



GM FINANCIAL

Planview Journey

Blake Smith

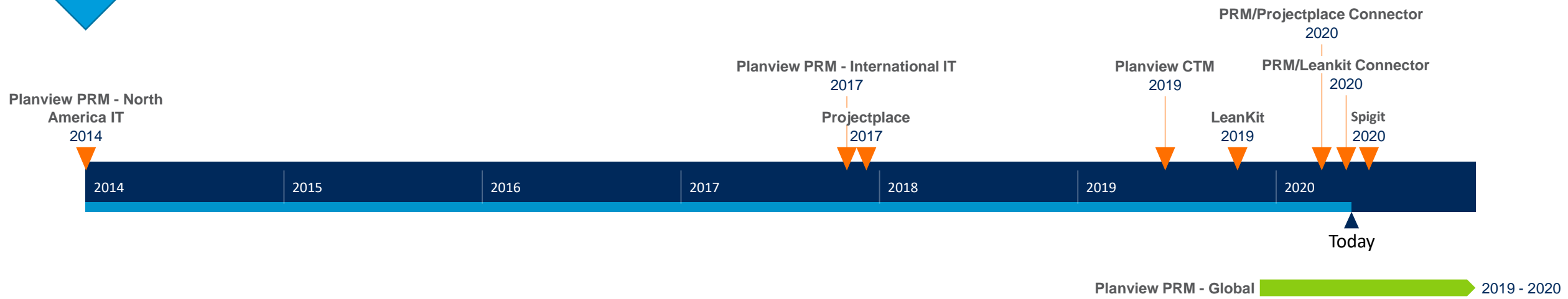
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GM FINANCIAL CONFIDENTIAL - RESTRICTED TO INTERNAL COMMUNICATION

About GM Financial

- Global provider of auto finance solutions
- Captive finance company for General Motors
- Product Offerings:
 - Auto Loans
 - Auto Leases
 - Commercial Lending
 - Commercial Vehicle Lending
- Operations in North America, South America and Asia
- Nearly 10,000 team members globally

Planview Timeline



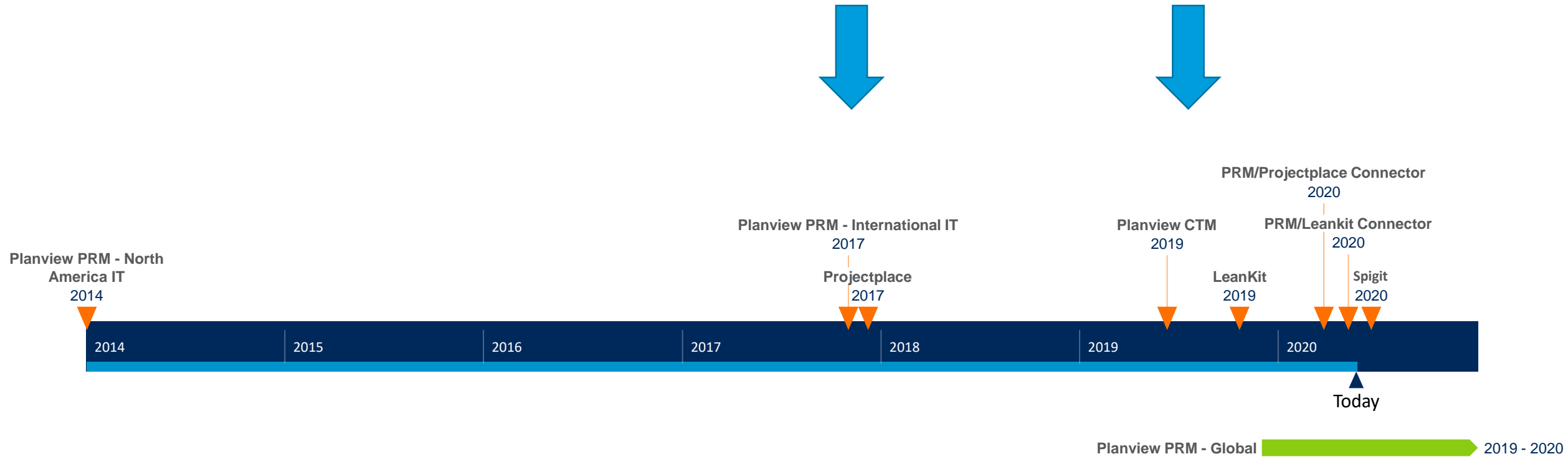
Why Planview Initially?

- Current PPM solution required a major upgrade and wasn't meeting all needs
- Growing IT department and demand from business partners
- Required the ability to track resources and costs
 - What are our team members working on?
 - What is the current demand?
 - What is the future capacity?
- Needed better transparency to IT leadership
 - Teams requesting additional resources, but no data to support the need
 - Portfolio reporting was manual and time consuming

What was implemented?

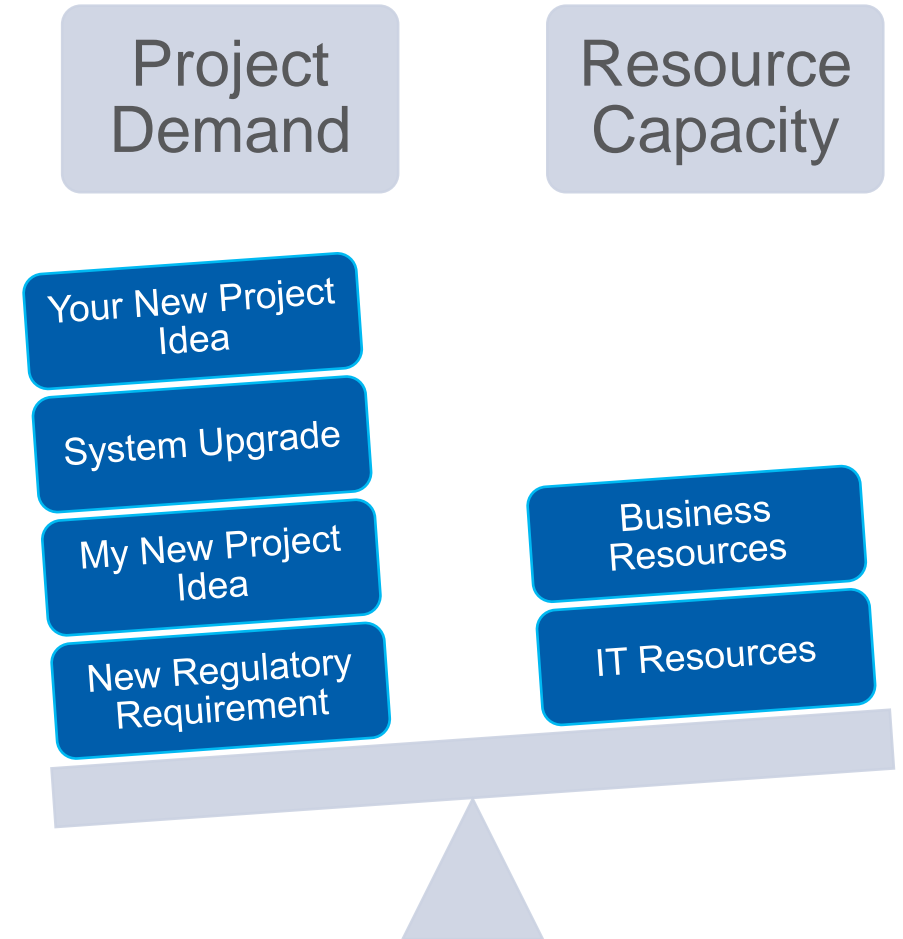
- Work
 - IT project schedules migrated and managed in PRM
- Resources
 - IT resources were added to PRM
 - Requirements, Reservations, Allocations and Authorizations were utilized
- Timesheets
 - Time tracking required of all IT resources

Planview Timeline



Organizational Challenges

- Rapid growth across the enterprise, increasing project demand in both number and complexity
- Limited visibility into the complete enterprise project portfolio due to multiple PPM solutions across the organization
- Incomplete information to make well-informed investment decisions
- Lack of standardized prioritization process
- Finite number of resources and renewed focus on operating expense
- Difficulty coordinating cross functional efforts
- Inconsistency in project management practices across the global organization



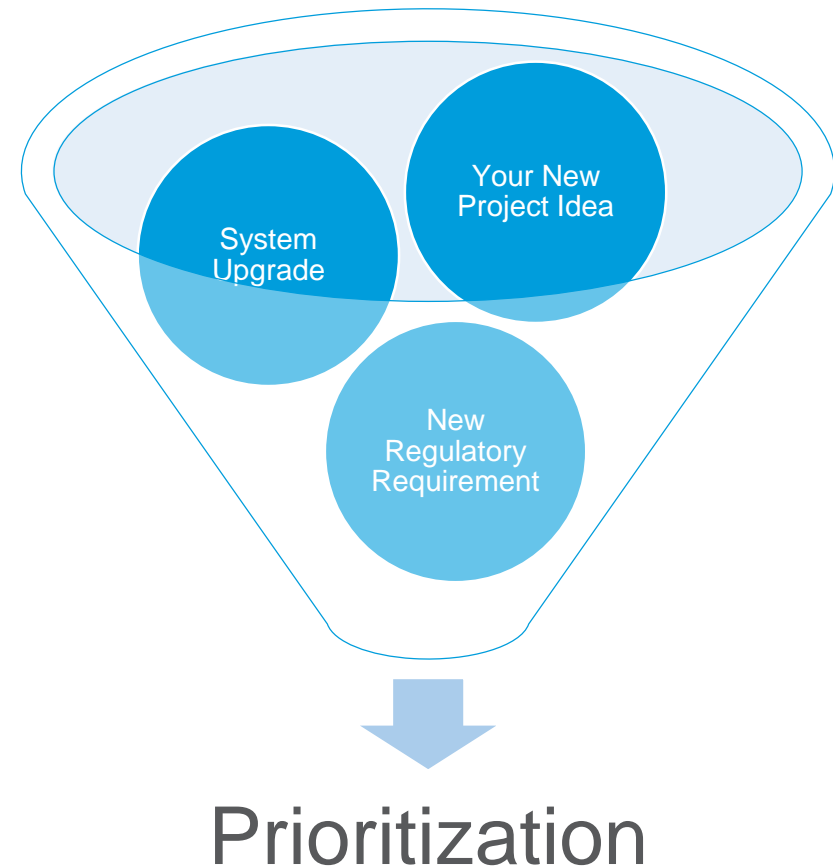
Global Approach to Project Management

- Established a federated structure with an EPMO and business aligned PMOs to meet the following objectives:
 - Prioritize and balance initiatives and resources across the organization
 - Ensure expected business value is realized for project investments
 - Provide improved organizational alignment and efficiencies



Why Planview Now?

- Ability to capture all project demand across the enterprise
- Investment portfolio planning
- Portfolio management capabilities
- Resource and capacity management
- Benefits realization



What's Next?

- Expand usage of Projectplace and LeanKit
- Portfolio Reporting via Power BI
- Financial Management
 - Forecast and actual tracking
- Resource and Capacity Management
 - Review opportunities from the first implementation
 - Enable only needed functionality
 - Globalize
- Enable Investment and Capacity Planning
 - Assist with prioritization
 - Scenario modeling
- Integrations
 - ServiceNow
 - Azure DevOps

Key Findings – Best Practices

- Understand and document your business processes first
- Don't try to enable all functionality at once
 - Start small (Crawl → Walk → Run)
- Pilot new functionality and processes
- Pivot when something isn't working
- Plan your change management approach



Contact

Blake Smith

EPMO Administration



817-302-7018



blake.smith@gmfinancial.com