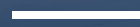




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2023

Successful Change

Technical

Design



Develop



Deliver

Reason for the Change

Current State



Transition State



Future State

People

Engage



Adopt



Use

Pre-Implementation Challenges



Lack of Governance



Unavailable Backend
Data Integration



Process Confusion



Low Tool Engagement



Reporting Limitations

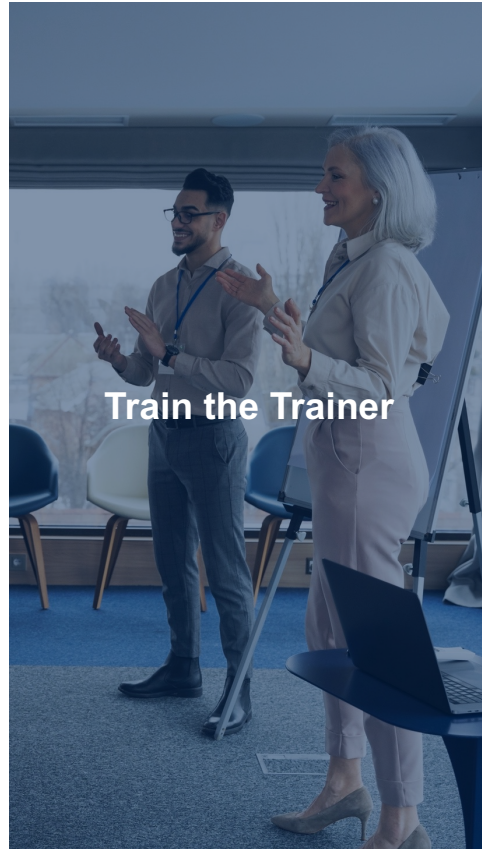


Not Intuitive UI

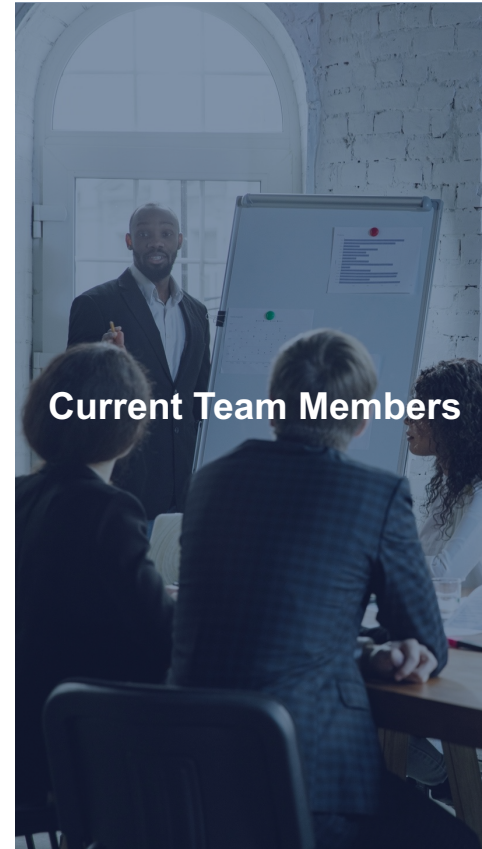
Learning Journeys



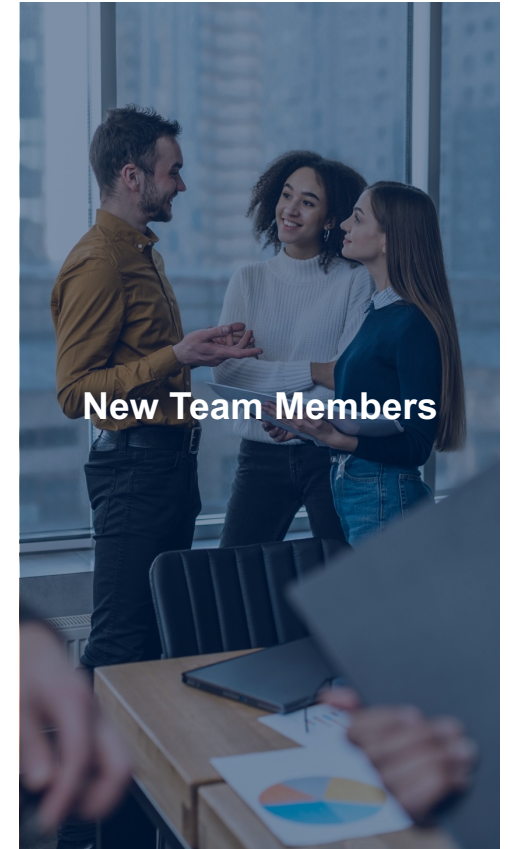
Administrators



Train the Trainer



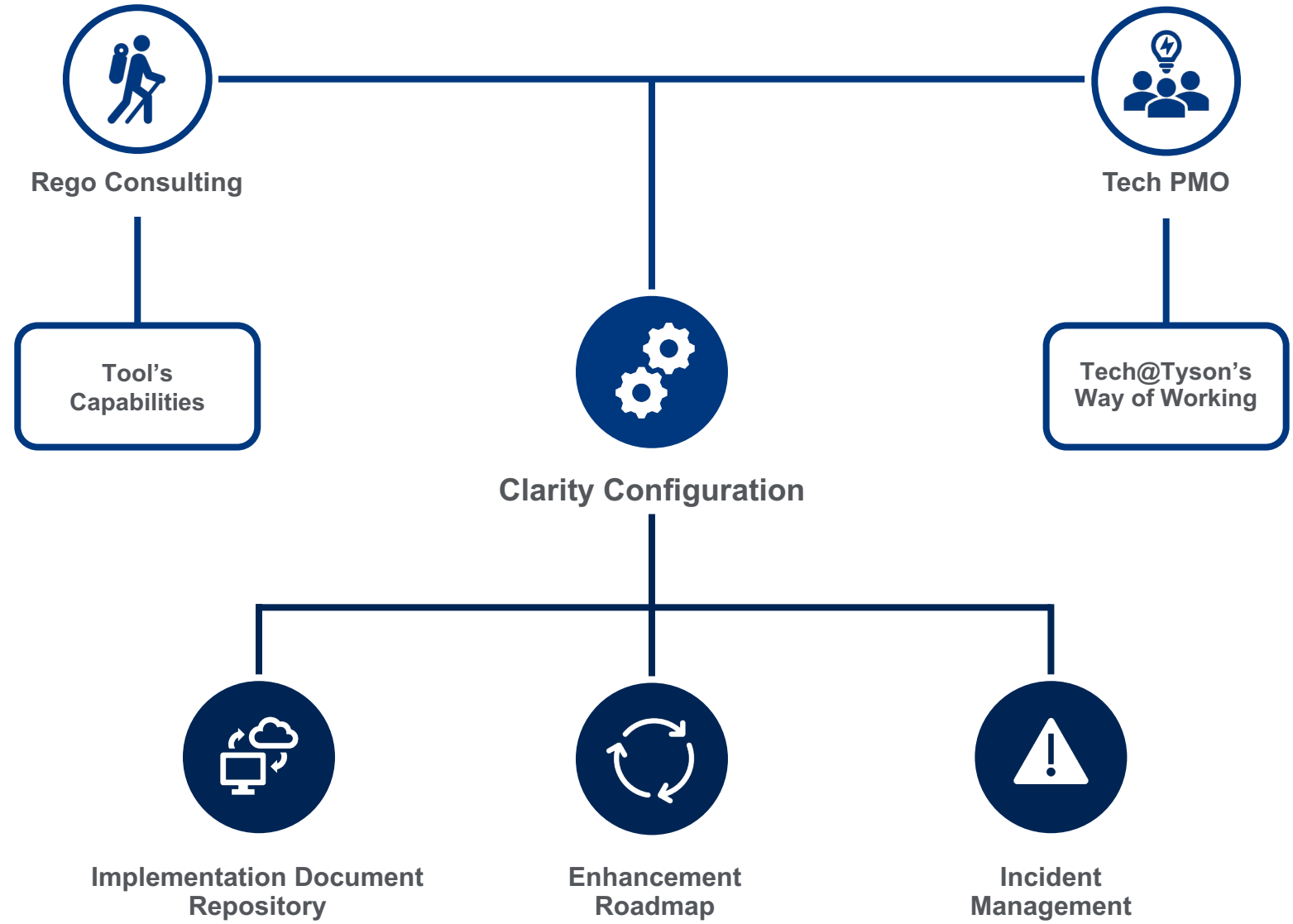
Current Team Members



New Team Members

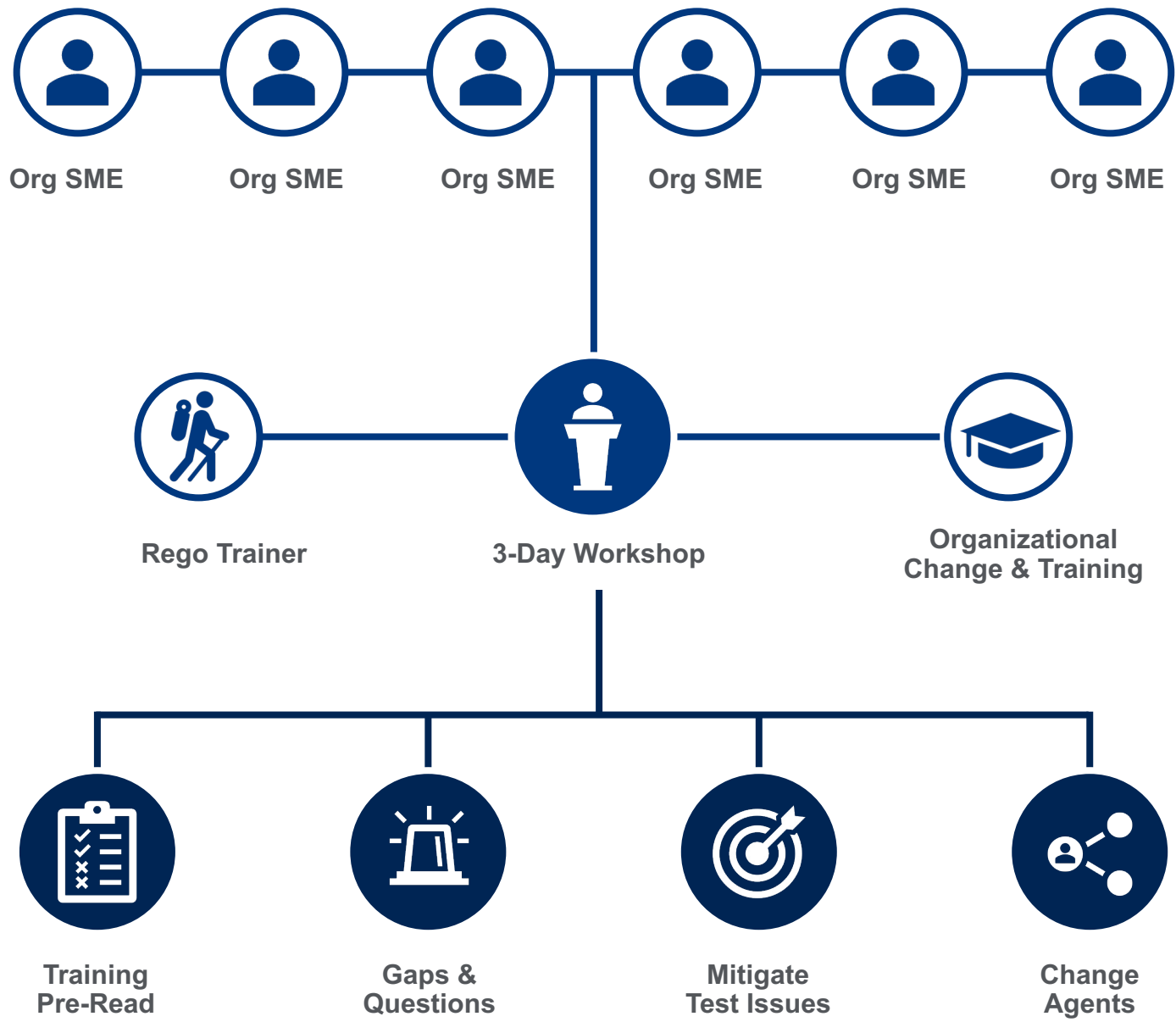


Administrator



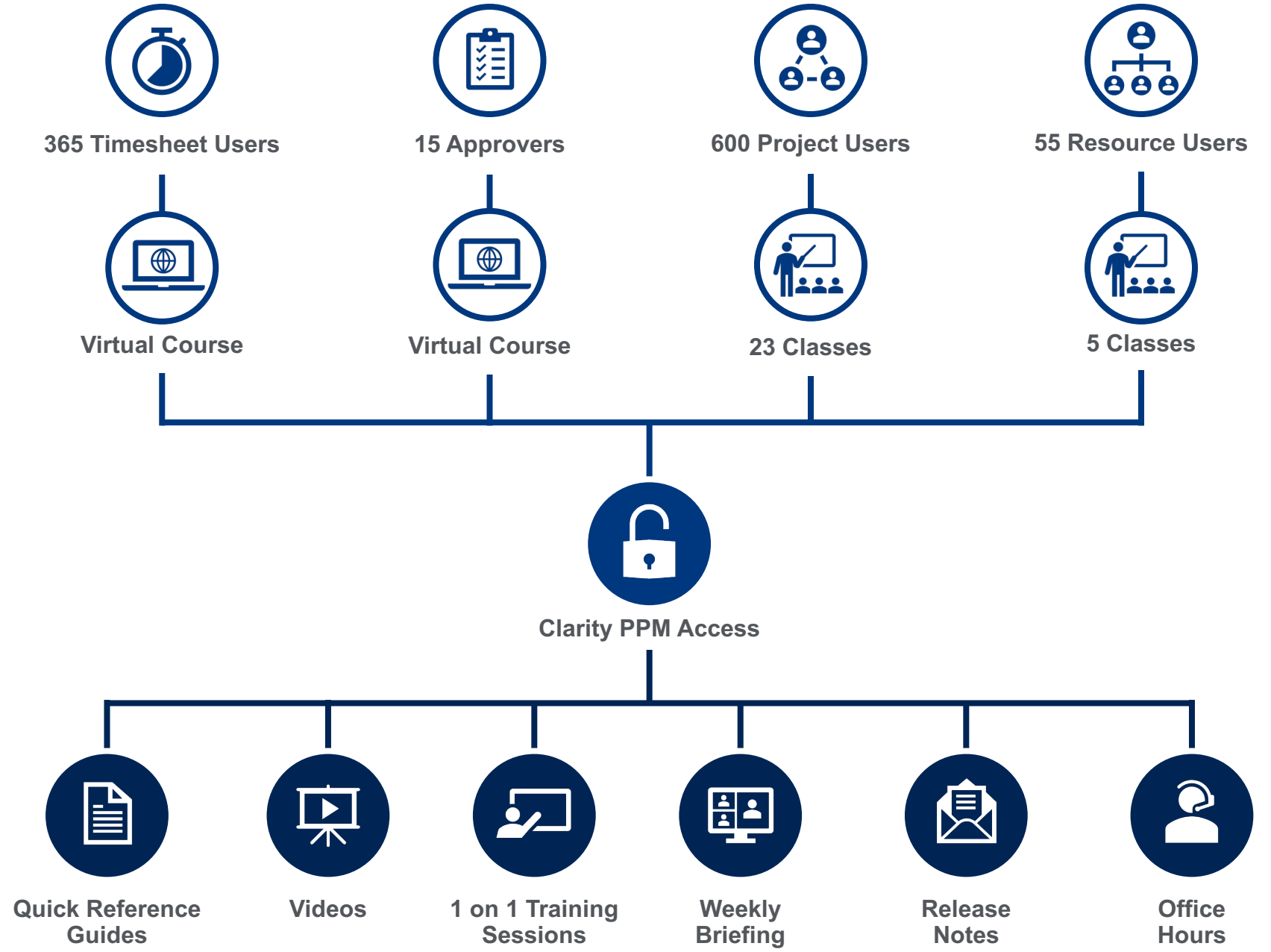


Train the Trainer





Current Team Members

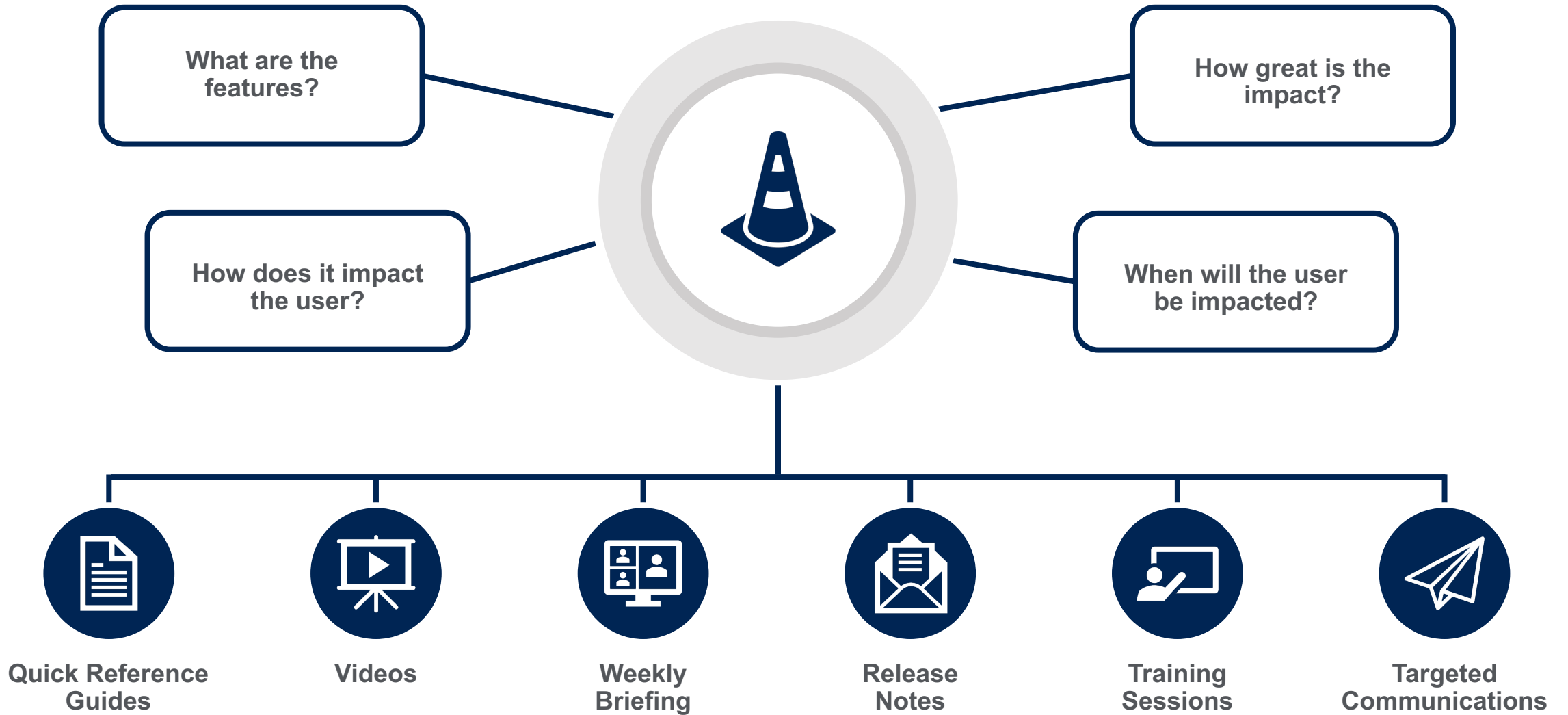




New Team Members



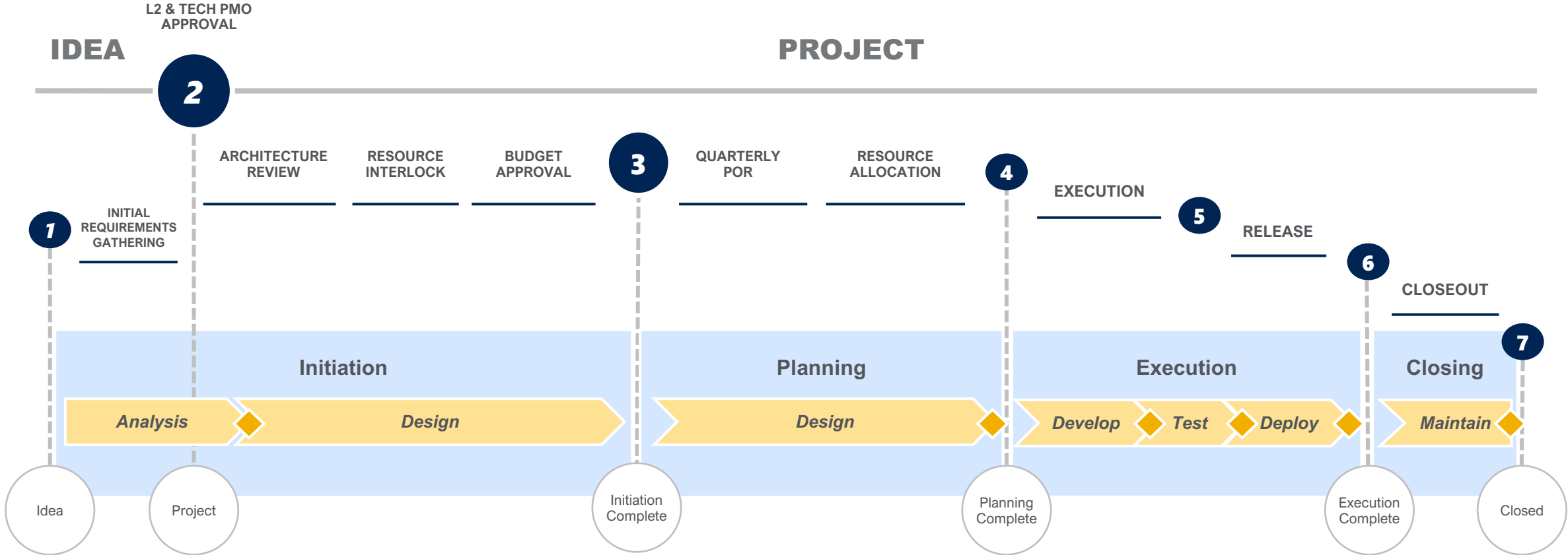
Enhancements



Key Takeaways



Project Lifecycle – Present State

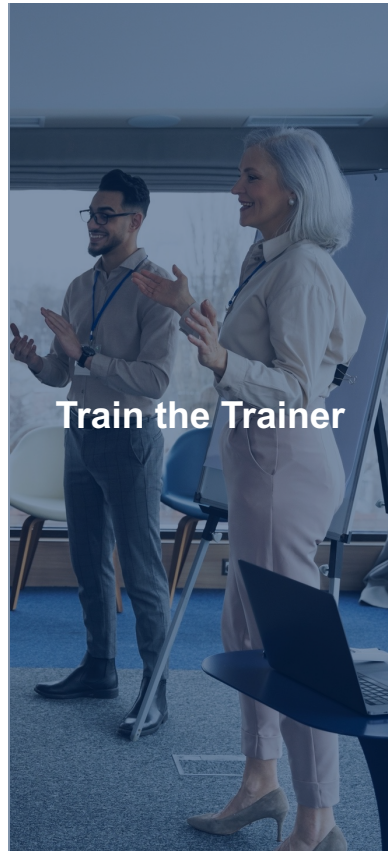


- Project Lifecycle (PLC) or Phases
- Software Development Lifecycle (SDLC)
- Milestone
- 1** Idea
- 2** Idea to Project Conversion
- 3** Initiation Complete
- 4** Planning Complete
- 5** Approved for Release
- 6** Execution Complete
- 7** Closed

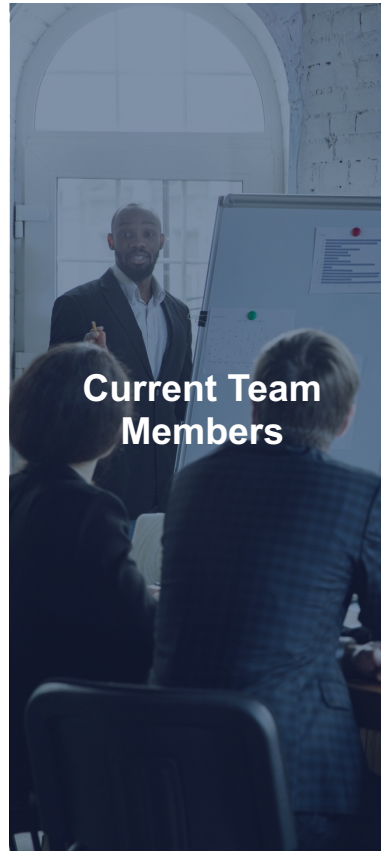
Learning Journeys



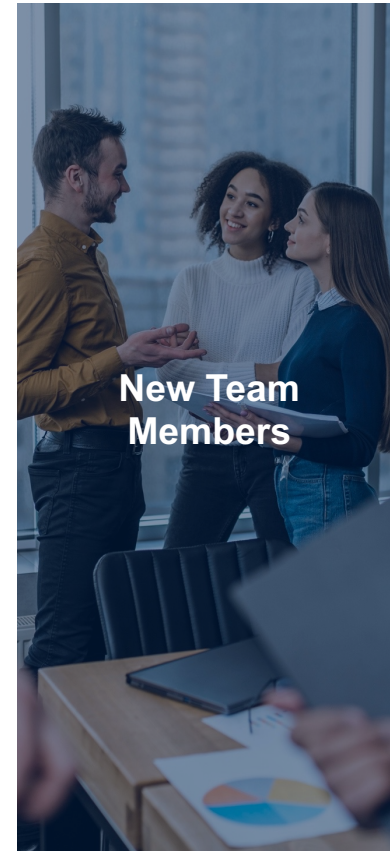
Administrators



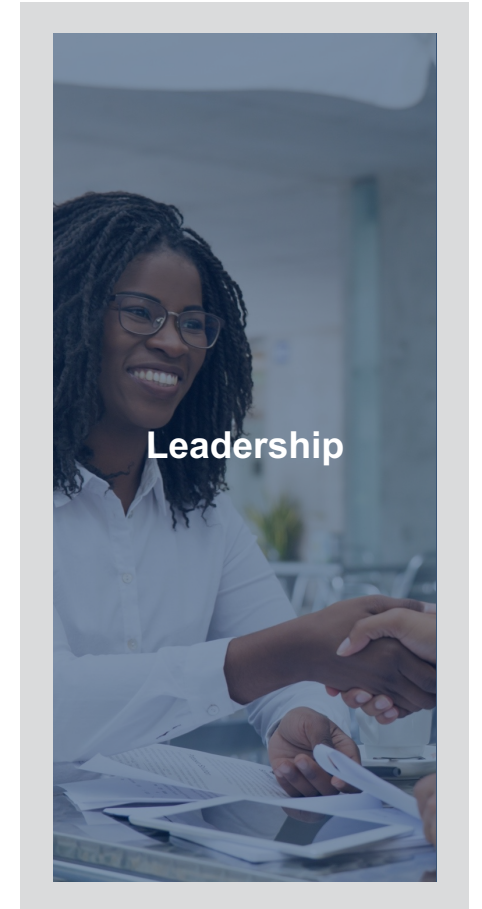
Train the Trainer



Current Team Members

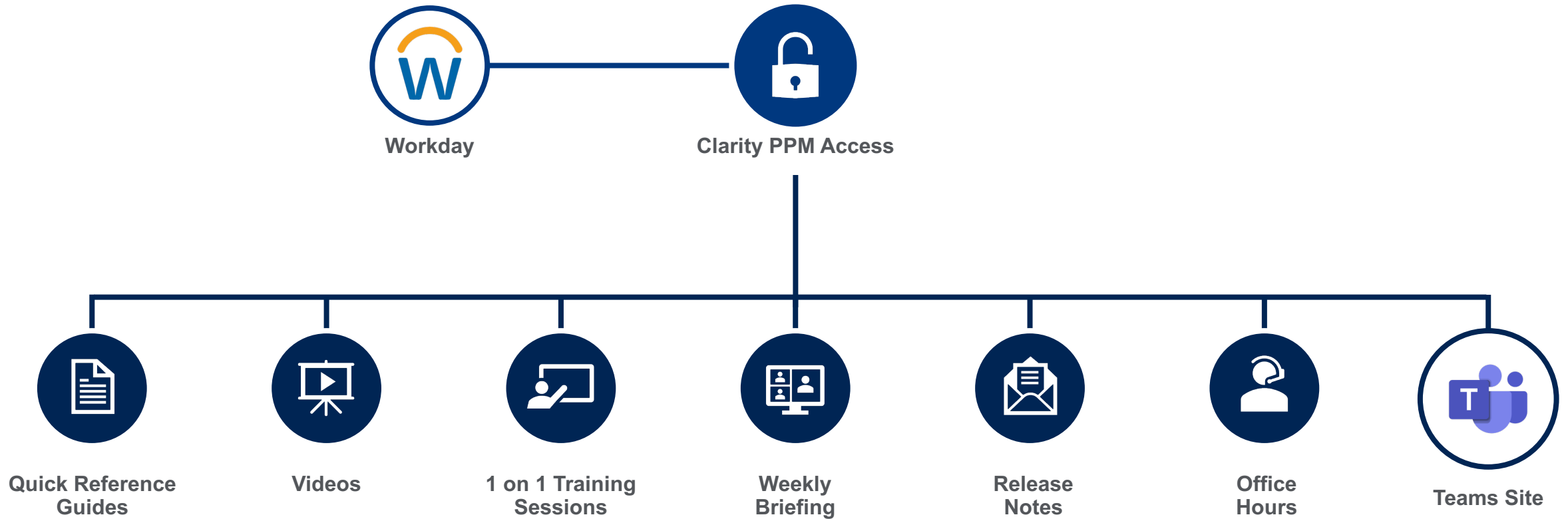


New Team Members




Leadership





Learning Journeys



Clarity PPM Site


C Clarity PPM  Public group | Tyson Confidential ☆ Not following

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+ New  Page details  Analytics Published 9/12/2023  

Announcements & Tips See all

+ Add



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Future State



**Organizational Breakdown
Structure (OBS) Automation**



**Scale to Enterprise
Implementation**



SAP Integration

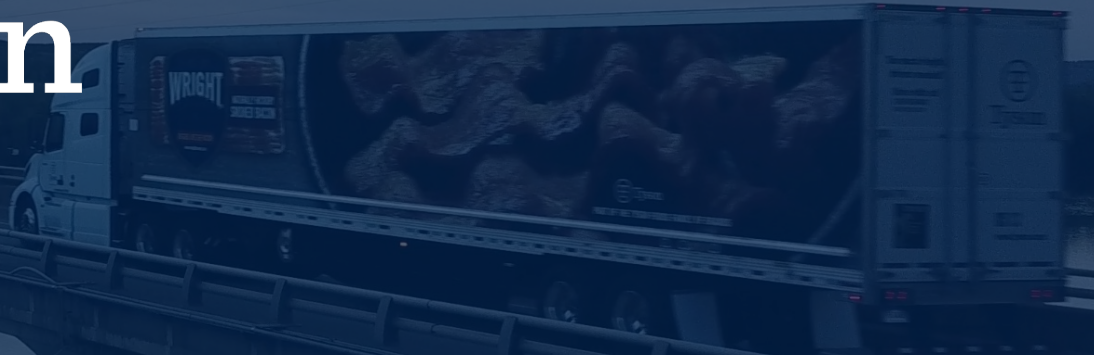


**Agile
Transformation**



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SAN DIEGO • 2023

HCSC | Journey to Product Funding

Your Guide:
Jesus Campos

Sponsored by

ValueOps

Clarity
Rally Software

 **BROADCOM**

Part I: Introduction

Journey to Product Funding

HCSC has used Clarity for 17 years, enterprise relies on Financial Data
generated by Clarity

Agenda

- Introduction
- Financial History – Clarity
- Idea Financials
- Monthly Forecast – End to End Process
- “Product Time Tracking” Jira / CA PPM / Allocation Tool
- What will / may our model look like
- Where are we today? Who is our Partner?
- Questions

Introduction



Health Care Service Corporation, a Mutual Legal Reserve Company (HCSC), is an Independent Licensee of the Blue Cross and Blue Shield Association.

HCSC is the largest customer-owned health insurer in the United States, operating through our Plans in Illinois, Montana, New Mexico, Oklahoma, and Texas.



Jesus Campos

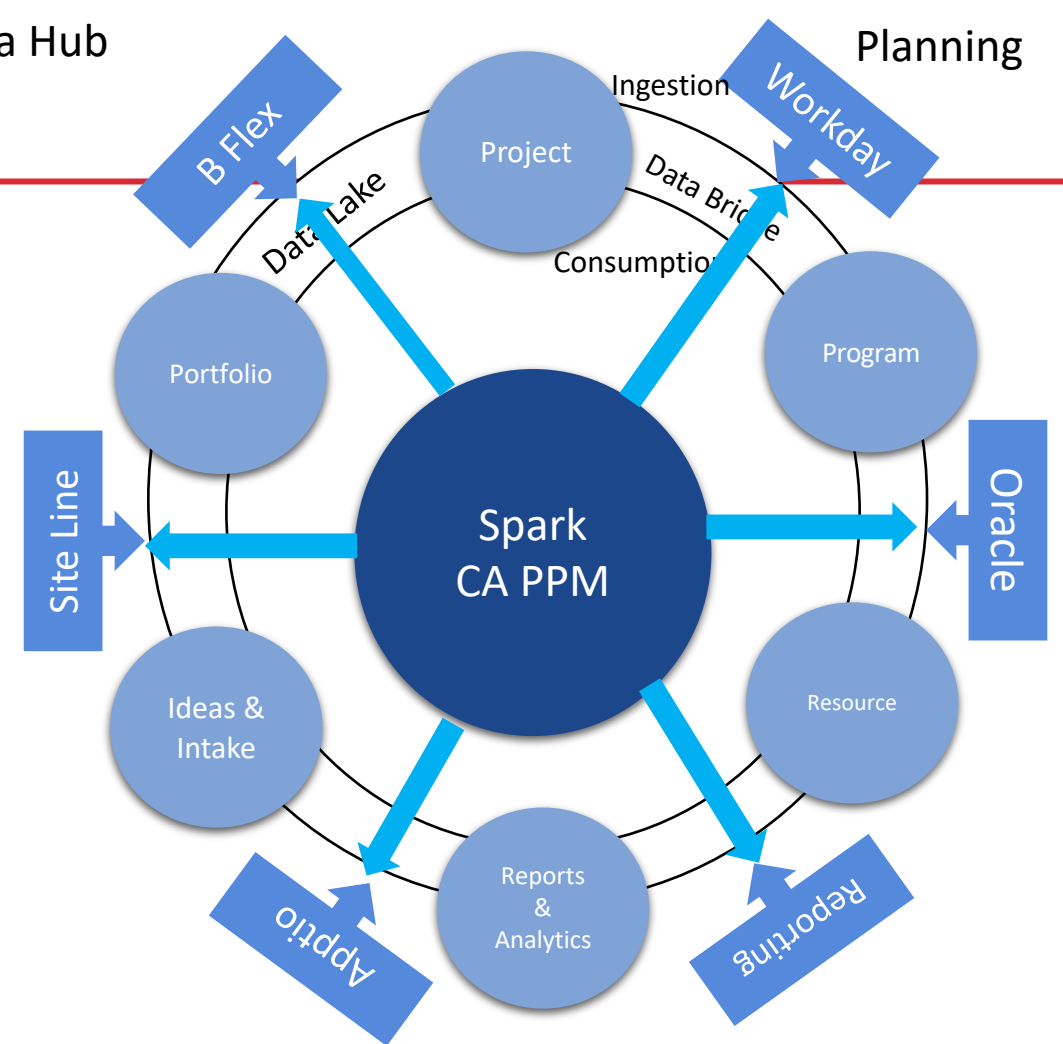
Business Product Owner CA PPM

- CA PPM 17 years
- CA PPM / Spark Top 10 Application HCSC – 3 years running
- Team of 5 to Support 8 – 10 K users
- Drive Business requirements
- Use & Adoption / Training Support
- Processing & Support Customers

Financial History

History Of Financials HCSC

- 2006 – system of record Labor Cost – Oracle
- 2014 – Labor & Non-Labor – Schedule
- 2015 – B Flex Vendor Management (SAP)
- 2016 – Ideation with Financials
- 2019 – CA PPM SaaS
- 2020 – Rego AWS SaaS
- 2022 – Labor Adjustments Oracle
- 2023 – Iterative Funding, Benefit Data in Spark, RoadMap Portfolio Funding – Spark – Ideation in Modern User Experience



CA PPM & HCSC Financials

- Spark is an integral part of the enterprise financial processes at HCSC
 - Month End Close, Labor expense, Capitalization, Investment expenditures
 - Spark supplies B Flex hours worked and approved for payment of external resources

Process Integration

Decision Support

Idea: Financial Tools & Finance Basics

Ideas: T-Shirt Size Funding – High Level narrative proposal

Candidate: Business Case – Refined Estimates (HEM manage estimates)

1. Labor

- Transclass & Role – 20 used for estimation – pre-assigned to a transclass

2. Non-Labor

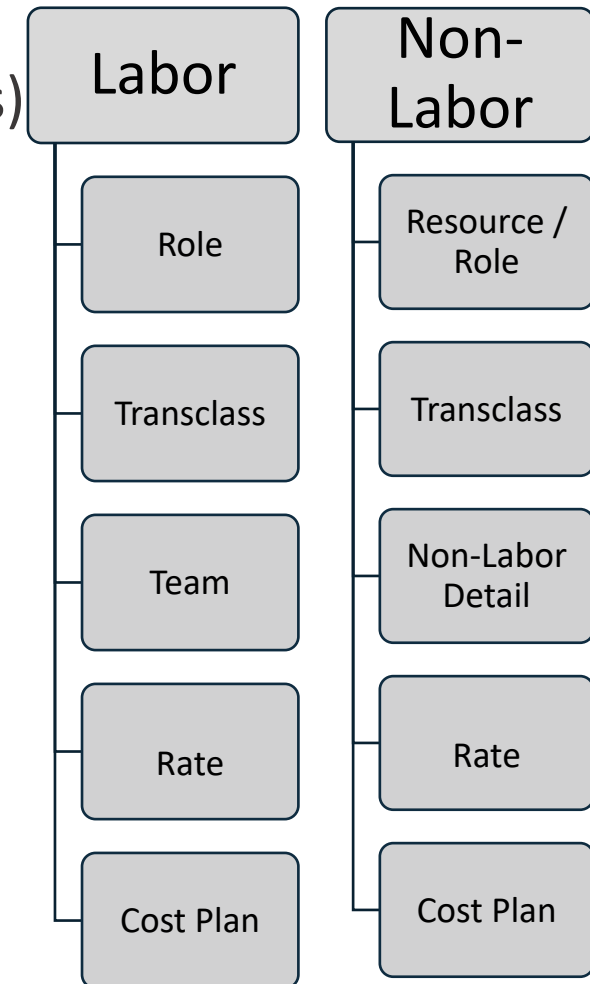
- Non-Labor Detail – Build required Purchase Type – Dates & In Service Date – start expense
- Transclass & Role
- Expense Rate set to \$ 1 – separate rate matrix

3. Excel Data Manager (EDM) – import estimates to Idea – (HEM)

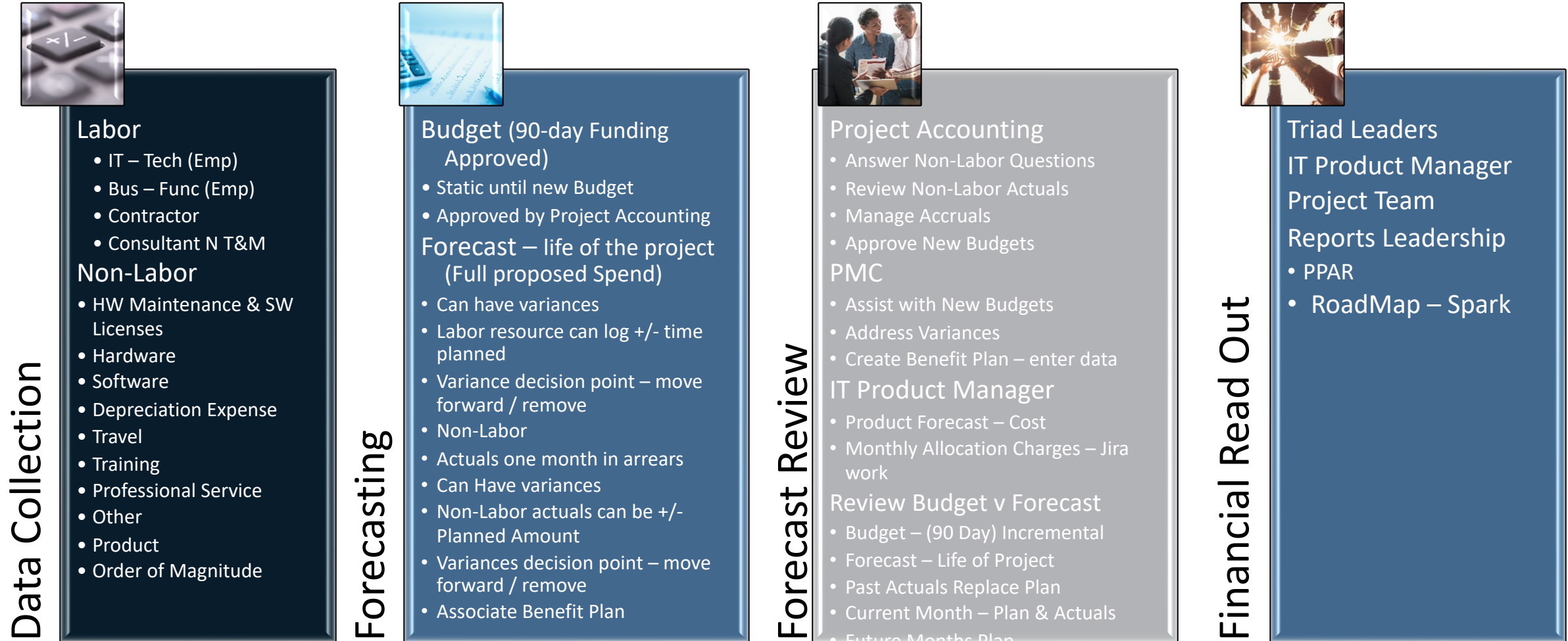
4. Schedule – we do not log time, create Status Reports on Ideas – pass thru to Project

5. Cost Plan Created

- Forecast to Budget that is approved when converted to Project



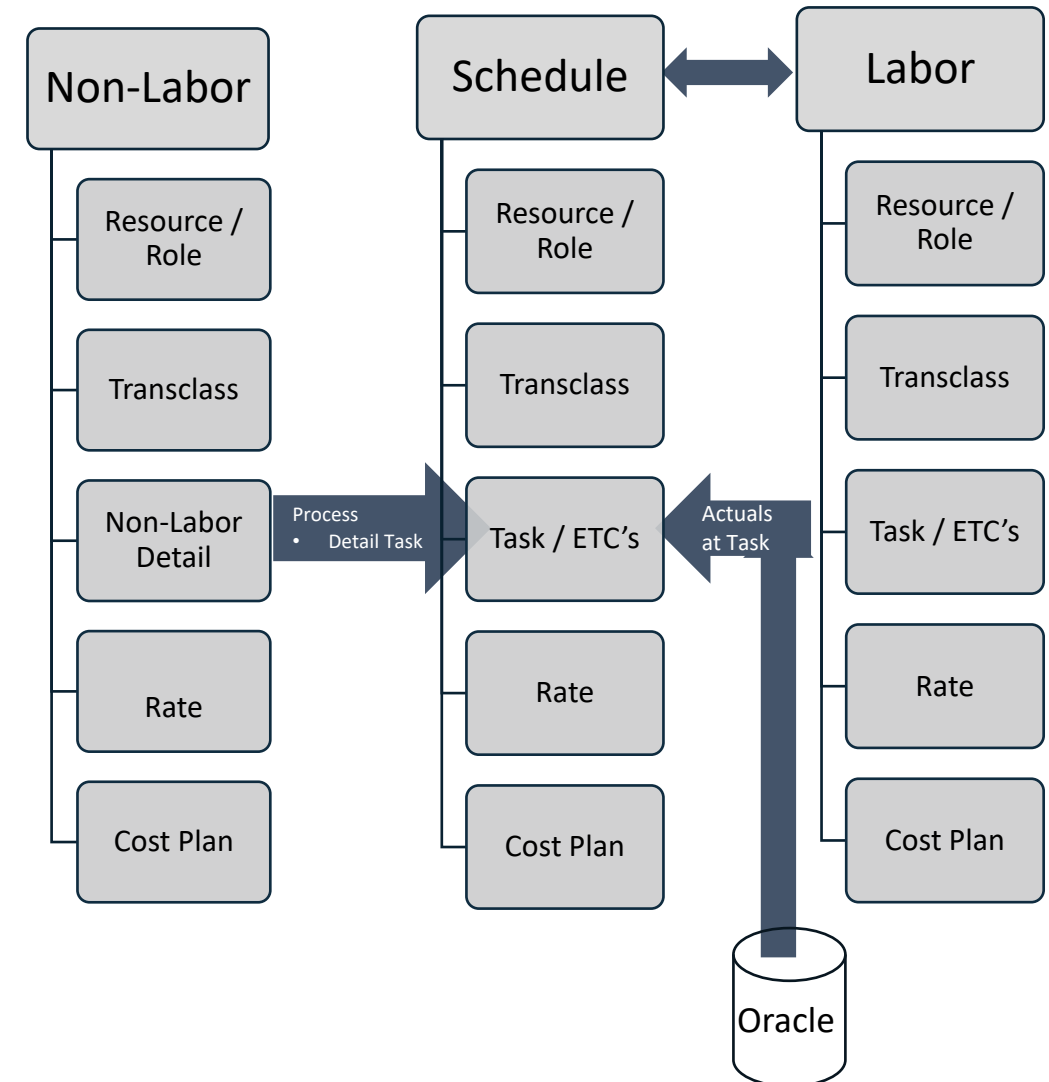
Monthly Forecast End to End Process (The “What”)



Product Funding: Spark & Jira

Time Entry:

1. Spark
 - Log time to Product
2. Jira
 - Detail – stories tied to Projects
 - Log time in Jira - Tempo
3. Allocation Tool
 - Product Manager Reconciles Spark & Jira – what to charge projects
 - Provide % to charge projects by product
4. Cost of Work Done
 - Oracle gets labor calculation for allocation tool
 - Charges are by Project Code and Product code
 - Come as non-labor
5. Forecast – Labor Cost
 - Various Tools
 - Ideation



Move to Product Funding

- Partner with Broadcom – Laureen Knudsen, Mary Lichtenauer, Suzanne Lorch
- Get Sponsors at HCSC Business, Technical, Financial...
- Understand current processes, what CA PPM data drives Financials HCSC
- What is the overall Vision at HCSC for work, and how to pay and prioritize
- Have Measures for success
- Be patient
- Learn from your journey
- Be ready to change, even from your original plan



ROADMAP JOURNEY

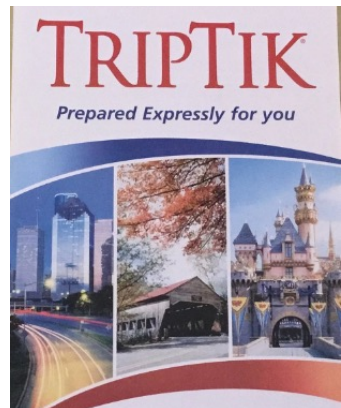
ERIE Insurance

Julie Britten

AGENDA



1. Starting Point
2. Taking the First Step
3. Challenges Faced
4. Organization Change Mgmt.
5. Key Takeaways



STARTING POINT (JULY 2018)



- **Investigation** of new functionality
 - Invest the time to learn how roadmaps work.
 - Attend all the Broadcom Forums and Rego U sessions.
- **Identify and Communicate** the value for ERIE
 - Removes manual updating by syncing with active investments.
 - All views looking at data in the tool of record.
 - Highlights dependencies, milestones and sequencing.
 - Enable better decision making focused on strategic outcomes.
 - Removed discrepancies seen across excel maps or word documents.



TAKING THAT FIRST STEP (MAY 2019)



IDENTIFY CURRENT STATE & SETUP FOR SUCCESS

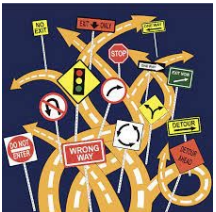


- Excel based files with multiple tabs capturing data already in Clarity.
- Identifying relevant initiatives.
- Identified the need for portfolio specific roadmap teams.
- Identified the need for a single roadmap owner.
- Identified audience.
- Continued learning the new functionality.

FIRST STEPS



- Each area had its own version of a roadmap.
- No connection to the tool of record.
- Cross portfolio initiatives not easily identified.
- Multiple tabs capturing data already in Clarity.
- Large efforts represented by multiple line items.
- Manually updates needed across all worksheets.
- No visibility into dependencies or milestones.



CHALLENGES



- Multiple excel tabs capturing spend, forecast, alignment to strategy and programs.
- Many of the investment names did not align with approved projects in Clarity.
- Data integrity - Clarity being regularly updated vs. verbal updates or assumptions.
- Convincing leadership that the tool will catch up to our needs.
- Identifying proper channels to showcase this functionality.
- Identifying need to stand up roadmap team within Enterprise PPM (EPPM).



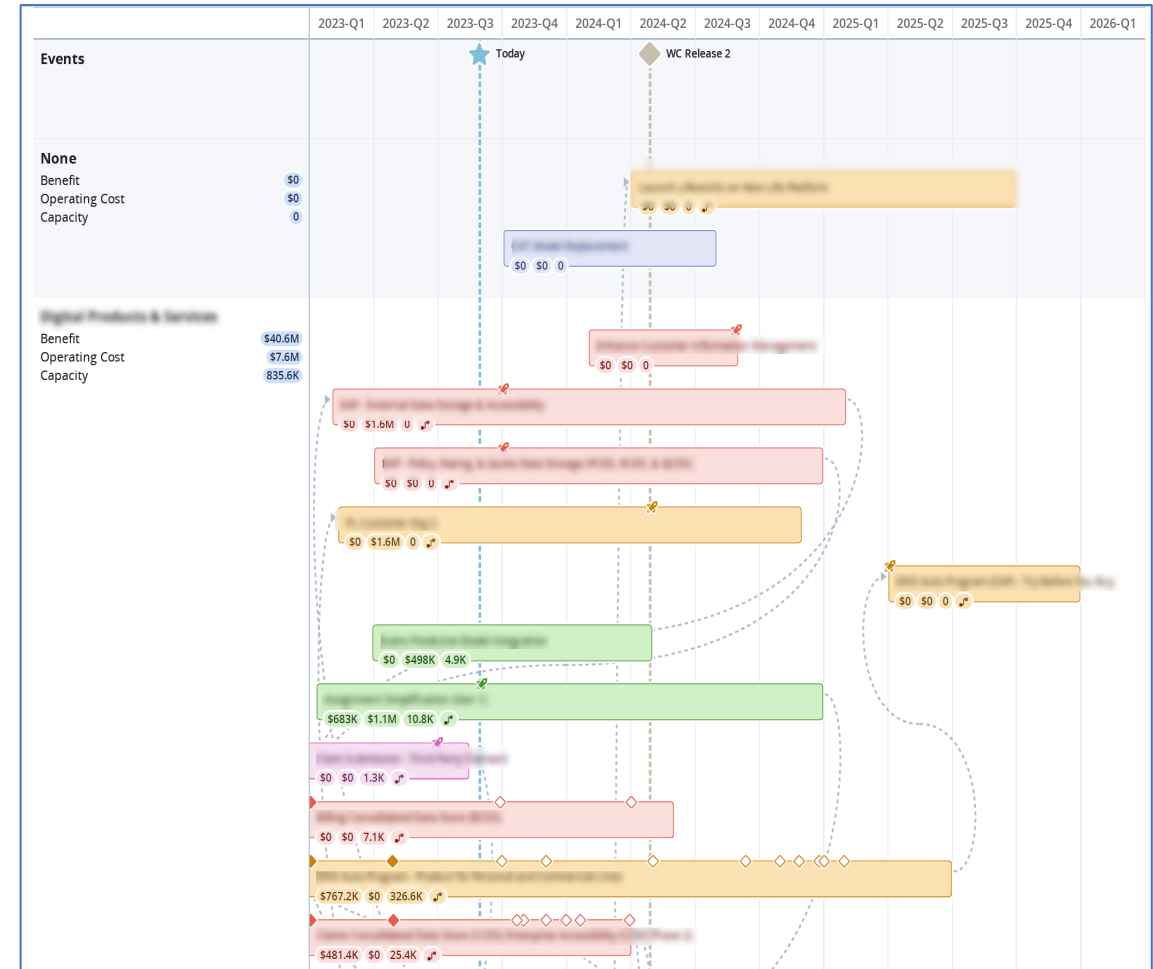
2019 vs 2023



STARTING POINT 2019

2019	2020	2021	2022
New POC strategy	Support WIS to WIS	Support Degree Program	Support WIS
Auto POC	WIS & U Auto POC - ready for consumption	New World for WIS POC	Prep for WIS (2021 to 2022) (2A, 2B, 2C, 2D & 2E)
	New World for Prep for WIS	New curriculum system upgrade	
New Billing Strategy (2019)	Remaining lines WIS, including WIS, (2020) (2A)	Add Product Staff for Product Staff	Business Staff for New State Geographic Expansion (2A off activities) (2A)
Auto Inflation	New Customer Registration (2020)	Auto WIS	Internal Data WIS WIS Strategy (2A)
System Enhancement	Auto WIS	WIS Implementation	WIS Expansion (2A WIS Budget Policy) (2020)
WIS/Scale Build	Customer Information Management (2020) (2A)	Light Capability Engagement (2A, 2B & 2C)	Long Term Scale Build
On Site	Site Personal Underwrite Endorsements (2A, 2B)	Refactoring Degree Work/Account Endorsing (2A, 2B)	Change WIS
Research and Dev	Real Endorsements	Product Build	Research
WIS/Scale Build	WIS WIS, including WIS & WIS	Product Program	
New State Decision Made	WIS WIS (2020 and 2021)	WIS Auto WIS (2020)	
New Customer Strategy	WIS/Scale Build	WIS WIS	
	WIS/Scale Build	WIS WIS	
	WIS/Scale Build	WIS WIS	
	WIS/Scale Build	WIS WIS	
2023	2024	2025+	Key
WIS/Scale Build	Geographic Expansion (2A)	WIS/Scale Build (2A)	WIS/Scale Build - Personal Lines
Internal Data WIS WIS Strategy (2A)	New Product Using Employee Staff		WIS/Scale Build - Auto
Light New State Research (2A)	Change WIS (2A)		WIS/Scale Build - Commercial Lines
Auto Prep for WIS (2A)	WIS WIS (2A)		Change WIS - WIS Portfolio
WIS/Scale Build	WIS/Scale Build - Gathering Interface		WIS/Scale Build - Enterprise Dependency Change
WIS/Scale Build			* Represents projects that should be included in Enterprise roadmap view
WIS/Scale Build			Identifies impacts by self position

CURRENT VIEW 2023



DIFFERENT ROADMAPS



- Enterprise Roadmap
 - Grow the Business initiatives funded by the Enterprise Portfolio.
 - Shared with Enterprise leadership team and Executive leaders.
 - Utilized to review, understand, approve new demand and change request impacts.
 - Maintained by Master PM in EPPM Office.
- Portfolio Level Roadmaps (15 active)
 - Any / All portfolio specific initiatives.
 - Shared with project sponsors, teams, project managers, and managers.
 - Utilized to review current work and new demand that is impacting specific areas.
 - Maintained by Portfolio (recommend max of 2 resources with edit rights).



DIFFERENT ROADMAPS



- Program / Initiative Roadmaps (2 active)
 - Focused on a specific set of investments / initiatives.
 - Shared with program sponsors, impacted program managers.
 - Utilized to review, understand cross portfolio impacts.
 - Maintenance varies between EPPM and owner.
- Product Roadmap (1 active)
 - Focused on all things Clarity.
 - Shared with product manager and product team.
 - Utilized to review, prioritize and understand all the work being done in the product and impacted areas.
 - Maintained by Product Owner.



ORG. CHANGE MANAGEMENT



- Focus on the What's In It For Me (WIIFM) for each individual area.
- Executive leadership support.
- Piloted with one portfolio roadmap = change champions.
- EPPM Roadmap Team conducts roadshows across organization.
- EPPM Roadmap Team holds monthly cadence meetings with portfolio leadership.
- Office hours specifically around roadmap functionality.



KEY TAKEAWAYS



- Start with purpose and intended outcome
- Start with a single pilot roadmap
- Demo as often as possible
- Change champions - identify those pilot areas
- Keep leadership informed of new functionality
- Don't limit to just active investments
- Encourage limited edit rights per roadmap



Questions?



Surveys

Please take a few moments to fill out the class survey.
Your feedback is extremely important for future events.



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Let us know how we can improve!
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