

2015 Awards for Customer Excellence Honorable Mention



Caroline Cox, BNY Mellon

Investment firm prioritizes, plans IT projects aligned with business goals using HP PPM Resource Management

Service & Portfolio Management

High-level overview: Using HP, BNY Mellon realized the following benefits:

- Gain full visibility and control over resource utilization
- Identify, capture and control demand of IT resources in alignment with business priorities
- Extend solution to 13,000 users including 3,000 senior managers or non-IT resources and a pool of 10,000 IT
- Manage resource planning for 950 projects at any given time
- Accelerate time-to-market of high-priority projects
- Pace projects based on resource availability
- Avoid unnecessary costs and fragmentation of effort due to project cancellations or holds
- Track key measures: forecasted demand vs. resource capacity; forecasted demand vs. actual effort; resource pool over/under utilization
- 2014 YTD shift of 12% from tactical to strategic which equals \$88,650,456
- 4% reduction in administrative activity efforts

Company: BNY Mellon is a global investments company with \$1.7 trillion in assets under management and provides investment management, investment services and wealth management for institutions and individuals.

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Business goals: IT platform and software development projects are essential to BNY Mellon's strategy to become a one-stop shop for investment customers by moving from siloed business lines to cross-selling. However, BNY Mellon lacked transparency into resource availability. Detailed time tracking gave a good view of the past, but there was no way to see future IT project priorities and balance resource supply and demand.

HP Software implemented: HP Project and Portfolio Management (PPM) Resource Management Module (RM). The HP PPM Resource Management module provides a holistic and real-time picture of resource supply including resource roles, skills, and skill levels across BNY Mellon.

Benefits: Actively identify, capture and control demand of IT resources ensuring BNY Mellon can support projects according to business priorities. Transparency into the type of demand resources BNY Mellon is working on.



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