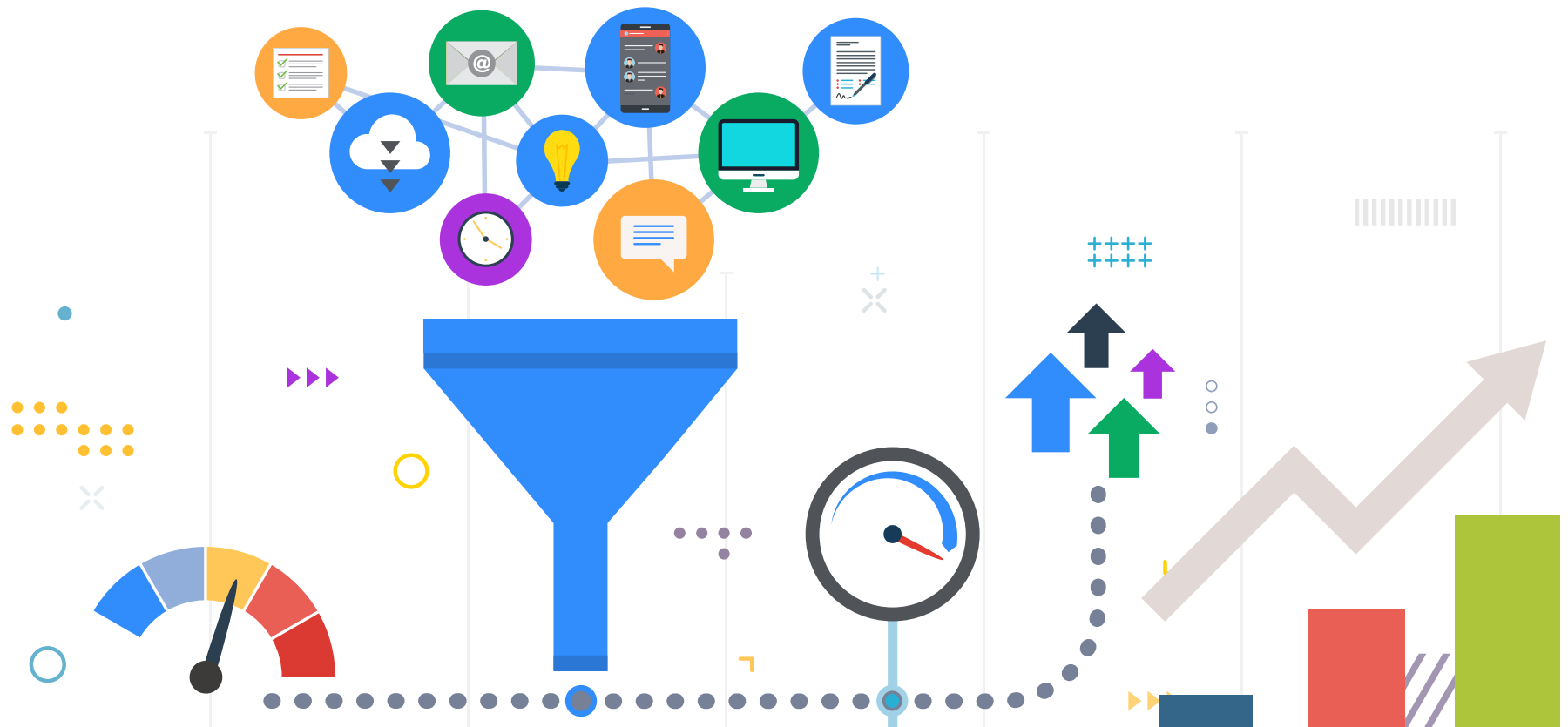


The Savvy PMO's Guide to Demand Management

Don't let work intake and demand manage you



Getting a grip on incoming work can challenge strategic delivery in your organization due to factors such as the rapid pace of change, new types of emerging work, and shifting business priorities. It is becoming more common to hear PMOs finding out that half of what they delivered in a single year was not even in their annual plan! With this level of uncertainty, an established demand management process is critical for success.

Having a formalized process in place to collect and evaluate work requests enables an organization to choose the right work to continuously deliver value by balancing growth initiatives with regulatory compliance and run-the-business work to meet the needs of the business. The Savvy PMO knows that a consistent, easily understood, and visible process is beneficial for everyone across the business. With a solid demand management process in place, all incoming work is objectively assessed for alignment to strategy, risk mitigation, customer impact, overall improvement, financial benefit, capacity, and more.

There are many ways to collect and qualify various types of demand from ideas to projects, programs, products, enhancements, as well as support work. Effective work intake will also help improve resource planning and prioritization, helping you accelerate delivery of business value.



Want to know how to improve the efficiency of your intake process? Check out the interactive checklist at the end of this guide and use it to establish a strong demand management process to become a Savvy PMO.

Now, let's get savvy with demand management!



1 Capture Initial Work Requests

Provide your organization with the freedom to submit work ideas and requests without suffering from intake overload. Start simple to improve the likelihood for early success and incrementally increase adoption over time.

Design a straightforward work intake form with the requester and approver in mind. Consult with team members to identify required field types and information and those that should be hidden at certain gates, streamlining and simplifying the process.

Next, provide different request forms for different types of work, departments, or sets of requesters – depending on how your organization operates.



Remember, you don't have to make a one-size-fits-all form. Create the intake form and approval process best suited for the work being requested.

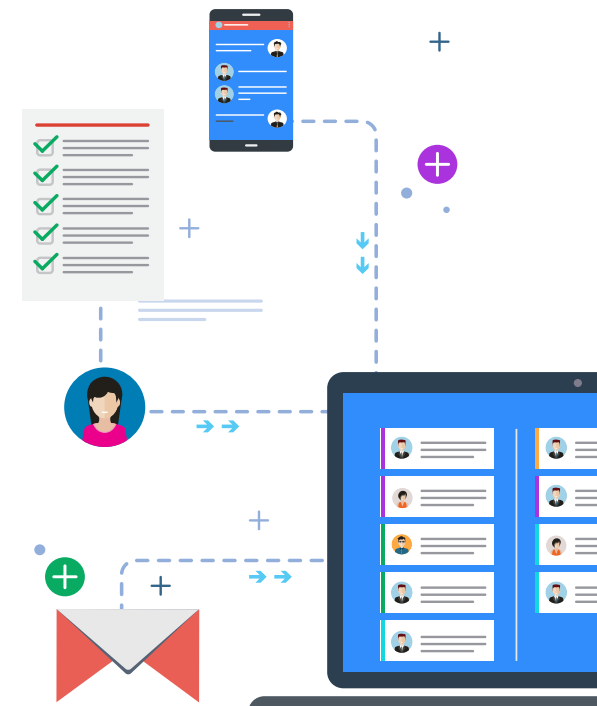
Lastly, consider not only new work intake, but also how change requests are processed for work in flight. Create an intake flow that captures and follows your organization's change control process for updating existing work.

Configure work intake forms and supporting items such as notes, attachments, and scoring, to collect essential information at the right time in the workflow process



"The lack of a single process point and function within the organization to review and manage all IT project demand results in a lack of visibility, unnecessary bottlenecks, and suboptimal choices."

– Gartner, How PPM Leaders Can Effectively Prioritize IT Projects

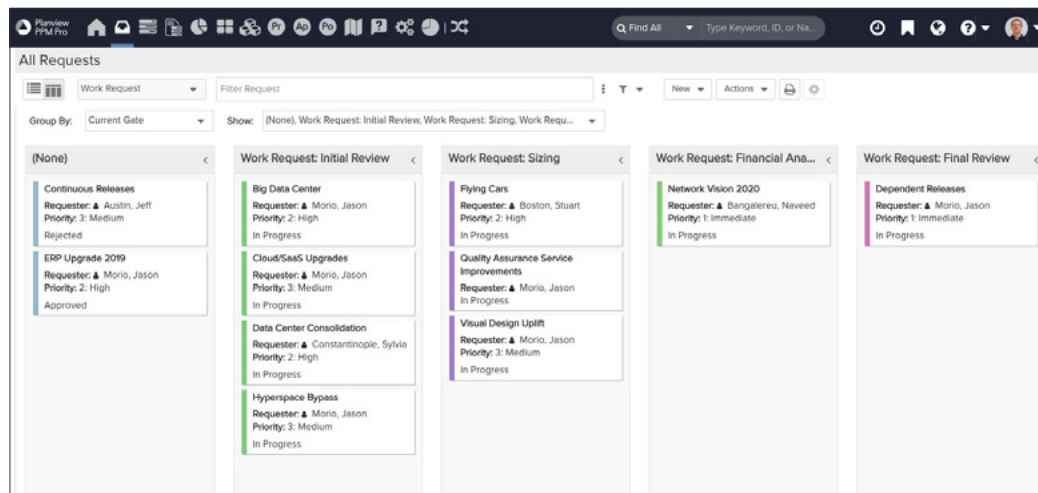


2 Direct the Work Intake Process

Let the process do the heavy lifting. Use gates as needed to organize the flow, collection, and evaluation of information, matching approval gates to the decision points of your business process. This includes gathering the supporting data and evaluations in a logical way to streamline the process. Kill unnecessary work requests as soon as possible, defer or place low-value work on hold, and advance high value work quickly.

An example of how a Savvy PMO can establish a simple intake process is to set stages such as: “Begin with a concept proposal”, “Send to financial review”, and “Prioritize”, where capital funding can be granted based on the prioritization. By developing a strategic work intake process, implementing it across your business, and reducing the time and effort on low-value work, you will be able to quickly begin seeing results and value.

An example of a Savvy PMO’s strategic work intake process might look something like this:

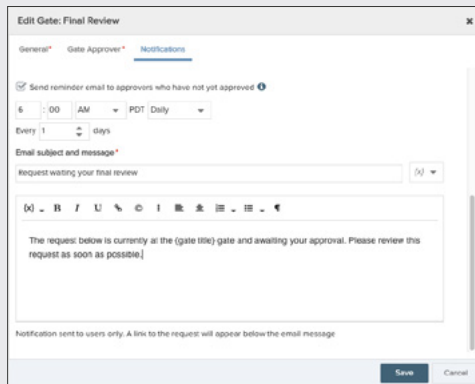


Use gates as needed to organize the flow and collect and evaluate the right data at the right time. Then match approval gates to the decision points of your business process

Automate the Project Intake Flow

Automate the project intake flow so appropriate approvers can be notified at the right point in the process, including “nag-o-gram” reminders when necessary.

- Constant, yet appropriate, notifications lead to efficient flow through the process
- This eliminates bottlenecks to keep the process running smoothly with quick results

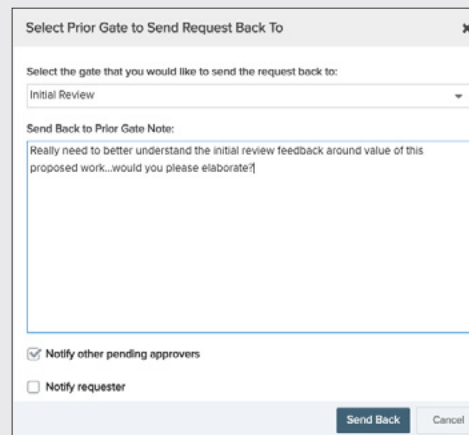


Set up automatic notifications for gate entry and for requests that are stagnant and have been sitting at a gate for too long

Trust Your Experts

Let the experts in your business evaluate the merits of the request and decide whether the work should move forward.

- Allow gate approvers to send a request for more information, place it on hold (if the timing is wrong), move it forward to the next step, or reject the request if it's not aligned with your organization's needs, goals, and/or strategies

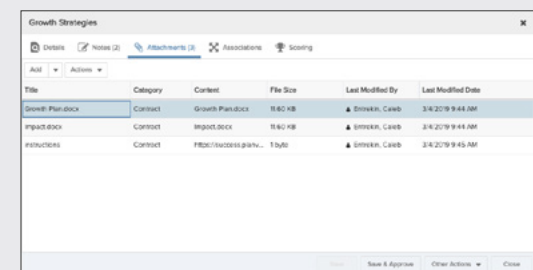


Allow your experts to move the work intake request along in the flow as appropriate

Collaborate

Use notes and attachments to document decisions, next steps, and actions within the workflow (and throughout the life of the request). Notes made when taking actions such as approval, rejection, placing a request on hold, and sending a work request back to a prior gate, further inform others about needed corrections, what information may be lacking, and can even spur exchanges to innovate on the work requested.

- Leverage collaborative work management software to make it easy for people to communicate, track the process, and complete the work
- Integrate the digital collaboration solutions into your central PPM system for a seamless exchange of information



Title	Category	Content	File Size	Last Modified By	Last Modified Date
Growth Plan.docx	Contract	Growth Plan.docx	15.62 KB	Smokin, Cade	3/4/2019 9:44 AM
Impact.docx	Contract	Impact.docx	15.62 KB	Smokin, Cade	3/4/2019 9:44 AM
PPM/ResourcePlan... 1.pdf	Contract	PPM/ResourcePlan... 1.pdf		Smokin, Cade	3/4/2019 9:44 AM

Having a single source of truth for all work means requests can flow quickly and predictably

3 Evaluate and Generate Key Work Items

To help guide categorization, analyze request details and scores to identify which requests are the most feasible and valuable for your organization. Savvy PMOs assess and categorize demand based on its overall organizational benefit, either by a simple calculated score of key data or a scoring model to represent business metrics. At the end, or as part of the request workflow process, relevant gate approvers and stakeholders can score on quantitative factors such as ROI, or on qualitative ones such as strategic fit, impact, or risk. These factors can also be weighted based on relative importance. Every organization is different, so do what's best for yours, just make sure you can consistently evaluate and compare the requested work.

Prioritization is also just as important as work intake. Use scores to approve the appropriate work, and turn approved work requests into new work efforts, whether project, task, action item, or a combination of these elements. A best practice that other Savvy PMOs recommend is establishing your prioritization process in tandem with a demand management process for maximum effect.



"When PPM leaders treat all requests and work as projects, the impact is felt through reduced benefit realization, low project performance and overstretching of key resources such as project managers."

– Gartner, 5 Best Practices for PPM Leaders to Categorize Demand for Intake Efficiency.



A major university merged three central IT organizations into one to provide shared services. To meet service delivery goals, their IT operations and internal processes needed to be redefined, implemented, and adopted by more than 800+ employees. Working with IT, their PMO started with demand management and has now reduced approved projects by 75 percent, created a visible pipeline of demand, lessened staff workload, and improved performance.

Growth Strategies

Details

Notes (2)

Attachments (3)

Associations

Scoring

Scoring Info: Growth Strategies

Scoring Profile

Standard Scoring Profile

Scoring Is Locked

No

Score

64.25

Scoring Locked Date

3/4/2019 8:30 AM PST

Scored As Of

Scores: Growth Strategies

View By User

Team Member

Score

Category

Weighted Category Score

Criteria

Criteria Selection

Weighted Criteria Score

Function

Entrekin, Caleb

64.25

Value

33.00

Payback Period

75.0 - 1-2 Years

12.38

Strategic Alignment

75.0 - Aligns with multiple Business Objectives

12.38

Business Value (ROI)

50.0 - Medium High Value or ROI

8.25

Risk

31.25

Complexity

75.0 - Minor Impact to Systems or Processes

18.75

Technical Risk

50.0 - Emerging technology; market presence; skills available

12.50

This list contains 1 item(s).

Save

Save & Approve

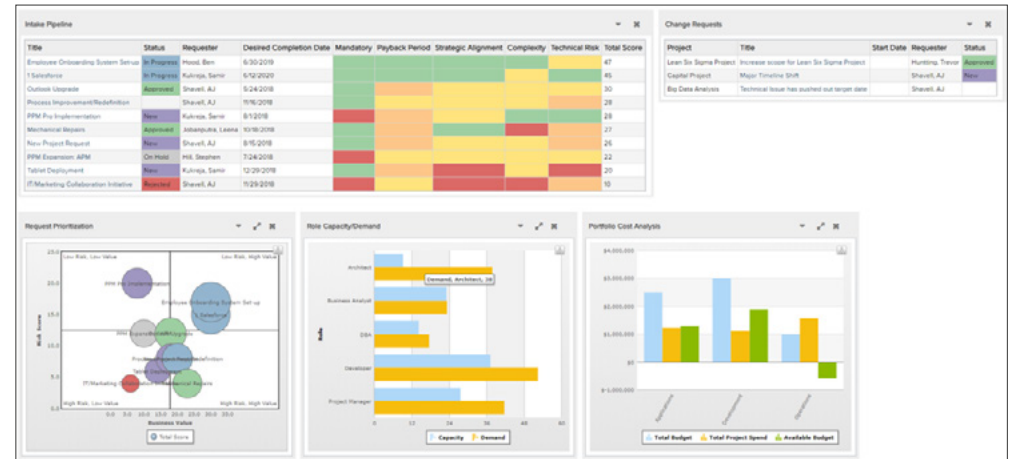
Other Actions

Close

Use prioritization scoring to compare and evaluate work intake requests so that you can ensure your organization is working on the right work

4 Audit, Track, and Improve

Continuously trying to improve your process is the key to sustainable success for demand management. Highlight your successes, improve, and evolve as the needs of your organization change. One Savvy PMO recommends, “Embrace continuous improvement! Keep score – it’s imperative that you evaluate how the work intake (and resulting work) performs both operationally and financially, and that all stakeholders are aware, so you can improve as an organization and meet your strategic goals.”



Use regularly published dashboards to enable stakeholders to monitor progress, improve the process, and ensure that the right strategic work is moving along quickly

Analyze Flow	Analyze the number and velocity of requests flowing through the work intake process	<p>Look into requests that are redundant, made it too far before being stopped, and should have been prevented from entering the process.</p> <ul style="list-style-type: none"> Adjust the process to prevent and identify any unwanted work intake items as early in the process as possible
Identify Bottlenecks	Locate the gates that have bottlenecks and are blocking high value requests	<p>Evaluate the request forms and information collected at each gate.</p> <ul style="list-style-type: none"> Is wrong information being considered or is not enough information being collected? Look at the logic for identifying the gate approvers and ask – are the right subject matter experts identified and assigned to be approvers?
Document and Improve	Identify and address lessons learned and take action	Modify and evolve the intake process as your organization grows. Keep a history and avoid repeating known mistakes.
Segment Work Requests	By score, department, strategic initiative, and other important factors	This will allow you to make comparisons and analyze impacts. Leverage reports and dashboards from their PPM software solutions to easily compare and access work request results.
Summarize Results	Regularly publish meaningful information to stakeholders	<p>This demonstrates the outcomes and value of work intake. “Keep score” and make sure your stakeholders are aware of the scoreboard.</p> <ul style="list-style-type: none"> Did the scores and prioritization result in the right work making it through? Did this work meet your strategic goals? If not, find out why and course-correct.

Demand Management Checklist for the Savvy PMO



Complete this checklist to evaluate and improve your work intake and demand management processes.

1. CAPTURE INITIAL WORK REQUESTS

Design a work intake form to gather the right upfront information with both the requester and approver in mind

Design different request forms for different types of work, departments, or sets of requesters, as needed

Create an intake flow to manage change requests and to update existing work

Start capturing work ideas and requests from your team(s)

2. DIRECT THE WORK INTAKE PROCESS

Automate the project intake flow

- Set up automatic notifications for gate entry and requests

Trust your experts

- Allow your experts to move intake requests along in the process workflow

Collaborate

- Leverage collaboration software to partner with team members and work together

3. EVALUATE AND GENERATE KEY WORK ITEMS

Assess and categorize demand based on factors important to your business and overall organizational benefit

Use scores to approve the appropriate work, and turn approved work requests into new work efforts, whether project, task, action item, or a combination of work elements

Work on establishing and improving your [prioritization process](#) for a streamlined approach to taking on the right work

4. AUDIT, TRACK, AND IMPROVE

Analyze the number and velocity of requests flowing through the work intake process

Identify the gates that are bottlenecks which are blocking high value requests

Document lessons learned and identify actions to address those lessons

Segment work requests by score, department, strategic initiative, and other important factors

Summarize results and regularly publish meaningful information to stakeholders

Highlight the steps that make sense for your organization's work intake process...



or create your own...



Partner with Planview and Be Savvy with Demand Management

Savvy PMOs know that leveraging demand management makes a difference. By establishing demand management for your organization, you can ensure you are taking on the right work that benefits your company goals. Ultimately, if you are choosing and completing the right work, you are delivering on strategy and driving value – now that's savvy.

The Savvy PMO not only utilizes a strong work intake process, but also effectively prioritizes work, and can successfully start resource and capacity planning. Route requests through the system and re-prioritize frequently as new demand comes in, planning and managing on an ongoing basis.

Now that you've learned about demand management, read the next two Savvy PMO Guides in this series:

- [Savvy PMO's Guide to Resource Planning](#)
- [Savvy PMO's Guide to Prioritization](#)
- [Savvy PMO's Guide to Visibility and Reporting](#)

One more thing... with over 30+ years in the market, Planview has gained the knowledge and experience from working with thousands of PMOs who have been in your shoes. These Savvy PMOs integrate planning and delivery and confidently deliver high-value work that matters to their business. Get Savvy – Partner with Planview and take advantage of best practices, guidance, frameworks, and support for your constantly improving organization and connect strategy to delivery across the business.

Want to learn more about how you can become a Savvy PMO?
Visit [**Planview.info/savvy-pmo.**](https://planview.info/savvy-pmo)