

IT Demand Management

Process Management DEM
Integrated Business Solutions (IBS)
Henkel AG & Co. KGaA
October 2013

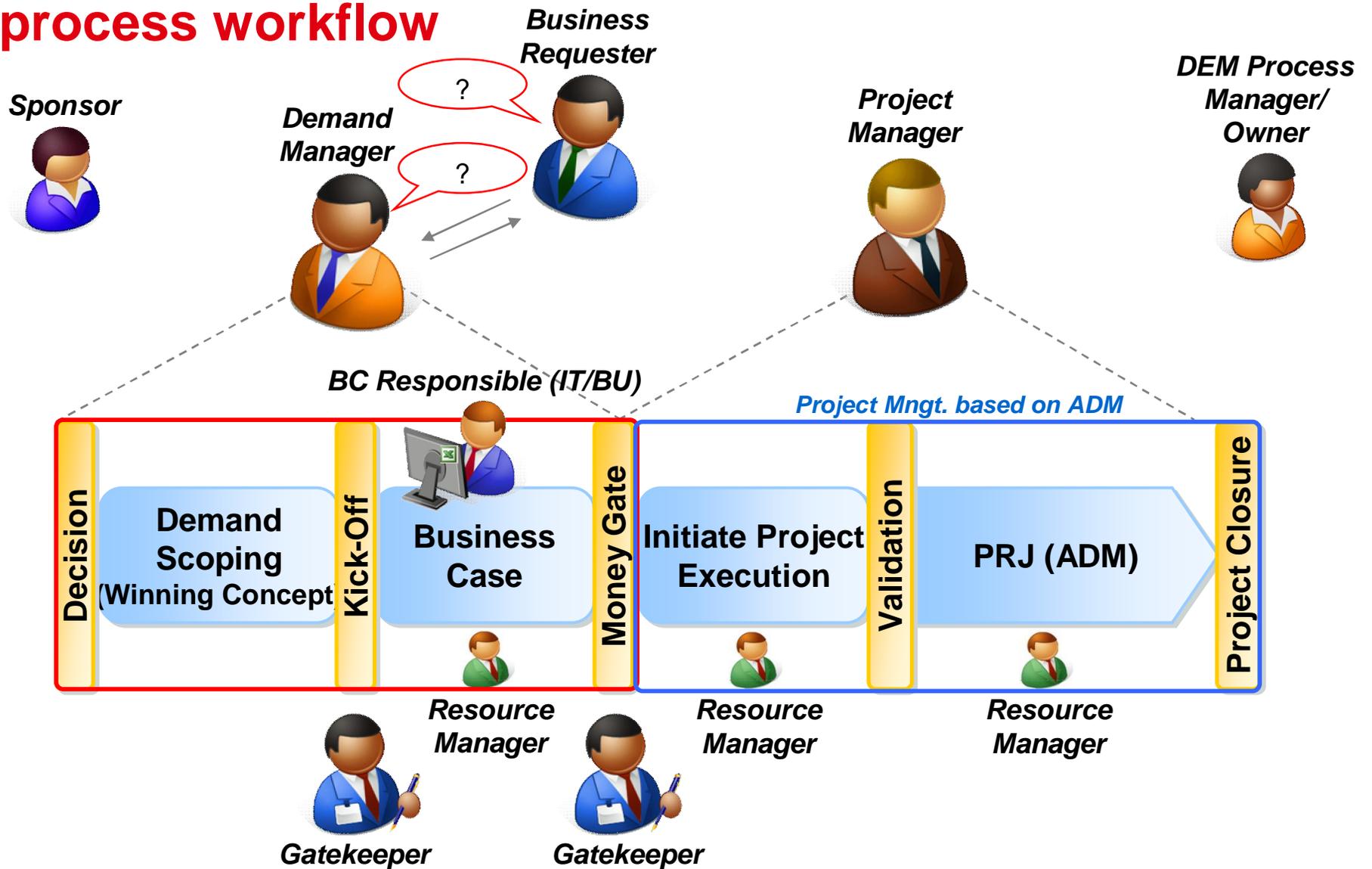


Excellence is our Passion

Agenda

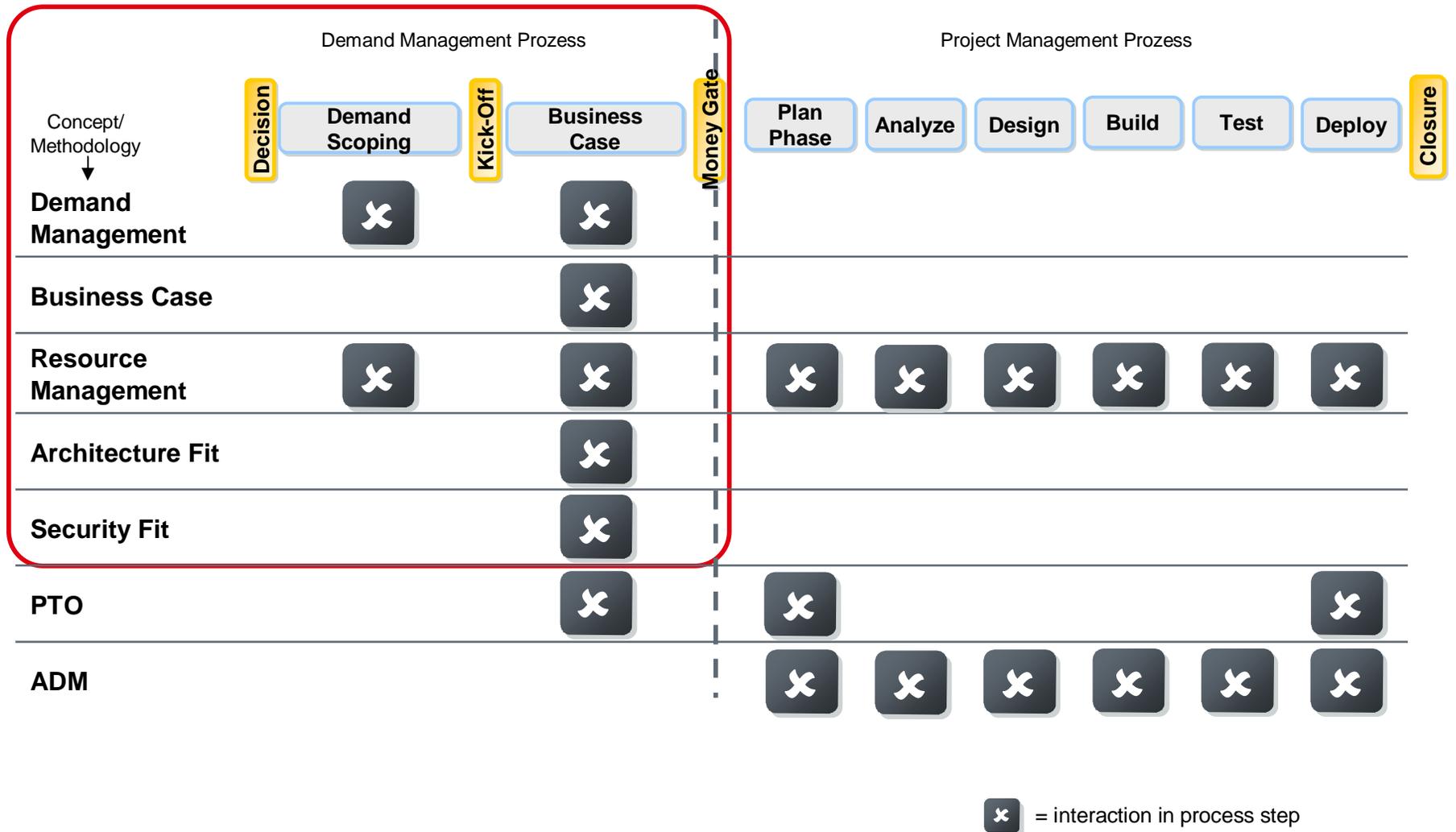
- DEM Process & Templates
- DEM System-based Scenarios (Clarity)
- DEM Reporting

Key players' role in DEM, RES and PRJ process workflow



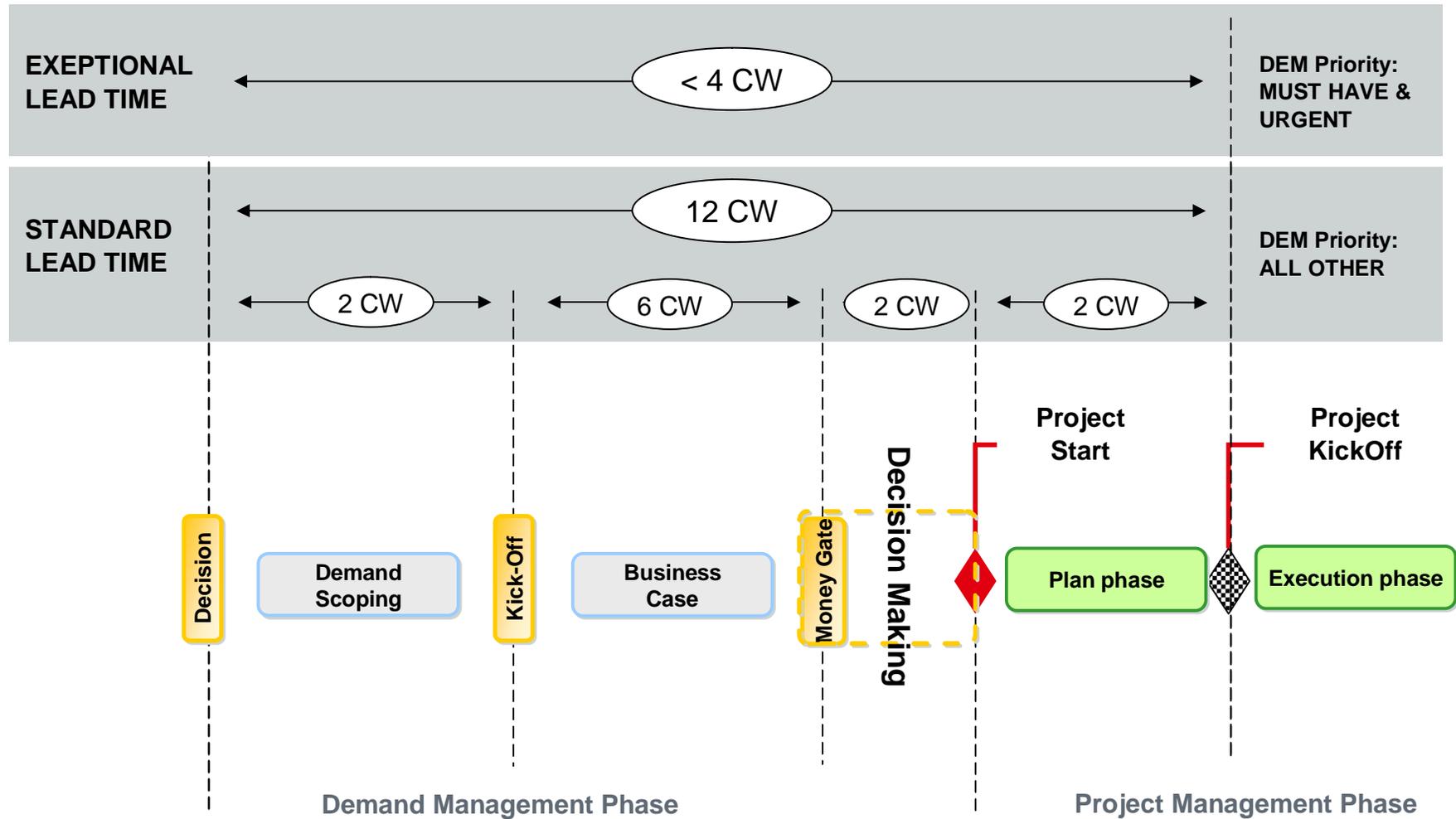
Process Framework Overview

How DEM fits into IT process environment



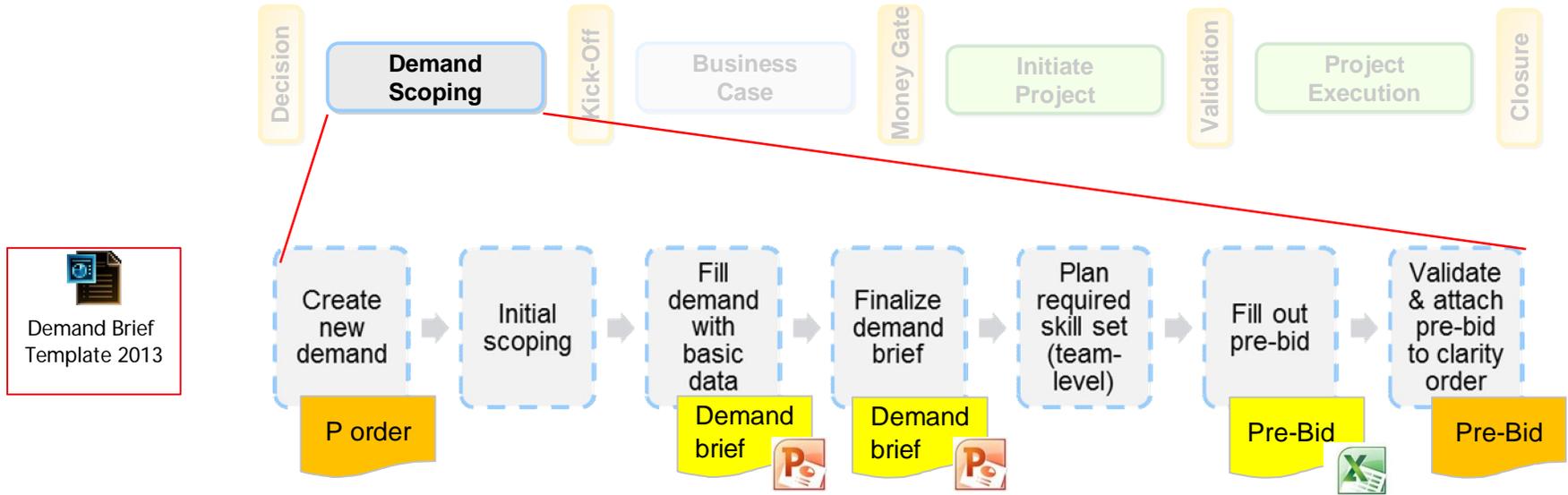
Target Lead Times Demand Management

Standard cases w/o additional complexity drivers



Roles and Responsibilities – Demand Scoping

Major tasks and deliverables



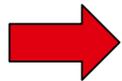
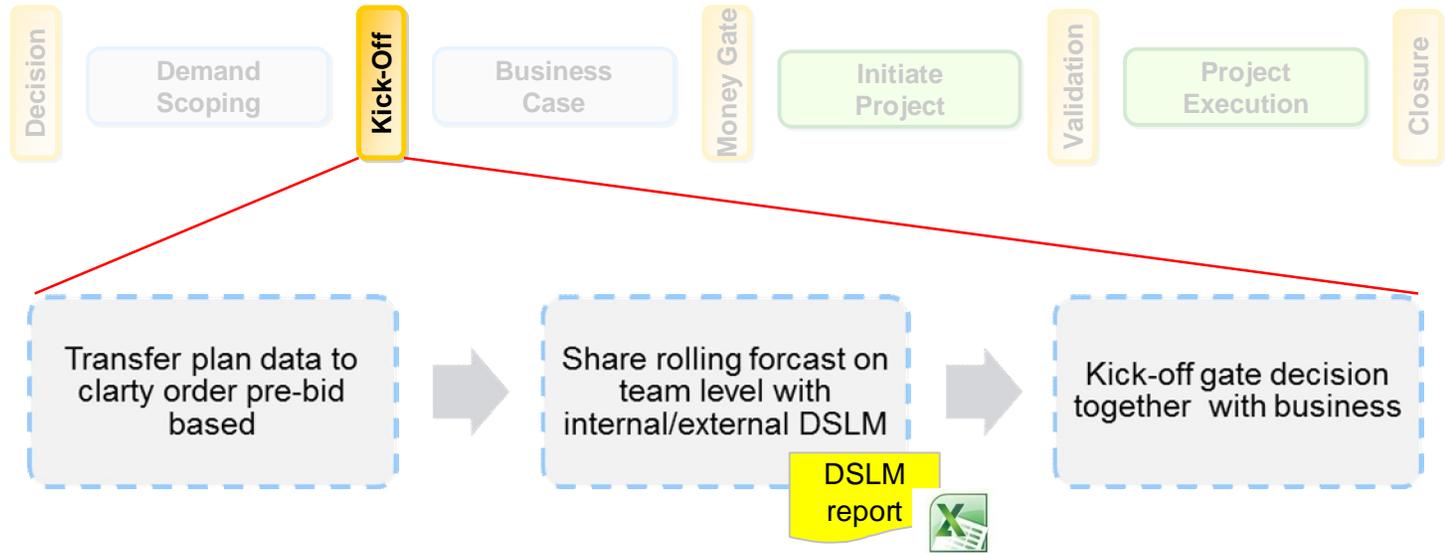
	DM	E	E	E	I	I	I	E
	BCR							
	PM			I		I		
	RM				C	C		
	SSC							
	C/SME				E	E	E	
	SP							
	RES							

D: Decide E: Execute C: Consult I: Inform

file clarity

Roles and Responsibilities – Kick-Off

Major tasks and deliverables



	DM		I	D
	BCR			
	PM			
	RM		I	
	SSC	E		
	C/SME			
	SP		I	
	RES		E	I

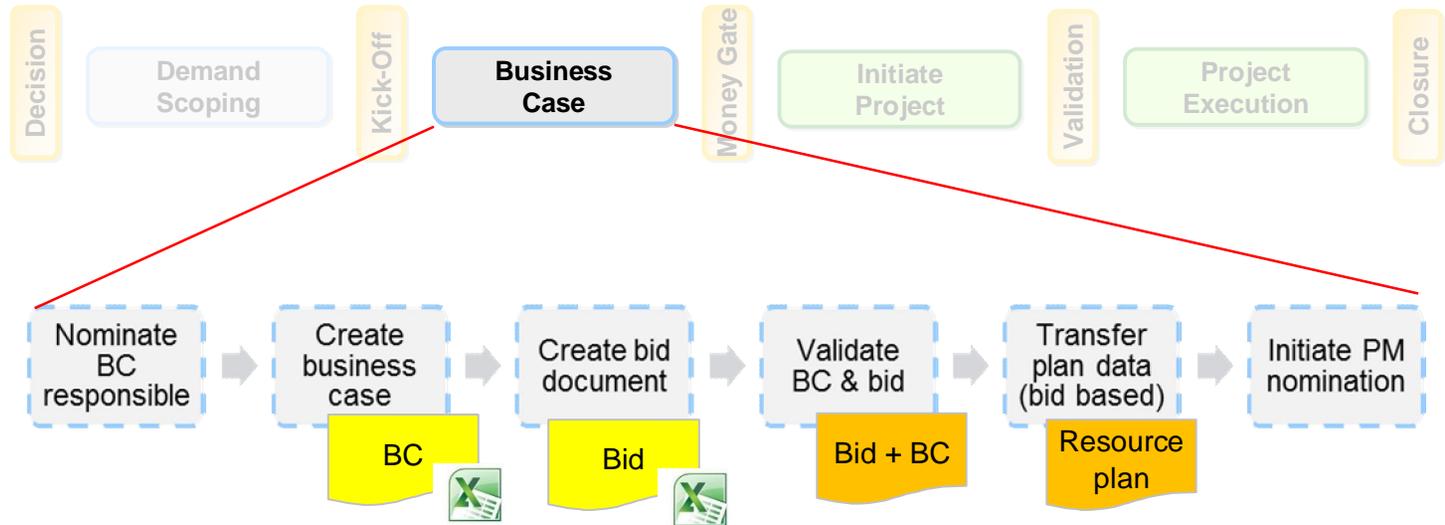
D: Decide E: Execute C: Consult I: Inform

file

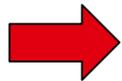
clarity

Roles and Responsibilities – Business Case

Major tasks and deliverables



-  Business Case Template 2013
-  (Pre-)bid Template 2013



	DM	E	I	C	E		E
	BCR	I	E	E	C		
	PM	I		I	I		
	RM	C	I	I			I
	SSC					E	
	C/SME		C	C			
	SP			I			
	RES						
	ARC	<i>ARCfit will request the Business Case Responsible (BCR) via BPM to complete the ARCfit questionnaire.</i>					

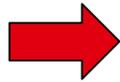
D: Decide E: Execute C: Consult I: Inform

Roles and Responsibilities – Money Gate

Major tasks and deliverables



DSL
report



	DM	E	D	I
	BCR			
	PM			
	RM			I
	SSC			
	C/SME			
	SP			I
	RES			E

D: Decide E: Execute C: Consult I: Inform

file clarity

Agenda

- DEM Process & Templates
- DEM System-based Scenarios (Clarity)
- DEM Reporting

Selection of Template: Project, Lump Sum, Enhancement or Maintenance



Project Template Filter [Filter: System Default] [Collapse Filter]

Project Name:
Project ID:
OBS Unit:
OBS Unit Filter Mode: Unit only

Manager:
Active: Yes
Template: Yes
Power Filter: [Build Power Filter]

Filter Save Filter Clear

Project	ID	Template	Active
<input type="radio"/> Global Managed Application		✓	✓
<input type="radio"/> Henkel Enhancement Template	00009	✓	✓
<input type="radio"/> Henkel Lump Sum Template	000212	✓	✓
<input checked="" type="radio"/> Henkel New Project Template	000110	✓	✓
<input type="radio"/> Local/Regional Products	00007	✓	✓

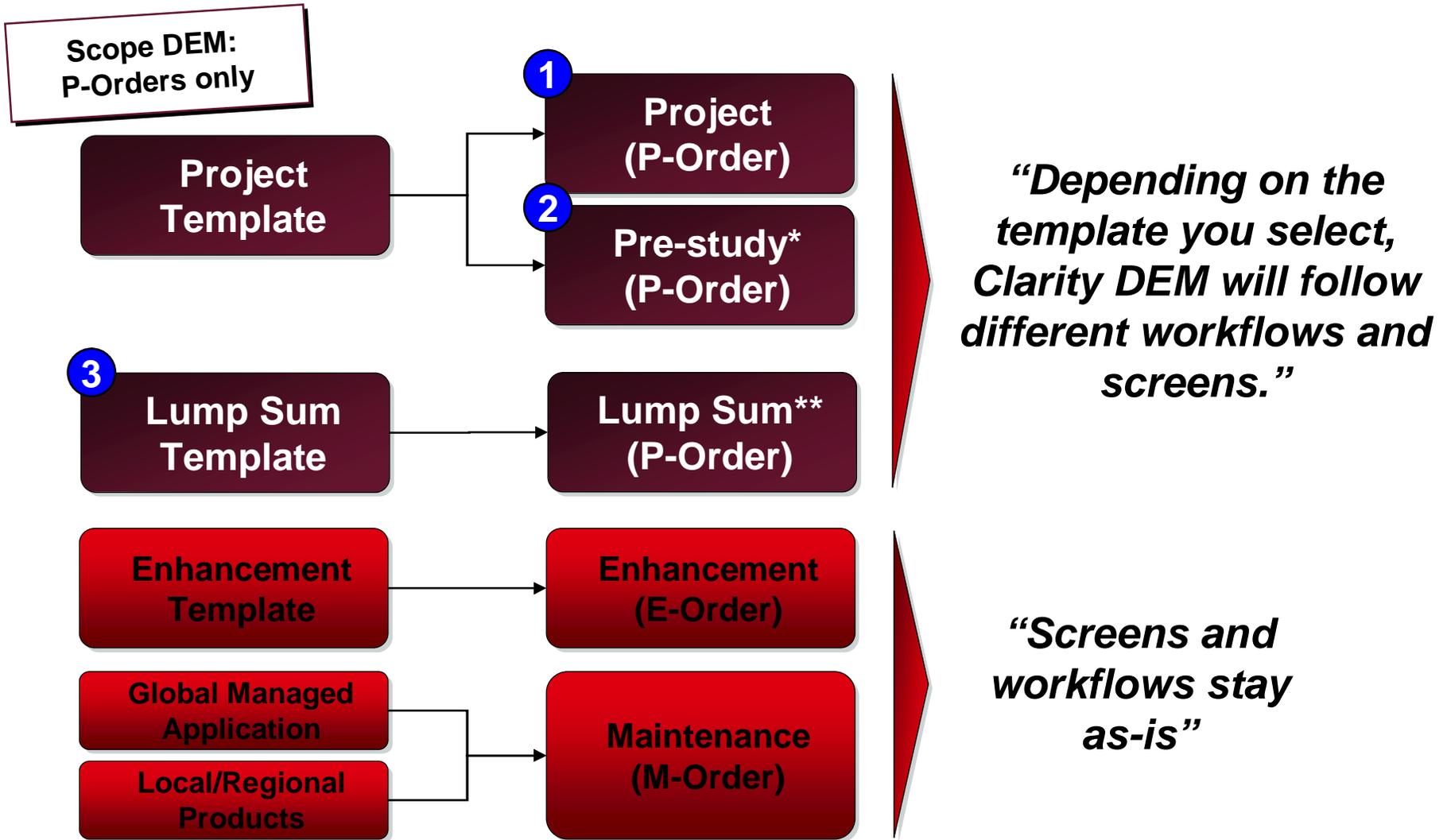
Total Results: 5

Next Cancel

Order Type Selection: P-Order, M-Order, E-Order

Scope of DEM = P-Orders only

Selection of Template: Project, Lump Sum, Enhancement or Maintenance

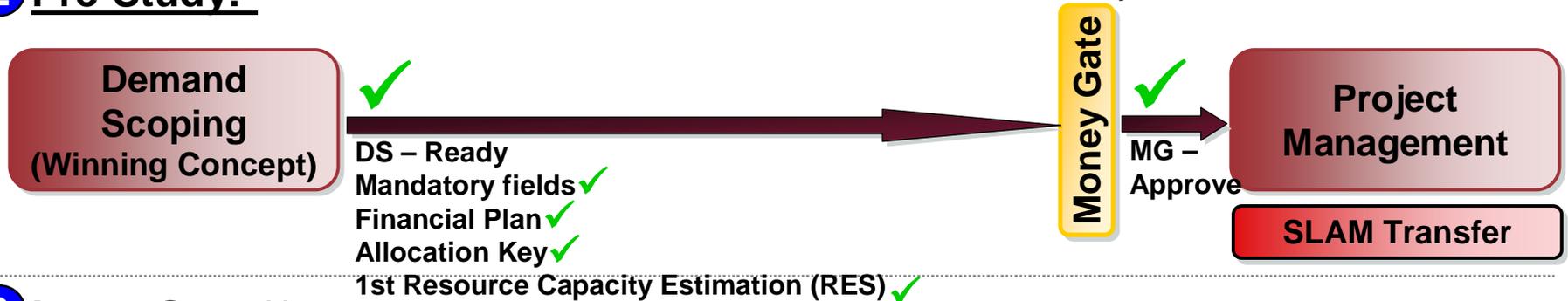


Handling of Stages and Gates in different workflows

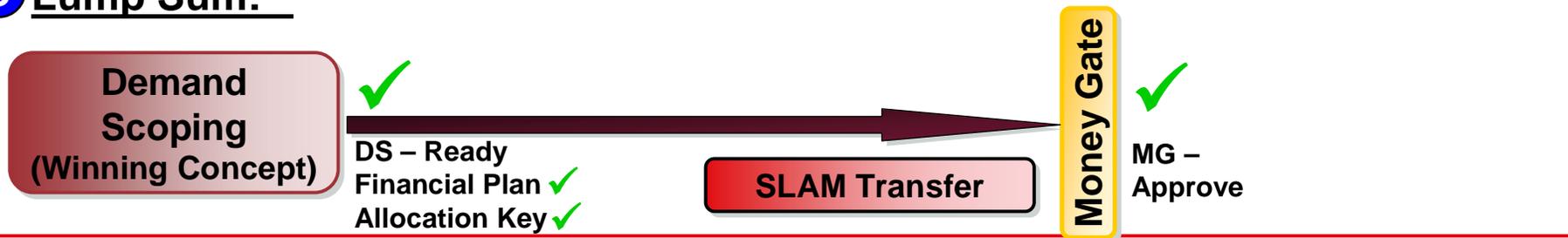
1 P-Order (Demand):



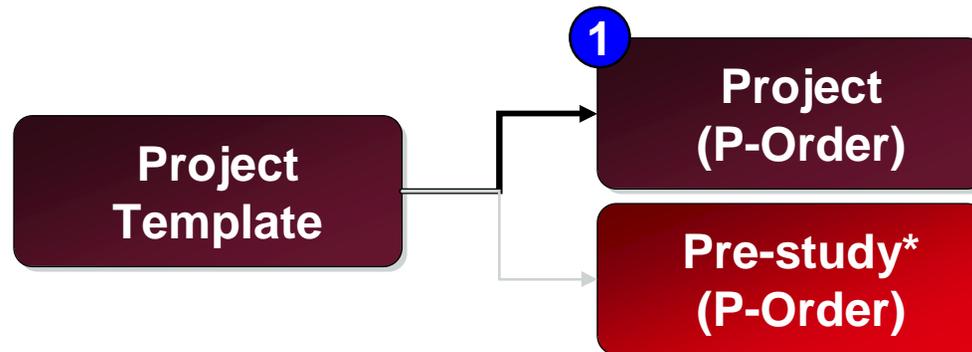
2 Pre-Study:*



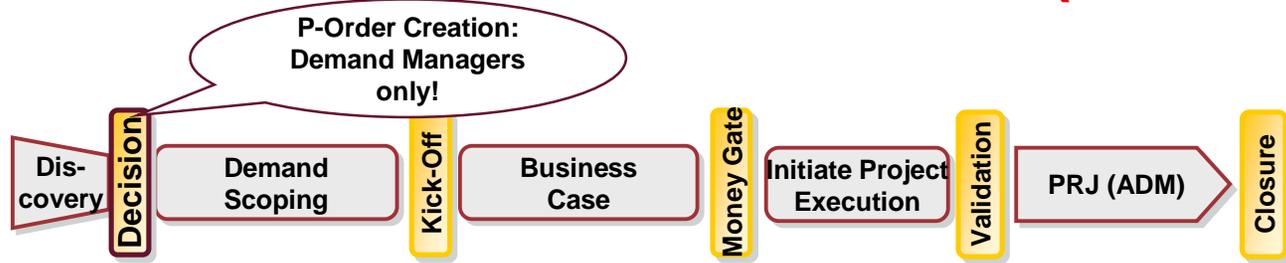
3 Lump Sum:**



Demand (P-Order)



Decision Gate: Creation of a Demand (P-Order)



General

* Name

* Currency Code Currency of budget and actuals

* Chargeable Status Chargeable = BU Project
Statistical = Internal Project

* Start Date

* End Date

Organizational Breakdown Structures

A Henkel Department

A Henkel Lead Company Lead Department and Lead Company required for SLAM accounting

Copy Template Project Options

Template Name

Sc

Convert resou

Not Relevant

Save Submit Cancel

Demand Scoping (Winning Concept) (1/2)

The screenshot shows a software interface for Demand Scoping. At the top, a process flow diagram includes stages: Discovery, Decision, Demand Scoping, Kick-Off, Business Case, Money Gate, Initiate Project Execution, Validation, PRJ (ADM), and Closure. The main interface is divided into 'General' and 'Timeline' sections. Callouts provide the following explanations:

- Requester of IT service in Business Unit (or Head IT unit)**: Points to the Business Requester field.
- Aligned Business Priority**: Points to the Business Priority dropdown menu.
- WHERE the project will be implemented**: Points to the Geographical Scope field.
- Probability of Project realization**: Points to the Level of Probability dropdown menu.
- Pre-study, New Process, New Tool, Roll Out, Technical**: Points to the Main Deliverable dropdown menu.
- Requested Project Timeline**: Points to the Start Date and End Date fields.
- Process Cluster to which a project can be assigned**: Points to the Process Category dropdown menu.

Demand Scoping (Winning Concept) (2/2)

The screenshot shows a project management software interface with several sections and callouts:

- Process Flow:** A sequence of steps: Discovery, Decision, Demand Scoping (highlighted), Kick-Off, Business Case, Money Gate, Initiate Project Execution, Validation, PRJ (ADM), and Closure.
- Financials Section:**
 - Project Type:** A dropdown menu with a callout: "Business Process, Business Structure, Strategic, Technical, Legal".
 - Project Class:** A dropdown menu with a callout: "Small, medium, large investment → BC guidelines".
 - OPEX / CAPEX:** A dropdown menu with a callout: "Charge code of a project: OPEX OR CAPEX".
 - 1st Budget Estimate (in currency):** A text input field with a callout: "1st rough budget estimation".
 - Corporate:** A dropdown menu with "No" selected and a callout: "Corporate project (e.g. ATA)".
 - Program (CAPEX only):** A dropdown menu with a callout: "Program required for CAPEX projects".
 - Allow Program for OPEX:** A checkbox with a callout: "A program might be allowed for OPEX projects".
- Description Section:**
 - Description: Problem, Opportunity:** A text area with a callout: "Reason why of a project".
 - Description: Solution, Ideas:** A text area with a callout: "Deliverables of a Project".
 - Comments (History):** A text area with a callout: "Comments remain open for entry after completion of DEM2 process".
 - Project Brief Attachment:** A text input field with a "Durchsuchen..." button and a callout: "Attach Project Brief Template".
 - Attach Documents:** A text input field with a "Durchsuchen..." button and a callout: "Attach additional documents (multiple possible)".
- Organizational Breakdown Structures:**
 - A Henkel Department:** A text input field with a callout: "A Henkel Department".
 - A Henkel Lead Company:** A text input field with a callout: "A Henkel Lead Company".

At the bottom left, there is a blue circle with the number "1" and a dark red button labeled "Project". At the bottom right, there is a red "HENKEL" logo.

BC Related Data in Clarity and when to update along the DEM Process



The screenshot shows the Clarity software interface with several callouts:

- Decision by KAM:** A callout points to the 'Project Class' dropdown menu in the 'Financials' section, which lists options like Business Process, Business Structure, Legal, Strategic, and Technical.
- Check in Project Brief (1st Page):** A callout points to the 'Project Brief Attachment' field in the 'Description' section.

Other visible fields in the interface include:

- Stage Status:** 01 in Progress
- Project Type:** Strategic
- Project Class:** large
- Requested Start Date:** 01.10.2009
- End Date:** 21.10.2010
- 1st Budget Estimate (in currency):** [Empty field]
- Corporate:** No
- Program (CAPEX only):** [--Select--]

1 Project



Kick-Off Gate



Save Submit Cancel

General

Gate-Status: 01 approve
[- Select -]
01 approve
02 Roll-back
03 Kill

Name: []
Date: 29.09.2009

Save Submit Cancel

= Locked by Process

Automatic documentation by WHOM and WHEN gate was approved

BC Related Data in Clarity and when to update along the DEM Process

Preliminary
 – currently being updated
 due to org changes 2012 –



General Data (BC planning aspects)

The screenshot shows the 'Business Case' data entry form in Clarity. Key fields include:

- IT BC Responsible** (Required field)
- BU BC Responsible** (Required field)
- BC Leading IT-Department** (Dropdown menu)
- Project Manager** (Dropdown menu)
- Project Manager 2** (Text field)
- Additional Comments** (Text area)
- IT Council(s)** (Text field)
- Date of Council(s)** (Text field)

Callout 1 (Left): Screen Shots Shows example for investment type "Large Impact". For "small" various fields are not displayed – no need to fill them!

Callout 2 (Center): For large & medium mostly determined via S&OP meeting

Callout 3 (Right): Final date(s) for delivery of BC results in IT Council(s) – Cross business projects need to be approved by more than one IT Council! Dates are result of "pipeline planning" between business, KAM and IT delivery units – IT council planning mostly given for the whole year.

Bottom Left: 1 Project

BC Related Data in Clarity and when to update along the DEM Process



Capture BC results

Results of calculation based on XLS template

Joint team effort between BC responsible and KAM to determine those details

Screen Shots Shows example for investment type "Large Impact"

For "small" various fields are not displayed – no need to fill them!

Check in final Results of BC Documentation package

Only if project is part of a program (BC for program is existing)

1 Project

Money Gate



Save Submit Cancel

Gate Status

Gate Status	01 approve	Name	
		Date	29.09.2009

General

* Start Date	29.09.2009	IT-Council(s)	
Comments	approved by IT Council XYZ	Sign Off Date(s)	123
Attachments	DUMMY.xls		

Save Submit Cancel

* = Required = Locked by Process

Automatic documentation by WHOM and WHEN gate was approved

Project Execution



Save Submit Cancel

Stage Status
Project Stage: [--Select--]

General Information

Name: DEM 2 TEST JokI

Project Manager: [] [] []

Project Manager: [] [] []

Demand Manager: [] [] []

Comments Project Execution: []

Open for Time Tracking (Can be set only for projects that have been released to SLAM)

Top 100

Timeline

Start Date: 29.09.2009 []

End Date: 31.12.2010 []

Go-Live Date: []

Annotations:

- In progress, hold, kill, closure** (points to Project Stage dropdown)
- Allow Time Tracking of assigned resources** (points to Open for Time Tracking checkbox)
- Determine whether project belongs to the Top 100 project reporting of PMG (ITG)** (points to Top 100 checkbox)
- Project Timeline** (points to Start and End Date fields)