THE NEW SERVICES ECONOMY
SERVICES LANDSCAPE

- 70% of global economic activity is services
- 30% of manufacturing firms sell services (60% in the US and 20% in China)
- Traditional Service firms are needing to:
  - Deliver exceptional customer experience
  - Have forward visibility of all key indicators
  - Perform Intelligent scheduling of Specialist and global resources
  - Ensure predictable delivery of sold margins
- Pricing services is inconsistent and challenging
- Allocating people and assets is problematic and often damages profitability, service levels or both
- Project management is siloed and opaque
- Costs associated with Services are seldom fully captured
- Billing and cash collection is slow and often does not reflect all Services delivered
Intelligent Platform for the new Services economy

Human Capital Management & Payroll

Intelligent Services Automation

CRM

ITSM

Finance

Professional Services

Media & Comms

Hi Tech

Healthcare & Lifesciences

Travel, Transport & Hospitality

Manufacturing & Auto

Pure-Play

Product Centric Services
ALL BUSINESSES ARE BECOMING SERVICE ORIENTED, REQUIRING EXPERTISE, WELL-DEFINED PROCESSES AND MANAGEMENT METRICS TO CREATE GREAT OUTCOMES

KIMBLE ENCAPSULATES BEST PRACTICE FOR SERVICE ORGANISATION OPTIMIZATION AND VALUE CREATION

VISIBILITY OF RESOURCE DEMAND AND INTELLIGENT RESOURCING IS THE KEY TO SUCCESS IN THE NEW SERVICES ECONOMY
GDPR is in force .... Now What?

Richard Parker : Elements.Cloud
Ian Maddison-Roberts : Kimble
GDPR – Don’t take it too Literally

If you take GDPR too literally it’s going to spoil everybody’s Christmas.
Kimble Strengths

1. Minimal Personal Data.
   - No Financial or Sensitive data.
   - Very light touch personal data (business email address, timesheet, expenses information).

2. Salesforce platform.
   - Strength of Salesforce as the platform provider and key Sub Processor.
   - Security features to mitigate the risk of a Data Breach.

3. GDPR compliant Data Processing Addendum.
   - Reviewed by our Lawyers and made available to all our Customers.

4. Kimble product features (Summer 18).
   - Supports anonymising resource data, subject access requests.
   - We are inviting feedback from Customers.
Richard Parker

- Co-founder and Chief Customer Officer at Elements.cloud
- Elements.cloud is a Freemium App to support powerful insights and better decisions around your Business Operations and Salesforce Implementations.
- The approach has been applied to thousands of companies over >20 years.
- The team at Elements are recognised thought leaders who have been working closely with Salesforce around the GDPR space over the last year.
- We have asked Richard to share his perspectives on GDPR in the Salesforce ecosystem.

I’m sure we’ll get to see how Elements can assist you in your privacy journey but this is primarily about where we are with GDPR today – and where it’s going...
WHY DO YOU GET THAT LOOK WHENEVER WE TALK ABOUT GDPR COMPLIANCE?
Most national Data Protection Authorities taking “a pragmatic view to accompany companies on the journey – not sanction them”

It’s really up to you to take a view...

The GDPR sets out seven key principles:

- Lawfulness, fairness and transparency
- Purpose limitation
- Data minimisation
- Integrity and confidentiality (security)
- Accuracy
- Storage limitation
- Accountability

These principles should lie at the heart of your approach to processing personal data.
The Salesforce Advantage

**Data Subject**
Individual to whom Personal Data relates

**Controller (Customers)**
Primarily responsible for privacy compliance

**Processor (App Provider):**
Act upon instructions of Controller; also responsible for privacy compliance

**Processor (Salesforce):**
Act upon instructions of Controller; also responsible for privacy compliance

**GDPR**

**Trailblazer**
Salesforce ISV
Why is GDPR Important? : “Keeping us honest about our data”

- Improves protection – updated for a Digital Age
- Gives the data subject control over their information
- Encourages better business management
- Harmonise privacy laws across Europe... (in principle!)
- Fines get everybody’s attention – but regulators are supportive

Key Principle : “Privacy by Design”
https://ico.org.uk/

Resources & self-assessment checklist
ICO.org.uk 12 steps to take

1. Awareness
2. Information you hold
3. Privacy notices
4. Subject rights
5. Subject access requests
6. Lawful basis for processing personal data
7. Consent
8. Children
9. Data Breaches
10. Data Protection by design & Data Protection Impact Assessments
11. Data Protection Officers
12. International

“Overall, only 15% of organizations surveyed expect to be fully compliant by May 2018, with the majority instead targeting a risk-based, defensible position.”

Deloitte GDPR Benchmarking survey of EMEA based organisations spring 2018
RIGHTS OF DATA SUBJECT

- The Right to be Informed
- The Right to Rectification
- The Right to Restrict Processing
- The Right to Data Portability
- The Right of Access
- The Right to Erasure
- The Right to Object
- The Rights In relation to Automated Decision Making and Processing
IN THIS CORNER WE HAVE OUR GDPR COMPLIANT TECH AND PROCESSES AND IN THIS CORNER WE HAVE ... DAVE!
PRIVACY BY DESIGN - People, Process & Technology

Benefits

Not Fines

Reputation

Better customer engagement

Process efficiencies
DON’T PANIC : KEY COMPLIANCE ACTIVITIES

Internal operations

- Update privacy policies
- Develop data inventory
- Deploy updated processes & procedures
- Implement GDPR Request & Consent management in Salesforce
Elements .cloud

FREE PRO

FREE PRO

MANAGED PACKAGE

AppExchange MANAGED PACKAGE

Document and manage
Drive change, training & compliance

Requirements & User Stories

Salesforce Org & Documentation

Setup & manage Data Privacy for GDPR

Document Hub for Salesforce Org & Data Inventory for GDPR
GENERATE SALESFORCE DATA INVENTORY

SALESFORCE CONFIG

nightly sync

 Apex Classes
 Apex Triggers
 Global Actions
 Standard & Custom Objects
 - Approval Processes
 - Fields
 - Page Layouts
 - Process Builder Flows
 - Record Types
 - Validation Rules
 Permission Sets
 Profiles
 Reports
 VisualForce Components
 VisualForce Pages

ELEMENTS REF MODEL

Salesforce GDPR

- Email Templates
- Objects
  - Custom Objects
  - Standard Objects
    - Account
      - Approval Processes
      - Compact Layouts
    - Fields
      - Account Description
      - Account Fax
      - Account ID
      - Account Name
DATA INVENTORY AND FIELD CATEGORISATION

- Every field in every object
  - Personal Data
  - Special Personal Data
  - Not applicable

- Comply with GDPR Requests

- Clean up Org

- Migrate out of spreadsheets

 nightly auto-sync for Salesforce
 Other apps via CSV update
FREE TEMPLATE PRE-BUILT PROCESS CONTENT

These are example processes for you to copy and modify for your own use. Help on copying maps: [http://bit.do/copymap](http://bit.do/copymap)

You are responsible for ensuring your own compliance with various laws and regulations, including GDPR. Elements.cloud does not provide legal advice and does not represent or warrant that its services or products will ensure that clients are in compliance with any law or regulation.
DON'T PANIC: KEY COMPLIANCE ACTIVITIES

**Internal operations**

- Update privacy policies
- Develop data inventory
- Deploy updated processes & procedures

- Implement GDPR Request & Privacy management in Salesforce
  - GDPR Clauses 5 & 7 - more than installing Individual object & adding checkboxes
  - Identify where data is sourced
  - Understand legal basis for sourcing
  - Understand and manage all channels of communication in context of consents
  - Proactively manage retention periods and changes in legal basis at granular level
  - Capture and act on all requests for change or stopping contact at granular level
SETUP AND MANAGE PRIVACY

Individual object is great but not sufficient for GDPR compliance (Articles 5 & 7)

Need evidence of Consent
- by role type
- when given
- what for
- when expires

Need to track GDPR Request
- occurrences
- when requested
- when completed

Lead/Contact

Individuall

Consent

GDPR Request

Need evidence of Consent by role
- when given: 12 June 2018 @ CeBIT stand A101
- what for: Marketing updates
- how to contact: Email
- when expires: 12 Dec 2018

Need evidence of Request
- when requested: 25 Oct 2018
- when completed: ...
<table>
<thead>
<tr>
<th>Source name</th>
<th>Contact period (months)</th>
<th>Retention Period (months)</th>
<th>Manual vs Automated</th>
<th>Lawful basis</th>
<th>Allowed Communication Rules</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subscribed to blog</td>
<td>12</td>
<td>12</td>
<td>A</td>
<td>Consent</td>
<td>☑</td>
</tr>
<tr>
<td>Inbound lead (email)</td>
<td>6</td>
<td>12</td>
<td>A</td>
<td>Consent</td>
<td>☑</td>
</tr>
<tr>
<td>Inbound lead (web form)</td>
<td>6</td>
<td>12</td>
<td>M</td>
<td>Consent</td>
<td>☑</td>
</tr>
<tr>
<td>Attended events / conference</td>
<td>6</td>
<td>12</td>
<td>A</td>
<td>Consent</td>
<td>☑</td>
</tr>
<tr>
<td>Scanned at exhibition stand</td>
<td>6</td>
<td>12</td>
<td>A</td>
<td>Consent</td>
<td>☑</td>
</tr>
<tr>
<td>Exchanged business cards</td>
<td>6</td>
<td>12</td>
<td>M</td>
<td>Consent</td>
<td>☑</td>
</tr>
<tr>
<td>In sales cycle</td>
<td>12</td>
<td>24</td>
<td>A</td>
<td>Legitimate Interest</td>
<td>☑</td>
</tr>
<tr>
<td>Signed Contract</td>
<td>36</td>
<td>84</td>
<td>A</td>
<td>Contract</td>
<td>☑</td>
</tr>
<tr>
<td>Joined Partner program</td>
<td>12</td>
<td>36</td>
<td>A</td>
<td>Contract</td>
<td>☑</td>
</tr>
</tbody>
</table>
List of all Consents (Privacy Permissions)

Aggregation of permissions
Data Privacy Manager: manage consents / permissions for GDPR

$3,000 USD per company per year

RATING
🌟🌟🌟🌟🌟 (1)

LISTED ON
5/6/2018

LATEST RELEASE
6/4/2018

There are still AppExchange issues. Download from http://bit.do/DPMinstall

Support GDPR with evidence that every lead / contact has valid data privacy permissions/consents for each type of communication with an expiry date. This app manages data entry via marketing rules, unsubscribes and auto-expiry, dashboard and reports.
Elements.cloud provides affordable tools required for sustainable GDPR compliance

- Data Privacy App for Salesforce (Permissions/Consents)
- Build a Data Inventory and Categorize Personal Data
- Free Pre-Built GDPR Process Documentation

Salesforce and/or Pardot user and need to comply with GDPR?
Quickly Comply with the AppExchange

There are already a number of GDPR solutions on the AppExchange, check out our handy guide to getting compliant quickly!

Learn More about App Exchange Solutions

Power To The Individual

World Tour London

GDPR @ DreamOlé

http://www.GDPRsuperheroes.com
Summary

- May 25th was a milestone in the journey
- It’s not going away so focus on the benefits and competitive advantages – not the fines
- Detail of enforcement will become clear over the coming years
- The ICO want to see companies moving in the right direction – they will be supportive
- If you aren’t where you want to be – don’t panic – follow the roadmap
- Leverage Salesforce and the platform as your customer master data
- Work with partners like Elements.cloud to support your journey
Improving performance

The key lever of performance in a services organization is better matching of supply and demand.

Getting the right resources allocated to projects is a key to success.

Driving up billable utilisation will directly impact profitability.

Tight coupling of supply and demand has been core to Kimble from day 1.
Benefits of better resource management

1. Improved **project performance** (time, budget, quality and fewer project failures)
2. Improved **utilization** of human capital – doing more with same or less
3. Better **customer satisfaction** (internal and external customers)
4. *Reduced attrition / improved employee satisfaction – less chaotic working environments*
5. *Reduced management time involved in staffing issues*

**COST SAVINGS ANALYSIS ($50/hr.)**

<table>
<thead>
<tr>
<th># of people</th>
<th>1</th>
<th>5</th>
<th>10</th>
<th>15</th>
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<tr>
<td>50</td>
<td>$52,000</td>
<td>$260,000</td>
<td>$520,000</td>
<td>$780,000</td>
</tr>
<tr>
<td>100</td>
<td>$104,000</td>
<td>$520,000</td>
<td>$1,040,000</td>
<td>$1,560,000</td>
</tr>
<tr>
<td>150</td>
<td>$166,000</td>
<td>$780,000</td>
<td>$1,560,000</td>
<td>$3,120,000</td>
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<tr>
<td>200</td>
<td>$208,000</td>
<td>$1,040,000</td>
<td>$2,080,000</td>
<td>$4,160,000</td>
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<tr>
<td>250</td>
<td>$260,000</td>
<td>$1,300,000</td>
<td>$2,600,000</td>
<td>$5,200,000</td>
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<tr>
<td>325</td>
<td>$338,000</td>
<td>$1,690,000</td>
<td>$3,380,000</td>
<td>$6,760,000</td>
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<tr>
<td>375</td>
<td>$390,000</td>
<td>$1,950,000</td>
<td>$3,900,000</td>
<td>$7,800,000</td>
</tr>
</tbody>
</table>

Doing more with the same or less improves operating efficiency

© Resource Management Institute
Observations/ recommendations

Close date is king

- Selling services is different to selling products
- Vital that close date discipline is ‘baked’ into your process
- More reliable forecasts of on-going as well as new work
- If don’t believe the data, don’t act upon data early enough
- Kimble: tight coupling, tentative booking, propositions, colour coding, firm/ probable/ possible, intelligent insights

<table>
<thead>
<tr>
<th>Measure</th>
<th>Effort/ focus</th>
<th>Impact of being wrong</th>
</tr>
</thead>
<tbody>
<tr>
<td>Close date</td>
<td>Low</td>
<td>High</td>
</tr>
<tr>
<td>Probability</td>
<td>Medium</td>
<td>Medium</td>
</tr>
<tr>
<td>Value</td>
<td>High</td>
<td>Low</td>
</tr>
</tbody>
</table>
Observations/ recommendations

Resource Managers are unsung heroes

- Utilisation biggest potential impact on profitability
- More complicated than it appears – balancing act
- Poor selection of resources on a project will negatively impact profitability
- Who is responsible for resource management (project managers, line managers, client manager, practice manager, resource manager)

- Kimble: enhanced collaboration, greater granularity (pin days, vacation, call offs, over-allocation, task level loading, enhanced capability matching)
Best practice

1. Set-up for success

- Maintain an accurate skills inventory for better staff alignment & planning
- Have a standard process and challenge existing process (establish ‘interlocks’)
  - E.g. weekly resource planning meeting or update meeting?
  - Centralised v de-centralised (Resource Management Office)
  - Opportunity to employee multiple sourcing strategies
- Define demand as early as possible
Best practice

2. Collaborate on execution

- Avoid silos (cross department resourcing)
- Leverage compensation schemes to drive behaviour
- Don’t hoard resources
  - Mixed teams are more productive
  - Steer towards most profitable projects
- Don’t celebrate the status quo
  - Look for opportunities to hire
Best practice

3. Tune the engine

➤ Measure as much as possible (as long as you act upon it)
➤ Hold formal sessions to review demand mix
Thank you
Resourcing Panel Discussion

Host: Peter Fitzpatrick, *Kimble*
Jeremy Wilson, *Oxford Computer Group*
Chris Hamilton, *Clarasys*
Rob Garner, *Garwood Solutions*
Jeremy Wilson

Role: Operations Director (aka Service Delivery Director) - 15 years
26 Years in IT Services – Trainer, Consultant, Practice Manager, Business Owner

Company:
• Specialist Service Provider in Identity and Security - Started in 2002
• Initial tight focus on training and services related to Microsoft Identity management technology. Established a niche and reputation and since grown and expanded to a broader portfolio of services related to Identity and Security
• Went live with Kimble on Jan 2nd 2012
• Offices in South Wales and Oxford. 65 employees. Services / Managed Service and Support / IP / Software Re-sale
• T&M/Annuity/Fixed Price
Chris Hamilton

Role: Chief Operating Officer

Company:
• Clarasys is a business consultancy using agile techniques to enable business change, with specialisms in business analysis, project management and change management
• Clarasys is 7 years old and has been using Kimble for 5 years
• 80 consultants, all of whom are employees
• Majority of our projects are T&M, with the remainder Fixed Price
Rob Garner

Role: Former Group CEO / MD Systems / MD Government & Society

Company:
• Tribal is a £100m t/o UK-listed company providing education management software and services
• Tribal is the sector leader in ‘student management systems’ to the UK & Australian higher and vocational education markets
• Tribal acquired Kimble in 2014 to support circa. 350 systems implementation consultants in the UK, Australia, Canada and South Africa
Product Update

David Scott
Release 1.27 (Summer 18)
Proposal Modelling

- Template Annuities for Product
- Create Annuities in Proposal Modeller
Vacation Management

- **Improved process for vacation carry over**
  - Bulk Vacation Transfer allows quick transfer of remaining unscheduled Usage between assignments across all assigned Resources.
  - Uses Usage Adjustments (approval not required) to remove Usage from expiring year’s assignment, add Usage to upcoming year’s assignment.
## Vacation Management

** Improved Vacation Reporting  
- New standard report, KRES27 - Detailed Vacation, shows actual vacation usage and scheduled vacation usage, broken down by month

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</thead>
<tbody>
<tr>
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<td>1.000000</td>
<td>0.000000</td>
<td>0.000000</td>
<td>4.000000</td>
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<td>Sum of Scheduled Usage</td>
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<td></td>
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<td>5.000000</td>
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<td>Sum of Vacation</td>
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</tr>
</tbody>
</table>
Vacation Management

**Consultant View of Vacation Entitlement**

- **Dashboard Component**
  - Resource Assignment Summary displays total Entitlement in center, surrounded by Used, Planned, and Remaining
  - Ability to flag Activities as *Include in Resource Assignment Summary*
Managing Leavers and Returners

- Improved process for managing Resources leaving and returning
  - Wizard based approach for Ending Tenure
  - End Group Memberships
  - End Assignments
  - Deactivate associated User

- New Tenure Wizard for returning Resources
Work Items

- New feature to represent “To Do” items

- Available at Activity level for non-plan based Projects, and at the Task level when plan-based
  - Activity Level is a simple alternative to a Task plan, but more nuanced than Categories
  - Task Level: Ability to define Work Items on each Task in a plan
  - Iteration Level: Ability to define Work Items in an Iteration

- Simple Status
  - Not Started, In Progress and Complete

- Work Items can be updated by Resources who have Activity or Task Assignments
  - No Time Booking against Work Items instead status and quantity fields are available

- Work Items can support estimation and tracking detail
  - Quantity-based
  - Point-based
Iterative Projects

- Iterations introduce a new way of managing plans in Kimble

- Iterations are bounded by dates and represent a project phase, iteration or sprint

- Iterations contain Work items
  - Work Items are available to Resources assigned to the Iteration

- Iteration Work Items can be managed through a new Planner view in Plan Gantt
  - Allowing you to move Work Items from Iteration to Iteration
  - or from Unassigned bucket/Backlog to an Iteration

- Iterations summarise the Work Items within
  - Sum of Quantity or Story Point values
Work Items & Iterations - Demo
Project Closedown

- **Ability to control the Actions that can be performed at each Delivery Stage**: You can decide which actions are allowed at each stage of the project.

- **Engagement may not be moved to subsequent Delivery Stage unless Actions which will no longer be available are completed**: This ensures that all necessary actions are completed before moving to the next stage.

### Example Table

<table>
<thead>
<tr>
<th>Delivery Stage</th>
<th>Menu Items</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Forecast</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Diagram

The diagram shows a grid layout with columns for different delivery stages, allowing for controlled actions. Each stage can have specific actions enabled or disabled, ensuring compliance with project requirements.
Program and Portfolio Status Summaries

- Ability to create a Status Summary for:
  - Delivery Program
  - Delivery Portfolio
GDPR

- Subject Access Request
  - Lists all mentions of a Resource
- Right To Be Forgotten
  - Anonymizes all references to Resource within application
  - Removes email addresses
- Consent to Contact
Einstein Analytics

- Packaged Analytics Templates
- First version contains Resource Analyzer
  - Capacity Analysis
  - Utilization Analysis
- Other Analyzers planned
Winter 19 (R 1.28) – Target Scope
Roadmap

- Operational Efficiency
- Easier Configuration & Administration
- Functional Enhancements
Operational Efficiency

Management Information
- Long-term Forecasting
- Forecast Accuracy
- New Analyzers for Delivery, Operations

Operational
- Period Closure tools, e.g. auto-actualise, auto-move
- Role-based Dashboards
- Timesheet Compliance

Transactional
- Auto-approval of actualised forecast (R1.27)
- Auto-actualisation of forecast (R1.27)
- Predictive Expense
- Alternative Approvers

Measure
- Month-on-month
- Benchmarking
**Configuration & Administration**

- Easier Configuration
- One-click installation of Catalog Items
- Turn features on/off
Resource Management Improvements

- Resource Matching based on Availability
  - Sophisticated search algorithms to complement skills search

- Scenario Modelling
- Improved Resource on-boarding
Finance & Operations

- Partial Credit Notes
  - Discretionary Credit
  - Specific Credit (against Invoiced Items)

- Detailed Invoices
  - More flexible Grouping Rules
  - Include Custom Fields on Invoice Lines
  - Provide full Time Entry / Expense Item detail

- Multiple Contacts
  - Record and email Invoice to multiple Contacts
Drinks & Networking