify common pitfalls like duplication or lack of integrations

- Well implemented protocols translate not only into better adoption, but also confidence in the application
  - Production of repeatable, reliable outputs (Portlets, Reports, Extracts)

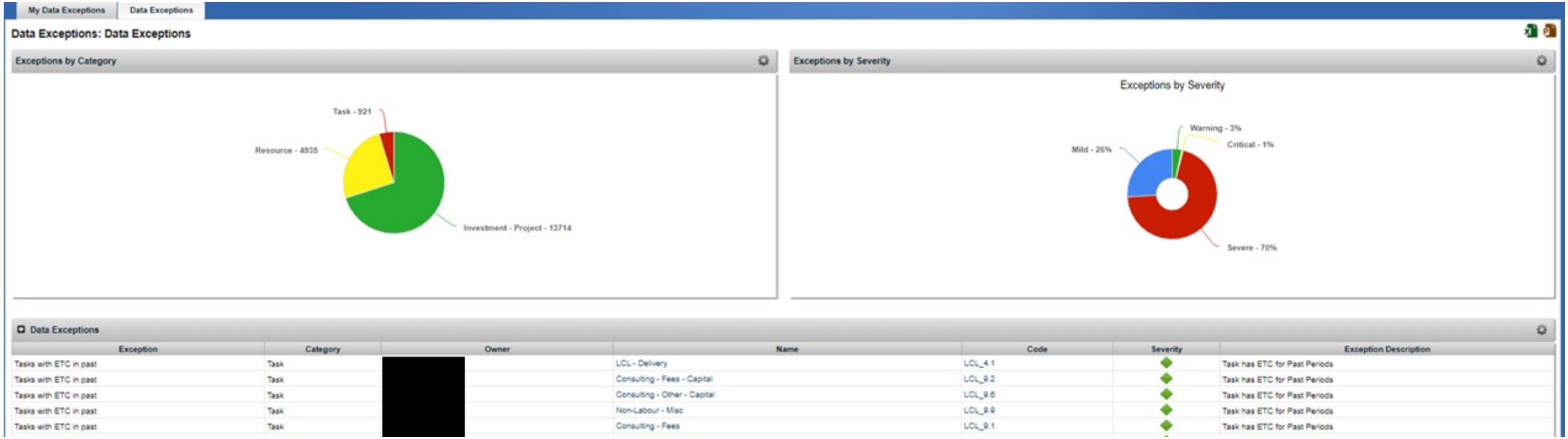
Example of Data Integrity Metrics

- Active Resources not open for time entry
- Active Projects in a completed state
- Projects without status reports
- Missing rates for Resources
- Missing financial fields in Projects and/or Resources
- Projects with rate matrix associations
- Projects/Resources with OBS associations
- Incomplete timesheets
- And much more …….

Loblaw's Data Integrity

- Allows us to configure rules that align with their business and categorize them by criticality, modules and
- Creates an "data exception" per violation, allowing organizations to automatically assign owners and ensure issue like tracking
- Provides metrics and trending on incidents and completion of the incidents

Data Exceptions Dashboard



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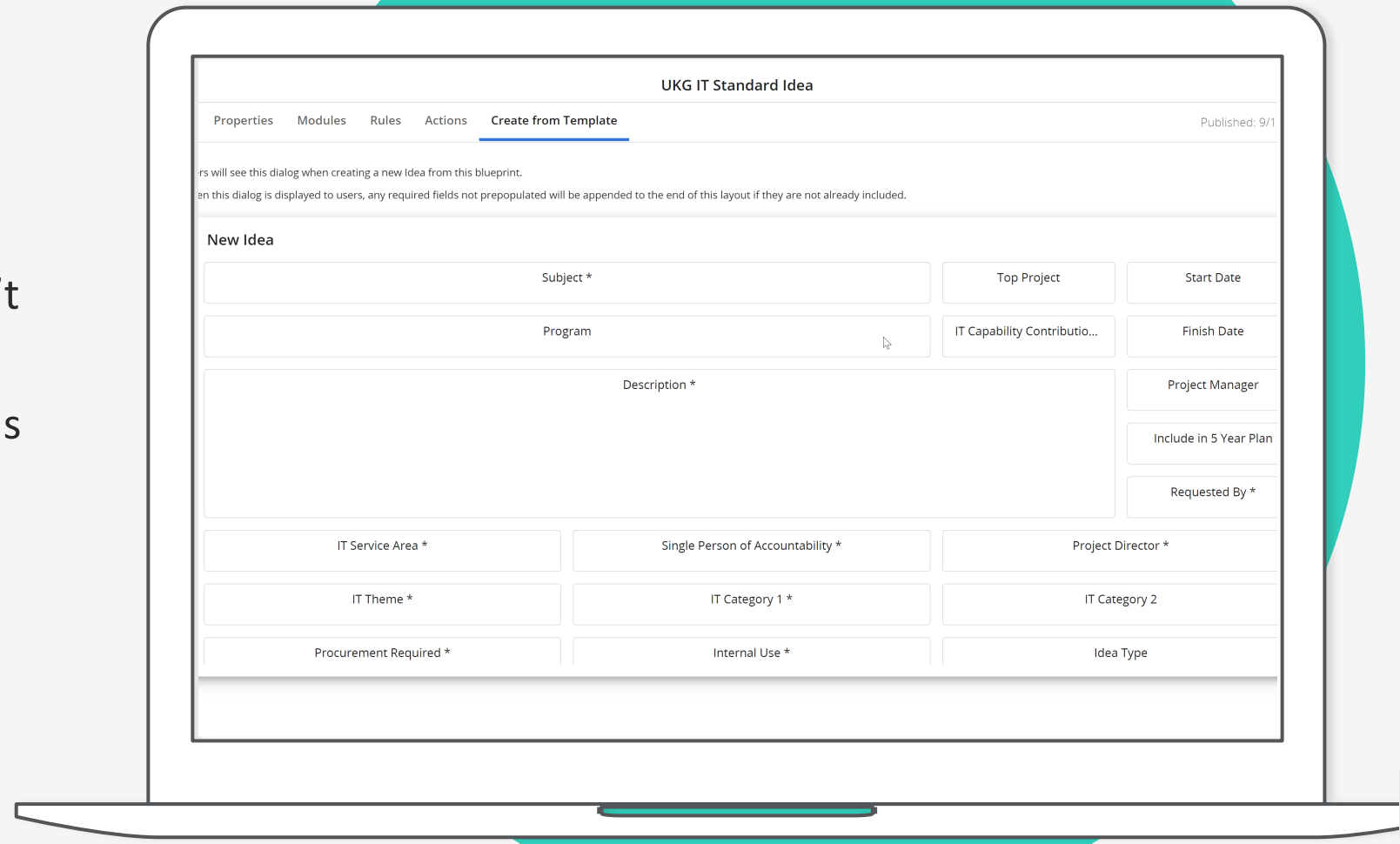
Business Rules – Required Fields

Multiple Teams using Clarity that don't all have the same required fields

- Business Rules define required fields for different blueprints
- Combine with templates to ensure required data is captured



Business Rules – Data Integrity

Financial Management Team has data required for their reporting

Project Managers were creating Cost Plans on investments that were missing some key data

Created a business rule to high Financials tab until all prerequisite data was populated

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University System

- School of Arts & Sciences
- Hajim School of Engineering & Applied Sciences
- Eastman School of Music
- Simon Business School
- Warner Graduate School of Education
- School of Medicine & Dentistry
- School of Nursing
- Memorial Art Gallery

Medical System

- Strong Memorial Hospital
- Golisano Children's Hospital
- Wilmot Cancer Center
- Eastman Institute for Oral Health
- UR Medicine Home Care
- Highlands Pittsford & Brighton
- 9 Urgent Care Centers
- Primary Care Network
- UR Medicine Affiliates
  - Highland Hospital
  - FF Thompson
  - Noyes Memorial
  - Jones Memorial
  - St. James

Meliora

3,000
Faculty and Instructional Staff

32,500
Employees

5th
Largest Private Sector Employer in New York State

Objective

Ensure we have the right data at the right time, in an intuitive format, so that we can facilitate

Ever Better conversations & decisions

Meliora *is a Latin adjective meaning "better". It may be used substantively to mean "better things", "always better", "ever better"*

- Improve & innovate in planning, current state assessments, and visibility/transparency
- Simplify & improve customer experience
- Maintain Operational Excellence
- Focus on top execution priorities
- Balance governance & agility

Implementation Keys to Objective:
Ever Better conversations & decisions

Proof of Concept	Focus on “real” examples Develop Future State requirements/vision
Roadmap Journey	Visualize and rationalize Foundation of communication plan
Iterate Delivery	Focus on building blocks needed for strategic objectives
Match process/delivery to key data needs	‘Work Where You Work’ time sourcing Maturity Level Match Ideation
Incorporate Organizational Change and Communication concepts often & early	Leverage communication channels Identify your champions, Use a variety of modalities (ex. Lunch-n-learns, Roadshows, intranet, e-mail, etc.) Understand your impacted groups & stakeholders

Questions?

Thank You For Attending Rego University

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- Class Name = **regoUniversity**
- Course **Description**
- Date Started = **Today's Date**
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Let us know how we can improve!
Don't forget to fill out the class survey.

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