# Value-added information services
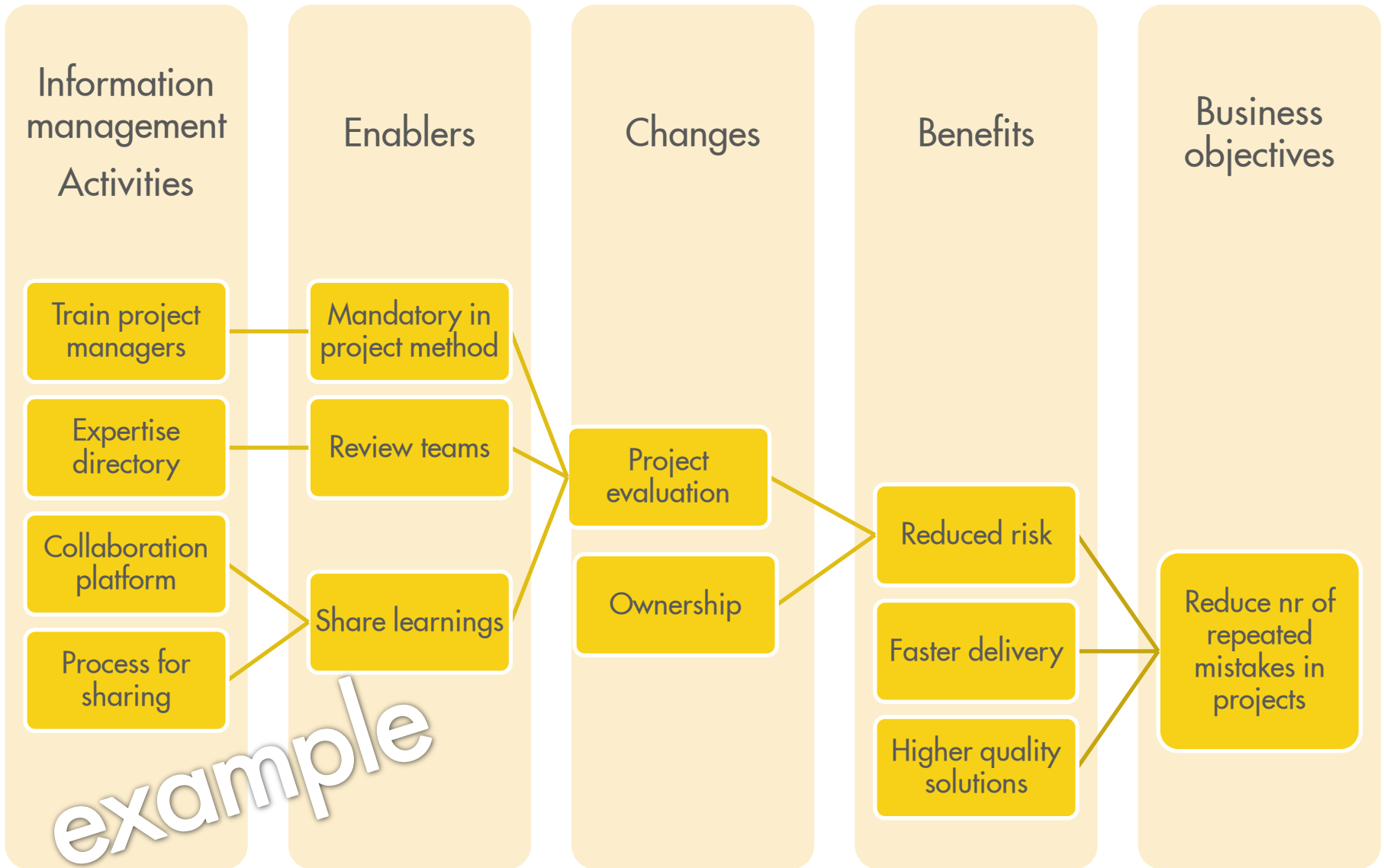
## How to stay relevant in a changing world

Dennie Heye ECMs

Global Knowledge Manager HR IT

# Agenda

- Background
- Value of information management: strategy and plan
- Value of information management: examples
  - Support portfolio management
  - Virtual team working
- Role of the information professional
- Key messages

# Positioning information management as pivotal enabler of business success

# Why: link information management to business objectives



Information management Activities → Enablers → Changes → Benefits → Business objectives

**Information management Activities**
- Train project managers
- Expertise directory
- Collaboration platform
- Process for sharing

**Enablers**
- Mandatory in project method
- Review teams
- Share learnings

**Changes**
- Project evaluation
- Ownership

**Benefits**
- Reduced risk
- Faster delivery
- Higher quality solutions

**Business objectives**
- Reduce nr of repeated mistakes in projects
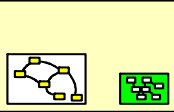
example

# How (1): maturity assessment

**Q4- 2012**

**Q1 - 2009**

### INITIAL

- info quality and sharing not seen as important
- info suppliers unaware of customers and their requirements
- info handling is inconsistent
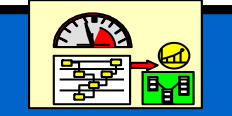- consequences of poor quality info not known

### RECOGNISING

- info standards and procedures not defined
- info requirements not explicitly defined
- info delivery dependent on skilled individuals
- individuals aware of need to manage info
- support from line to progress info quality improvements
- info analysis done in isolation

### SPECIFYING

- agreed customer info requirements
- defined info delivery process
- defined info delivery performance indicators
- critical info identifed
- responsibilities for critical info assigned
- info standards defined
- info redundancy controlled but info not shared or easy to access

### MANAGING

- info standards and procedures applied
- info delivery measures collected
- corrective actions initiated for critical info
- corporate models in place and used

### OPTIMISING

- customer feedback on info deliverables
- continuous improvement of info quality, accessibility and shareability
- portfolio enhancements driven by process improvement demands
- updates to corporate models managed

# How (2): from recognizing to the specifying maturity stage

**RECOGNISING** → **SPECIFYING**
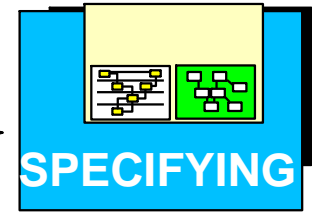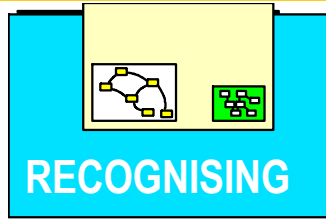
## Key Steps

▶ identify & prioritse critical information related to processes

▶ assign responsibilities for critical information

▶ agree information requirements for critical information

▶ define information delivery process

▶ define information delivery performance indicators

▶ carry out information analysis to control information redundancy

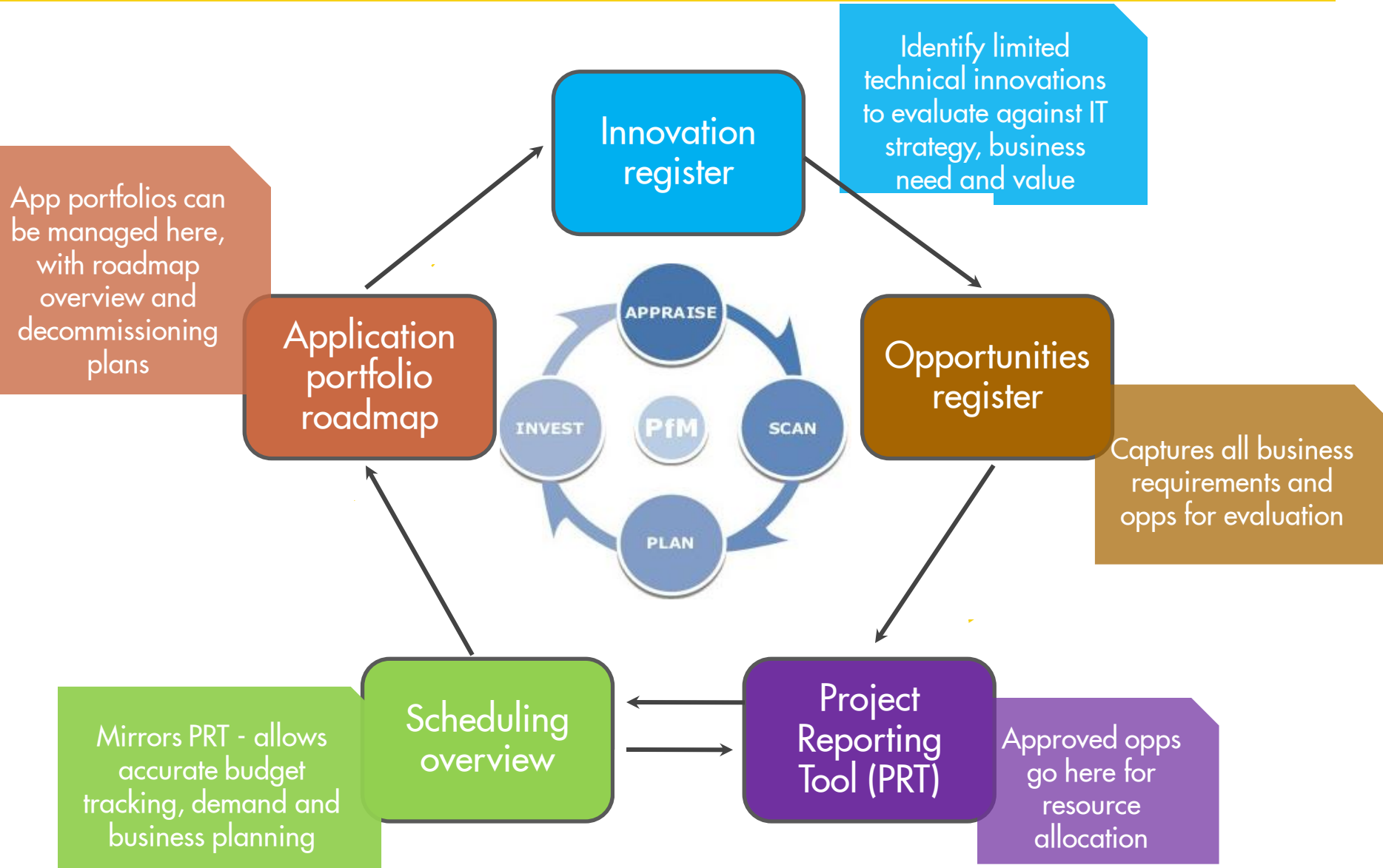▶ feed back evidence on business benefits to line management

## Critical Success Factors

▶ critical information and impact on business identified

▶ responsibilities assigned for critical information

▶ information models of existing systems available and understood

▶ line management allocates resources and expertise to improve information management

## KPIs

▶ proportion of critical information with assigned responsibilities and defined requirements

▶ proportion of critical information systems with customers and suppliers identified

▶ number of systems and interfaces identified as involved with critical information

▶ information delivery performance indicators described

# Value of information management: supporting portfolio management

# Core processes around application portfolio management

**Identify limited technical innovations to evaluate against IT strategy, business need and value**

**Innovation register**

**App portfolios can be managed here, with roadmap overview and decommissioning plans**

**Application portfolio roadmap**

APPRAISE

INVEST

PfM

SCAN

PLAN

**Opportunities register**

**Captures all business requirements and opps for evaluation**

**Scheduling overview**

**Mirrors PRT - allows accurate budget tracking, demand and business planning**

**Project Reporting Tool (PRT)**

**Approved opps go here for resource allocation**

# What has improved?

| From | To |
|---|---|
| Multiple sources of misaligned and incomplete information | Single version of the truth, easy to use |
| Manual updates | Automatic downloads, synchronization across lists |
| Demand planning challenging | Demand planning easy and straightforward |
| Most time spent on gathering and collating information | Most time spent on analyzing and planning |

# Opportunities register

Homepage | Innovation register | Opportunities register | Scheduling overview | APM roadmap

## Opportunities register

**View All Site Content**

**Opportunities register**

APM consolidated view

PPI opportunities view

Groupings and process

BSM

Sub Opps strategy talent and health

### Opportunities register

Records all potential opportunities for HRIT. Entries will be validated and prioritised ultimately by BSMs and business p

New ▾ | Actions ▾ | Settings ▾

| ID | Opportunity Name | Early estimate↓ | Confidence in estimate | Intent | Strategic Grouping | Status |
|----|------------------|-----------------|------------------------|--------|--------------------|--------|
|  | Count = Number | Sum = Number |  |  |  |  |
| 61 | Name | Number | Low | Must Do | Strategic Investment | Consider for Baseload |
| 316 | Name | Number | High |  | Strategic Investment | Consider for 2011 T&R |
| 356 | Name | Number | Medium | Should Do | Strategic Investment | Consider for 2011 T&R |
| 55 | Name | Number | Medium | Must Do | Strategic Investment | Consider for 2011 T&R |

Different views on same data

Can be edited online in bulk

Export to Excel for charts

Slicing and dicing of data

# Excel charts based on SharePoint data
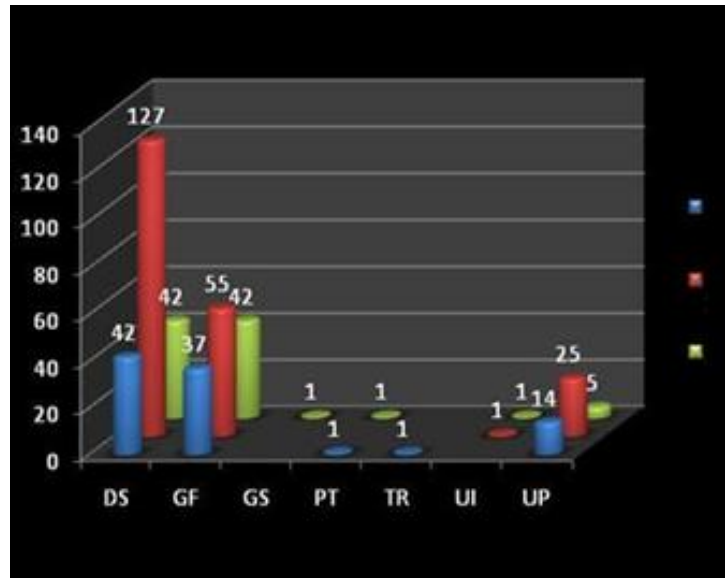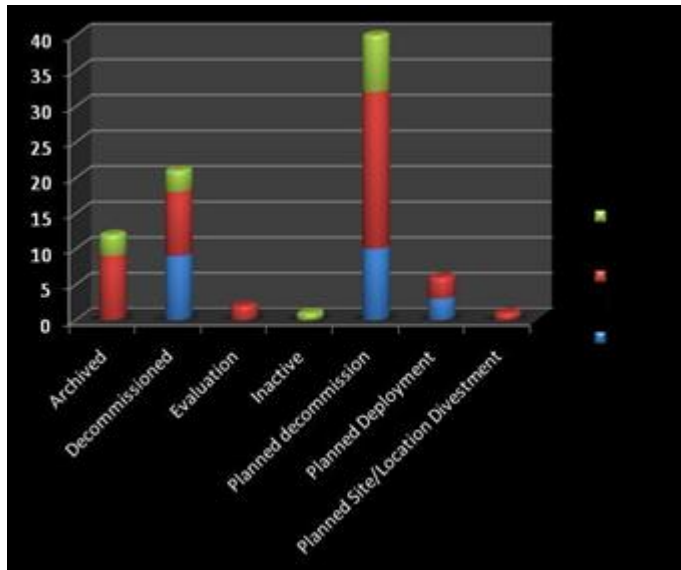




- charts are based on up to date data

- charts can be created quickly by exporting SharePoint list to Excel

- next version will allow charting in SharePoint online

# Scheduling overview

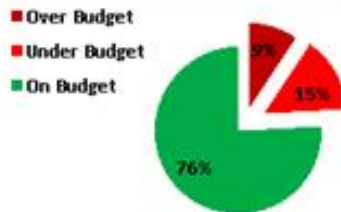# Next phase: online dashboards based on project data

GF IT PDAS Community site > PDAS-PMO > Reports Central (under development)

This area hosts all the various reports at all levels produced by PDAS PMO.
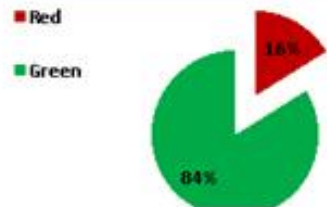
**IT Pulse - On Time**
- Over Time    6%    3%
- Under Time
- On Time    91%

**IT Pulse - On Budget**
- Over Budget    9%
- Under Budget    15%
- On Budget    76%
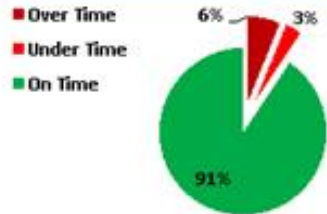
**IT Pulse - PDF Compliancy**
- Red    16%
- Green    84%

**Line of Business**

Finance IT

**IT Pulse Pivots**

Open ▾ | Update ▾ | 🔍 Find                     View: PDF Compliancy Dashb... ▾ | ❓

| | | |
|---|---|---|
| Line of Business | Finance IT | |
| Project Manager | (All) | |
| Metrics exclude from KPIs | (Multiple items) | |
| Risk Profile | (All) | |
| Project Status | (All) | |
| Delivery Confidence | (All) | |
| Year | 2011 | |
| Month | July | |

| Project Name | Registration Id | PDF Compliancy % | Project Charter & Approvals | PCP & Approvals | Risks Logged | Pre Investr Revie |
|---|---|---|---|---|---|---|
| **Red** | | | | | | |
| ⊟ / | ⊟ P03.00154 | ⊟ 88% | ⊟ | ⊟ | ⊟ | ⊟ |
| ⊟ ...ase 1 2011 | ⊟ P03.00183 | ⊟ 63% | ⊟ | ⊟ | ⊟ | ⊟ |
| ⊟ | ⊟ P03.00168 | ⊟ 83% | ⊟ | ⊟ | ⊟ | ⊟ |
| ⊟ S... ...ccuuting - Phase 2 | ⊟ P03.00201 | ⊟ 90% | ⊟ | ⊟ | ⊟ | ⊟ |
| **Green** | | | | | | |

sample data

# Key success factors

- Recognized problem that requires a solution
- Discipline to create a "single version of the truth"
- Standardized meta data across lists
- Solution is simple, flexible and integrated
- "Release early, release often"
- Close cooperation with customers
- Information architecture design

# Value of information management: virtual team working

# My Workspace program

- My Workspace is a new, flexible way of working virtually that will change the way we work, connect and communicate with each other. It packages new and existing IT products and services into eight components that are **integrated**

My computer

Making calls

Web conferencing

Video conferencing

Organising information

Access anywhere

E-mailing

Instant messaging

**Underpinned by training and support to enable behavioral change**

# Document management

- Drive to store documents centrally
- Move from folders to attributes based on processes, application
- Next version: automatic records management compliance

⊞ **Business Area : ITGF/GHT** (5)

⊞ **Business Area : ITGF/HS** (3)

⊟ **Business Area : STH Team** (20)

  ⊞ Document Type :  (7)

  ⊞ Document Type : Analysis (5)

  ⊞ Document Type : Communication (6)

  ⊞ Document Type : Functional/Technical Specification (1)

  ⊞ Document Type : Portfolio Management (1)

⊞ **Application : OneHealth** (24)

⊟ **Application : Open Resourcing** (8)

  ⊞ Document Type : Communication (3)

  ⊞ Document Type : Functional/Technical Specification (4)

  ⊞ Document Type : Work Instructions/Procedures (1)

⊞ **Application : Shell People** (56)

# Shared team calendar

# Shared task list

| My Shell | My Job | HR Online | Services | News | | | This List: Tasks | | |
|---|---|---|---|---|---|---|---|---|---|

Start Page | | | | | | | | Site Actions

## Tasks «

HR IT Strategy, Talent and Health - Tasks

Search All Task Items

| | Subject | Assigned To | Custom Status | Custom Priority | Due Date |
|---|---|---|---|---|---|
| | S0 - T2009 Financial Structure changes | \<name\> | Not Started | High | Sun 10/31/2010 |
| | Portfolio Review | \<name\> | Not Started | Low | None |
| | Portflio review | \<name\> | In Progress | Normal | Sun 10/31/2010 |
| | Confirm budget/project transfers in from HRS | \<name\> | Completed | High | None |
| | Decomissioning | \<name\> | In Progress | Normal | Thu 7/1/2010 |
| | S0 - r stabilization | \<name\> | Not Started | High | None |
| | S0 - mprovement | \<name\> | Not Started | Low | None |
| | S0 - Stabilisation | \<name\> | Completed | High | None |
| | Future Resourcing Model taskforce | \<name\> | Deferred | TBD (to be deci... | None |
| | Digital Strategy | \<name\> | Not Started | High | None |
| | S0 - t Data Clean up | \<name\> | Not Started | High | None |
| | Demo Nakisa - Talent visualisation | \<name\> | Deferred | Normal | None |
| | Workforce planning taskforce | \<name\> | Deferred | TBD (to be deci... | None |
| | External Reference data | \<name\> | Not Started | Normal | None |
| | Challenge case - e-Recruitment | \<name\> | Not Started | Normal | None |
| | Portfolio refresh - Attraction tools | \<name\> | Not Started | TBD (to be deci... | None |
| | S0 - Decomissioning | \<name\> | Waiting on so... | Low | None |
| | Portfolio Review - Health | \<name\> | Not Started | Low | None |
| | Ad-Hoc portfolio consultancy | \<name\> | In Progress | High | None |
| | Cross-portfolio review - all APM's | \<name\> | In Progress | High | None |
| | Portfolio Decommissioning | \<name\> | Not Started | Normal | None |
| | Demand Management - Projects | \<name\> | Not Started | Normal | None |
| | Virtualisation (T-Systems) | \<name\> | Not Started | Low | None |
| | Full STH Team Mtgs | \<name\> | Not Started | Low | None |
| | Information Risk Management | | Not Started | Normal | None |

### All Task Items ▾

**My Tasks** ⌄
- 🚩 To-Do List
- Tasks
- Tasks in Archive Old
- Tasks in Archive Folders
- Tasks in Personal Folders

**Other Tasks** ⌄
- HR IT – Strategy, Portfolio & Pla
- HR Services partner team - Task
- HR IT – Strategy, Portfolio & Pla
- HR Services partner team - Task
- HR IT Strategy, Talent and Healt

**Current View** ⌄
- ○ Simple List
- ○ Detailed List
- ○ Active Tasks
- ○ Next Seven Days
- ○ Overdue Tasks
- ○ By Category
- ○ Assignment
- ○ By Person Responsible
- ○ Completed Tasks
- ○ Task Timeline
- ● Server Tasks
- ○ Outlook Data Files

# Role of the information professional

# Role of the information professional

**Strategy**

- Define governance model
- Deliver business benefits

**Content**
- Content migration
- Content guidelines
- Content retention

**Technology**
- Build SharePoint expertise
- Help to improve search

**Design**
- Site design & structure (taxonomies)
- Usability & information architecture

**Change and communication**
- Change management
- Communication

# Key messages

- Link information management to business objectives to prove value
- Identify business needs and map them to solutions
- A tool will not solve a problem without people and process
- Change is a journey, not an event
- Information management skills are key to a successful implementation
- SharePoint can is a good toolbox, but it requires skills and business insight to be successful
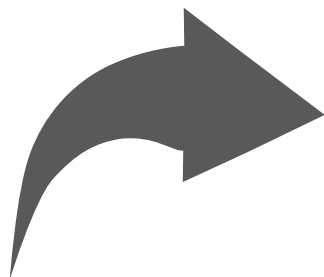
# Q & A

**Contact:** dennie.heye@shell.com
**Personal website**: http://dennie.heye.nl

# HOW (3): Strategy on a page

**KS Awareness 2009**

**KS embedded in 2012**

**Embed Knowledge Sharing**

- Ownership Knowledge Sharing with leadership & individuals
- KS part of "way of working"
- KS activities are sustainable
- Improved Knowledge bases & processes for contributions

**Knowledge Sharing 2009**

- Ownership within small communities
- Awareness of Knowledge Sharing
- Knowledge in minds of individuals
- No explicit ask, learn, share culture

**People - Staff & Leadership Behaviour**

**Processes - Communication**

**Tools- Knowledge Sharing technology**

**L&D – Motivate staff to develop**

**Ask, Learn, Share**