Case study

Creating, Implementing, and Enabling Demand Management Process Adoption at University of Michigan Information Technology Services

About the University of Michigan

The University of Michigan is a top research university known for research spending, interdisciplinary programs, international outreach, athletics and academic excellence. The university offers graduate, undergraduate, PhD, and post-doctoral programs. The university has its main campus in Ann Arbor as well as the University of Michigan-Dearborn and University of Michigan-Flint.

About University of Michigan IT Services

University of Michigan Information and Technology Services (ITS) provides technology shared services including network, voice, storage, enterprise applications, and desktop computing. They support facility, staff, and students across all schools, institutes, and the central administration for the campus. The ITS employs approximately 800 staff working on 200+ active projects across the IT portfolio.

The Challenge: Rising Costs, Increased Competition

With education costs on the rise and new technology transforming the way information is delivered and acquired, the need to cut operational spend to remain competitive is imperative. University of Michigan created a corporate-wide initiative known as "Next Gen Michigan". The long-term strategy focuses on reducing costs and improving efficiencies while simultaneously fueling technological advancement. To meet this challenge, the university merged three central IT organizations and modified their operational approach to provide shared services, changing their funding model.

Soon after the merger, the ITS group realized that IT operations and internal processes needed to be redefined, implemented, and adopted by more than 800+ employees to meet service delivery goals. After conducting a portfolio and project management assessment, they chose to focus on redefining their demand management processes. Management knew they had to fix the common problem of overpromising and under delivering and as a first step they needed to know how many projects were being worked on, and what requests were in the pipeline.

UNIVERSITY OF MICHIGAN

Overview

Customer
The University of Michigan

Industry
Higher education

Geographies
Ann Arbor, Michigan

The University of Michigan uses Planview Enterprise to reduce approved projects by 75%, create a visible pipeline of demand, and reduce staff workload and improve performance.

> *"Planview Consulting really challenged us in saying, 'If you are going to capture data, make sure you know what decision you are making with the data. And that is something we continue to practice."*
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> *— Cathleen Curley, Assistant Director PMO Office, The University of Michigan*

"Trying to say 'yes' to everything resulted in us not being able to finish things on-time or at all. We needed to quit wasting time reshuffling people and priorities on a daily and weekly basis," says Cathleen Curley, assistant director, portfolio and project management office at University of Michigan.

The Solution: Quickest Path to Improving Prioritization

After deciding to reinvent their demand management processes, ITS engaged Planview Consulting to assist in the process design and configuration of Planview Enterprise. As a result, ITS created a three stage demand management process to help capture, define, and schedule projects. They incorporated process lifecycle steps in Planview Enterprise which provides a visual representation of who is responsible and where the process stands at a given time.

"We used lifecycles for the first time… it helped breakdown perception barriers about processes. It highlights where things get stuck in the process so we can help move it forward," explains Curley.

They set up a seven field request form that allowed users to easily submit requests. With visibility into demand, they were able to determine which projects to prioritize – defining investment, effort by role, and business value. The schedule phase serves as a check point with the Enterprise Portfolio Project Management Office (EPPMO) helping everyone involved understand capacity assessment and determine availability of resources, financials, and risk.

To tackle the complexities inherent with the merging three IT organizations into one group, ITS established new roles and redefined responsibilities. They identified specific tasks by role and integrated those tasks into the process and lifecycles.

They created a unique change management program to address multiple requirements and preconceived perceptions like "process is bad and bureaucratic". They aligned communication messaging and imagery with the theme "Next Gen Michigan" with a tagline Right Work, Right People, Right Time which resonated well with the employees. In addition, the team used infocasts, in person presentations, provided regular announcements, and developed an ELearning program by role for initial and ongoing support.

Benefits:

With Planview Enterprise, University of Michigan's ITS group has transformed the way they manage their project portfolio to deliver value and results on the university's company-wide strategy. The benefits include:

- 23% reduction in their active project portfolio to support improved prioritization and throughput

- Increased number of projects in the portfolio with baselines from 10% to 75% to start reporting on delivery consistency

- Visibility into the overall set of projects ITS is managing ensuring all projects align with the university's long-term strategy

- Better transparency into demand, capacity, and resources – shifting from "No we can't," to "Yes, here's when" ensuring staff is focused on the right work that delivers value

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