

# Transforming project management for People's Partnership in record time with ServiceNow SPM

Since 2012, People's Partnership has been the provider of The People's Pension, trusted by 6.5 million members from more than 100,000 employers across the UK. Founded for social good, as a business without shareholders, the organisation re-invests profits to help customers and achieve better financial outcomes for millions of people across the UK.



**Industry:** Financial Services

**Company size:** 700 **Location:** London

**UP3 services:** ServiceNow Implementation, ServiceNow Managed Service

**ServiceNow products:** Strategic Portfolio Management, Strategic Planning Workspace, Project Management, Demand Management, Innovation Management, Resource Management, Financial Management, Time Card Management

## Outcomes:

- ✓ Full SPM deployment and roll out in just 12 weeks
- ✓ 250+ people now using SPM for Project Management and timesheets
- ✓ Improved resource planning
- ✓ Improved visibility through PMO dashboards
- ✓ Optimised activity and reporting through Project Workspace

## Overview:

Financial services organisation People's Partnership needed to modernise its approach to project management. A key goal was to drive greater standardisation and visibility across the 30 projects it has ongoing at any one time. The business was already using ServiceNow ITSM to great success. Working with UP3 as part of its ongoing ServiceNow Managed Service, the company deployed ServiceNow's Strategic Portfolio Management (SPM), rolling it out across the organisation in just 12 weeks.

Now People's Partnership can understand progress across all projects at a glance, make faster and smarter decisions based on real-time data, and more effectively demonstrate value for stakeholders.

"UP3's knowledge about the ServiceNow platform shone through the entire project. The majority of the time, they had answers to any of our questions at their fingertips and they also came with suggestions of what could be done. This wasn't just down to their platform knowledge though – they really understood our processes and what we were trying to achieve.

The implementation itself was very slick, and the UP3 team throughout were very cool and calm. Even though they were releasing into a system that drives our entire IT system management, it never seemed like a problem to them. We knew they'd done this lots of times before, and that experience and expertise gave us lots of confidence as the customer."

- Shaun Bigg, Project Manager, People's Partnership

## The challenge:

Like any modern financial services organisation, People's Partnership deals with vast amounts of data, putting technology front and centre. Across a typical year, the People's Partnership team will have around 30 data-driven projects going on, led by different project managers.

However, as the business grew, processes got layered on top of each other and complexity got magnified. Each project was delivered and managed separately, within its own SharePoint folder structure. Every team member managed projects slightly differently: some used Microsoft Excel for project plans, for instance, while others preferred Microsoft Project.

That lack of standardisation made it impossible to create a "single source of truth" across all projects and made reporting extremely time-consuming and manual. Each project manager only had access to their particular SharePoint, so there was no visibility across all of them. That siloed approach slowed the organisation down and hindered the ability to gain and act on insights and learnings.

Things got even more complicated when it came to timesheets and budgeting. Project managers were forecasting project costs using Excel spreadsheets they updated manually at the end of each month, with information taken from two other systems. It was a lengthy and convoluted process. And it meant that project managers had no visibility on budget tracking until halfway through the following month.

Lastly, project reporting was done via PowerPoint. Again, this was a manual process that took significant amounts of time. When each report was finally completed, the project would have moved on and it would be too late to act on the information. People's Partnership knew it needed a more modern and mature approach to every aspect of project management. One that helped it access trustworthy data, drive better decision-making, allocate resources effectively and report to stakeholders.

People's Partnership was already using ServiceNow within its IT function and asked UP3, as part of its ServiceNow Managed Service, to examine how ServiceNow could transform its portfolio management while also considering how best to quickly implement the software and start delivering results.

## The solution:

With a ServiceNow Managed Service in place already, UP3 was able to rapidly commit dedicated resources to solve People's Partnership's critical challenge.

UP3 stood up a team to run workshops to understand People's Partnership's current processes and ways of working. Based on this understanding, UP3 recommended ServiceNow's Strategic Portfolio Management (SPM) as the best way for the customer to manage all projects in one place.

UP3 demoed ServiceNow SPM so that People's Partnership could see it in action. Appreciating that the project management team were unfamiliar with ServiceNow, UP3 set up a test environment where they could familiarise themselves with it in detail. Leveraging its deep relationships, UP3 engaged ServiceNow Solution Consultants to share information about the product's functionality and answer any additional questions.

Throughout the implementation process, through daily updates and regular touchpoints, UP3 flexed and adapted to feedback from People's Partnership. Going beyond technical delivery alone, UP3 worked consultatively to help People's Partnership understand ServiceNow SPM and the functionality that was most relevant to their needs. The entire implementation took just 12 weeks to complete, quickly delivering huge value to People's Partnership.

**"UP3 were really good to work with and created an actual partnership with us. They were flexible when they needed to be and provided regular communication to us. I was impressed by how they were quick to respond to problems as they occurred, but also took the time to understand the issues and come up with solutions."**

- Dominic Williams, PMO Practice Lead,  
People's Partnership

## The outcome:

Fifty people at People's Partnership are now using ServiceNow SPM to manage their projects (with some managing multiple projects simultaneously). A further 200 people use it for their timesheets. As People's Partnership rolls out the adoption of the new way of working, workshops and weekly drop-in sessions are being held to answer any questions and provide ongoing support. People's Partnership has already seen multiple benefits of implementing ServiceNow Strategic Portfolio Management, including:

### Improved resource planning

All project managers can now add a resource plan to their project, which gives forecasting costs and lets them see the hours spent on each project in real time. This is far more efficient than the previous manual process and enables them to proactively take action if a project is getting close to budget.

### Improved visibility through PMO dashboards

UP3 has created a single view of key metrics, where those overseeing multiple projects can understand risks or actions in one place. This gives them the crucial business visibility they were missing before – and provides it all at a glance, rather than by laboriously going through dozens of SharePoint folders. Having access to trustworthy data also allows the business to prioritise and deliver projects and then manage both strategic and operational work in one place, reducing bottlenecks. Not only do these reports help the PMO but they help the Project Managers as they no longer have to spend time reporting upwards as the PMO can self-serve.

### Optimised activity and reporting through Project Workspace

At an individual project level, new dashboards provide real-time visibility on status and actions. This massively streamlines existing ways of working, reduces mistakes and delays, and speeds up decisions and reporting.

As part of the UP3 ServiceNow Managed Service, the teams from UP3 and People's Partnership will continue to work collaboratively on further enhancements to the ServiceNow platform. This will ensure the company is getting the most out of its investment in ServiceNow and getting the outcomes it wants to achieve.



“UP3’s user story approach really helped us get to heart of what we needed to do. And the release itself stood out as a high point, with the UP3 team coming on site to ensure everything went off flawlessly. We’ve had good feedback so far from our project managers, but we’re just at the beginning of the journey so there is still lots more to come. I’m looking forward to working with UP3 on that.”

- Dominic Williams, PMO Practice Lead, People's Partnership