

# TBM Conference 2013

## Viewing Projects From All Perspectives

Chuck Niethold, VP of TBM and IT PPM

January 10, 2013

First American Financial Corporation makes no express or implied warranty respecting the information presented and assumes no responsibility for errors or omissions. First American and the eagle logo are registered trademarks or trademarks of First American Financial Corporation and/or its affiliates.

The following presentation is for informational purposes only and is not and may not be construed as legal advice. First American Financial Corporation is not a law firm and does not offer legal services of any kind. No third party entity may rely upon anything contained herein when making legal and/or other determinations regarding title practices. You should consult with an attorney prior to embarking upon any specific course of action.



*First American*

# Agenda

- RtB/CtB
- Project Attributes
- Data Sources
- Types Of Reports
- What Levers Can Be Pulled?
- Lessons learned and recommendations
- Question



# RtB/CtB

## RtB

- This is an indicator of how much of the IT resource is consumed and focused on the continuing operation of the business. It includes all nondiscretionary expenses as part of the run-the-business cost. Most Infrastructure initiatives, defects, small enhancements and compliance items will fall into this area. Technology software upgrades will also fall into this area.

## CtB

- This is an indicator of how much IT resources are consumed and focused on developing technology that drives or supports business growth (ex. customer facing portals and integrations). Discretionary investments are more likely to be included in change the business category. Major projects that will change the way we process orders or provide new services or functions to our clients will also fall into this category.

# RtB/CtB

## Define RtB/CtB for your Company

- **Use examples of projects from you company**
- **Educate Everyone on RtB/CtB**
- **Review Projects Each Month**

## Add This Attribute Into Your Project System

## Provide Report Reports To The Business



# Project Attributes

**What Attributes Are Needed?**

**What Questions Are Your Business Partners Asking?**

**What Questions Will Your Business Partner Be Asking?**



# Creating The Attribute List

## Do You Have Multiple

- **Systems?**
- **Divisions?**
- **Regions?**
- **States?**
- **Business Channels?**
- **IT Groups?**

## Swim Lanes

## Who Can Request Projects?

# FA Current Attributes

- **RtB/CtB**
- **Primary System**
- **Requesting Division**
- **Funding Division**
- **Swim Lane**
- **Business Channel**
- **CFT or Non-CFT (Customer Facing Technology)**
- **IT Group**
- **Internal Request or Customer Request**



# Data Sources

## Accounting System

## CMDB

- **Applications**
- **Servers**
- **Desktops/Laptops**
- **SAN Data**

## Project Management System

- **New Projects**
- **Closed Projects**
- **Project Attributes**

## Time Tracking

- **Hour booked to each project**

## HR System

- **Headcount**



# Projects by FTE

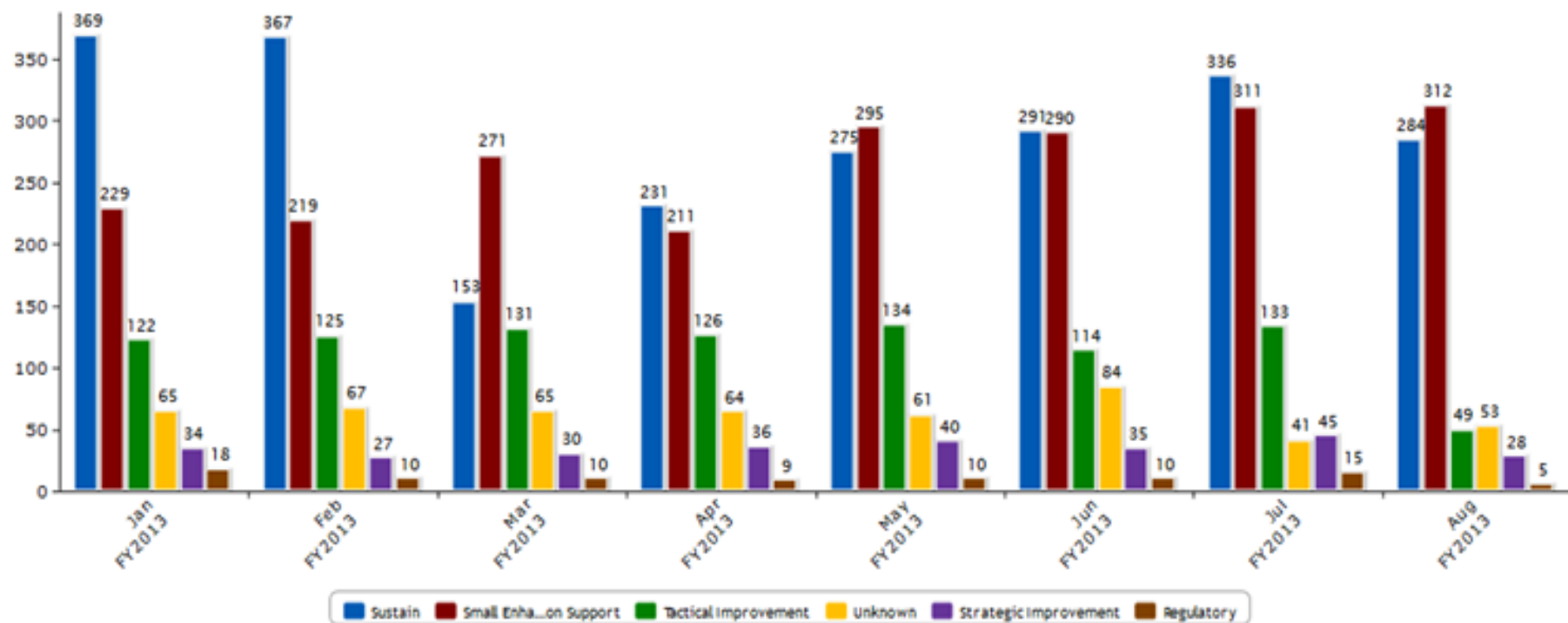
ProjectName	Hours Worked	% Of Total Hours	Development FTEs	Cost
19388 Production_Support_2013	2,841	3.18%	21	\$107,872
20379 Small Or Medium Enhancement	2,335	2.61%	18	\$225,032
13955 Production_Defects_2013	2,131	2.39%	16	\$81,047
12567 Document_Management	1,848	2.07%	14	\$67,663
21033 Recurring_Enhancement_A	1,587	1.78%	12	\$65,093
19335 2013 Releases	1,579	1.77%	12	\$58,182
20378 Support	1,481	1.66%	11	\$124,760
23108 Enhancements_And_Produ	1,461	1.64%	11	\$32,642
21131 Enhancements_And_Produ	1,420	1.59%	11	\$58,514
17542 Enhancement	1,348	1.51%	10	\$51,575
19655 2013_Enhancements	1,260	1.41%	9	\$39,325
25120 2013-Releases	1,208	1.35%	9	\$43,550
21631 Documentation_Timetrackir	941	1.05%	7	\$30,822
21616 Enhancements_And_Produ	901	1.01%	7	\$16,960
21112 Enhancements_And_Produ	897	1.00%	7	\$26,338
51938 Workbench_V_1_0	890	1.00%	7	\$34,668
14735 System Integration	672	.75%	5	\$25,284
12989 Mobile_Apps_Defect_Corre	662	.74%	5	\$29,120
22213 Iteration_2	655	.73%	5	\$25,159
21082 System ABC Small_Enha	648	.73%	5	\$22,889
21921 System ABC 2013-Release	610	.68%	5	\$22,290
22045 Credit_Card_Processing	602	.67%	5	\$11,183
19801 System XYX Monthly_Relea	544	.61%	4	\$20,924
17040 System 123	537	.60%	4	\$7,784
21018 Report Enhancements_And	513	.57%	4	\$147,012
21705 System 543 Enhancements	509	.57%	4	\$6,255
21606 Platform_Enhancements_A	484	.54%	4	\$5,577
21817 Data_Warehouse_Enhance	454	.51%	3	\$130,015
300647 Rule_Management_Tool	436	.49%	3	\$13,570
21164 System 888Enhancements	429	.48%	3	\$16,221
23668 IT System Product_Support	385	.43%	3	\$139,983



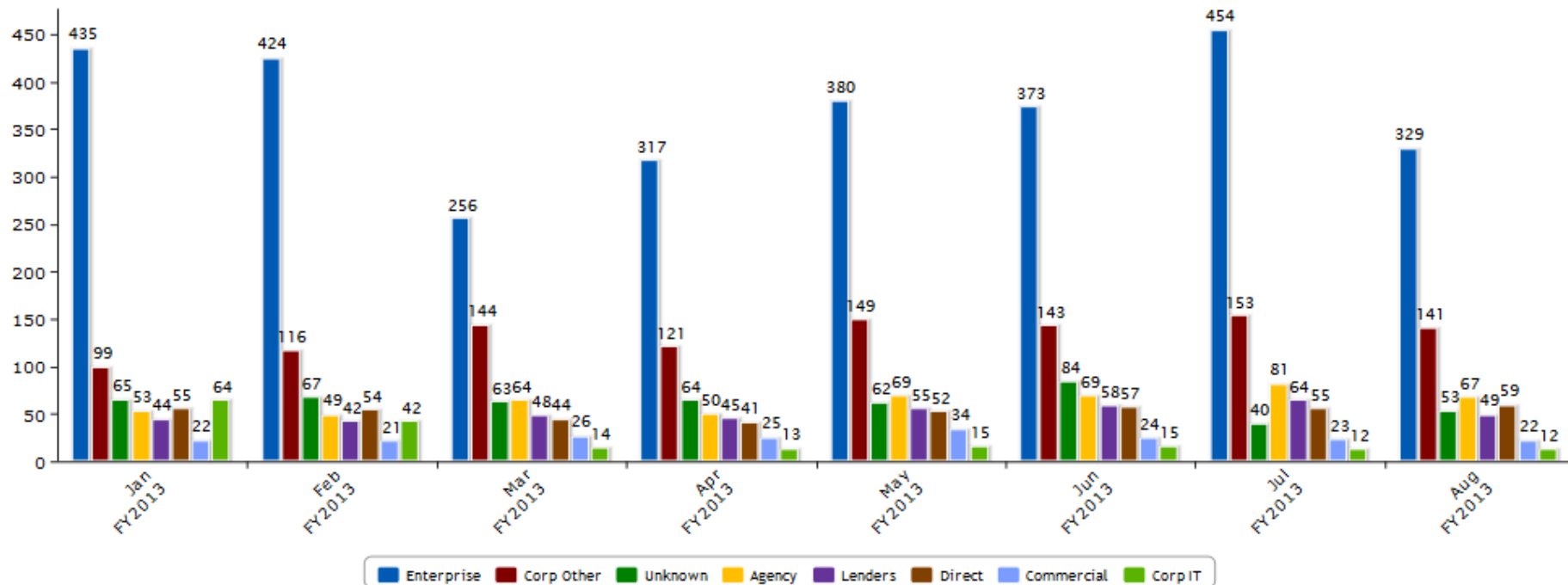
# Projects by Cost

ProjectName	Hours Worked	% Of Total Hours	Development FTEs	Cost
20379 Small Or Medium Enhancer	2,335	2.61%	18	\$225,032
21018 Report Enhancements_And	513	.57%	4	\$147,012
23668 IT System Product_Support	385	.43%	3	\$139,983
21817 Data_Warehouse_Enhance	454	.51%	3	\$130,015
20378 Support	1,481	1.66%	11	\$124,760
19388 Production_Support_2013	2,841	3.18%	21	\$107,872
13955 Production_Defects_2013	2,131	2.39%	16	\$81,047
12567 Document_Management	1,848	2.07%	14	\$67,663
21033 Recurring_Enhancement_A	1,587	1.78%	12	\$65,093
21131 Enhancements_And_Produ	1,420	1.59%	11	\$58,514
19335 2013 Releases	1,579	1.77%	12	\$58,182
17542 Enhancement	1,348	1.51%	10	\$51,575
25120 2013-Releases	1,208	1.35%	9	\$43,550
19655 2013_Enhancements	1,260	1.41%	9	\$39,325
51938 Workbench_V_1_0	890	1.00%	7	\$34,668
23108 Enhancements_And_Produ	1,461	1.64%	11	\$32,642
21631 Documentation_Timetrackir	941	1.05%	7	\$30,822
12989 Mobile_Apps_Defect_Corre	662	.74%	5	\$29,120
21112 Enhancements_And_Produ	897	1.00%	7	\$26,338
14735 System Integration	672	.75%	5	\$25,284
22213 Iteration_2	655	.73%	5	\$25,159
21082 System ABC Small_Enha	648	.73%	5	\$22,889
21921 System ABC 2013-Release	610	.68%	5	\$22,290
19801 System XYX Monthly_Rele	544	.61%	4	\$20,924
21616 Enhancements_And_Produ	901	1.01%	7	\$16,960
21164 System 888Enhancements	429	.48%	3	\$16,221
300647 Rule_Management_Tool	436	.49%	3	\$13,570
22045 Credit_Card_Processing	602	.67%	5	\$11,183
17040 System 123	537	.60%	4	\$7,784
21705 System 543 Enhancements	509	.57%	4	\$6,255
21606 Platform_Enhancements_A	484	.54%	4	\$5,577

# Projects by Swim Lane



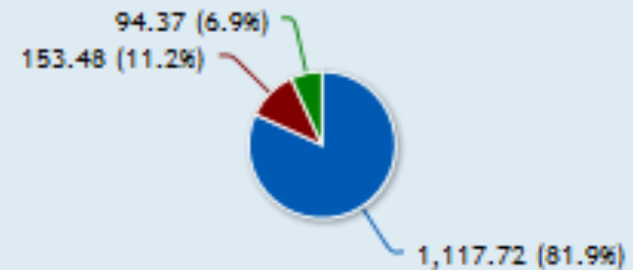
# Projects by Business Channel



# Overall RtB/Ctb

FTE Grouped By RTB CTB For Current Quarter

RTB CTB	PPM Labor By Quarter ▾
RTB	1,118
Unknown	153
CTB	94
Total	1,366



Total: 1,365.57

# Business Channel RtB/Ctb

FTE Grouped By RTB CTB For Current Quarter

RTB CTB	PPM Labor By Quarter ▾
RTB	83
CTB	36
Total	119

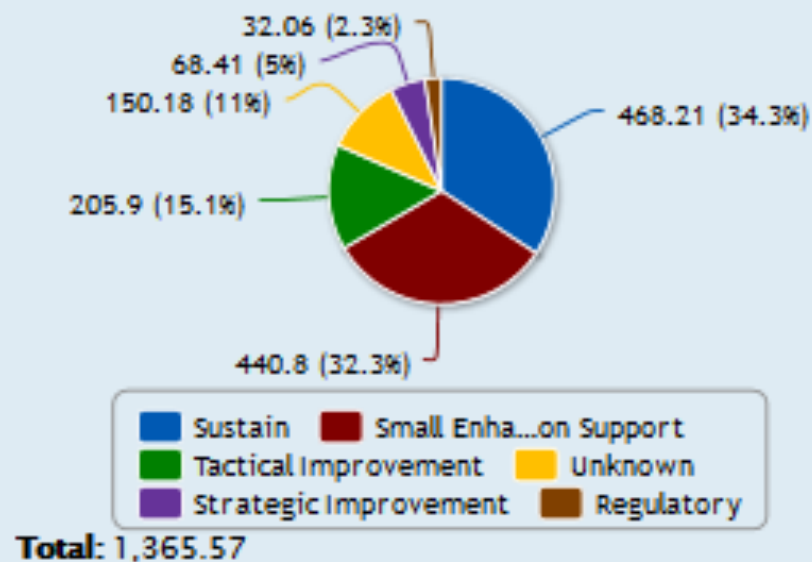


Total: 119.25

# Overall FTE by Swim Lane

FTE Grouped By Swimlane For Current Quarter

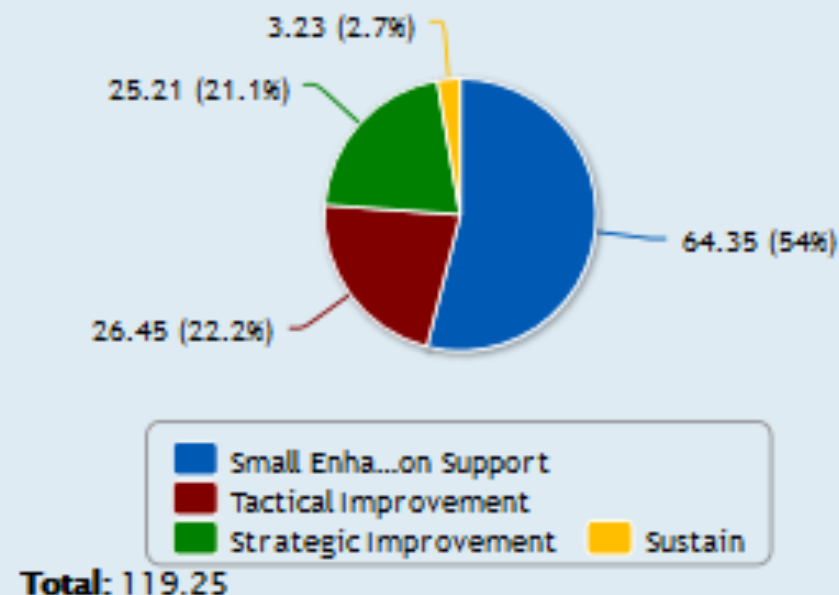
Portfolio Swimlane	PPM Labor By Quarter ▾
Sustain	468
Small Enhancement & Production Support	441
Tactical Improvement	206
Unknown	150
Strategic Improvement	68
Regulatory	32
<b>Total</b>	<b>1,366</b>



# Business Channel FTE by Swim Lane

FTE Grouped By Swimlane For Current Quarter

Portfolio Swimlane	PPM Labor By Quarter ▾
Small Enhancement & Production Support	64
Tactical Improvement	26
Strategic Improvement	25
Sustain	3
<b>Total</b>	<b>119</b>





# What Levers Can Be Pull?

## Educate Your Business Partners

- **Data sources**
- **How it is used**
- **How to read the reports**

## Do Your Homework

- **Why Is the ratio high or low?**
- **Anticipate the questions**
- **What is interest in the data**

## Have Recommendations

- **Provide options for the business**
- **Load level resources**
- **Cancel one or more projects**
- **Change the project selection process**

# Lessons Learned

## Results Will Be Interesting

- Double Check Data
- Share With Data Providers First
- Share With CIO
- Then Share With Business

Data quality will increase over time

Time Tracking data will need support from the CIO to improve

Keep report format simple

Need data QA process

# Recommendation

# Start Now!!!

# Questions?

