



Project Remedies Inc.

The BMC Remedy ITSM Suite's Missing Application:

Project Portfolio Management
And 6 More Applications,
Including the Functionality and Metrics
You Need to Streamline Processes,
Optimize Resources and
Improve Operations Execution.

Game-Changing Unique Functionality from
Project Remedies Inc.

May 1, 2013



Table of Contents

| | | |
|--------------|------------------------------------------------------------------------------|----------|
| I. | Executive Summary. | 3 |
| II. | The Metrics You Need to Pinpoint an Opportunity for Efficiency. | 4 |
| III. | Types of Projects | 4 |
| IV. | Effective Resource Management | 5 |
| V. | Time Tracking and Other Costs Against All Tasks Becomes Simple. | 6 |
| VI. | Streamlining Processes. | 7 |
| VII. | Creating a Culture of Accountability | 8 |
| VIII. | Lowering Cost. | 9 |
| IX. | Project Remedies Inc. | 9 |

Project Remedies, PRI and the PRI logo are the exclusive properties of Project Remedies Inc., are pending registration with the U.S. Patent and Trademark Office, and may be registered or pending registration in other countries. All other trademarks or registered trademarks are the property of their respective owners. © Copyright 2013 Project Remedies, Inc. ITIL® is a registered trademark, and a registered community trademark of the Office of Government Commerce.



Abstract

*Adding Project Remedies' ActionProgram Manager Plus to your existing Remedy ITSM Suite consolidates management and maximizes returns on your Remedy investment. Besides visibility and transparency, you will get the two metrics needed to find opportunities for efficiency and improvements in customer service **across all of IT, across all Remedy touch-points.** You will be able to optimize resources, align resources to demand, and create a culture of accountability. No other application offers this functionality.*

I. Executive Summary.

Most of our customers view Project Remedies Inc.'s ActionProgram Manager Plus (APM Plus) as the "missing part" of the BMC Remedy ITSM Suite, and acquire APM Plus to fill the Process, Project, Program, Portfolio, Governance, Resource, Risk and Cost Management gaps that the ITSM Suite does not address. Rather than acquire or build 8 separate applications that may or may not work together, Project Remedies has bundled all of these applications into one, our ActionProgram Manager Plus. APM Plus was developed with the same Remedy Action Request System that BMC used to develop the applications included in the Remedy IT Service Management suite, and designed these capabilities to work together and with the ITSM Suite.

Adding APM Plus to your existing Remedy ITSM environment is the easiest, fastest, and least expensive way to get to a fully integrated demand or work management system. The result looks like this. The orange represents the functionality provided by APM Plus. The rest is the ITSM suite.

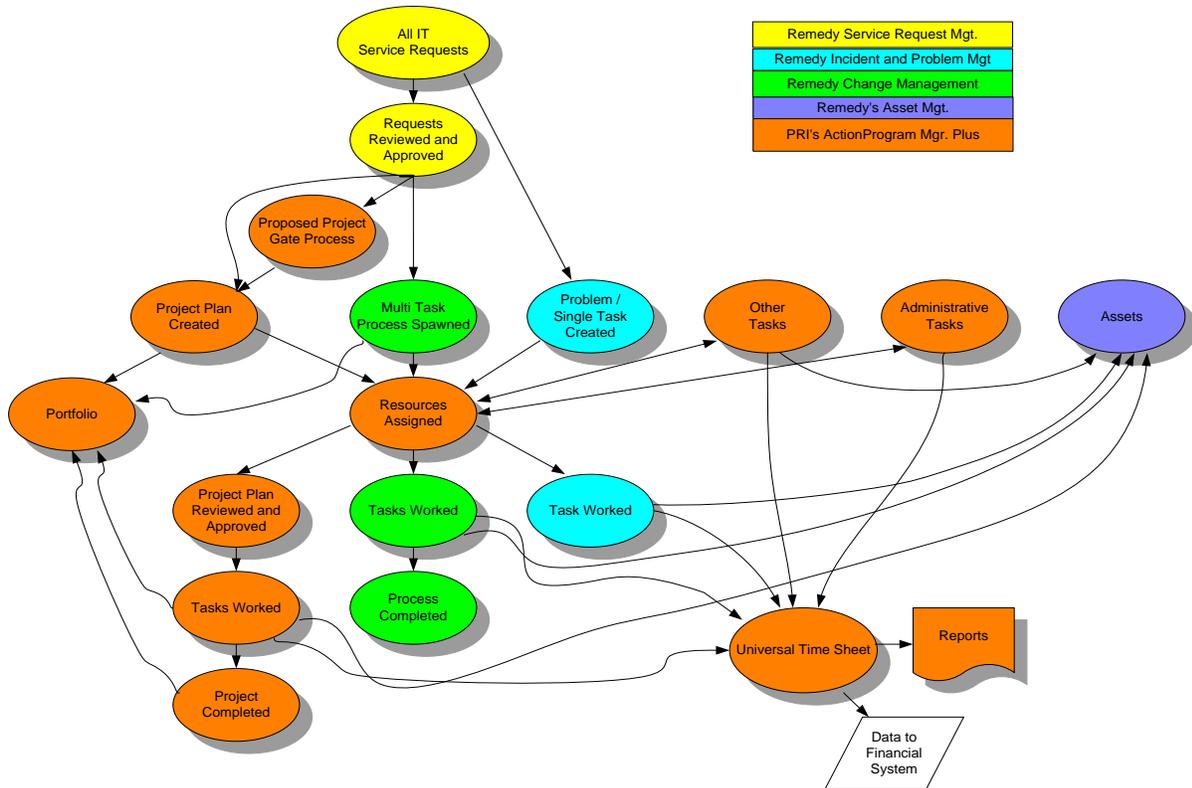


Diagram 1. High-level work management / demand management system process diagram.



Measuring what you manage. APM Plus is a process and project portfolio management system, but it is also more. Integrating APM Plus with your existing suite of applications also delivers the metrics you need to improve customer service and find efficiencies across all of IT. No other application does that. And you have 2/3rds of what you need already in place.

With APM Plus installed on your existing Remedy environment, the Service Management Lifecycle team can build repeatable processes; implement best practice processes and procedures, and measure performance. APM Plus integration improves CMDB accuracy, following assets from Project Initiation (Service Strategy) -> Service Transition (Project Implementation) -> Service Operations -> Lifecycle Management of HW/SW to decommissioning a service, etc. That means more accurate and complete Total Cost of Ownership data, and ultimately better decisions.

From a technology standpoint, the installation is simple: APM Plus runs on your existing Remedy environment. APM Plus takes about an hour to install. No additional hardware or software is needed and usually no additional AR System licenses are needed. The implementation plan would be similar to those of the other applications in the ITSM suite. Your investment in Remedy is leveraged and the potential cost of the major integration project and the time involved with this integration project is eliminated.

II. The Metrics You Need to Pinpoint an Opportunity for Efficiency.

To know if you have an opportunity for improving efficiency and or customer service, you need to know two metrics about each request: duration and the amount of time spent working the request. Knowing one is not enough.

For example, let's say that a service request came in Monday at 8AM and completed on Friday at 5PM. Is this an opportunity for efficiency? You don't know.

Let's say people spent 3 hours doing the work necessary to complete a request. Is this an opportunity for efficiency? You still don't know.

But let's say you know that a service request came in Monday at 8AM and completed on Friday at 5PM and people spent 3 hours working on it. Obviously, this is one that you want to look at further. You need to know both metrics, duration and time spent, to pinpoint an opportunity for efficiency. APM Plus added to your existing ITSM suite applications gives you both metrics across all work, every Remedy touch-point.

To take this example a step further, let's say that the work for this request involved multiple organizations, each one with one or more tasks in the small project plan (a group of tasks performed in a specific sequence.) APM Plus shows you which task caused the delay. Importantly, if all of the work was tracked in a single task, you would not have this visibility.

III. Types of Projects.

While projects can be categorized many different ways (development projects and operations projects, release management projects, cyber projects, dev/ops projects, those managed by trained project managers from the Program Management Office and those managed by team leaders, etc.), one category considers size. We know from experience approximately 10% of projects have a significant dollar value and require top management approval, while



approximately 90% are small and do not require top management approval. Another way to categorize projects is if the project plan is truly unique or not. Frequently the small number of large projects requires a project plan to be built from scratch, while the large number of small projects can and should be managed in a repeatable way.

APM Plus was designed to manage both types, and provide what you really want: a central repository of all work and governance processes, projects, programs, portfolios, resources, risks and costs. This offers transparency and detailed visibility. It reduces duplicate entry and the associated errors.. And very importantly, it reduces the number of required project managers. .

We realized 90% of small projects have repeatable, consistent project plans so we included a robust work template capability in APM Plus. This work template capability creates project plans automatically from different sources such as your service catalog or an event management system like HBSS or ArcSight. These projects are usually managed by team leaders, not trained project managers. That means the application has to be easy enough for team leaders to use, and it is. No organization can or should have all the certified project managers necessary to manage all of the projects within the organization, and if you do, you are paying too much. Using pre-defined work templates to automatically create project plans solves this problem and you get repeatable, consistently executable project plans at the same time.

And then we added a similar capability for governance or approval processes. We realized each organization has different governance processes embedded within the overall project life-cycle, and the approval template capability gives each organization the ability to quickly define and or modify their specific approval processes. .

IV. Effective Resource Management.

Work and governance processes, proposed and active projects, resources, risks and costs all affect each other, so when they are in one system, in one central repository, you can make better decisions and avoid inevitable problems.

When you think about what people in an IT department work on, you realize that they work on incidents, problems, changes and project tasks, which are all related to service requests, and “other tasks” which are not related to service requests. The ITSM suite manages incidents, problems and changes; APM Plus manages the rest. Having a central repository of all tasks allows you to see in one place what everyone is working on.

When you are considering moving someone off what they are doing now onto a higher priority task, the questions are: what are they working on now, and if they take them off those projects, what will be the impact on those projects? Having it all in one central repository makes it much easier to see the data, and enables you to make faster, more informed decisions.

Another element of effective resource management is knowing when project tasks are supposed to be performed. Effective resource management forecasts how busy people will be at a specific point in the future. That means having project plans created with critical path method date calculations, and assigning people to tasks. In APM Plus, you can see how busy each person is at that time. Is each person in a team really busy, somewhat busy, not very busy, or not at all busy?



In today’s constrained or reduced IT budget environment, you want to ask a team leader: “Can your team do what it does with fewer people?” And you want to see the metrics underpinning the answer. Without the metrics, the answer is based on conjecture. The answer should look like this:

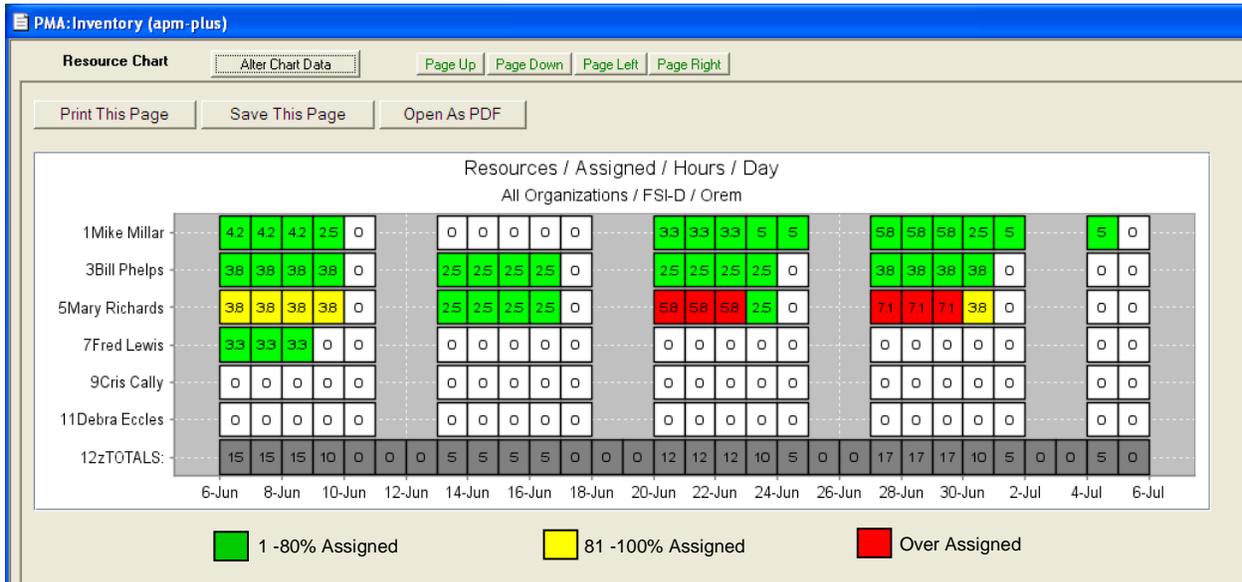


Diagram 2. Resource Management Chart Daily View. Individuals with one skill, one location, all organizations.

This chart shows the daily view for people with one skill in one location for a little longer than one month. You can see the hours assigned to each person for each day (although it might be hard to see the decimal point between each number). If the box is white, no time has been assigned. If the box is green, the person is 1 – 80% assigned. If the box is yellow, the person is 81 – 100% assigned. If the box is red, the person is over assigned.

If this chart was real, it would show that three of the people have almost no work assigned to them FOR A MONTH, and the other people really are not very busy over the month. Of course, if all the boxes are red, you might want to add more people on this team.

This chart can be sorted and summarized skill within organization or organization within skill. These charts show you if the departments are organized correctly based on the demand coming into IT: which departments are very busy and which are not. This answers questions about aligning resources to services and as your service catalog changes, how should department staffing change. It also allows a manager to know what everyone is working on.

Of course, the first time you ask the team leader to show you how busy his / her people are, and you show him / her this chart, they’ll say, well the people are not putting all of their work into the system. And then you say, have them start and let’s take a look at this again in a week. And the culture has changed. One user called APM Plus “No Excuses.” Another calls it “Nirvana.”

V. Tracking Time and Other Costs Simplified

Time tracking against all tasks (incidents, problems, changes and project tasks) becomes simple because all of the tasks are in the same Remedy system, and because we designed



time tracking to be very easy to use. APM Plus captures time two ways: automatically, when a task is opened and closed, and manually, because frequently, the metrics captured automatically do not reflect what really happened. APM Plus gives the person whose time was captured automatically the opportunity to make any corrections necessary. Time can be entered in the task or using the Universal Timesheet, where a person can see all of his/her tasks.

APM Plus is the only true project management system interfacing with an asset management system. This means time spent on any task effecting an asset is attributable and measured. That way, you have a more accurate total cost of ownership for each specific asset. It also means links between tasks, even project tasks, and assets or vice versa are easy to implement.

A “true project management system” includes complex dependencies and Gantt charts. MS Word and Excel have been called project management systems. One person said that a woman he worked with had post-it notes on her monitor; she called the post-it notes her “project management system.” A true project management system should automatically calculate the schedule and cost based on your plan using a critical path method date calculator, and then, as events occur, recalculate the schedule and cost automatically. That way, you can immediately see the impact from both a schedule and cost view.

To summarize, if you want to track cost, APM Plus brings together all three costs: labor, expense and asset cost, into one system. Cost can then be reported against each service request, and since you know who made each service request, can see the cost for each requesting organization. And all the data is current up to the last entry. This allows you to charge back for your work, with all of the detail, if that is what you want to do. No other process and project portfolio management system gives you these capabilities.

VI. Streamlining Processes.

Our white paper [Implementing Project Oriented Customer Service](#) outlines the steps involved with streamlining processes. But let me summarize here.

For each service in the service catalog, you need to determine whether the service can best be managed and tracked with a single task or with a group of tasks performed in a specific sequence, i.e. a project. If the latter, a group of subject matter experts (experienced people who are familiar with how that work is now performed) come together and define the process, i.e. the tasks that should be tracked (which is a subset of all of the tasks) and the sequence in which the work should be performed. This information is typed into APM Plus as a “work template” in minutes and the template is connected to the service in the service catalog. That way, when someone requests the service, using Remedy workflow, the repeatable project plan is created automatically at network speed and the team leader is notified.

Let’s say that over the next 3 months, you get 250 requests for this common service and the work is performed by 3 different organizations. You find out that organization 1 does task 2 on average in 1 person-hour. Organization 2 does task 2 on average in 6 person-hours. And organization 3 does task 2 on average in 12 person-hours. This is one of the metrics you need to determine which organization is doing it “best.” It is one of the metrics, arguably the key metric you need to make changes, improve quality and improve operations execution. Without it, you cannot.



During this time, the people doing the work suggest to the subject matter experts who set up the template that if the template was tweaked a bit, if a few tasks were removed and a few others were added and the work was done in a little different sequence, the process would be "better." The SMEs look at this suggestion, and let's say that they agree, that with these changes the process would be "better." They go into the system and change the template in a couple of minutes. Then, over the next 3 months, you get 250 more requests for this same service. Sr. Management's question is: Is the new process better? How much better? What are the metrics? APM Plus gives you these answers. How else can you know? Without a robust work template capability and a robust and easy to use time-tracking capability, how can you know?

VII. Creating a Culture of Accountability.

To create a culture of accountability, you need to do several things. One is to tell the person what you are expecting them to do (the project or the task), when you expect it to be done (the planned start and finish dates), and how much cost (time) they have to complete the task. Then you have to check to see that the project or task was completed, when it was completed (actual start and finish dates) and at what cost. All of this data is in the Project Details Report, which is a standard report in APM Plus.

Project Details Report

Information as of: 5/31/01
 Project Id: Proj0000000007
 Project Name: Jim 1
 Project Manager: Allen Crouder
 Project Status: In Process
 Project Time Unit: Days
 Project Schedule Orientation: Project Start Date

| Group Association | Responsible Party | Task Name | Task Status | Critical Path | Slack | Predecessor | Planned Labor Hours | Actual Labor Hours | Plan Start Date Plan Finish Date | Duration Time Units | Actual Start Date Actual Finish Date | Planned Cost | Actual Cost | |
|--------------------|-------------------|----------------------------------|-------------|---------------|-------|-------------|---------------------|--------------------|----------------------------------------|------------------------|-----------------------------------------|--------------|-------------|----------|
| Programmer Analyst | Mary Richards | Execute Engineering Checklist | Complete | Y | 0.00 | | 10.00 | 12.00 | 5/24/01 8:00:00AM 5/25/01 5:00:00PM | 2.00 D | 5/23/01 6:20:47AM 5/23/01 6:22:39AM | 3,300.00 | 3,600.00 | |
| Programmer Analyst | Mary Richards | Execute Implementation Checklist | Assigned | Y | 0.00 | | 10.00 | 0.00 | 5/28/01 8:00:00AM 5/30/01 5:00:00PM | 3.00 D | | 3,300.00 | 0.00 | |
| Programmer Analyst | Mary Richards | Move to Operations Approval | Hold | N | 0.00 | | | | 5/30/01 5:00:00PM 5/30/01 5:00:00PM | 0.00 D | | | | |
| Programmer Analyst | Mary Richards | Execute Operations Checklist | Hold | Y | 0.00 | | 10.00 | 0.00 | 5/31/01 8:00:00AM 6/6/01 5:00:00PM | 5.00 D | | 3,300.00 | 0.00 | |
| Total for User | | | | | | | 30.00 | 12.00 | | | | 10,500.00 | 3,600.00 | |
| Project Totals | | | | | | | 30.00 | 12.00 | | | | | 10,500.00 | 3,600.00 |

Diagram 3. Project Details Report.

Secondly, senior management must have visibility into the project detail at any time. Yes, the project managers or team leaders need to send senior management the reports they normally send, but senior management must also be able to look over their shoulders at the detail and the managers need to know that you can do this. A Major General in the US Army CIO's office said: "Let me tell you what the problem is. Someone comes to us and says with enthusiasm: "If you give me this amount of money, in two years, we can create a Viennese stallion!" We look at each other and think how wonderful it would be to have a Viennese stallion, so we agree and fund the project. Two years later, this person comes back and says: "We've got 3 of the 4 legs of the camel done and if you approve a bit more money, we can finish the 4th leg." We say: "Camel? We already have a camel. We thought you were building a Viennese stallion." He says: "Viennese stallion? Where did you get that?" So the money is gone, the time is gone and the confidence is gone, and it's our fault because we weren't paying attention."



It is also their fault because they are not using APM Plus. What the project is for, i.e. building a Viennese stallion, i.e. the project charter, is stored in the Proposed Project definition so they could easily determine exactly what was promised. Senior management can also look at the detail at any time, and if they saw mid-way into the project that in fact a camel was being built, they could stop the project, thereby saving some of the time and money. Senior management having access to the project data at any time, and the people working the projects knowing that senior management has this access are needed to create a culture of accountability.

VIII. Lowering Cost.

Lowering cost is simple. Cut people. Cut assets. Cut facilities. But doing so without awareness is dangerous.

What you really want to know is what these cuts will do to your ability to offer a wide range of services with superior quality, lower risk, and high customer satisfaction. You want to be smarter about what and whom to cut or not cut. Knowing how busy people are and whether each department is staffed correctly based on the demand is critical and one of the first things you want to look at. (See "Effective Resource Management" above.)

In ITIL terminology, what you need to know is the cost of each service request, each transaction. Understanding transaction cost is the first topic discussed in Service Strategy, the first book in the ITIL V3 series, and it outlines all of the reasons why you need to know this.

As you saw above, APM Plus with the ITSM suite gives you the metrics you need including the cost metrics for each service request. Which organizations are performing each service request best and which people in which organizations are performing best? Is the new process is cheaper or faster than the old process?

IX. Project Remedies Inc.

Project Remedies Inc. is a proven technology and services company. We were the first Remedy reseller in Southern California 19 years ago and our focus has remained on Remedy and helping our customers realize the full value of their Remedy investment. If you would like to learn more about Project Remedies Inc. and our ActionProgram Manager Plus or other services such as placing really good Remedy consultants, please contact Stan Feinstein at 310-230-1722 or stanf@projectremedies.com. We would like to know more about the issues you are facing, particularly those involving your Remedy environment.