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PPM Configuration to Support KeyBank's Funding Lifecycle for Programs and Projects
January 26, 2021



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Project & Portfolio Management (PPM) Special Interest Group (SIG)



Benny Kung
SIG Leader PPM
Business Development Manager
PPMetrics

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Today's Presenters



Tasha Holland
PMO Consultant
KeyBank

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House Keeping

- This “LIVE” session is being recorded
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- Session Q&A:
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Questions



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Vivit Forum

PPM Configuration to Support Funding Lifecycle for Programs and Projects

January 26, 2021

Introductions



*Tasha Holland
Technology &
Operations PMO
Manager, KeyBank*

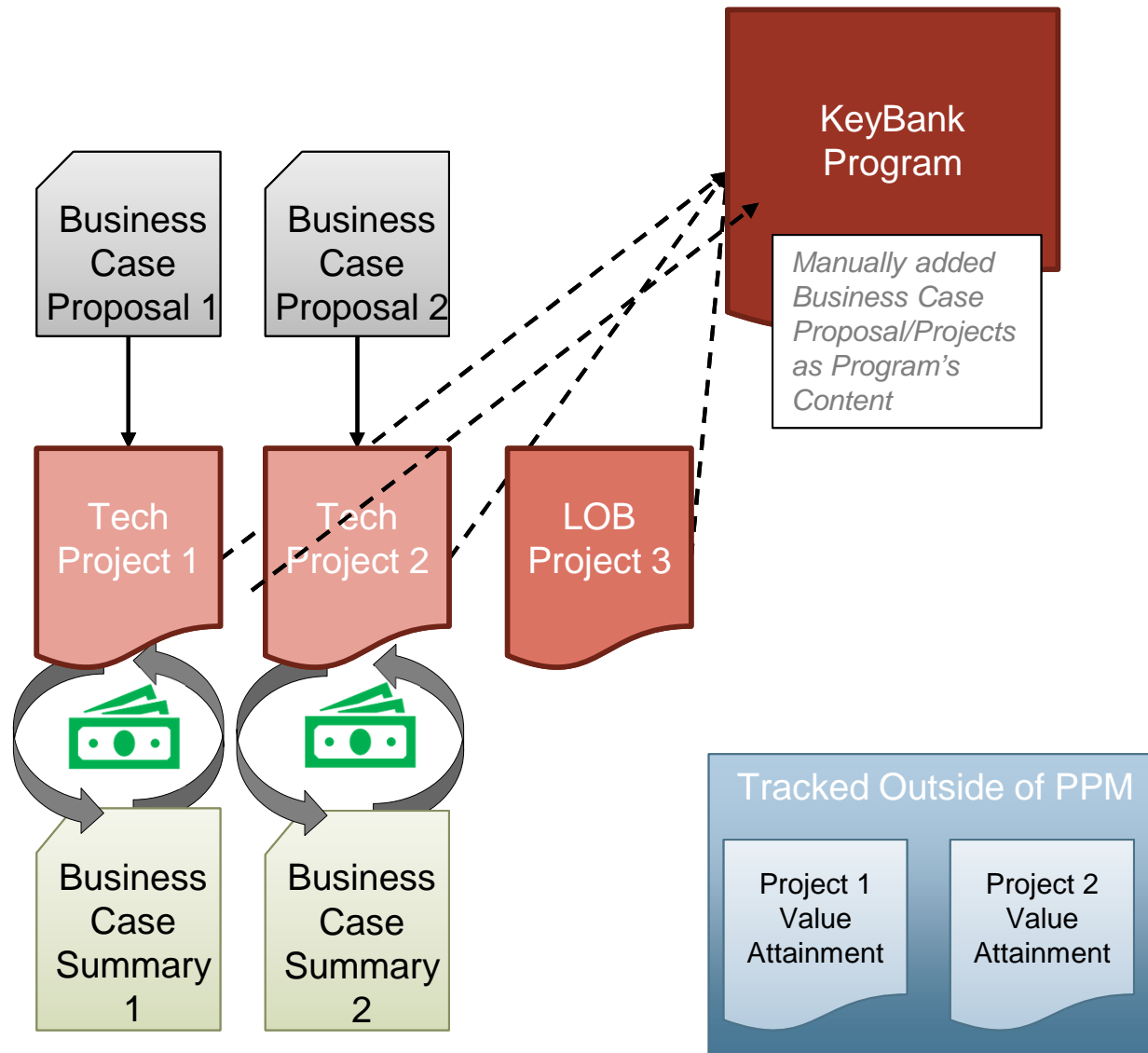
Over a decade of experience using, implementing, designing, developing and supporting various Project & Portfolio Management applications for technology organizations within large financial institutions. Worked at KeyBank supporting Micro Focus' PPM Tool since 2016.

KeyBank leverages Project Management, Program Management, Time Management, Resource Management and Financial Management functionality of Micro Focus' PPM (version 9.55) and supports a 3000+ user community with a project portfolio of \$140+ million.



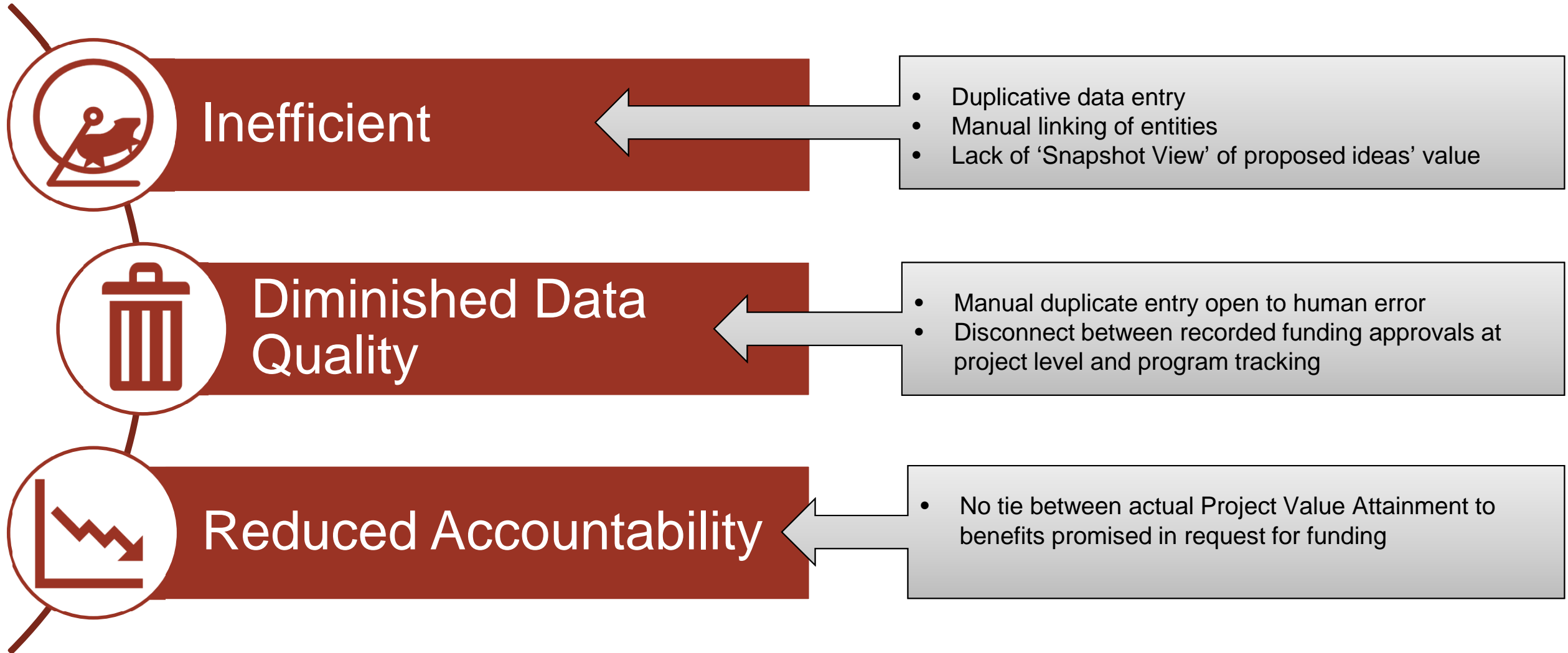
- Prior State
- Challenges with Previous Configuration
- Changes Implemented
- Current state
- Benefits of Revamped Configuration
- Demo
- Questions

Prior Program & Project Funding and Value Attainment Life Cycle



- Program created in PPM
- Projects and/or Proposals associated with a Program in PPM after creation
- Business Case Proposal (BCP) submitted for approval to fund each individual Project as applicable
- Business Case Summary created for each Project for any additional Project level funding requests
- Funding requests and approvals tracked from bottom up only (Project to Program)
- Benefits listed in BCP however Value Attainment tracked outside of PPM

Challenges with Previous Configuration

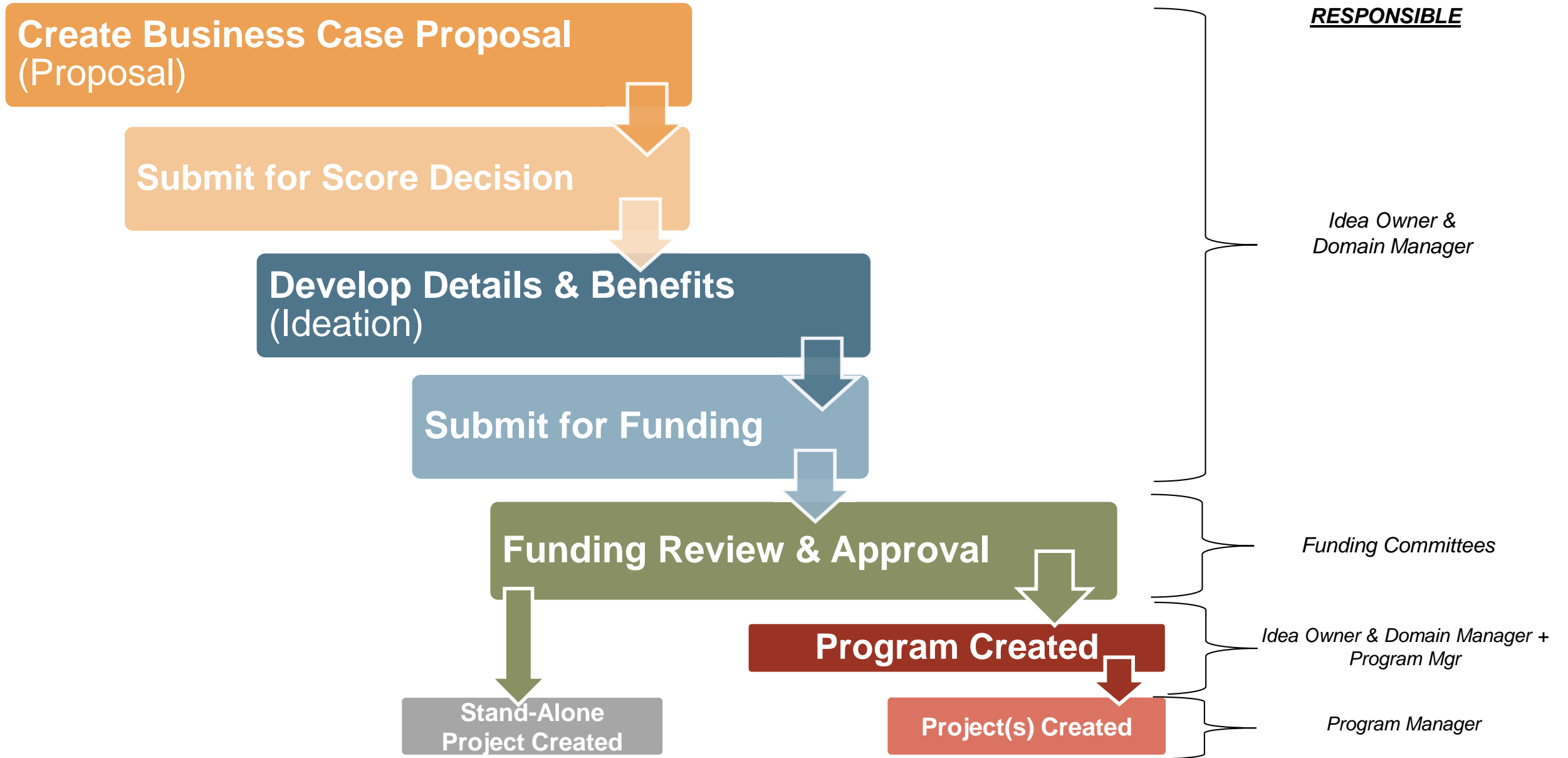


High Level Summary of Changes Implemented

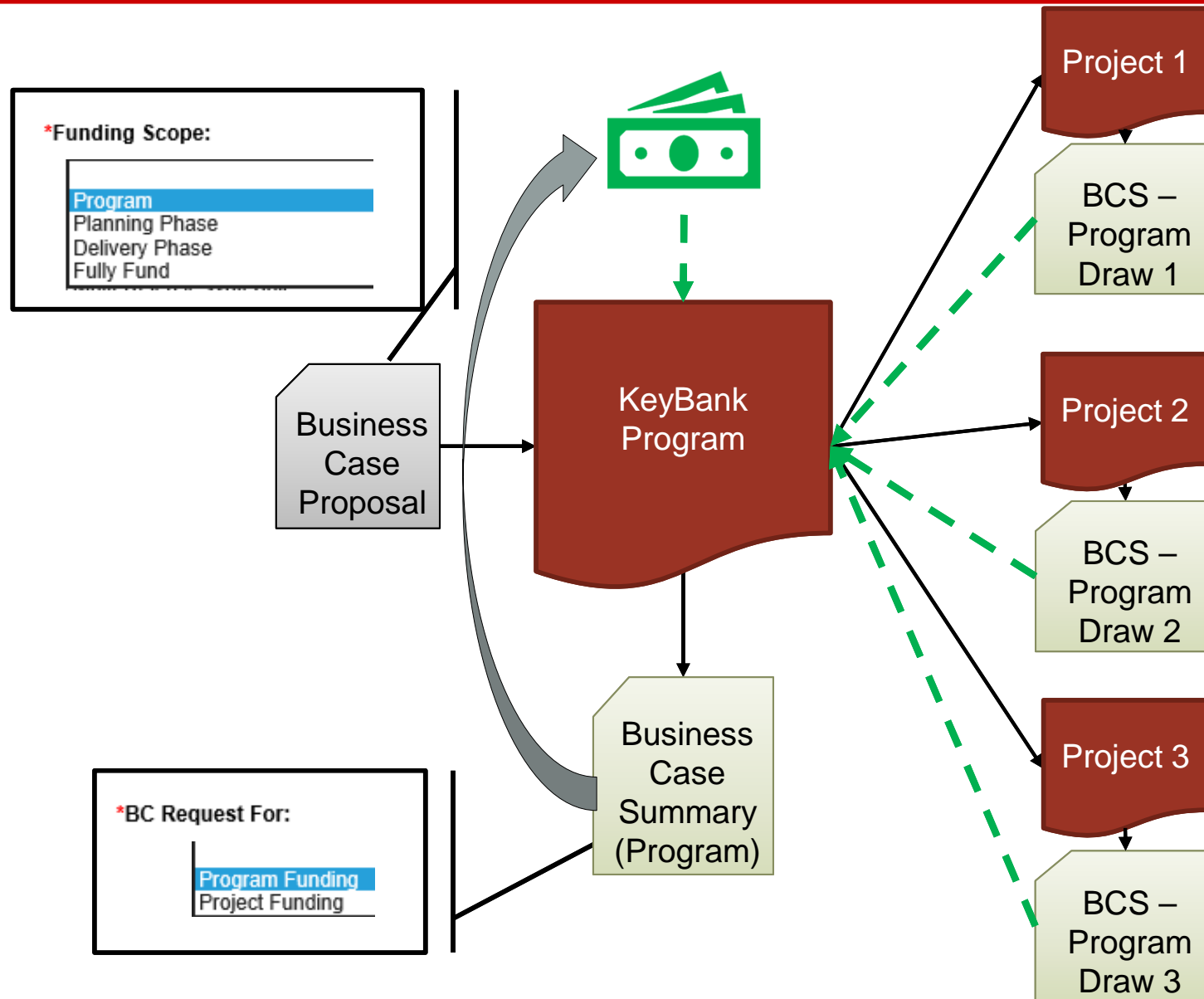


- Created a new request type “Business Case Proposal” (BCP) to **support funding** request level of **either a Program or a Project**
- **Creation of a One Page Summary** to provide a simple view for Senior Management and Finance to review for committee approvals
- Once the BCP is submitted and fully approved, the new funded **Program or Project** record is **automatically created**
 - All the data elements, including the Financial Summary Forecasts and Benefits and Expected Business Outcomes are auto-populated on the new record (i.e., matching the Business Case Proposal) and baselined
- For Program records, the Program Manager can **spawn Projects from the Program at the click of a button**
 - A few Project-specific data fields must be entered/validated to complete the creation
 - The majority of data elements are auto-populated on the new Project (i.e., matching the Program)
 - Still allow Program functionality for “Oversight/Content Driven” records
- **Created request type Business Case Summary (BCS)** to support **funding requests** for:
 - **Project Funding** (normal process for singular projects requesting additional funding)
 - **Program Funding** (new process to support additional funding requests for Programs)
- Created Value Attainment request types to **connect ‘Expected Business Outcomes’** from Business Case Proposals to **Measurable Event Outcomes on Projects**

Revamped Business Case Proposal to Program to Project Flow



Revamped Program to Project Funding Process



- Business Case Proposal submitted to create and fund Program
- Program funded and created in PPM
- Projects created and funded from Program by Program Manager
- Business Case Summary created to request additional funding for Program

Business Case 'One-Pager'



Print

January 2021 PAB - Technology Investment Portfolio

Confidence: 60-90%

January 2021 - December 2024

Modernization / Scope: Program / Proposal

Vivit Demo 20210126 (#311359)

Executive Sponsor
Keith Krueger

Project Sponsor
Tasha M Holland

Finance Director
Keith Krueger

CFO
Keith Krueger

CIO
Keith Krueger

Domain Manager
Keith Krueger

Enterprise Digital
Consumer

Business Case Objectives			Tech Labor Cost		Direct Project Benefits (<i>rounded \$ in millions</i>)								
Business Case Objectives Business Case Objectives Business Case Objectives Business Case Objectives Business Case Objectives Business Case Objectives Business Case Objectives Business Case Objectives Business Case Objectives Business Case Objectives Business Case Objectives			Total Projected Labor (ACT + FC)	\$4,916,667	In Plan?	Yes	2021	2022	2023	2024	2025	5 Yr Total	Grand Total
Strategic Pillar: Digitization			Approved Budget to date		Revenue		0.000	0.500	0.500	1.000	2.000	4.000	4.000
BID Status: Not Applicable			FY Approved Budget		Cost Reduction Technology			0.100	0.100	0.100	0.100	0.400	0.400
Delivery Approach: Multi-Release Waterfall			FY Proceed as Planned (PaP)	\$1,000,000	Cost Reduction Business								
Build vs Run Percent: N/A			Impact to PaP	\$1,000,000	Total Benefits		0.000	0.600	0.600	1.100	2.100	4.400	4.400
			Today's Ask	\$1,000,000	Critical Assumptions	Critical Assumptions Critical Assumptions Critical Assumptions Critical Assumptions Critical Assumptions Critical As							
			NPV	-\$1,781,133									
			Product vs Project	N/A									

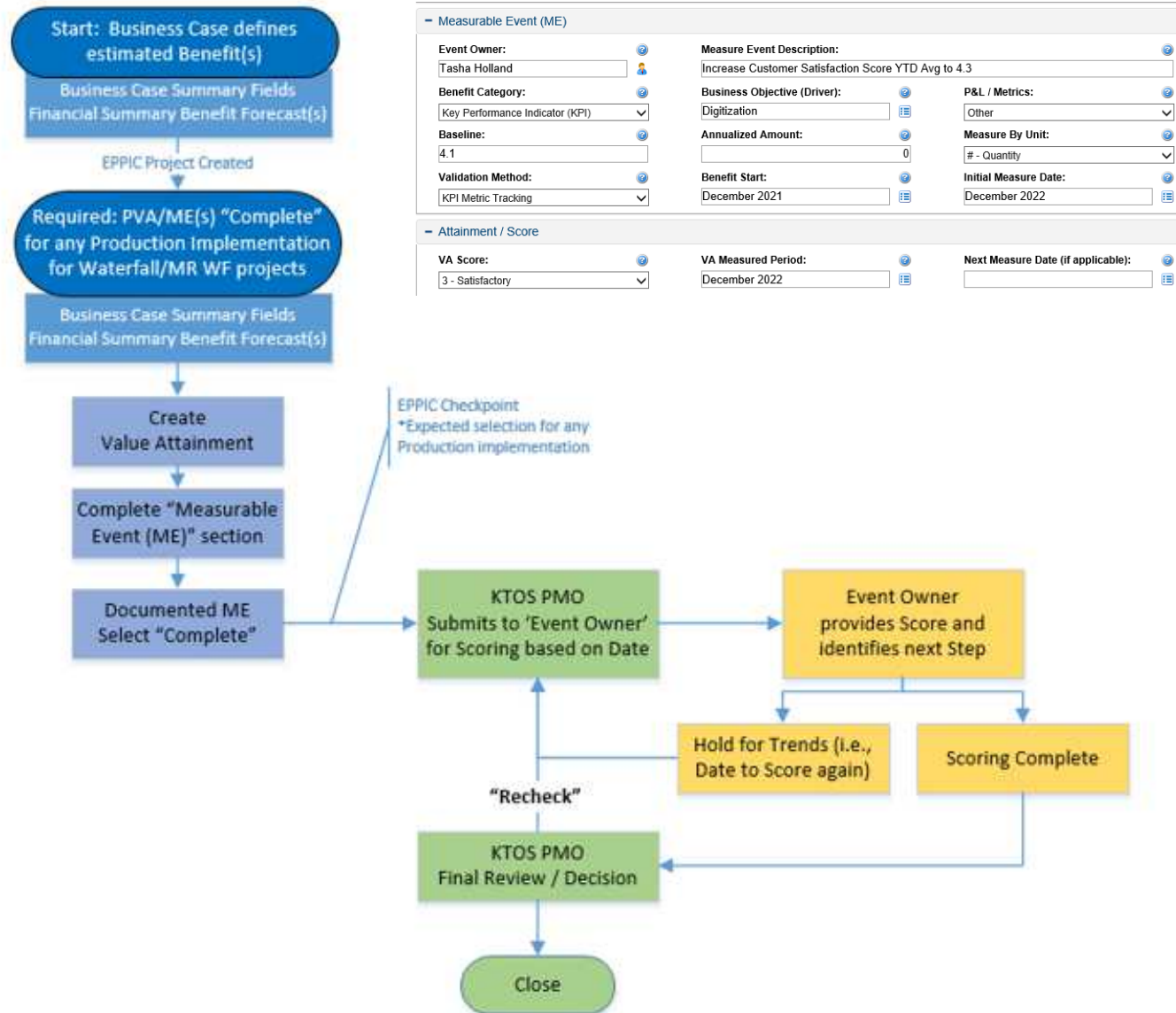
Reason for Today's Ask: Initial Funding Request

Business Outcome	KPI / Measurement	Direct Benefit \$	Baseline / Starting Point	Target	Target Date
Infrastructure Savings	KPI	\$400,000	1000000	600000	12/21/2023
Revenue	New Deposits	\$4,000,000	0	4000000	12/31/2025

Idea Description: Idea Description Idea Description Idea Description Idea Description Idea Description Idea Description Idea Description Idea Description Idea Description Idea Description
Constraints and/or Dependencies: Constraints and/or Dependencies Constraints and/or Dependencies Constraints and/or Dependencies Constraints and/or Dependencies
Risks (Known or Potential): Risks (Known or Potential) Risks (Known or Potential) Risks (Known or Potential) Risks (Known or Potential) Risks (Known or Potential)

Capitalized	Investment Recap (<i>rounded \$ in millions</i>)							
One Time	2021	2022	2023	2024	2025	5 Yr Total	Grand Total	
Technology Labor	1.000	1.000	1.000	1.000	1.000	5.000	5.000	
Technology Non-Labor	0.200					0.200	0.200	
Business	0.100					0.100	0.100	
Total One Time	1.300	1.000	1.000	1.000	1.000	5.300	5.300	
Ongoing								
Technology		0.100	0.100	0.100	0.100	0.400	0.500	
Business		0.050	0.100	0.200	0.200	0.550	0.550	
Total Ongoing		0.150	0.200	0.300	0.300	0.950	1.050	
Total Costs	1.300	1.150	1.200	1.300	1.300	6.250	6.350	

Current State Value Attainment Process



- Measurable Event (ME)

Event Owner:	Measure Event Description:	
Tasha Holland	Increase Customer Satisfaction Score YTD Avg to 4.3	
Benefit Category:	Business Objective (Driver):	P&L / Metrics:
Key Performance Indicator (KPI)	Digitization	Other
Baseline:	Annualized Amount:	Measure By Unit:
4.1	0	# - Quantity
Validation Method:	Benefit Start:	Initial Measure Date:
KPI Metric Tracking	December 2021	December 2022

- Attainment / Score

VA Score:	VA Measured Period:	Next Measure Date (if applicable):
3 - Satisfactory	December 2022	

- Total Benefits Forecast on Financial Summary must remain 'in balance' with Expected Business Outcomes Measured for Value Attainment
- A combination of Hard \$ and Soft Benefits is expected and accommodated
- Value Attainment for Agile Projects is Measured/Reported Monthly
- Value Attainment for Waterfall / Multi-Release Waterfall is Measured as indicated per the requirements of the project and reported on Quarterly

- Expected Business Outcomes: (Total 1 Entry)

NOTE1: Total of the "Direct Benefit \$" column must equal the "Total Forecasted Benefits" from Financial Summary (displayed immediately above for reference)
NOTE2: Columns "PVA Result" and "Current PVA Health" entry is only required when completing PVA Tracking Request(s)

Seq	*Business Outcome	*KPI / Measurement	*Direct Benefit \$	*Baseline	*Target	*Target Date
1	Increase Customer Satisfaction Score YTD Avg	Customer Survey Score	0	4.1	4.3	December 31, 2022
Total			0			

Key Benefits of New Program Funding Process



- Minimizes duplication of data entry for common fields in Business Case Proposals, Program, Project(s), Value Attainment and Business Case Summaries
- Reduce data quality issues and PPM linked record disconnects as data spawned is auto-populated
- Supports a flexible funding model for Programs (e.g., Agile Capability supported by identified future KPIs)
- Creates a centralized record and approval workflow for Program funding and funding change
- Child Project creation and funding at the discretion of Program Manager
- Provides ability to track Value Attainment realized from funded projects and compare results to initially promised performance/outcomes for increased accountability



Questions & Answers

Please type your questions in the questions pane.

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Agile 20

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AGILE

FUTUREPERSPECTIVE

Expert Panel Discussion
with live Q&A with sli.do



Brian Marick



Ray Arell



Jurgen Appelo



Geoff Watts



Giles Lindsay

TWENTY

INSPIRATIONAL TALKS

15min TED style
with live Q&A with sli.do



Mark Lines



Jurgen Appelo



Geoff Watts



Brian Marick



Jonathon Wright

REFLECT

CLOSING KEYNOTE

Laura M Powers

COO of the Business Agility Institute

"Agile: What? So What? Now What?"



Laura M Powers



BUSINESS AGILITY
INSTITUTE



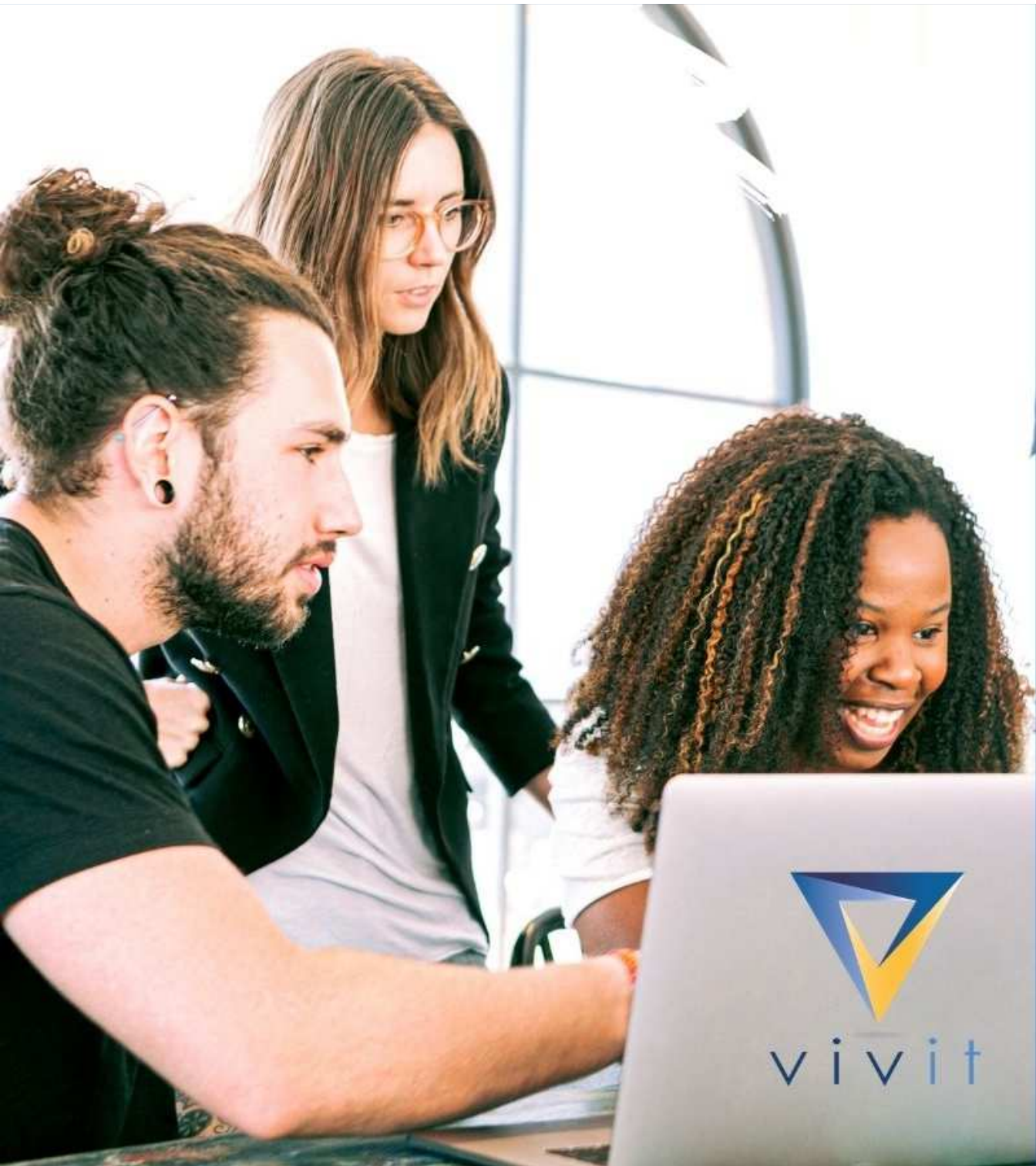
Ashleigh Dueker



Paul Gerrard

February 12 @ 5:00 pm - 8:00 pm GMT

Register Free @Agile20.org



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 - Micro Focus Community Site at <https://community.microfocus.com/t5/Project-and-Portfolio-Management/ct-p/sws-PPM>

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Thank You
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