



regoUniversity

NASHVILLE • 2022

Demand Mgmt. | Erie Insurance

Your Guide:

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Dept.**

Demand Management Setup / Adoption

The Setup:

- Enterprise priorities and strategy set by company leadership
- Developed the business case in Clarity
- Developed reporting dashboards

Adoption:

- Executive / Senior Leaders became change champions
- Several informational sessions
- Mandatory training on the new process
- Ongoing training (bite size learning, lunch & learns, etc.)



Benefits

- **Immediate**
 - Early insight
 - Enterprise focused discussions
 - Prioritization for ERIE
 - Focus on data
- **Future**
 - Planning and prioritization (which we are doing now)
 - Execute initiatives that support company strategy
 - Identify critical paths
 - Dependencies
 - Benefit tracking (forecasts and realized)



Business Case Reporting

Idea Executive Summary

Exec. Summary

Summary Overview

Item	Year 1	Year 2	Total
Revenue	0	0	0
Expenses	0	0	0
Net Profit	0	0	0

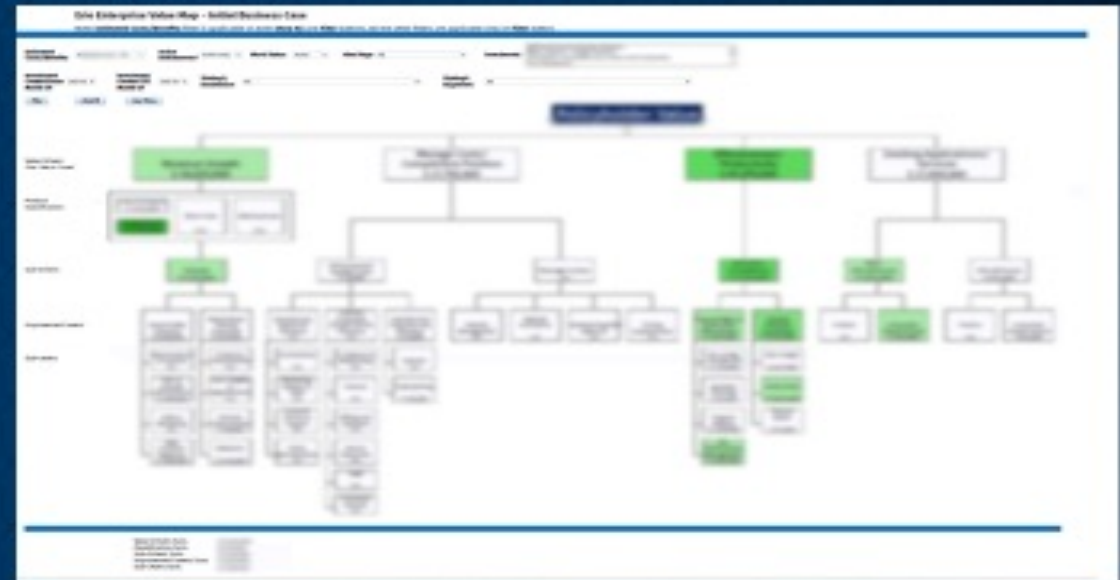
Executive Value Map Alignment

Stakeholder Assessment

Stakeholder	Impact	Interest
Customers	High	High
Employees	Medium	Medium
Suppliers	Low	Low

Financial Breakdown - expand for detail

Year	Revenue	Expenses	Net Profit
Year 1	0	0	0
Year 2	0	0	0
Total	0	0	0



clarity

Items

ID	Name	Project	Type	Status	Priority	Assignee	Start Date	End Date	Progress
1001	Project A	Marketing	Task	Completed	High	John Doe	2022-01-01	2022-01-15	100%
1002	Project B	Development	Task	In Progress	Medium	Jane Smith	2022-01-10	2022-02-01	75%
1003	Project C	Design	Task	Not Started	Low	Mike Johnson	2022-02-01	2022-02-15	0%



Portfolio & Enterprise Reporting

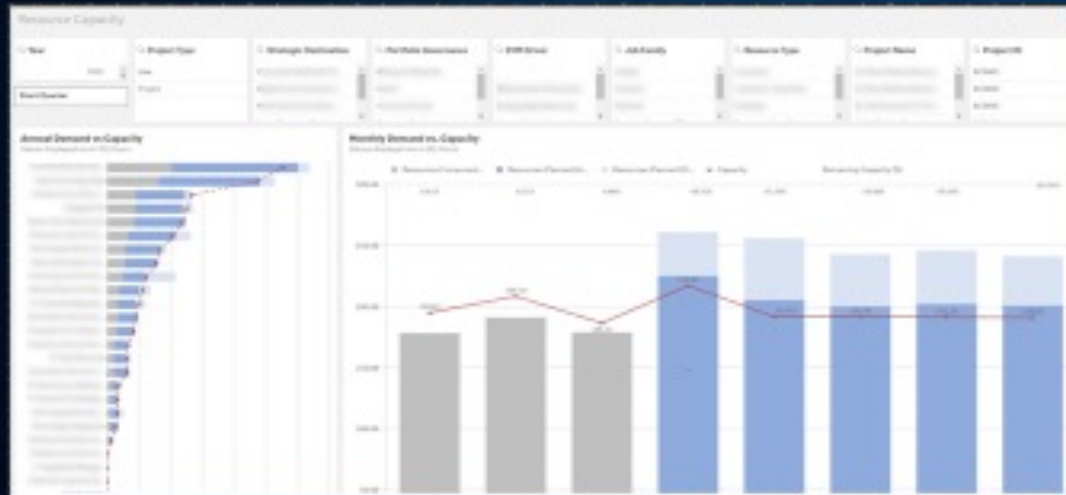
Portfolio Financials



Enterprise Roadmap



Capacity Report



Portfolio /Project Health





University of California
San Francisco

Clarity at University of California, San Francisco

Clarity Focus Areas

- Source of truth for UCSF Health's strategic plan
- Common portfolio tool for all UCSF Health technology projects
- Backbone for demand management
- Healthcare operational project support

Key Impacts, FY22

Portfolio Area	Impacts	How
Strategic Plan	<ul style="list-style-type: none">• Departmental delivery of strategic plan components• Leadership accountability & OKRs• Demand awareness (IT teams)	Custom investments, Outlook alerts, Tableau
Common portfolio tool, IT	<ul style="list-style-type: none">• Awareness of IT spend on run, grow, transform• Alignment of project delivery across IT teams	Projects, custom investments,
Demand management backbone, IT	<ul style="list-style-type: none">• Single front door for IT requests• project business case & score-carding,• Alignment of IT spend with exec sponsors and exec team	Ideas, Outlook alerts, Reporting
Healthcare operational projects	<ul style="list-style-type: none">• Project workflow & collaboration tool for 'accidental' project managers• Enterprise visibility to all investments	Custom investments (to deliver project management light)

Examples of Goal Deployment via Clarity

Goals, initiatives and projects assigned to, and monitored, by accountable leaders



Next Focus Areas

- Clarity supports new UCSF Health management system
- Launching an initiative to more fully move to top down portfolio management
 - Clarity buildout of program, product and portfolio hierarchy
 - Supported with portfolio management methodologies
 - Impacts to demand management

UCSF

University of California
San Francisco

HERSHEY'S
RESOURCE MANAGEMENT

CANDY LAND

HERSHEY'S

JOURNEY

INTRODUCTION

Our goal is to provide an understanding of Hershey's success in Resource Management. From a starting point of having no allocation data in Clarity to providing Executive Level Dashboards & Reporting of accurate real time data to make key resourcing decisions across the IS Enterprise.

This was our recipe for success!





BUILD YOUR STORY

*Understanding the Candy Land
objective*



Getting Started:

- 👉 Define your WHY?
- 👉 Identify your GOALS
 - 👉 Paint the STORY

Why is Resource Management Important?



Cost Savings



Project Prioritization
Decisions



Streamlined
Communication



Better Forecasting



Real-Time
Resource Tracking



Improved Effectiveness

THE 4 “A”s OF RESOURCE MANAGEMENT

Availability

THE HOURS A RESOURCE IS AVAILABLE TO WORK

Determined by:

Resource's daily rate (hours) times the number of working days in the period (week / month / quarter / year) less any planned time off entered into their Clarity Calendar

Allocation

THE HOURS A RESOURCE IS PLANNED (FORECASTED) TO WORK ON A PROJECT

Determined by:

- Resource's Start and Finish Dates on the Project
- PM / RM's Allocation method (default %, detailed entry, Task ETC)

Assignment

THE HOURS A RESOURCE IS ALLOCATED TO WORK A SPECIFIC TASK

Assignment to a Task

calculates an **Estimate to Complete (ETC)** as hours

Determined by:

- Resource's Allocation method on the Project (default %, detailed entry)

Actuals

THE ACTUAL HOURS A RESOURCE EXPENDED SO FAR ON A TASK → PROJECT

Determined by:

Timesheets posted against the Project → Task





Know your AUDIENCE
*Select your Candy Land Game
Pieces*

KNOWING YOUR AUDIENCE

Identifying the key partners in Resource Management is imperative to success

Stakeholders
Identify who your Resource Managers are, team structures & points of contact to get started

Executive Leadership
Executive Leadership support & understanding of the needs from their team(s)

Internal Support Team
Having the right size team and availability to undertake Resource Management

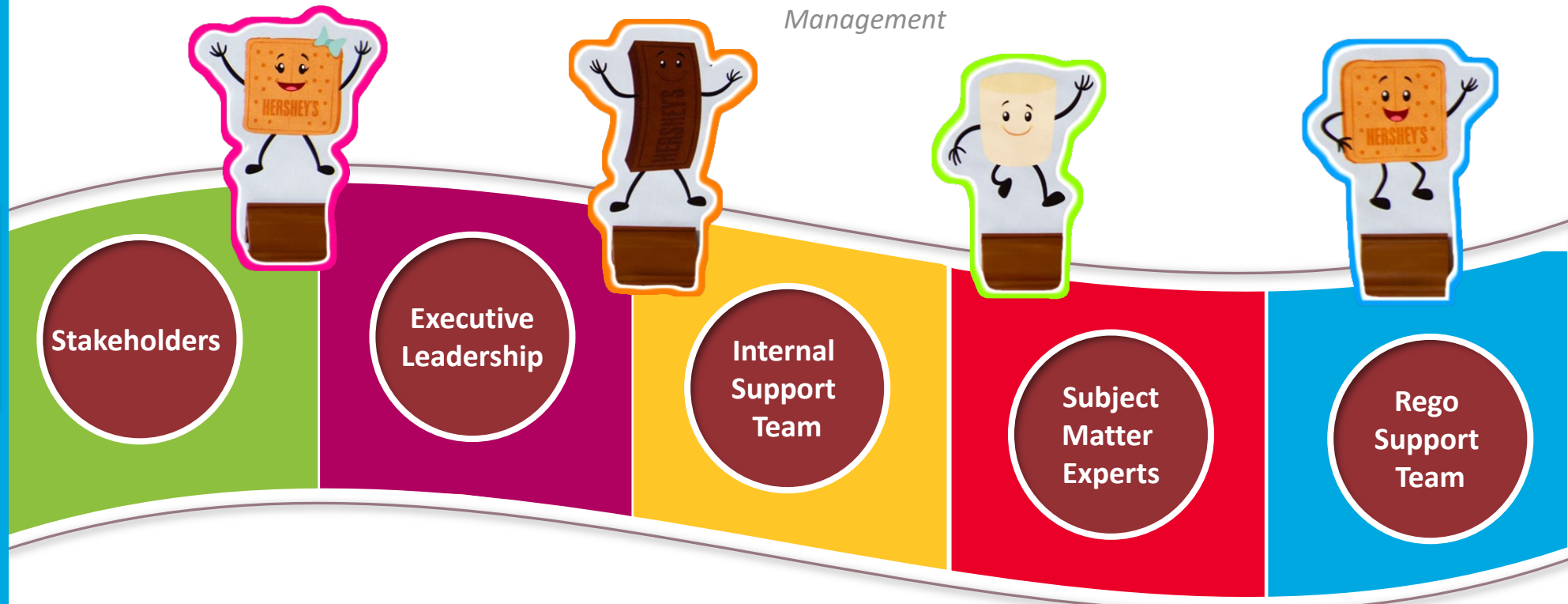
Subject Matter Experts
Ensuring you have key individuals who fully understand the terminology & RM processes

Rego Support Team
Utilizing Rego's expertise & available portlets/reports



S'more Tip:

Build a "Board of Directors" who become your strongest allies in Resource Management to ask questions, collect feedback and enhancement ideas from!





Be VISUAL

Find your Candy Land Checkpoints

As you navigate this journey, it is imperative to set your checkpoints and goals to measure success.

For Hershey, we had allocation compliance metric goals within each quarter.

Example Checkpoints for maintaining the data:

- Start thru Q1: 35%
- Q2: 50%
- Q3: 70%
- End of Q4: 80%+



CHECKPOINTS IN OUR JOURNEY



Initial Goal:

Why did we need to reach this goal?

Metrics:

How did we measure progress and success?

Additional Info:

What action is required? Anything to celebrate?

Key successes:

*What did we accomplish along the way?
Deliverables?*

Takeaway:

How did reaching this goal help our team and future of the company/team?

COMPLIANCE REPORTING

TRAINING MATERIALS

EMAIL ALERTS

RM TOOLKIT

STRATEGIC REPORTING

S'more Tip:

While some of these checkpoints may take place simultaneously, it is important to determine the receptiveness of the audience to move forward



OUR RESOURCE MANAGEMENT MVP



Phase 1

Focus on Allocations and Actuals

- **Education and communication** on the RM role responsibilities in Clarity
- **NEW!** RM Toolkit rollout to enable the Resource Manager.
- **NEW!** ISLT Dashboard Rollout
- Timesheet Submission Compliance
- RM's **focus** on verifying your resource information and allocating their resources 32 hours each week. Users **SHOULD NOT** be allocated to 40 hours of project work. (*Employees only*)

The Why?

We want to gain visibility into our team members workload to provide support.

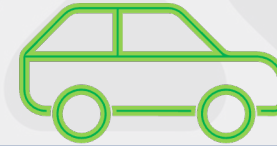


Phase 2

- **Data Quality Review:** Facilitate conversations to ensure data in the tool is accurate
- **Refresher Training:** Provide QRGs and refresher on the established processes from Phase 1
- **Updated Training:** QRG Training Guides, Updated Resource Management Training Manual
- **Roles:** Review of active roles, and modifications as needed.

The Why?

We need to start improving on the outlined process with reporting, data quality, and preparation for Executive Management Reporting



Phase 3

- **NEW! Outlook Calendar Sync:** Integrate Outlook Calendar with Clarity Calendar
- **NEW! Email Alerts:** RM Weekly Recap Email Notifications
- **RM Toolkit Upgrade:** Including new and upgraded RM Dashboards and customized portlet configurations

The Why?

Now that the foundation is established to reinforce our resource management initiatives, we will introduce new enhancements to facilitate utilizing Clarity efficiently for their updates



S'more Tip:

Define your customized version of Crawl, Walk, Run that best fits your organization!



Phase 4

- **Formal Requisitions - Pilot Action Item Responder Usage**
Users will now be automatically allocated to 8 hours a week "Admin." (*Employees Only*)
PM's request roles and can name a resource manager to fill the role
RM's will receive an automated message with a link to the requisition, can start discussions, and see availability matches of their resources.
- **Compliance Reporting** upon completion of Phase 3, we will be prepared to begin distributing a formal cadence of reporting and data metrics across IS
- **Iterate:** Evaluate the process and iterate for improvement

COMPLIANCE REPORTING

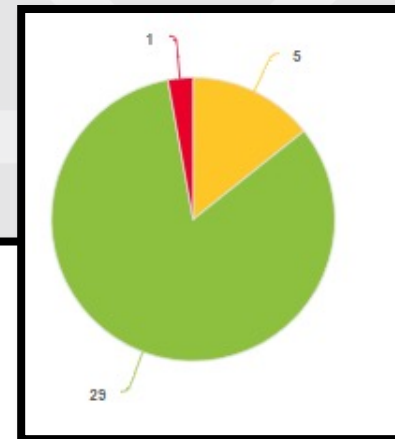


From your start date, capture a full year view of availability vs. allocations goals and actual data to understand your starting state

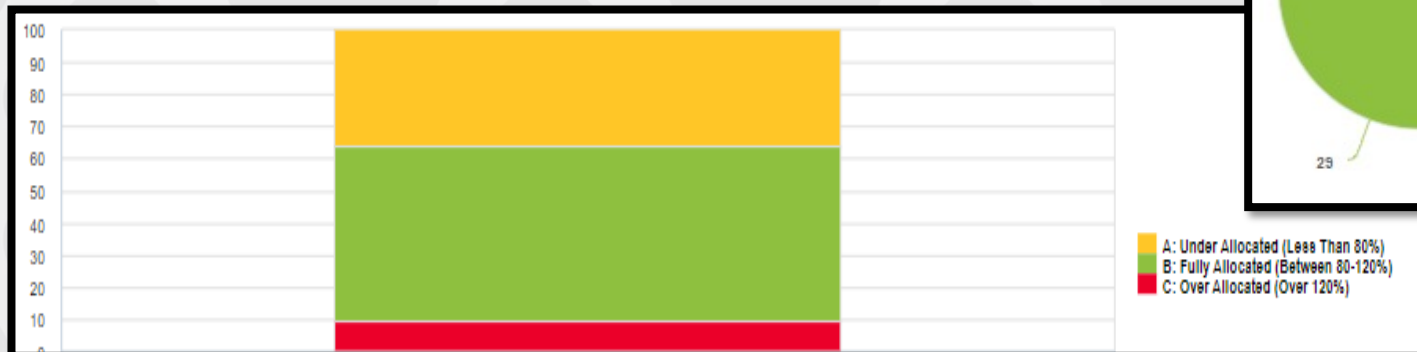


S'more Tip:

Utilize the graphs on a regular basis to track success as you navigate through your journey!




Utilize RegoXchange for resource management portlets to help capture the allocation details




TRAINING MATERIALS

**QUICK
REFERENCE
GUIDES**




Allocate from Estimates

Quick Reference Guide (QRG)



Bringing S'more Clarity to the way we work



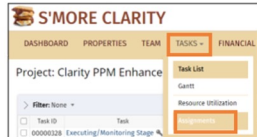

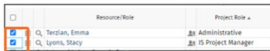
Allocate from Estimates

Purpose/Background
Allocate from Estimates is utilized when you have done forecasting at your Tasks (updating ETC's) and want to carry the resource estimating back up to the Team Allocation of your project to keep the data in sync.

Tips & Tricks to Utilizing Allocate from Estimates

- To keep Task ETC & Planned Team Allocation in sync, you must perform these steps every time you update ETCs
- The Default Allocation % field will not update after running Allocate from Estimates. Updates will reflect in the Allocation by Period and the Segment Allocations

How to Run Allocate from Estimates

1. **Navigate to the Project**
1. To begin, verify your ETC's are accurate utilizing the **Tasks Tab: Assignments**
Note: In this view, you can see the total ETCs at the task level, and at the Resource level for each task assignment. Edits can be made by selecting the Task Name and editing in-line the Assignments section at bottom of the page.
2. Once in your project and updates have been made to the ETCs at the task level, navigate to the **Team Tab**.
3. Select the resource name(s) by checking the box next to their name.
4. Select the **Actions** menu



S'more Tip:
Decide which type of training guide is appropriate based on feedback and extent of difficulty for each piece of material!

ROADSHOWS

We hosted "Roadshows" attending Executive Leadership team meetings and sharing the latest updates and metrics for Resource Management maintain constant communication

VIDEO TRAINING GUIDES

For training materials that were more in-depth, we created screen recordings with captions going through hands-on demonstrations

EMAIL ALERTS

PHASE 1



🔔 **Weekly RM Actuals**

Provides the individual report of their past 12 weeks of actuals for the RM to review the hours & trends

🔔 **Weekly RM Forecast**

Provides the future 6 weeks of allocations detailed by investment for each Team Member

🔔 **Weekly PM Unfilled Role Demands**

Provides the PM of each project a list of unfilled role demands on their project that are missing key details in order to replace the role with a named resource.

🔔 **Project Allocations vs. Actuals**

Provides details at a weekly level of past 6 weeks of planned allocation vs. actuals by project

🔔 **Individual Allocation Review**

Provides the next 6 weeks of allocation details directly to the resource for their review corrective action.

🔔 **RM Unfilled Role Demand Requests**

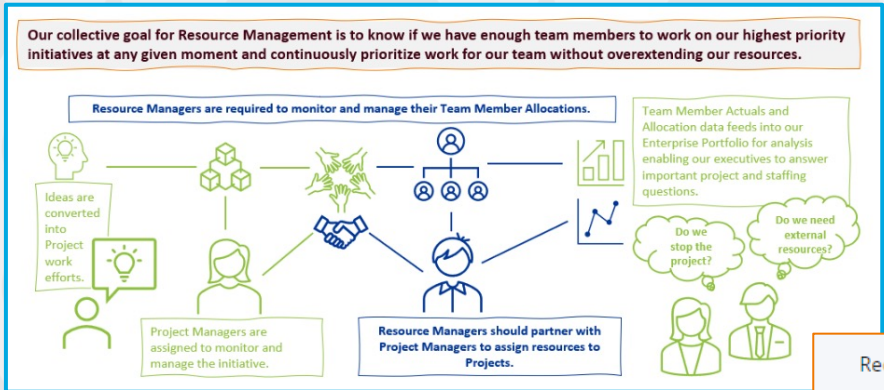
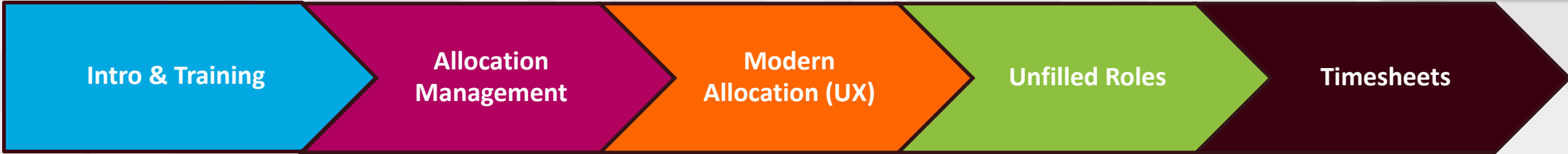
Provides the RM any unfilled role demands that have been requested from them through the Staff OBS value.



HERSHEY'S RM TOOLKIT



S'more Tip:
Keep a consistent look and feel across views with easy navigation instructions embedded on the pages!



Unfilled Roles

This tab should be utilized to manage unfilled role demands that need to be staffed with named resources as well as viewing hard and soft booking to make updates as needed.

- Unfilled Requirements:** Review all the details where resource demands have been added to projects that need to be staffed with named resources
- Resource Request View:** An additional monthly view of where there are unfilled role demands to be staffed with named resources
- Booking Status:** Utilize this portlet to view hard & soft booking statuses and make updates as needed

Requests

	Sep 2022		Oct 2022	
	ALLOCATION	FORECAST	ALLOCATION	FORECAST
> Administrative	17,192.87	0	13,947.28	0
> Agile Coach - PMO	0.00	0.00	0.00	0.00
> Architect - Commercial	11.30	0.00	8.00	0.00
> Architect - Corp	9.60	0.00	8.00	0.00
> Architect - I&O	136.80	0.00	136.00	0.00

Allocation Management Instructions

Allocation Management

This tab should be utilized as your first step in understanding, reviewing and modifying your team's current allocations within clarity.

Capacity Graph: Understand your capacity trends against current allocations, actuals, assignments & availability

RM Governance: Review your team allocations for accuracy & utilize this portlet to edit your team member allocations

Allocation Compliance Graphs: Track your allocation updates through a pie chart and/or column chart

Filter for yourself as the manager

Logged in User: All

> Capacity Graph

> RM Governance

Resource	Availability hours (Week)	Allocation hours (Week)	Allocation in availability (% week %)	Availability hours (Week)	Allocation hours (Week)	Allocation in availability (% week %)	Availability hours (Week)	Allocation hours (Week)	Allocation in availability (% week %)
Quartina, Nicole	72	72	100	72	72	100	72	72	100
James, Greg	72	107	149	72	107	149	72	107	149
Lucas, Ralph, III	44	44	100	44	44	100	44	44	100
Heena, Anil	72	81	113	72	81	113	72	81	113
Arbana, Nisha	72	109	151	72	109	151	72	109	151
Terrell, Gerald	72	72	100	72	72	100	72	72	100
Karanth, Suresh	72	88	122	72	88	122	72	88	122
Chandana, Ravi	72	72	100	72	72	100	72	72	100

> Timesheet Approval Compliance by RM

Resource Manager	Timesheets Not Compliant (as of Monday 4PM EST)	Total Timesheets Required (as of Monday 4PM EST)	Current Week Compliance Percentage (as of Monday 4PM EST)	Aug 29	Aug 22	Aug 15
Aguilar, Felipe	1	1	0	0	0	0
Allison, Robert	0	2	100	100	100	100
Amster, Sean	3	15	80	93	87	80
Angel, Juan	0	2	100	100	100	100
Auerbach, Walter Antonio	0	1	100	100	0	100
Auslander, Michael	0	3	100	100	67	100
Ausmus, Carolyn	1	2	50	50	50	50
Banda, Diego Armando	1	1	0	0	0	0
Baratam, Kameswara Rao	2	18	89	100	100	100
Baum, Sara	0	1	100	100	100	100
Beaver, Elizabeth	0	1	100	100	100	100
Beck, Joel	1	3	67	67	67	67
Benard, Jody	0	1	100	100	100	100
Bentzel, Elise	1	1	0	0	0	0
Bilson, John	0	6	100	100	100	100
Boback, Joseph	0	3	100	100	100	100
Boldt, Ashley	6	6	0	0	17	17
Bollinger, Terence	3	3	0	67	0	0

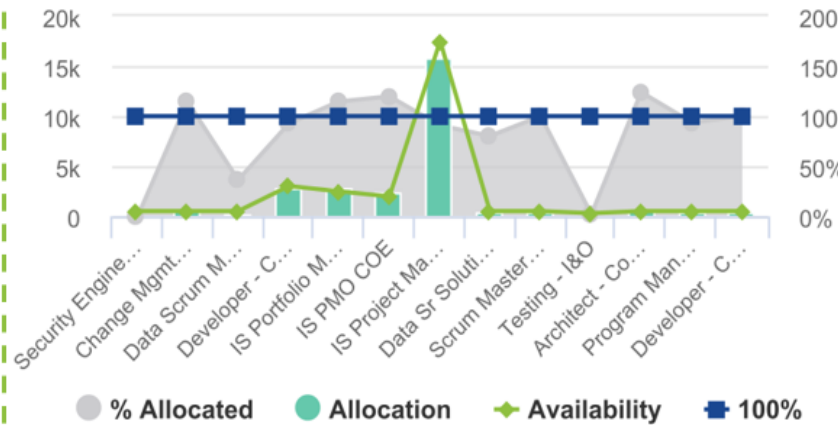
STRATEGIC REPORTS

PMO TEAM SUMMARY

VP Name
Team Total: 62

As of end of Q2

2022 Q3 - ALLOCATION TRENDDING

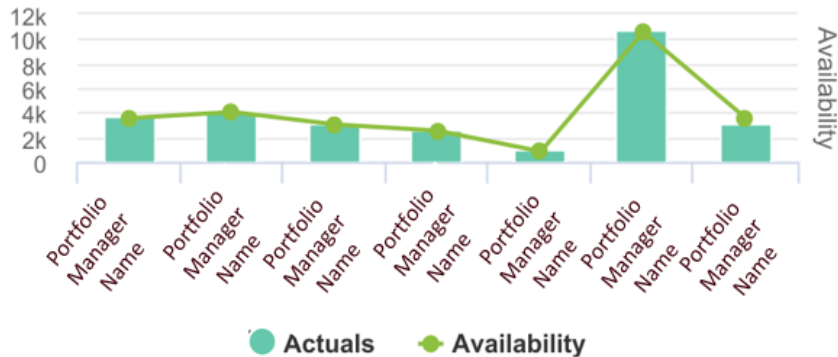


Q3 - TOP ALLOCATED TEAM MEMBERS

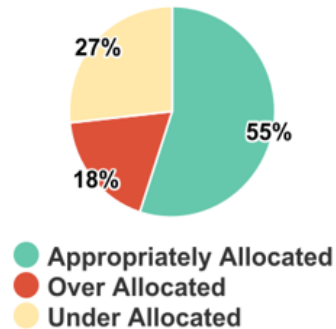
Role	% Allocated
Architect - Commercial	124%
IS PMO COE	120%
Change Mgmt - PMO	115%
IS Portfolio Mgr - PMO	115%
Scrum Master - PMO	100%
Developer - Corp	100%
Program Manager - PMO	94%
Developer - Commercial	93%

Resource	Resource Manager	% Allocated
Resource Name	Resource Manager	178%
Resource Name	Resource Manager	166%
Resource Name	Resource Manager	166%
Resource Name	Resource Manager	165%
Resource Name	Resource Manager	159%
Resource Name	Resource Manager	148%
Resource Name	Resource Manager	133%
Resource Name	Resource Manager	131%
Resource Name	Resource Manager	124%
Resource Name	Resource Manager	124%

2022 Q2 TEAM MEMBERS ACTUALS TREND



Q3 - FORECAST



Q3 - LOWEST ALLOCATED TEAM

Resource	Resource Manager	% Allocated
Resource Name	Resource Manager	0%
Resource Name	Resource Manager	0%
Resource Name	Resource Manager	2%
Resource Name	Resource Manager	3%
Resource Name	Resource Manager	12%
Resource Name	Resource Manager	37%
Resource Name	Resource Manager	50%
Resource Name	Resource Manager	50%
Resource Name	Resource Manager	52%
Resource Name	Resource Manager	53%



S'more Tip:

Provide the reports in multiple reporting cycles to finalize the format prior to automating in Clarity to ensure the version will stay the same





DELIVER Your Story
Reaching Chocolate World!



Congratulations!

**How do you
measure success?**



HERSHEY'S

CHOCOLATE WORLD

Summary of Accomplishments:

- 🚩 Hitting your compliance goals
- 🚩 Automated Executive Dashboards
- 🚩 Utilizing metrics for key decision making
- 🚩 Determine a resource waterline for project prioritization

The journey to Resource Management can be challenging! Our journey included making s'more moments of goodness for the teams and continuing to be the Center of Excellence!



Questions?



Thank You For Attending Rego University

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 Provider = **Rego Consulting**
- Class Name = **regoUniversity**
- Course **Description**
- 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.



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