



## Who Should Read

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CIO

Project Management  
Directors

IT Governance Participants

# Mastering the IT Project Pipeline

Tactics for Effective Project Demand Management

## ▶ Study in Brief

This report profiles tactics that improve project management's ability to gain control over chaotic project backlogs, develop a standardized project request process, cost-effectively filter project requests for further development, and shape customer project demand.

## 5 Ways to Use This Research

1. Develop a user-friendly project intake process
2. Address a backlog of unprioritized projects
3. Optimize project request triage to eliminate non-viable requests
4. Work with customer units to pre-prioritize project requests
5. Improve the visibility and manageability of total institutional project demand

# The Project Prioritization Challenge

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When demand exceeds resources—and it almost always does—deciding which project requests to approve and which to reject is a challenging and sensitive problem. CIOs and project managers want to see the best interests of the institution served. But without effective ways to discover, develop, and prioritize project requests, IT units often find themselves with a confused project portfolio.

At the root of the project prioritization challenge is a competition between campus units, each trying to get IT to dedicate resources to its requests. Because technology touches so many aspects of university operations, the project request pool is diverse and complex, but requesters see only the thin slice representing their needs. They naturally look for ways to advance their interests—minimizing project costs, submitting requests to friendly parties, exaggerating the benefits of their particular initiative. Effective project prioritization must tame these tendencies and assert the interests of the institution as a whole.

## Institutional Interests Undermined by a Parochial Scramble for Resources



### Project Profusion

- IT touches everything and everybody
- Multiple uncoordinated pathways for submitting project requests
- Legacy of “go-to” project accepters/approvers



### Weak Project Assessment

- Requesters lack project cost and effort estimation skills, make self-serving guesses
- No standard mechanism for comparing value of different projects
- Governance committee overloaded, indecisive



### Clashing Interests

- Units and individuals favor pet projects over institutional benefit
- Back channels circumvent prioritization process



### Unstable Priorities

- Constant change puts priorities in flux
- Political influence overturns prioritization decisions, undermines credibility of process



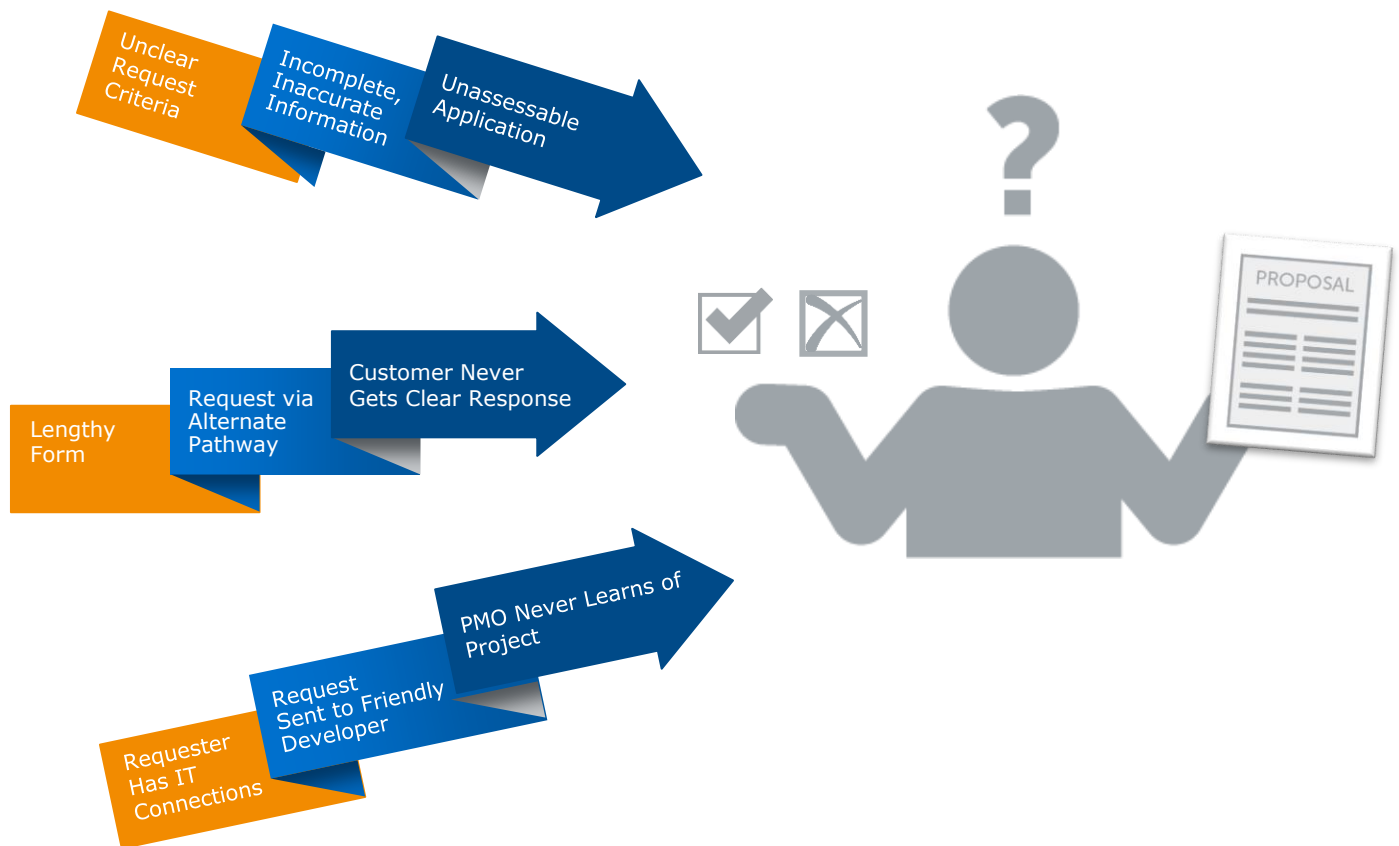
“There are way more ideas than resources. We are looking for tools that assist in prioritizing the projects that add the most value to the organization--to develop a prioritization system that optimizes our project work.”

Project Management Office Director  
*Public Research University*

# Inviting Customers to Shop for Answers

## Piecemeal Intake Paths Hinder Comprehensive View of Project Demand

A lot of the problems with project prioritization start with project intake. Many institutions have a piecemeal approach to project submission, relying on a mix of old habits and half-hearted reform efforts. Users may not know what information to submit, where to submit it, or how their requests will be evaluated. At many campuses, multiple formal and informal paths for submitting projects compromise transparency and leave the IT organization's knowledge of project demand incomplete.



Over time, problems like these create an unmanageable portfolio with a mix of “officially” approved projects, informally accepted projects that are unknown to the PMO or IT leadership, and submitted requests sitting in some limbo where they are ignored and forgotten. Customers wise to the situation exploit personal relationships or appeal to leadership to get their work done, while others carry on in the naive belief that someone is attending to their request. More consistent practices at the top of the project funnel will help IT better manage demand for its services all the way from project initiation to completion.

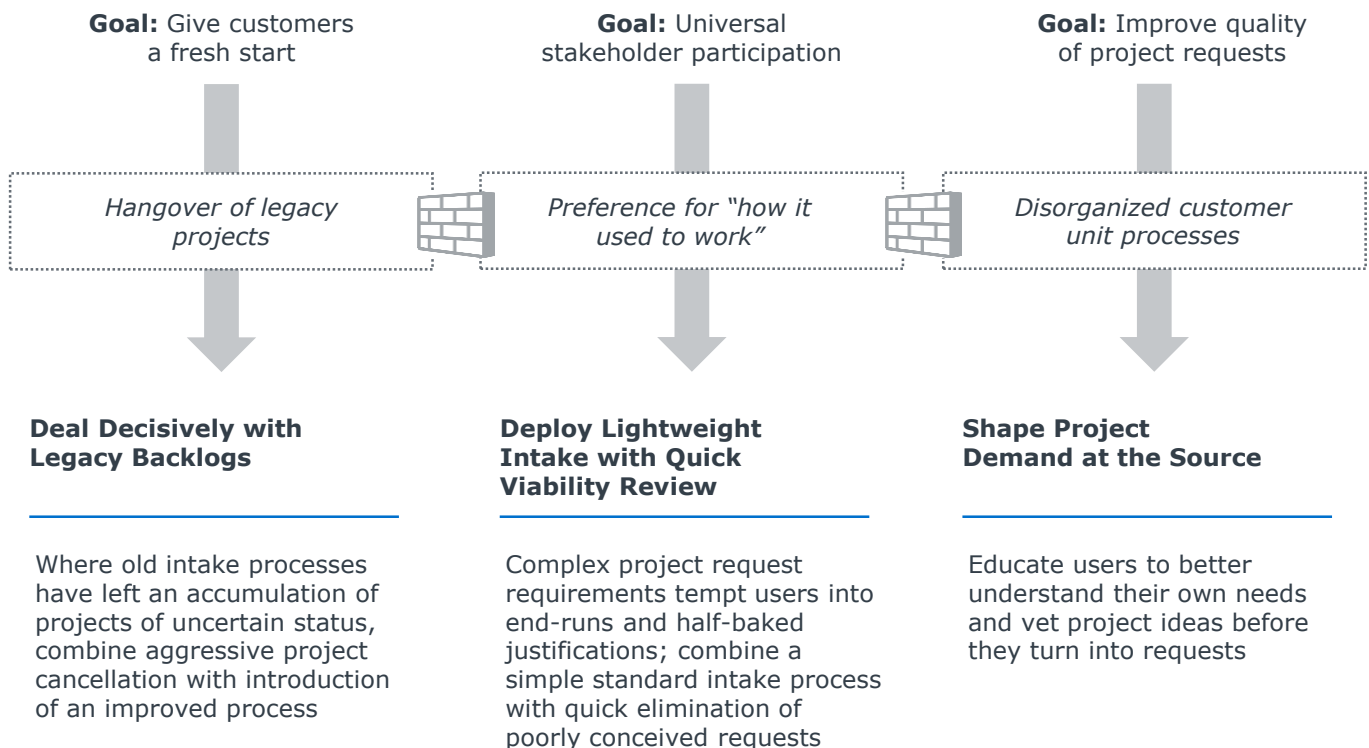
# Orchestrating Intake to Develop a Coherent Portfolio

## Reforming Project Intake Requires Attention to Context

Project request intake processes should be comprehensive, simple, and designed to weed out weak requests quickly while further developing viable requests to the point that they can be passed along to a prioritizing body. A lightweight intake process that users can easily understand and trust will go a long way toward discouraging attempted circumventions.

To fully optimize project intake, IT organizations need to consider the totality of project demand, including the state of the portfolio that approved projects will join and the customer environments from which requests originate. A chaotic legacy portfolio of stale, unresolved project requests and untracked ad hoc projects in progress is no place to send a rationalized stream of new initiatives. Likewise, the intake process will function more smoothly if stakeholders are better equipped to do their own due diligence and prioritization before project ideas are turned into project requests.

### Overcoming Obstacles on the Road to Better Project Intake



# Looking for Frontier Practices

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*How can we build an efficient intake process that produces high-quality requests?”*

Members asked the Forum to find promising, replicable approaches to two problems: standardizing project intake and fostering better project requests. From our interviews with CIOs and Project Management Office Directors, four scalable strategies emerged.

This study originated in the IT Forum’s Functional Collaborative on Project Management, a cohort of over 50 higher education project managers convened to discuss common issues and share practices. We are grateful to the Collaborative’s participants and to additional interviewees for sharing institutional insights and practices. We have abstracted these insights to make them more generalizable to institutions with different missions and budgets, but the IT Forum’s work is as ever grounded in the proven innovations of progressive practitioners.

## *Featured Institutions—With Sincere Appreciation*

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Robyn Betts  
Director of Project Management Office



Gary Pratt  
Chief Information Officer

Ashley Wondra  
Project Management Director

## *Selected Research Participants*

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### **Pepperdine University**

Rita Schnepf  
Director of Project Management

### **University of Maryland Baltimore County**

John Fritz  
Assoc. VP Division of Information Technology

Joe Kirby  
Assistant VP, DoIT

### **Simon Fraser University**

Jennifer Casey  
Director Digital Transformation Office

### **Old Dominion University**

David Underwood  
Director Project Management Office

### **Boston College**

Denis Walsh  
Associate Director, IT Planning & Portfolio Governance ITS Business Planning & Project Services

### **University of Illinois Urbana-Champaign**

Troy Gagne  
IT Project Management Manager

### **William & Mary**

Courtney Carpenter  
Chief Information Officer

### **Bowdoin College**

Amy Kerr  
Senior Director Project Management

### **University of Wisconsin-Madison**

Karen Hansen  
Assistant Director of Project Management

# What the Best Are Doing

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Improving project intake processes requires careful attention to campus culture and the environment that generates and accepts project requests. To optimize their intake processes, the best ensure that new processes are not compromised by the defects of prior practices, and shape customer awareness in ways that improve the quality of new project requests. They also make it easy for customers to comply with standardized intake processes, while making quick, smart decisions about which requests merit further development.

## *Rationalizing the Project Landscape*

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### **Project Portfolio Reset**

*Map and Eliminate Unproductive Project Activity*

Clear the ground for improved project intake processes by mapping the existing project landscape left by legacy processes. Aggressively cancel old pending requests and reassess projects that were initiated without adequate review. To address customer pushback, offer accelerated consideration for requests resubmitted through the new process.

## *Incentivizing Participation in Standard Intake Processes*

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### **Standardized Project Intake**

*Use a Simple Request Process to Encourage Customer Compliance*

Without a standard, clearly defined project intake process, it is impossible to have a complete overview of the project portfolio. Use a single easy-to-complete project request form to reduce bias in the prioritization process and lessen the temptation to submit requests via non-standard back channels.



### **Project Request Triage**

*Filter Project Requests to Speed Responsiveness and Better Allocate Resources*

One consequence of a lightweight intake process is the need to further develop requests after submission, drawing on limited PMO or IT resources. By introducing early-stage request filtering that quickly weeds out non-viable projects, IT units make better use of their project development resources and provide customers with timely feedback that helps them improve their requests.

## *Shaping Project Demand Within Customer Units*

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### **Customer Unit Demand Shaping**

*Strengthen Customer Relationships to Build a Better Project Pipeline*

Through formal assignment of relationship managers to customer units, or more informally via other roles, encourage customers to be more intentional in developing project ideas, and to prioritize their own needs before submitting requests.

# Project Portfolio Reset

## Clearing the Decks for Project Prioritization Reform



### Practice in Brief

When introducing project intake reforms, make a clean break from the past rather than trying to reconcile improved intake with a messy legacy portfolio and a backlog of inactive project requests. Build a complete inventory of ongoing project work and pending requests, and cull aggressively.

### Implementation Steps

- In the face of poor project portfolio control and a project request backlog of unknown dimensions, CIO and IT leadership team design improved project intake and prioritization processes.
- Prior to introducing the new process, CIO launches an audit of current active project work and pending requests to create a comprehensive inventory. The project management office redirects effort from current projects to the audit.
- CIO and PMO together identify a short list of essential projects from the request backlog, cancelling all others. Likewise, active projects that are still in planning or early stages are reviewed with a bias toward cancellation. The revised portfolio is dramatically (80-90%) smaller.
- Selected cancelled projects that the audit identifies as potentially high-value are referred back to customers for resubmission to the new intake process.
- Extra resources are assigned to the revised project intake and prioritization processes so that the initial surge of new and resubmitted requests will be addressed quickly, building stakeholder confidence in the process.

### Benefits to Institution

- » Develop a baseline view of the project portfolio
- » Keep old defects in project demand management from compromising new, improved processes

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“We didn’t say no to anything. We had anywhere from 250 to 350 projects sitting out there in the black hole—where projects go to die, as I referred to it.”

Gary Pratt  
CIO

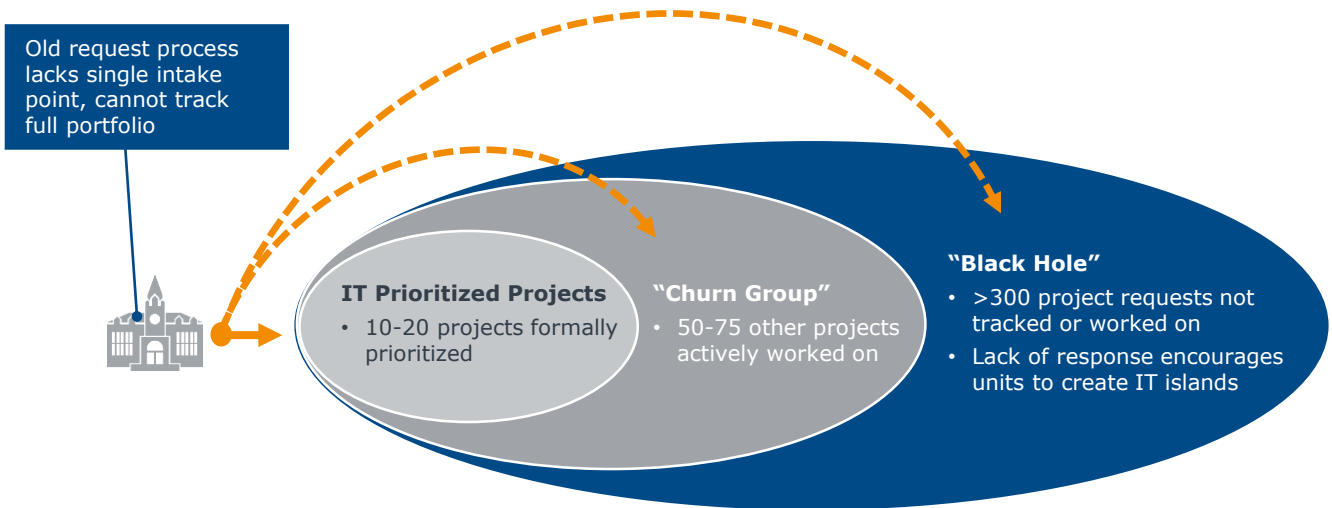
*Kansas State University*



# Spotlight Practices

Kansas State University

Weak project intake and prioritization processes left Kansas State with a modest number of formally prioritized projects, a larger group that was actively worked on but not prioritized, and a huge "black hole" of requests that were received but never acted on. Incoming CIO Gary Pratt developed a new IT governance process to address the underlying issues, but before introducing it he asked KSU's project management office to map the existing project landscape for review and reduction.



## Completed Audit Allows for Intake and Governance Structures to be Improved

An Unmanageable Backlog...



### Comprehensive Project Roundup

All IT staff asked to report active and requested projects for PMO to establish total count.

...Aggressively Reduced to Help New IT Governance Establish Credibility



### Impact-Based Filtering

CIO and PMO scrutinize "black hole" list to identify:

- Must-do projects
- High-potential projects for resubmission to new process
- Non-viable projects to cut



### Supercharged IT Governance

New IT governance committee asked to move quickly on first-round surge of projects.

- Biweekly meetings for first 2 to 3 months
- Aim to show process is responsive, "able to say no"

AUDIT RESULTS ▶

5

Non-discretionary projects retained

~75

High-impact projects referred for resubmission

~250

Outdated, inactive projects cut from list



# Standardized Project Intake



## A Lightweight Project Intake Process Improves Project Demand Visibility

### Practice in Brief

IT replaces diverse multi-path project intake mechanisms with a single, standardized form that captures enough project characteristics to permit project viability assessment and further development by IT and/or the PMO. Quick completability encourages customer compliance, but also requires robust follow-up.

### Implementation Steps

- Assess existing methods of project intake to understand the various submission points and formats customers are accustomed to using. Learn why customers prefer different submission pathways, and communicate the value of a standardized process.
- Design a customized intake form that balances ease of completion with ability to capture a project's key characteristics, such as potential benefits, risks, and the institutional strategic goals that the project will serve. Aim for customer completion time of one hour or less.
- Reach out to IT staffers and others who have previously accepted and approved requests to acquaint them with the new process and ask that they redirect customers to it.
- Provided that all requests are forwarded to a single intake point and that they include common required information, request channels may vary depending on institutional capabilities and culture. A web-based form is most versatile, but may be supplemented by paper forms, email, and in-person or phone intake assisted by an IT staff person.

### Benefits to Institution

- » Increases IT ability to discover and track all project requests
- » Improves fairness and transparency of project request evaluation



"Project intake is a big issue. Our old solution folded because it was abused by those who ran the system. Now I am left taking requests in person as they come in."

Project Management Office Director  
*Public Research University*



# Spotlight Practices

Assorted Institutions

## Non-Standardized Intake Practices Increase Problems with the Project Funnel

### Project Management Avoidance

- Uncoordinated intake increases applicant's ability to avoid the PMO
- PMO cannot develop full view of project demand

### Low-Quality Project Requests

- Intake fails to gather accurate or consistent information
- No customer incentive to improve planning or estimation skills

## Imperatives of a Standard Project Intake Form

Simplicity	Speed	Centrality	Assessment
Emphasize simplicity backed up with value-added assistance	Form should take <1 hour to complete	All projects submitted through a central hub	Ensure quick follow-up to assess further request development needs

## Core Questions of an Intake Form

**Project Intake Channels**  
Tailor intake formats to your campus culture: online, paper, and in-person

**Applicant Estimates**  
Requesting basic estimates of cost, timeline, IT resources needed, etc. encourages applicants to think through the scope of the request

**Project Intake Form**

**Name and Contact:**  
 Project Name: \_\_\_\_\_  
 Executive Sponsor: \_\_\_\_\_

**Provide a short project summary:**  
 \_\_\_\_\_  
 \_\_\_\_\_

**What are the projected benefits:**  
 \_\_\_\_\_  
 \_\_\_\_\_

**What are the projected risks:**  
 \_\_\_\_\_  
 \_\_\_\_\_

**Does the project enable any new capacities for the University:**  
 \_\_\_\_\_  
 \_\_\_\_\_

Strategic Alignment: Select which of the University Goals your Project Aligns with:	
Strategic Goal 1	<input type="checkbox"/>
Strategic Goal 2	<input type="checkbox"/>
Strategic Goal 3	<input type="checkbox"/>
Strategic Goal 4	<input type="checkbox"/>

TIMING, COSTS and SAVINGS ESTIMATES	ESTIMATES
Desired Start Time (1 month, 6 month, 1 year, other)	
Total Costs (estimate)	
Project Size (sm, med, lg)	
Funded? (Y/N)	
Funding Source (Name)	
Amount Unfunded (Estimate)	

**Intake Musts**  
Summary, benefits, risks, and institutional strategic goals that the project will serve

# Project Request Triage

## Early-Stage Viability Checks Improve Allocation of Request Development Resources



### Practice in Brief

Incoming project requests are scrutinized for viability before significant IT or PMO resources are dedicated to preparing the request for prioritization and approval. The object is to avoid committing limited IT/PMO resources to project requests that do not meet a minimum level of quality, or that are clearly destined for denial.

### Implementation Steps

- Where a lightweight project intake process is in place, plan on dedicating IT or project management effort to further develop project requests to the point where they may be effectively assessed for prioritization by IT or an IT governance process. This effort may include, for example, providing technical or business domain expertise, developing a formal business case, or refining customer timeline, cost, risk, and benefit estimates.
- To avoid wasted effort, do an early-stage “rough cut” to filter out incoming project requests that do not merit further development. This might be conducted by the PMO or through referral to an IT governance steering committee.
- Criteria for rejection at this stage might include incomplete proposals, unmeetable resource needs, or deviation from strategic priorities. The goal is not to supplant the formal project approval process, but rather to eliminate clearly non-viable requests from the approval stream.
- Provide customers with guidance on why a request was rejected and on whether it might be improved or resubmitted at a later date.

### Benefits to Institution

- » Make best use of scarce project management/IT resources
- » Provide quick feedback to project requesters



“Our PMO can spend hours and hours fleshing out proposals. I don’t want to spend that time if the project governance committee says we have other priorities. So the proposal goes to the committee to just say no, we don’t have time or resources, or to approve developing the proposal further.”

Gary Pratt  
CIO

*Kansas State University*

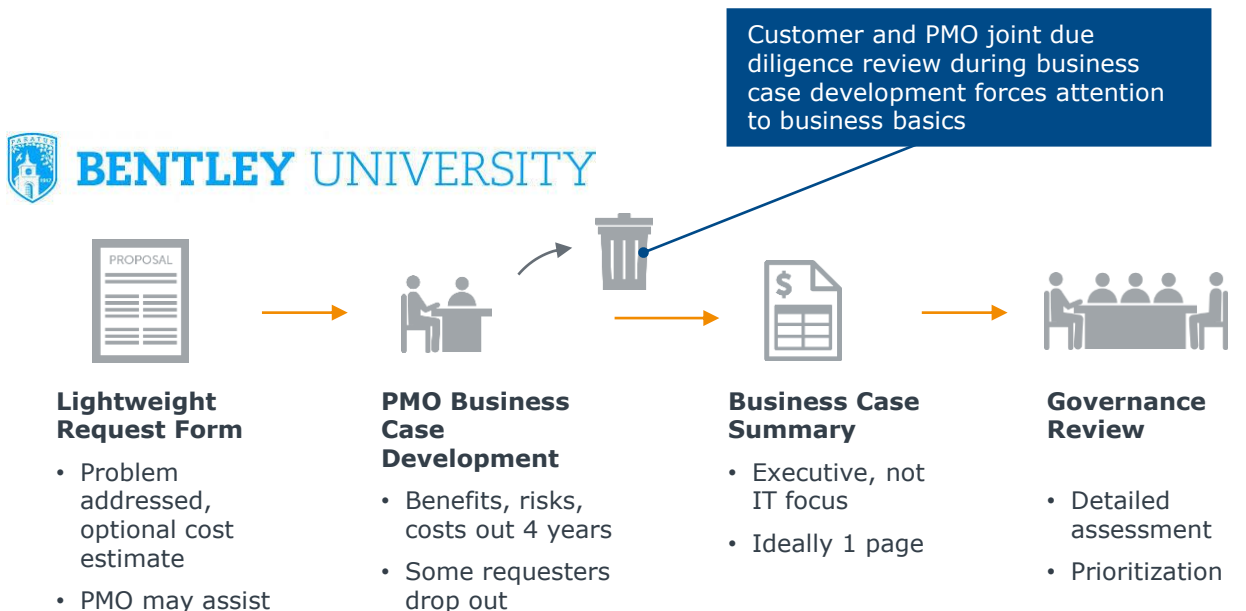
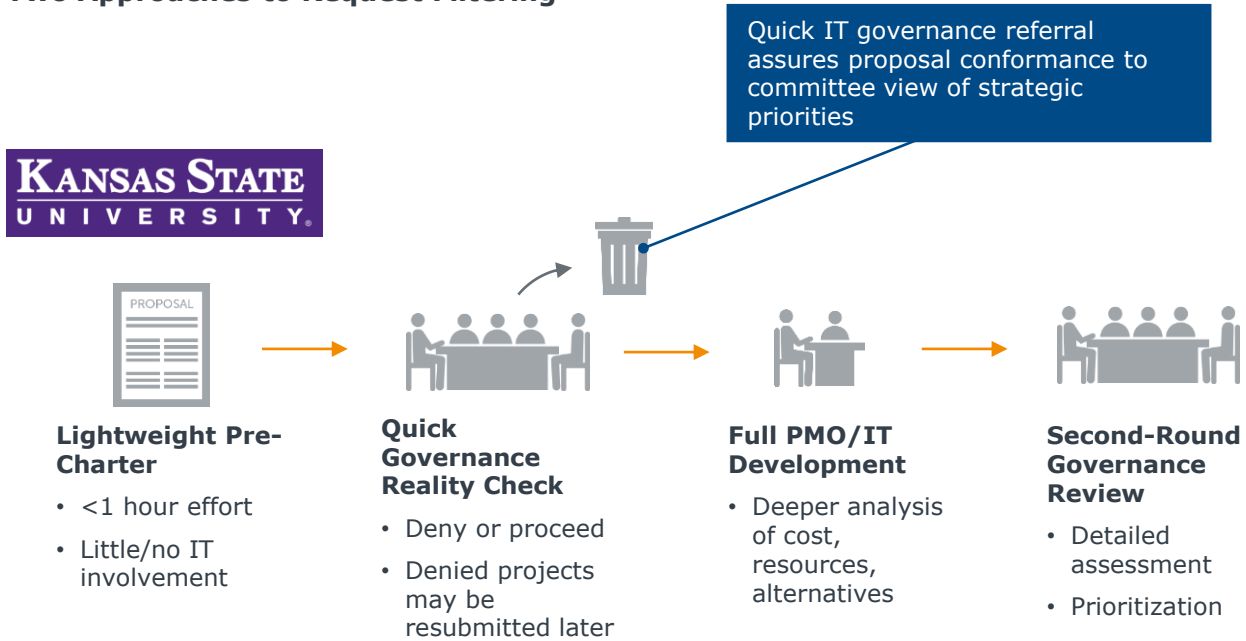


# Spotlight Practices

Kansas State University  
Bentley University

Easy intake processes encourage customer compliance, but leave work to be done. To make the best use of proposal follow-up resources, Kansas State University and Bentley each pressure-test project requests, aiming to eliminate those that aren't appropriate for full development and governance review. Kansas State refers incoming proposals for a pre-check by its IT governance prioritization body, while Bentley, with a smaller project stream and a culture of close customer/PMO partnership, uses a disciplined business case development process.

## Two Approaches to Request Filtering



# Customer Unit Demand Shaping

## Leverage Customer Relationships to Build a Better Pipeline



### Practice in Brief

Work with the leadership of customer units to help them better understand their own needs and to be more intentional in assessing project ideas before submitting them as requests. This can be accomplished through a formal IT relationship manager position or by introducing relationship management principles into PMO and/or IT staff roles.

### Implementation Steps

- For major customer units, assign a relationship manager within IT or the PMO who is responsible for maintaining overall relationship health with the unit and for understanding its strategic goals and operational needs.
- Relationship managers may be formally designated as such, or may be senior IT managers tasked with the relationship management role. They must be senior enough to credibly discuss strategic concerns with unit leadership (VPs, AVPs, deans).
- Relationship managers meet on a regular basis with senior leadership of the customer unit to learn about unit strategy, suggest technology options, and develop potential project requests arising from the unit.
- In the IT organization, relationship managers act as a customer advocate, educating IT staff and the PMO about unit needs and strategic priorities.
- Leverage these relationships to encourage unit leadership to eliminate spurious projects, develop unit-internal business cases, and pre-prioritize requests before submitting them to project intake.

### Benefits to Institution

- » Shift some project assessment and prioritization to unit leadership
- » Increase quality of project requests
- » Improve IT alignment with unit strategy



“You’re the customer advocate, but you’re also putting more responsibility on the customer to get their house in order and speak to you in a clear voice about their priorities.”

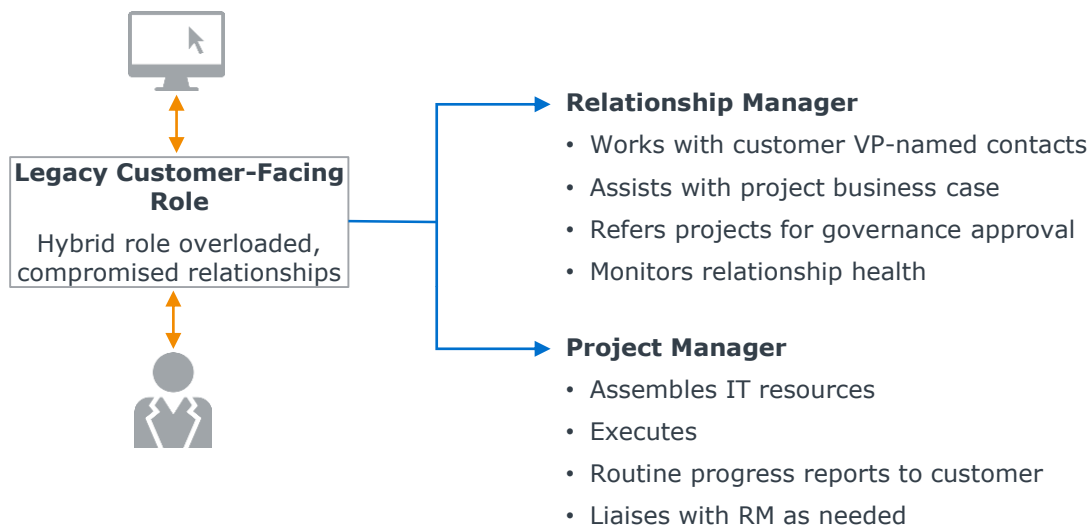
Customer Relationship Manager  
*Private Research University*



## Spotlight Practices

Kappa University<sup>1</sup>

In the absence of a close working relationship with IT, project applicants within units may make uncoordinated requests, or may be unaware of existing alternatives. They may also struggle to formulate solid business cases. At Kappa University, an earlier position that combined relationship and project manager responsibilities was redefined to eliminate conflicts of interest between the two roles. Relationship managers work with unit leadership to suggest IT solutions that support unit strategic goals, and represent customer interests to the IT organization. They also encourage the customer units to collect and prioritize their potential IT project requests before submitting them. Project managers are committed to the organization and on-time delivery of approved projects.



### Relationship Managers Encourage In-Unit Prioritization at Kappa University

✓ Leveraging Customer Executive Relationships

Case in Brief:  
"Don't Really Need It"

HR line manager asks for project requiring massive new storage array

- RM escalates request through contacts to unit leadership
- VP acknowledges the project is not a priority

✓ Establishing Unit Business Case Process

Case in Brief:  
"Case Closed"

RM assists customer unit with project business case for submission prior to project request

- Business case process uncovers unit uncertainty about value and costs
- Other business cases demonstrate clear value
- Unit withdraws project

✓ Encouraging Customer Internal Governance

Case in Brief:  
"No Surprises"

VP sits on institutional governance committee, does not want to be surprised by requests from own unit

- RM assembles complete picture of customer unit IT requests for VP review
- VP establishes internal governance for projects prior to institutional process

<sup>1</sup>Pseudonym



## Decision Guide

# Selecting Project Demand Management Tactics for Your Institution

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### Using this Report to Speed Consensus for Change

The purpose of the IT Forum's Executive Briefs is to kickstart targeted innovation on our members' campuses. Many IT Forum members use our research as an occasion to convene IT and campus stakeholders to review best-practice lessons from innovative higher education institutions and deliberate about the need to implement them.

To that end, IT Forum reports feature decision guides that IT leaders can use as a backbone for focused working sessions at staff and task force meetings. We recommend that members distribute the report to the relevant stakeholders as pre-reading to establish a common vocabulary and fact base, then spend time going through the worksheets to consider the applicability and resource requirements of the practices in this brief.

IT Forum staff are happy to facilitate such discussions live on your campus or on a private web conference as helpful.

### Creating an IT Team Working Session

- Send report to project management, IT leadership, and selected stakeholders for pre-reading
- Convene group to discuss applicability questions and assess necessary implementation steps
- Contact IT Forum for implementation support:
  - Unmetered consultation with Forum researchers
  - Networking contact with profiled institutions
  - Model policy and process templates

# Project Portfolio Reset Action Plan

Use the worksheet below to consider whether a project portfolio reset (see pp. 7-8) is right for your institution, and to identify actions need to implement one.



## Is This Practice Appropriate For Us?

Indicate whether each statement accurately describes your institution, and use the box below for implementation guidance.

- Our current portfolio fails to discover or track at least 30% of all active projects and pending project requests.
- We have a large backlog of old (> 1 year) project requests that have never been approved or denied.
- Trying to follow through on all currently pending projects would be impractical.
- Customers are frustrated with a lack of clear feedback about project status.
- Without significant improvement to our project intake process, problems like those above will worsen.

How many of these issues are present on our campus?

**4-5** Project portfolio reset recommended

**2-3** Targeted backlog review and project cancellations may be sufficient

**0-1** Project portfolio reset not needed



## What Do We Need to Do to Implement?



Indicate whether each item below is already in place, partially in place but needs enhancement, or must be created.

Capability/Resource	In Place	Partially in Place	Create
Process and personnel to gather an up-to-date inventory of all projects and project request, and their status.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Evaluation criteria for winnowing active and pending projects, identifying which to keep, cancel, and/or flag for resubmission.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
IT management or IT governance team to make project reset decisions.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Communications plan for informing customers of project reset decisions, addressing objections or concerns.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Contingency plans to expedite review and approval of new and resubmitted project requests following portfolio reset.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Planned or implemented project intake improvements to prevent future issues with untracked projects and resource over-commitment.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>



# Standardized Project Intake Action Plan

Use the worksheet below to consider whether standardizing project intake (see pp. 9-10) is right for your institution, and to identify actions need to implement this practice.



## Is This Practice Appropriate For Us?

Indicate whether each statement accurately describes your institution, and use the box below for implementation guidance.

- We lack a single intake point for project requests.
- We lack a standardized form that captures necessary information about every project request.
- Twenty percent or more of incoming project requests are missing basic information needed for project viability assessment or further proposal development by project management.
- Our project intake request form takes more than an hour of customer effort to complete.
- The fairness and consistency of our project approval process suffers from alternate project request submission pathways.

How many of these issues are present on our campus?

**4-5** Standardizing project intake is recommended

**2-3** Targeted intake improvements may be sufficient

**0-1** Standardized project intake already exists/not needed

## What Do We Need to Do to Implement?

Indicate whether each item below is already in place, partially in place but needs enhancement, or must be created.

Capability/Resource	In Place	Partially in Place	Create
Process and personnel to map existing project submission points and request forms, including informal and "back-channel" processes.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
A standard set of project characteristics to scope and develop project requests that a typical customer could reasonably provide with an hour of effort or less.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Mechanisms for submitting standardized project requests, possibly including paper, web, and email-based forms, and for aggregating them in a single collection point.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Communications plan for explaining the revised intake form and process, addressing the concerns of different customers as revealed in the map of legacy submission practices.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Communications and training plan for IT staff to explain the new form and process, and to discourage IT acceptance of back-channel requests.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Incorporation of the new form and process into PMO follow-up and request development workflows.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

# Project Request Triage Action Plan

Use the worksheet below to consider whether quick project request triage (see pp. 11-12) is right for your institution, and to identify actions needed to implement this practice.



## Is This Practice Appropriate For Us?

Indicate whether each statement accurately describes your institution, and use the box below for implementation guidance.

- We devote significant IT or PMO staff resources to developing project requests beyond the original customer submission (e.g., building business cases, cost and effort estimation, technical review, etc.).
- We waste staff time developing project requests that have no realistic chance of approval by downstream governance or prioritization bodies.
- At least 10% of project requests require excessive development effort due to missing or poor quality information in the proposal.
- At least 10% of project requests require excessive development effort due to missing or poor quality information in the proposal.
- At least 10% of project requests require excessive development effort due to missing or poor quality information in the proposal IT governance or prioritization body decisions are slowed by insufficiently developed or excessive project requests..

How many of these issues are present on our campus?

**4-5** Project request triage is recommended

**2-3** Targeted project review improvements may be sufficient

**0-1** Project request triage exists/not needed



## What Do We Need to Do to Implement?

Indicate whether each item below is already in place, partially in place but needs enhancement, or must be created.

Capability/Resource	In Place	Partially in Place	Create
Process and personnel to perform early-stage viability checks on incoming project requests.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
CIO and customer leadership support for quick elimination of inappropriate project requests.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Process and personnel to explain to project requesters the reasons for early-stage elimination and suggest improvements for resubmission.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
(Optional) IT governance or other prioritization body prepared to review project requests for further development approval.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

# Customer Unit Demand Shaping Action Plan

Use the worksheet below to consider whether quick project request triage (see pp. 13-14) is right for your institution, and to identify actions needed to implement this practice.



## Is This Practice Appropriate For Us?

Indicate whether each statement accurately describes your institution, and use the box below to find implementation guidance based on the number of "Yes" answers.

- Our relationship with customer units is largely transactional or that of an "order taker" rather than a strategic partner.
- We lack IT or PMO staff assigned to specific customer units who work routinely with unit leadership on strategic objectives or high-level unit planning.
- Customer units do not coordinate project requests internally, often leading to duplicated or inappropriate requests.
- Customer unit leadership does not prioritize project requests internally before submitting them.
- Customers units struggle to develop business cases, cost and effort estimates, and other basic parameters of their project requests.

How many of these issues are present on our campus?

**4-5** Customer unit demand shaping is recommended

**2-3** Targeted improvements to shaping customer unit demand may be sufficient

**0-1** Customer unit demand shaping exists/not needed



## What Do We Need to Do to Implement?

Indicate whether each item below is already in place, partially in place but needs enhancement, or must be created.

Capability/Resource	In Place	Partially in Place	Create
For each major customer unit, a designated relationship manager responsible for understanding the unit's strategic goals and operational needs.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Plans for developing relationship manager interactions at the unit leadership level focused on the IT dimensions of unit strategy.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
A process for collecting emerging project ideas within each customer unit for review and consultation with the IT relationship manager.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
A process and advocacy plan to encourage unit leadership, with IT assistance, to prioritize and vet unit proposals before submitting them to project intake.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
A council in which relationship managers can share emerging customer needs, to identify possible shared solutions and reduce redundancy.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

## Research Consultant

Ron Yanosky

## Research Analyst

Alec Pallin

## Project Manager

Scott Winslow

### LEGAL CAVEAT

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