

Innotas Demand Management

While most Project Portfolio Management (PPM) applications focus on Project Management, successful IT PPM implementations depend on strong demand management to control the “funnel” of demand flowing into IT. Innotas tracks requests for new projects, simple change requests, medium-sized enhancements and “Keep the Lights On” (“KTLO”) activities. Efficient prioritization and resource allocation requires a uniform demand management framework across various work categories. Innotas Demand Management is designed specifically for IT to control the flow of demand into IT in three ways:

- Capturing project and work requests in a single repository
- Standardizing processes for consistent data collection and evaluation
- Providing a flexible platform for automating processes

Capture Demand

IT leaders constantly struggle with shifting priorities and without proper demand management tools, and best practices, it’s difficult to gauge how much work is in the pipeline. Additionally, it becomes difficult to identify when new work might impact existing priorities. In many cases, small enhancements are tracked in spreadsheets, project requests might be tracked in a homegrown system, and changes to projects could be tracked on a wiki. This often creates challenges when attempting to cross-prioritize across multiple data sources. Generally difficulties arise when trying to ensure that the highest priority work is completed first. Innotas Demand Management provides IT organizations with templates and best practices to capture incoming requisitions from the customer base for all types of work. The user community is presented with a clear interface for work requests from IT, including customer-configured instructions, forms, and stage-gate approval workflow.

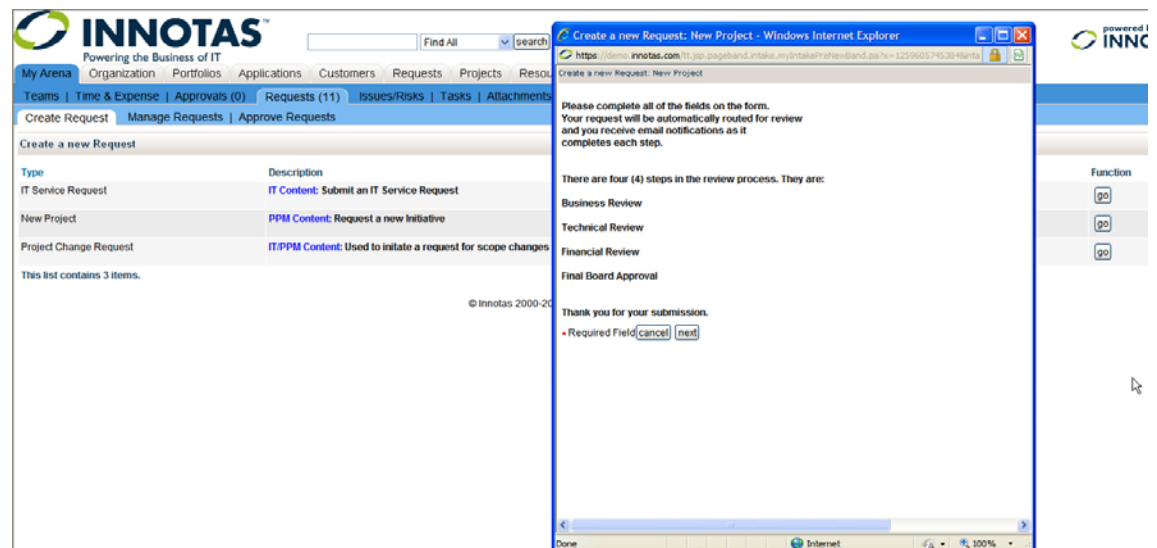


Fig 1: The Create Request page presents end users with different types of requests, all configured by the customer. Once the user presses “Go”, the user is presented with instructions for completing the request.

Standardize Processes

Another pivotal challenge for most IT organizations is justifying why some work is completed while other work waits in the queue. Prioritization is difficult because demand rarely follows a single process for evaluation, and often, the data presented for evaluation is different depending on who submits it. In some cases work is started based on hallway conversations, others from email, or from an outdated project request form.

Innotas Demand Management helps IT organizations standardize their data collection and process for evaluating new work requests regardless of the type of work.

Customers can configure the existing templates and stage gate approval processes, or create new ones based on their specific work types. Each step of the process can be assigned to different users, and each change or approval throughout the process is captured in history for the request. Individual fields can be configured as required, ensuring that when projects or other work requests are evaluated against each other, consistent data is being compared.

The screenshot displays a web interface for a request titled 'Sales Commission Application' (ID: 1054423). The interface includes tabs for 'Status', 'Basic Info', 'Notes', and 'Attachments'. Below the request details, a 'Log' section provides a chronological history of actions:

- Approved by Entrekin, Caleb on 03/13/2009 3:51 PM
- Submitted by Madewell, Tim on 09/13/2007 2:17 PM
- [] from gate [Financial Review] by Madewell, Tim on 09/13/2007 2:17 PM
- Sent to gate [Financial Review] for [Action] by Brown, Robert on 09/13/2007 10:35 AM
- [] from gate [Technical Review] by Brown, Robert on 09/13/2007 10:35 AM
- Sent to gate [Technical Review] for [Action] by Madewell, Tim on 09/13/2007 10:29 AM
- [] from gate [Business Analysis] by Madewell, Tim on 09/13/2007 10:29 AM
- Sent to gate [Business Analysis] for [Action] by Loewy, Steven on 09/13/2007 10:24 AM
- Submitted by Loewy, Steven on 09/13/2007 10:24 AM

At the bottom of the log, there is a copyright notice: '© Innotas 2000-2009 All Rights Reserved. Privacy Policy' and a link for 'Timing'.

Figure 2: Each Request includes history that tracks who approved the request at various stages in the process.

Flexible Platform

Innotas Demand Management makes it easy to model your process and data with customer configurable forms, alerts, stage-gate approvals, workflow, reports, and dashboards. Request types can also be configured to automatically create projects or tasks once approved, completing the lifecycle of the request.

- **Configurable Forms.** Customers configure each request type including the fields that should be tracked on the form, default values, lookup lists, and labels.

Status Basic Info Notes Attachments	
Request Info: Sales Commission Application help assign owner create item edit delete	
Id	1054423
Title	Sales Commission Application
Description	
A new system to determine commissions for the sales team. Easy-to-use Web-based CRM solution for sales, service, marketing, and call center operations that streamlines customer relationship management and boosts customer satisfaction. Organizations can enjoy unparalleled productivity, revenue growth, and business intelligence with Salesforce CRM	
Investment Category	KTLO Project
Executive Sponsor	Loewy, Steven
Business Unit	Finance
Business Owner	Booker, Paul
Business Objective	Cost Reduction
Target Portfolio	
Priority	1:High
Desired Go Live Quarter	
Executive Sponsor Approved?	Yes
Steering Committee Approval Required?	Yes
Scope	
The following WBS is based on the PMI Software Implementation WBS Example. This WBS is illustrative only and is intended to provide guidance to the PM. The Project Management Team is always responsible for determining what is appropriate for any given project.	
Out of Scope	
streamline the process and gain control.	
Describe impacts on other applications	
Have the impacted IT teams been contacted?	Yes
If yes, list teams impacted and person contacted	
Project Approach	
Reduce processing time, reduce costs.	
Desired Completion Date	02/01/2008
Financial Impact	
Estimated Cost	\$450,000.00
Estimated Return on Investment	0
Estimated Hours	0

Figure 3: Project Request template

- **Stage-Gate Approval Workflow.** Each request type includes a configurable stage-gate approval workflow that manages the hand-offs of the request between various approvers in the cycle.
- **Required fields.** Fields on Request Types can be defined as required or optional at each step in the stage-gate approval workflow. This helps ensure that all necessary data is available at the right time for evaluation and prioritization.
- **Alerts.** Automated alerts are generated throughout the stage-gate approval process to notify users when a request is ready for action.
- **Generate Tasks and Projects.** Request types can be configured to automatically create Tasks and/or Projects at the appropriate point in the process, including copying all data between the forms.
- **Dashboards and Reports.** Once request types are created, all data in those requests is available in configurable reports and dashboards.



Figure 4: Demand Management dashboards and reports show breakdowns of requests by organization, type, costs, or any other customer-defined attributes.

About Innotas: Innotas provides the only on-demand IT Governance solution.

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