

# Living the CPDE Life



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Director BPMO Americas  
Business Transformation  
Architect

**ITIL Expert**

**ITIL Managing Professional**

**CPDE**

**Educator**

# Agenda?

- **Wake Up** - What is CPDE?
- **Morning Coffee** - Facing chaos without caffeine
- **Morning Meetings** – Bringing together “the list”
- **Lunch Break** – Prioritizing the improvements
- **Afternoon Slump** – Getting everyone on board with the priorities
- **Soda Break** – Process design/redesign/improvement
- **Clocking Out** – Using & following the new processes
- **Dinner Time** – Replenishing the “tank”
- **Bedtime** – Preparing for a new day

Thanks for joining us today.  
Please use the chat feature to send in your questions.

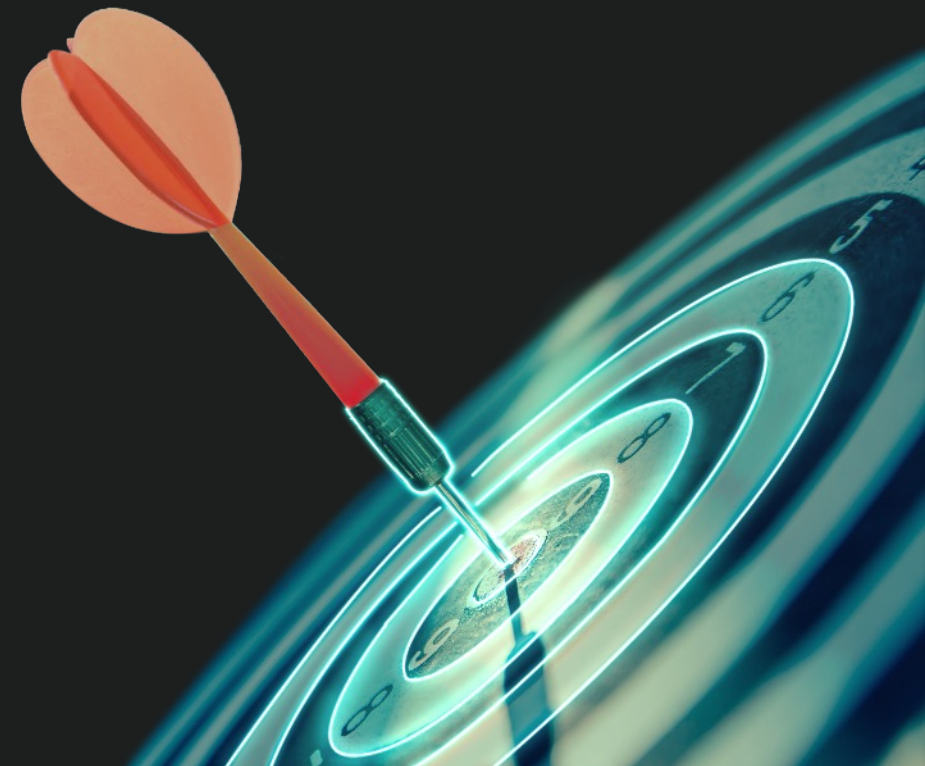
# Wake Up

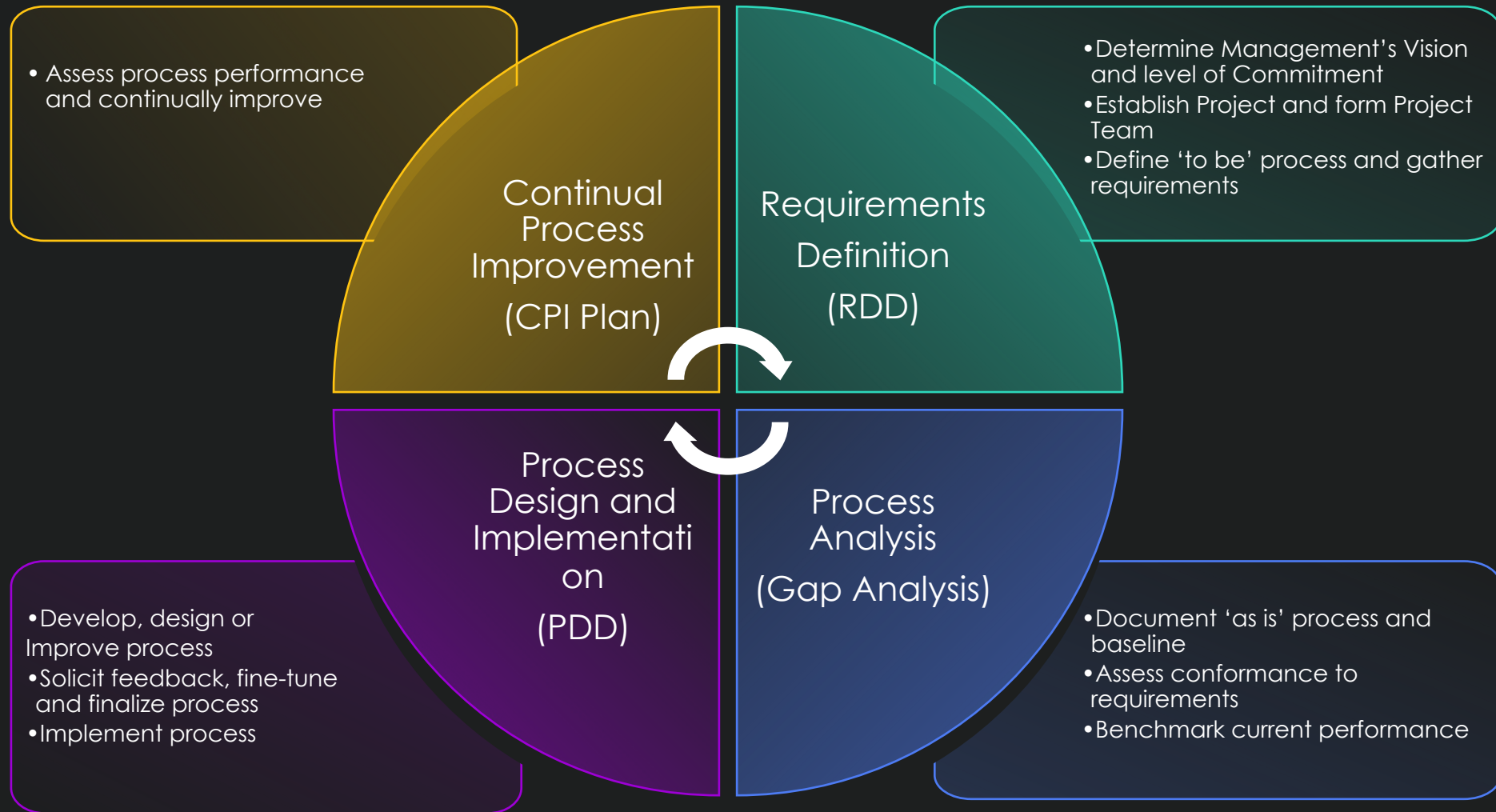
What is CPDE?

# Goals

- Utilize available frameworks and standards
  - IT Service management
  - Process Maturity
  - Quality Management
- Determine customer requirements
- Evaluate maturity of processes
- Use proven methods to design (or redesign) processes
- Use best practices to implement and improve processes
- Measure and market the benefits or process improvement
- Overcome resistance to organizational change
- Use technology to increase efficiency and effectiveness

*Courtesy ITSM Academy*





Source: *The ITSM Process Design Guide: Developing, Reengineering and Improving IT Service Management*

# Morning Coffee

Facing the chaos without caffeine

# I cannot function without coffee...

- Thirdera came to life as a merger of 7 companies over 2.5 years
  - Each company, team, and individual had their established and comfortable ways of doing things
- Lots of people feel their way(s) was/were the “best” way
- Lots of people want lots of changes, improvements, and fixes to process and tools
- We needed a way to identify and prioritize the “important” stuff



The answer: CPDE!



# Morning Meetings

Bringing together “the list”

# And I would improve 500 items...

- The “list” of desired or needed changes, fixes, or improvements was over 500 items!
  - There were many duplicates
  - Many improvements were really “requests” (misdirected records)
- Many items did not have formal tracking mechanisms (manual or ad hoc tracking or management); some did have records
  - Excel, Word, OneNote, ServiceNow, etc.
- Many items were “pet” projects or not based on strategic, organizational, or customer-oriented goals
- Many items were not based in best practices for process design (i.e. CPDE)

*How did the 500 items map to Service Management frameworks, practices, and processes?*

# E2E Process

Sales (0%-60%)

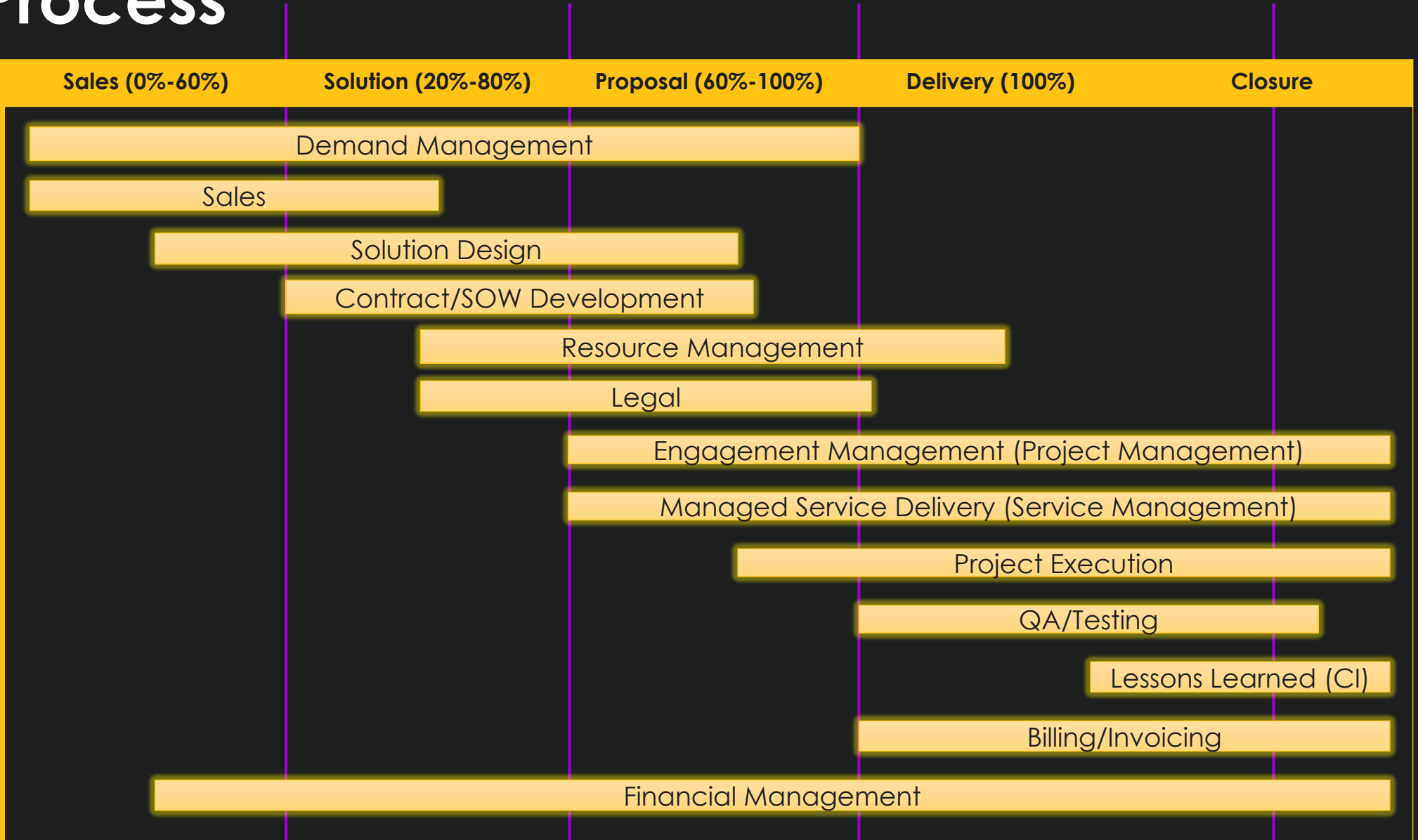
Solution (20%-80%)

Proposal (60%-100%)

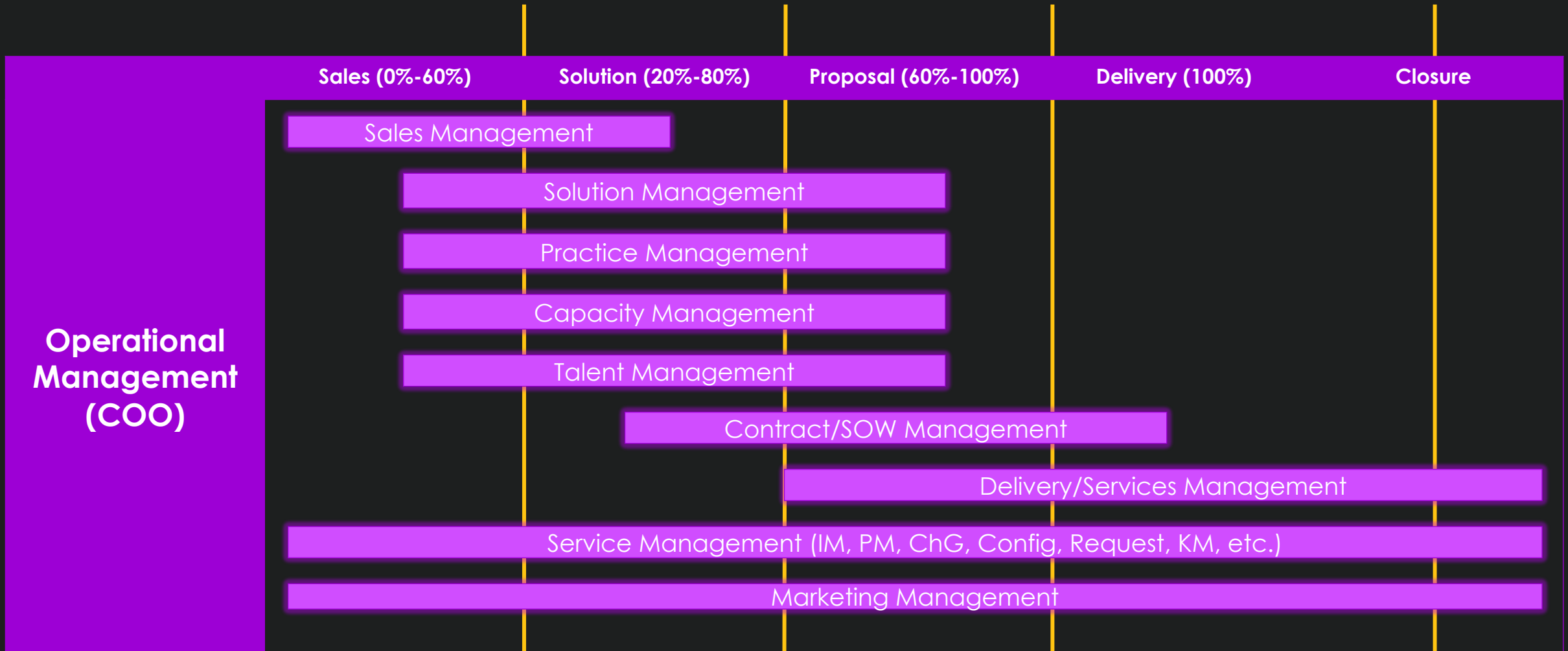
Delivery (100%)

Closure

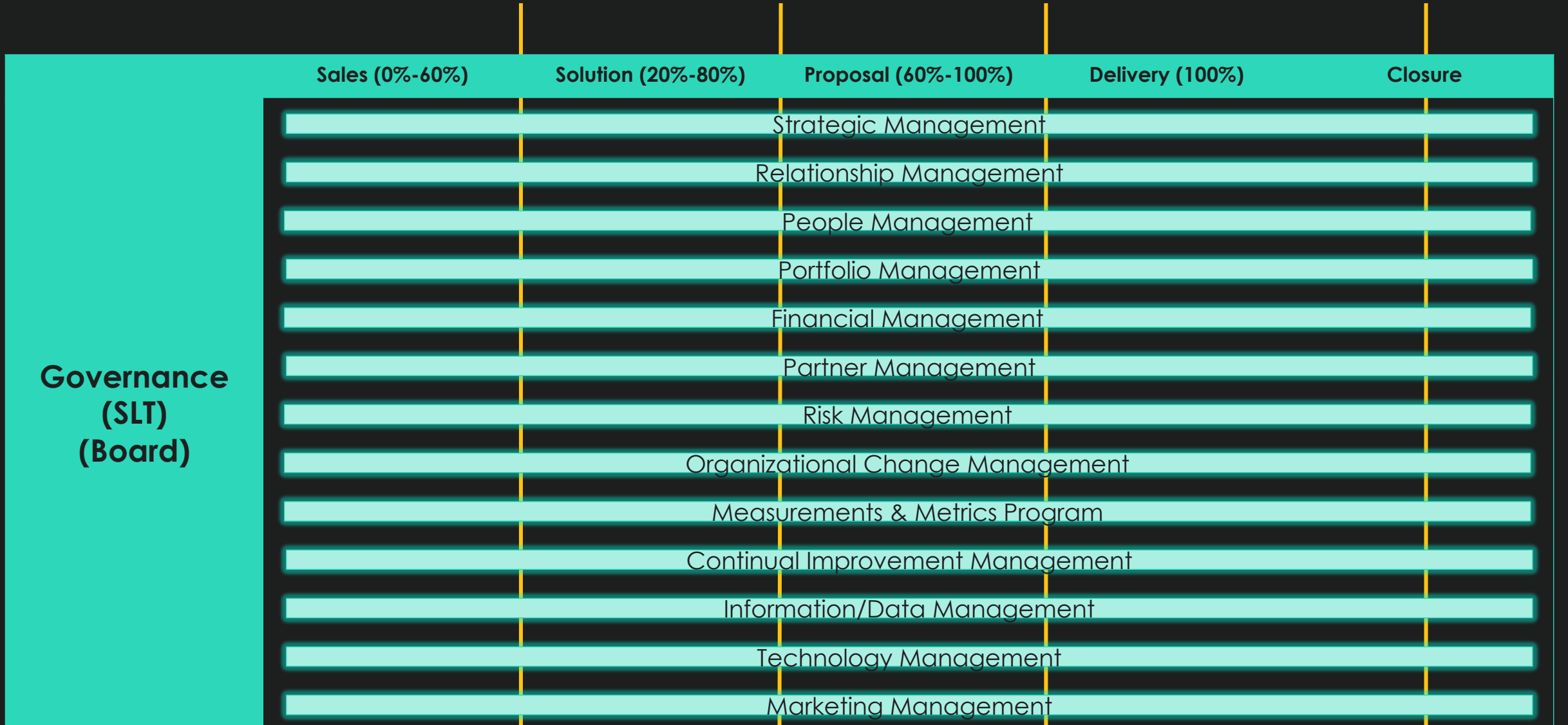
**Execution  
Activities  
(External  
Facing)  
(CSO)**



# E2E Process



# E2E Process

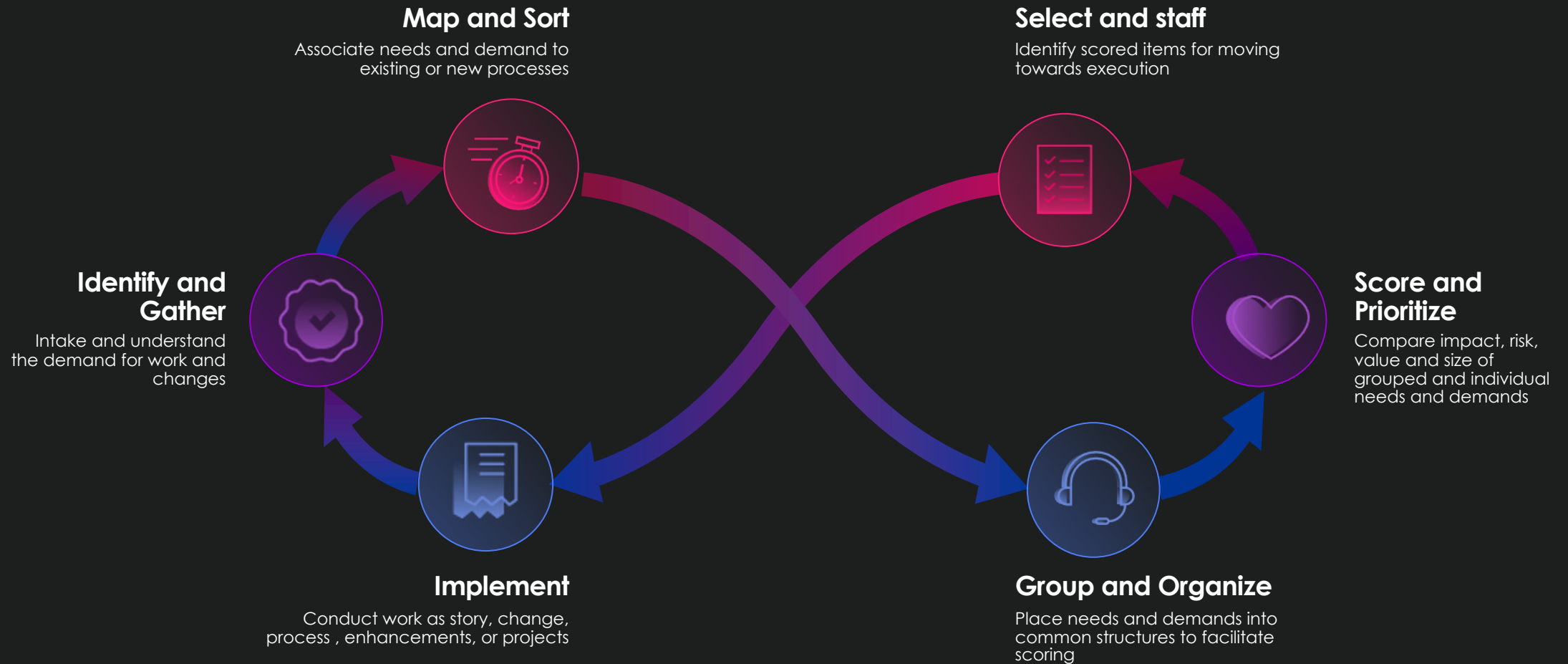


# Lunch Break

Prioritizing the improvements



# Method for the madness






# Prioritization Model

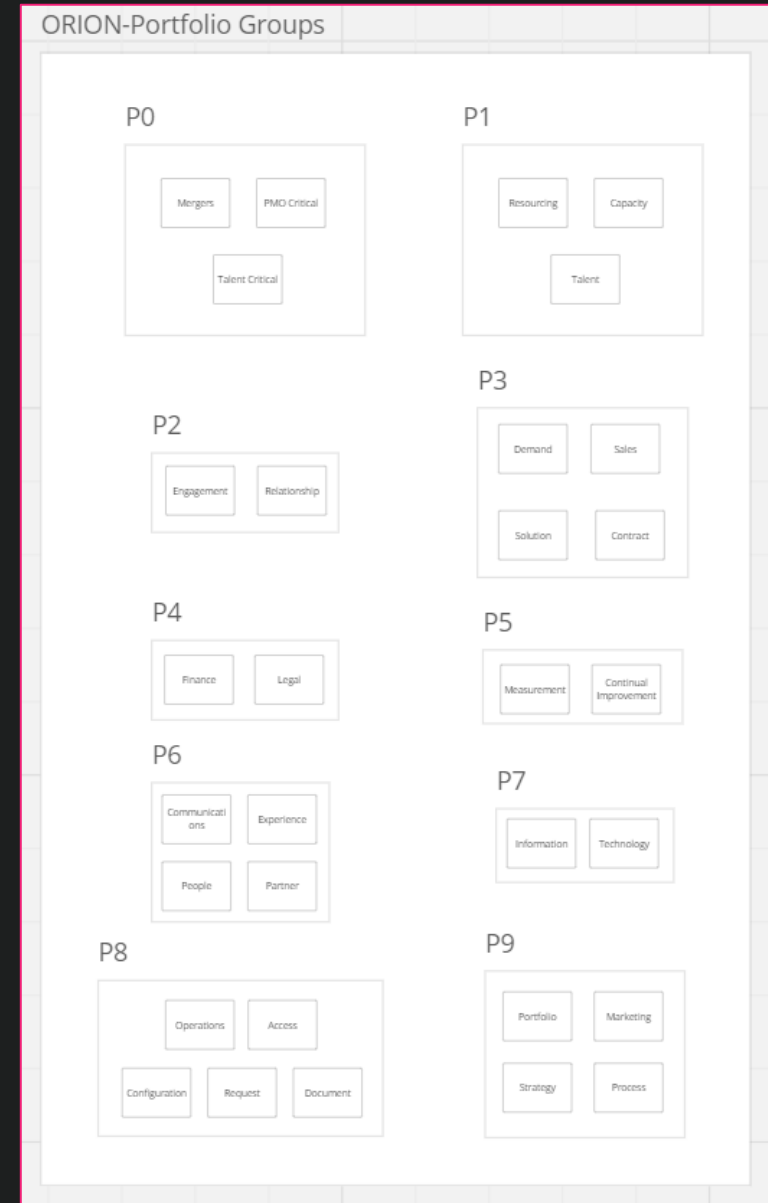
 **01** **MUST**  
Dictated by outside Authority

 **02** **Should**  
Highest Priority we control

 **03** **Could**  
Lesser Impact

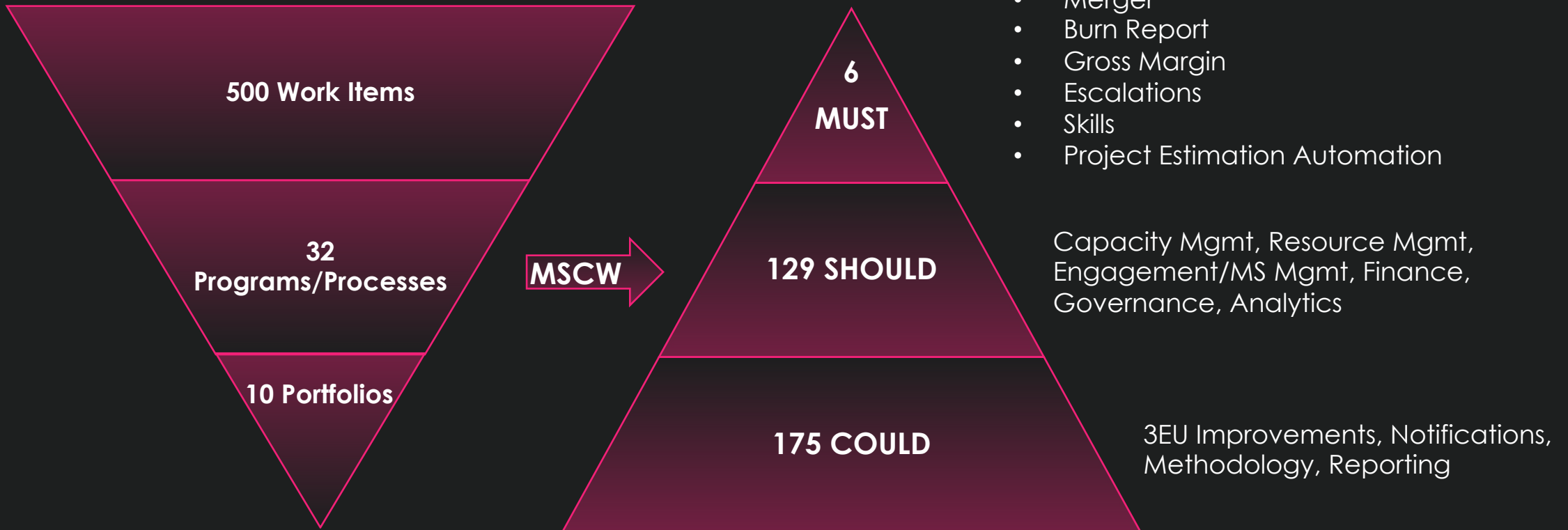
 **04** **Won't or Wish**  
Nice to have

Must & Should will take priority  
Could, Won't or Wish will go on hold



The uncharted space we've explored thus far...

# Galaxy of Improvements\*



**\*Does not include Operations/Steady State activities**

# The “List”

CI INITIATIVE	PRIORITY CATEGORY	PROCESS MAPPING	SN Record	TOOL ENHANCE?	STATUS
Capacity Planning Process	CAPACITY, RESOURCING, TALENT	Talent Management, Capacity Management, Resource Management		No	Submitted
RP (addition of skills & product area)	INFORMATION, RESOURCING, TALENT	Resource Management, Talent Management, Information/Data Management	IDEA0001400 STRY0319701 <a href="https://thirdera.service-now.com/thirdera/?id=view_idea&amp;sysparm_idea_id=f41f733adbcc2d10fd9ba67f56961972&amp;sysparm_idea_table=idea&amp;sysparm_module_id=internal">https://thirdera.service-now.com/thirdera/?id=view_idea&amp;sysparm_idea_id=f41f733adbcc2d10fd9ba67f56961972&amp;sysparm_idea_table=idea&amp;sysparm_module_id=internal</a>	Maybe	Submitted
Time Card Policy Improvements	ENGAGEMENT, FINANCE, RESOURCING	Resource Management, Engagement Management/MS, Financials	IDEA0001420	Maybe	In Development
Billable Optimization - APAC	ENGAGEMENT, FINANCE, RESOURCING, SALES, SOLUTION	Financials, Engagement Management/MS, Resource Management		No	Under Review
	CAPACITY, DEMAND,	Demand Management, Talent Management,			

Orion ScoreCard

OVERVIEW

Groupings

Analysis

Resourcing

Capacity

Ta

# Afternoon Slump

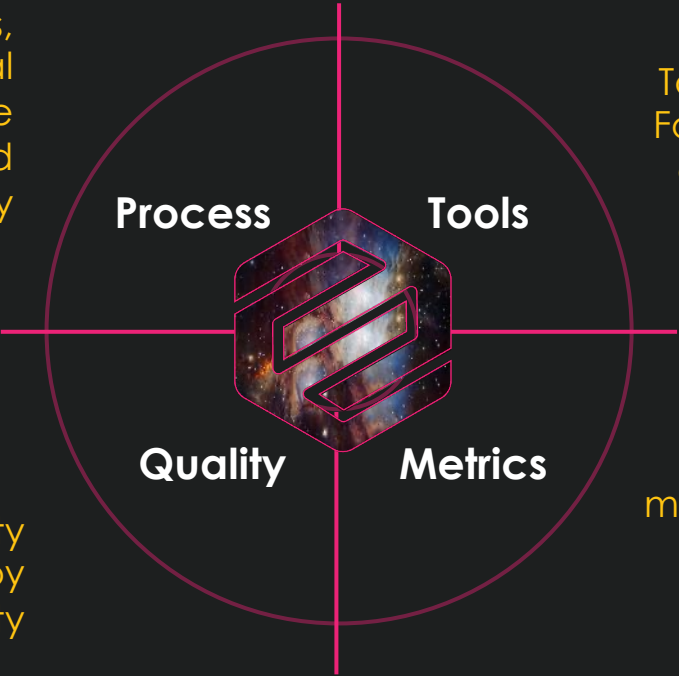
Getting everyone on board with the priorities

# Answer to Problem Statement: Orion CI Program

## Program Outcomes

Best in class processes, streamlined for global efficiency, while maintaining required regional flexibility

Ensuring utmost quality and integrity, thereby improving productivity



Tools to arm our Eranaut Force to ensure the most efficient use of scarce resources

Qualitative and Quantitative measurement to ensure all our improvements are increasing our velocity and efficiency

## Continual Improvement

**O** Outstanding  
**R** Reliable  
**I** Innovative  
**O** Organized  
**N** Nimble



**Eranauts**

Our people are the best in the ServiceNow Partner Universe!

#OneThirdera



# Guiding Principles:

How is this going to transform our day to day?



## Process First Approach:

- Analyze and understand the **process, data** and **targets first**.
- Tools are meant to **support** the process & **simplify** day to day.
- Select the tool that is **fit for purpose**.
- **Organize** and work on the **priorities together!**



## Distribution of Information:

- Delegation of **information** & authority.
- Data **transparency** whenever possible.
- Provide **people** with **access** to info they require.



## #OneThirdera:

- No place for Ego's or Empires.
- Let's **break** down the **walls**; let's **build bridges**.
- Structure **utilizes our expertise** to become world class!

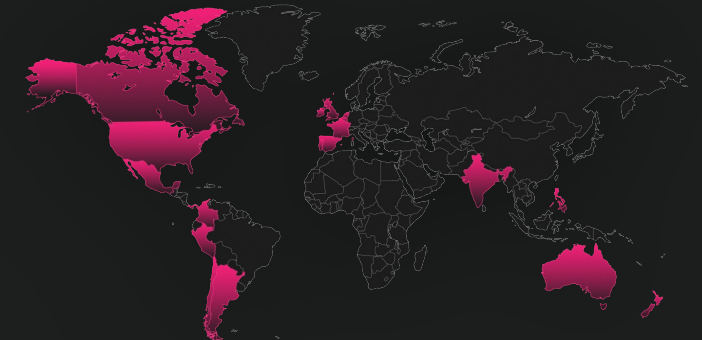


## Bottom Line:

- Clients Above All
- People First
- This IS how we do it!

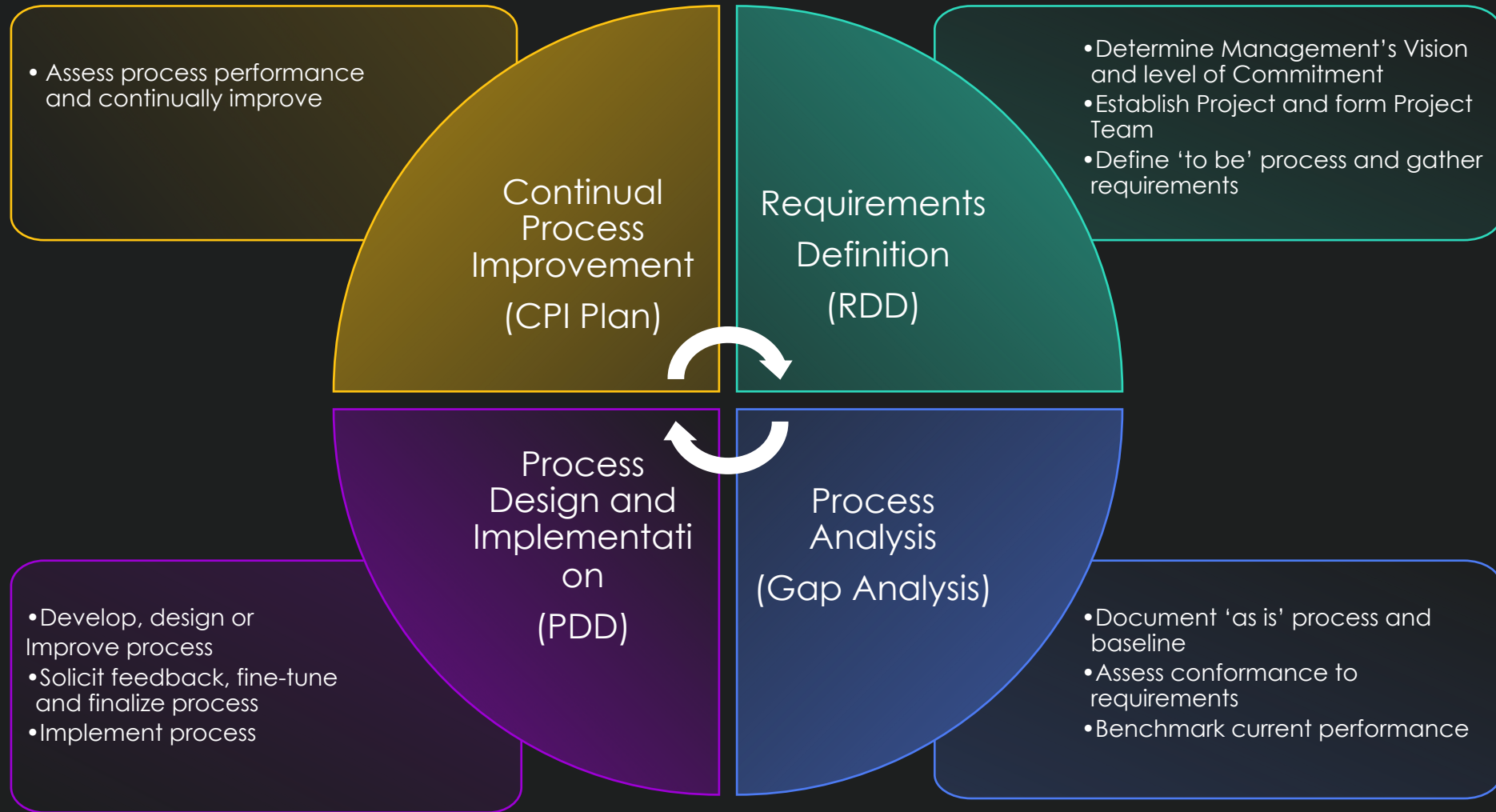
## Internal OCM:

- **Communicate** often, **honestly**, and with intent.
- Structure supports **open communication**.
- Internal **OCM** (Change, Train, Comms).
- **Everyone has a voice**, provide them a mic.



# Soda Break

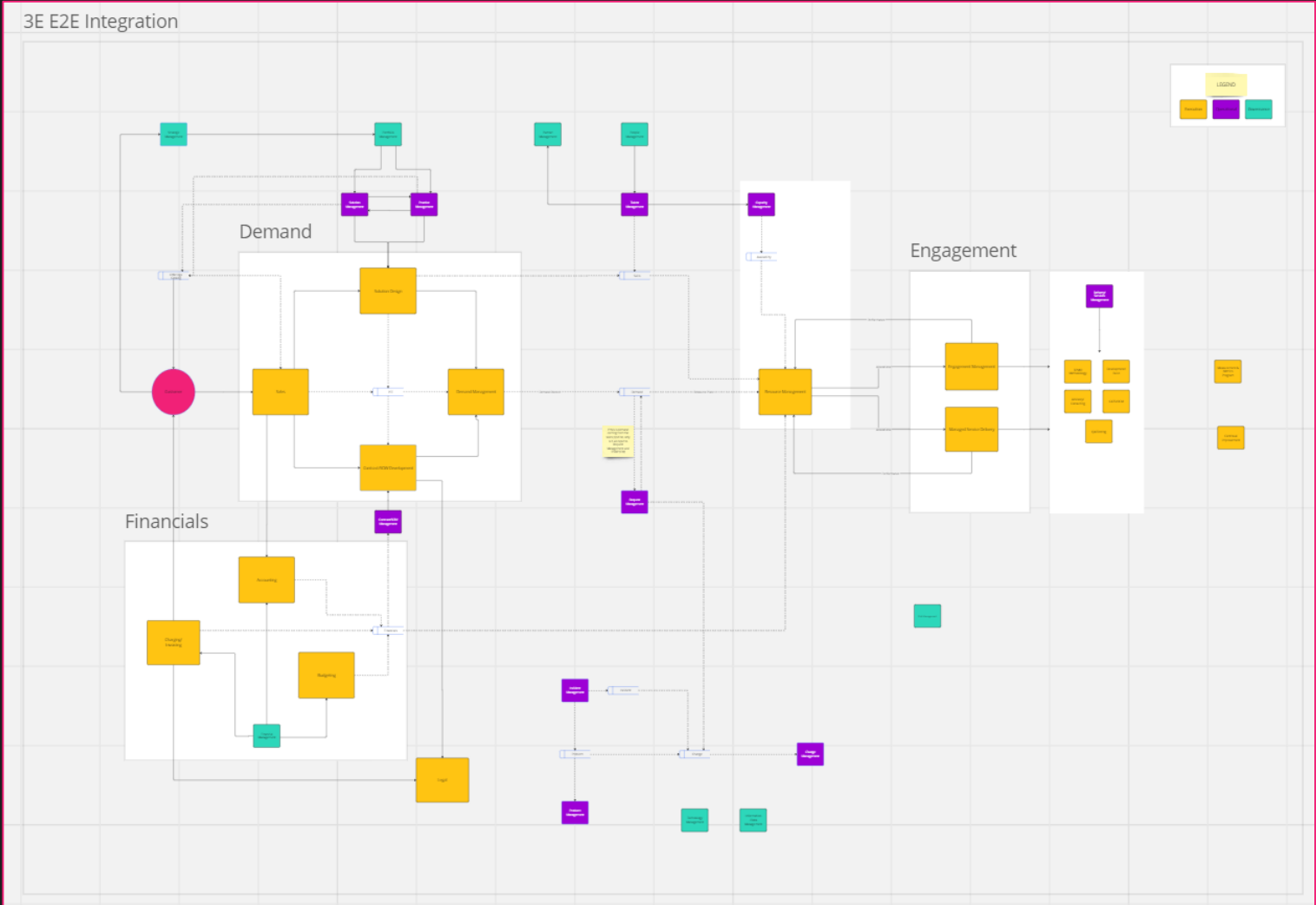
Process design/redesign/improvement



Source: *The ITSM Process Design Guide: Developing, Reengineering and Improving IT Service Management*

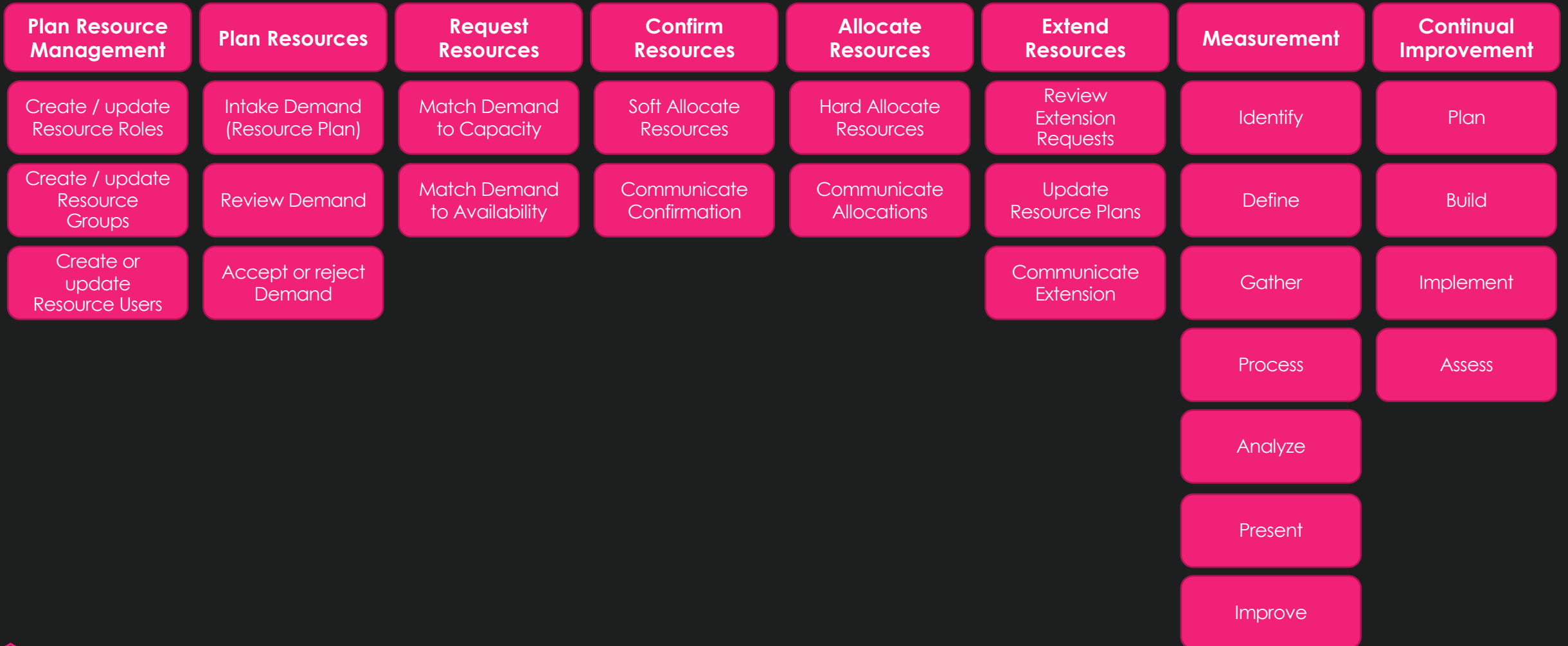


# High Level Integration



# Resource Management Process

## Resource Management Ownership



# Clocking Out

Using & following the new processes

# Process in action

**Escalation Intake**

Hi, Michael. When you submit this form, the owner will see your name and email address.

\* Required

1. Date of incident and/or escalation? \*

Please input date (M/d/yyyy)

2. Escalation Source \*

Client Escalation

Internal Escalation

3. Which client is involved in this escalation (if applicable)? \*

Enter your answer

4. Escalation Description & Background Context \*

Enter your answer

5. Involved Parties \*

Engagement Manager (PMO)

Sales & Solutioning

Delivery Services (BP/PO, Consulting, Technical, OCM)

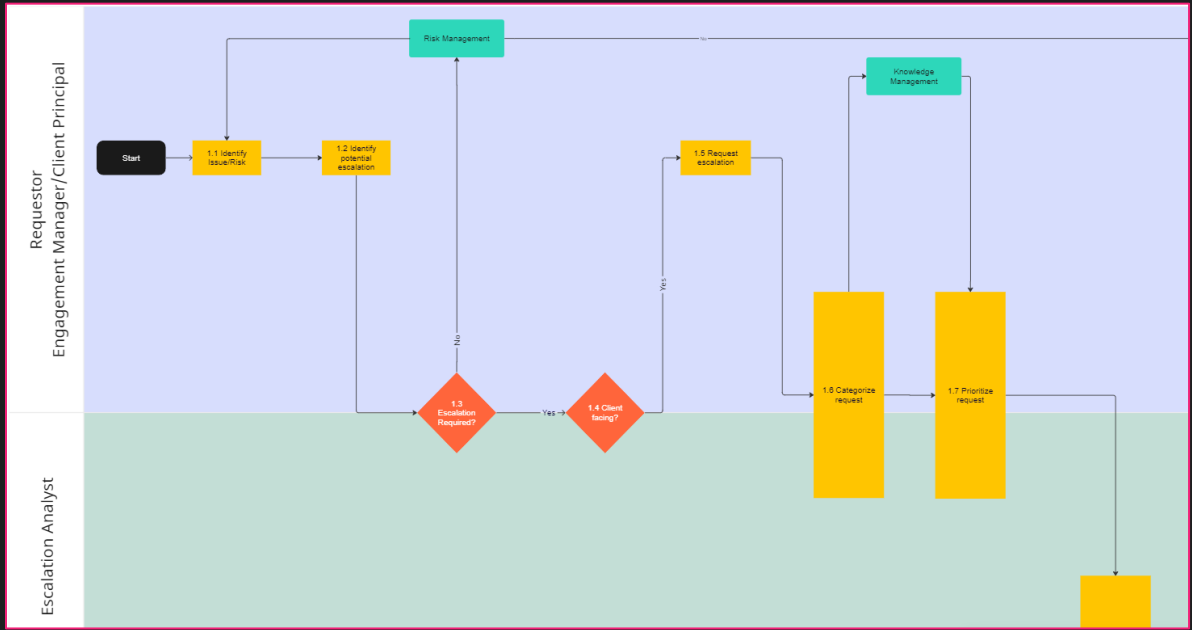
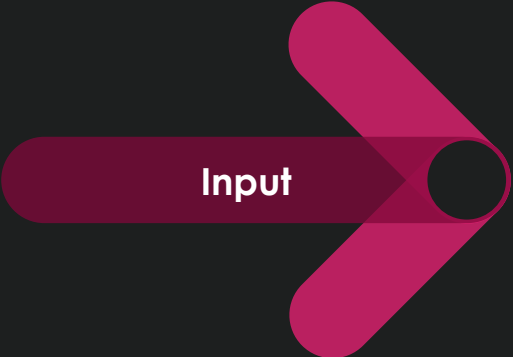
Client Principal

6. Was this escalation submitted on behalf of a team member? \*

Yes

No

Submit

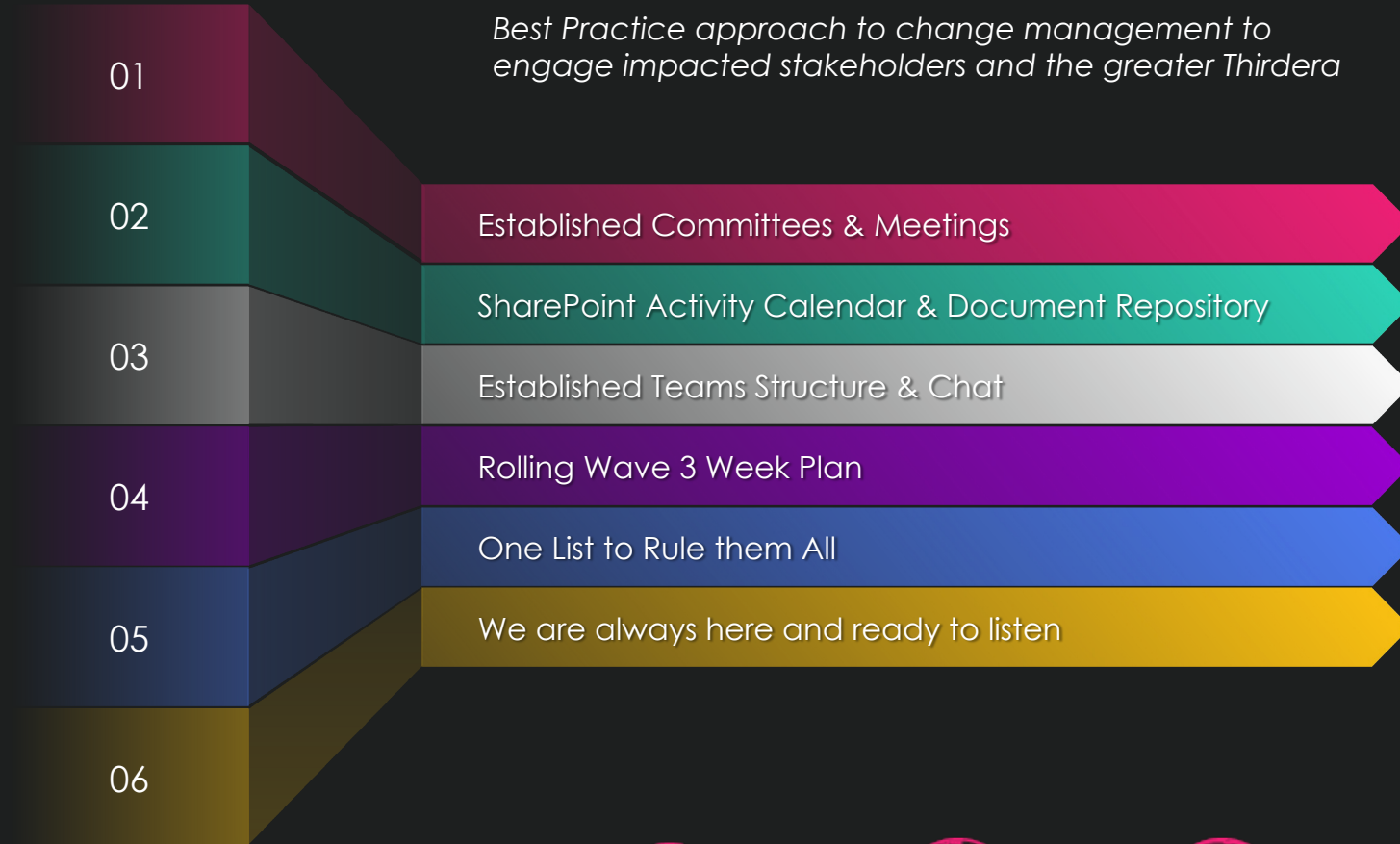


# Dinner Time

Replenishing the “tank”

How we will stay partnering and in touch:

# Communication Vehicles



## Multi-phase Orion Continual Improvement



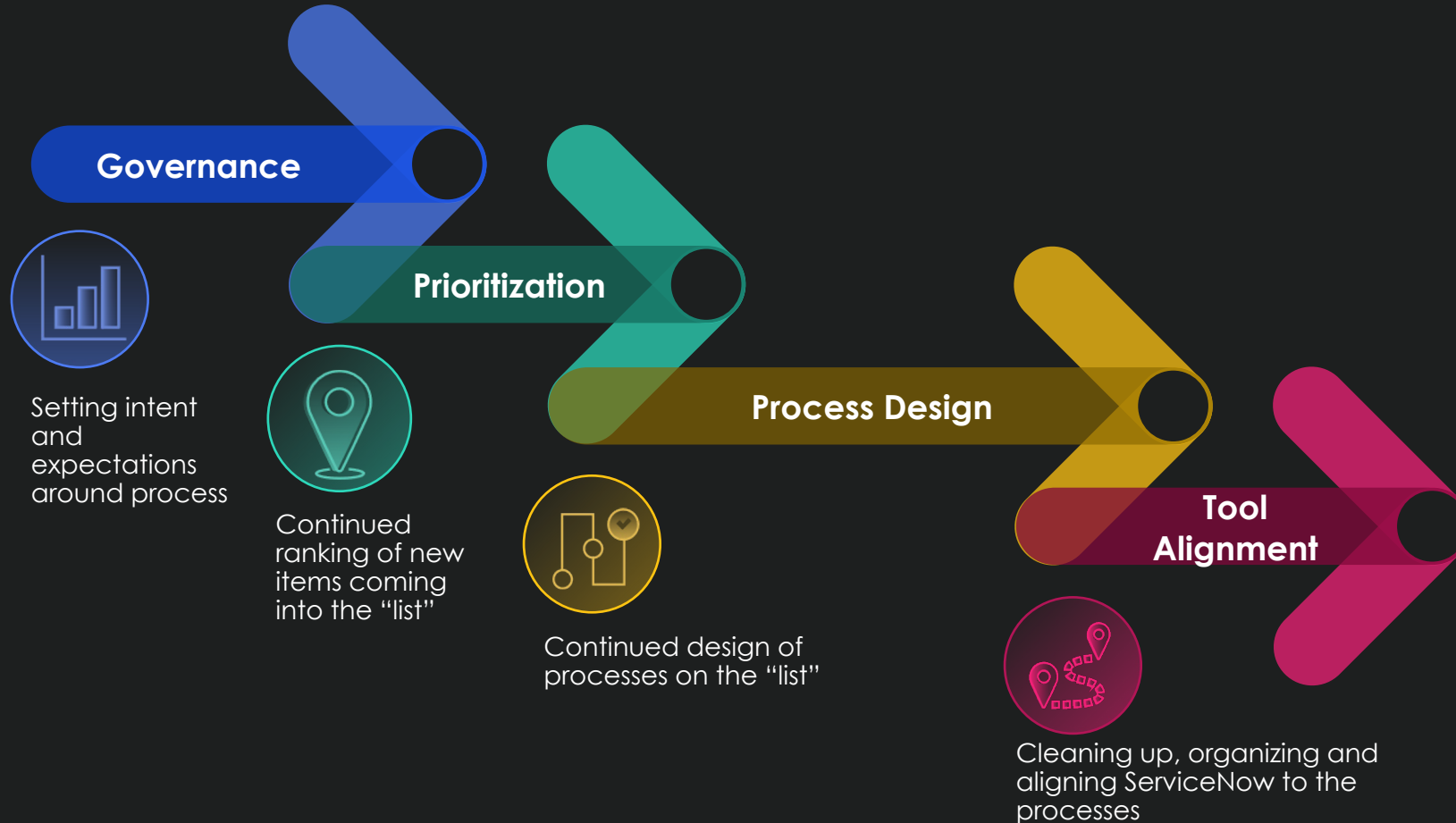
- ✓ Combining our strengths
- ✓ Aligned Priorities
- ✓ Continual Improvement
- ✓ Celebrate Successes

# Bedtime

Preparing for a new day

Rinse and Repeat

# Next Steps





# A New Era of Partner

Learn more at [thirdera.com](https://thirdera.com)