



# Delivering Old Fashioned Capability Through a Modern Approach



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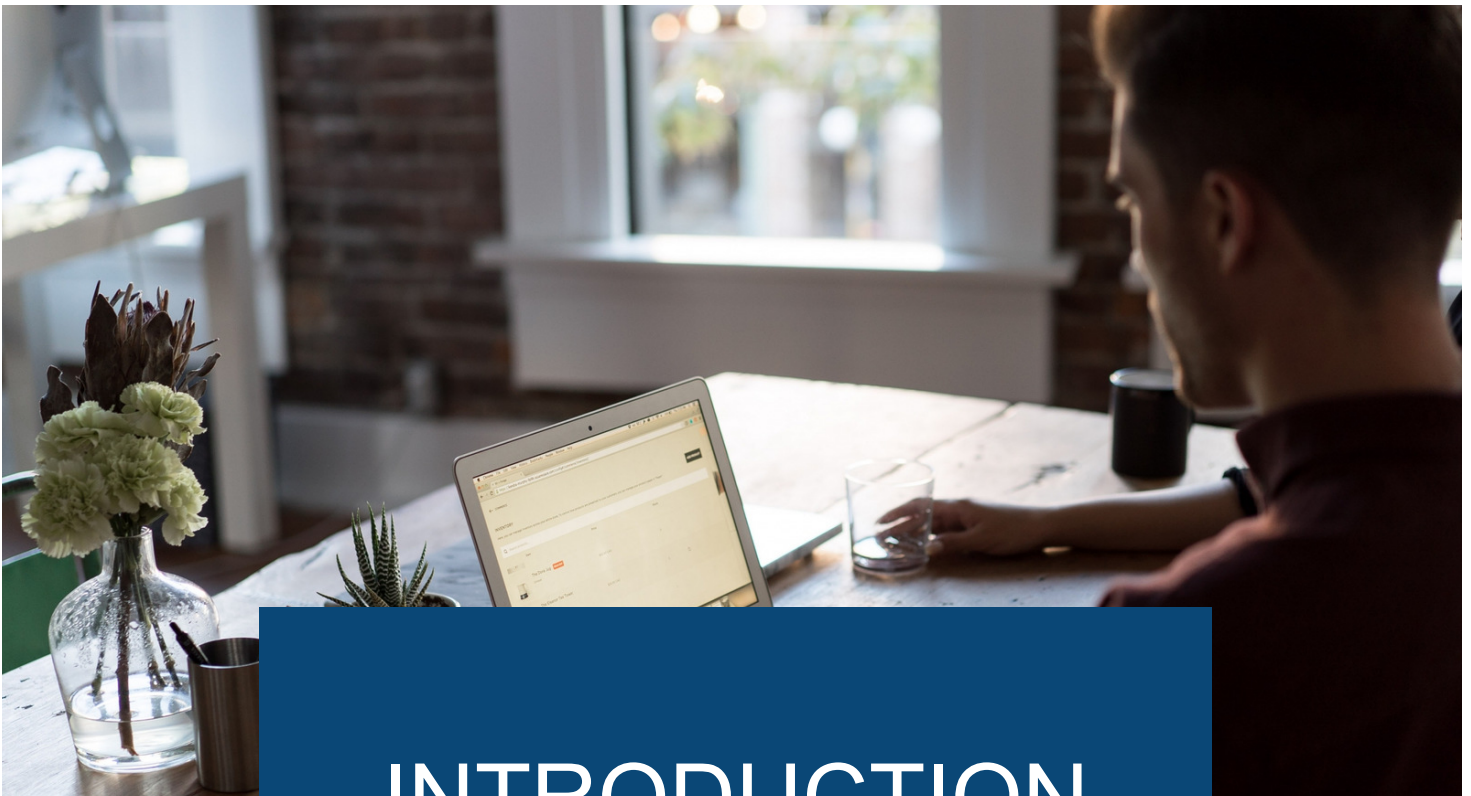
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# INTRODUCTION

## The Legacy Burden Challenge

For many organizations, Excel and email are the de facto “budget system.” Campbell was no different. As budgeting requirements continued to evolve over time, the legacy challenge became extremely painful. Senior Finance & Operations Manager Ryan O’Hagan shared, “Our pain points with our legacy budgeting process boiled down to communicating what decision levers leadership had available, transparency into why the company needed the budget line item, and the cumbersome corporate finance Excel macro tool.” These obstacles created challenges not only within IT, they impacted the relationship between IT, corporate finance, and IT business partners.

O’Hagan elaborated, “We struggled to communicate the good stewardship of the IT budget dollars every year to finance leadership with supporting additional growth and demand from the business.”

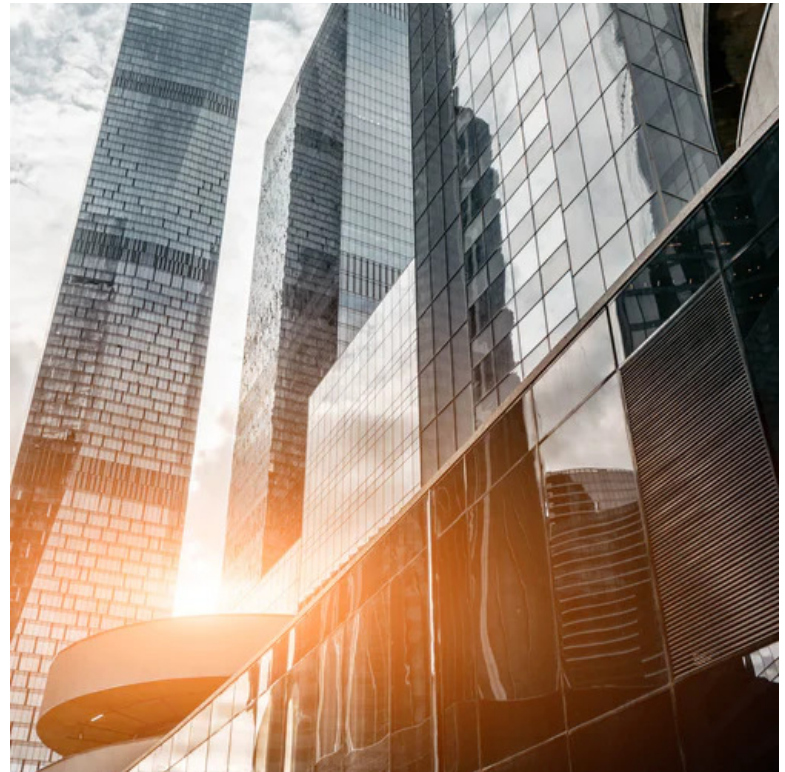
He continued, “Business consumption and additional projects end up raising the budget, so our good stewardship of our own costs gets lost in the shuffle.”

The extremely manual and limited capability of the legacy approach made it difficult for IT to not only effectively communicate how their budget dollars delivered, but to effectively pivot when budgets needed realigned. Campbell needed a tool to enforce data governance, auditability of the submissions, and automation of the many operational tasks needed to manage the budget formulation process. Proven Optics had just the solution.



# Embracing the Power of Platform to Modernize

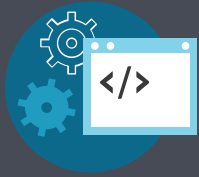
Campbell came to the modernization process with a clear set of requirements and a healthy skepticism of how Proven Optics could address the requirements. Chief among their requirements, Campbell needed to automate the numerous administrative tasks required to build and maintain a complex IT budget. The idea was, by addressing the onerous manual processes, Campbell could significantly improve responsiveness, analysis, and accuracy. “Looking back, we didn’t realize the power the ServiceNow platform had. With the guidance from Proven Optics, we realized what the budgeting formulation and execution capability could become on the platform,” said O’Hagan, who mentioned that at first their desired outcomes from the modernization were modest.



That is the power of the platform. ServiceNow offers significant native functionality that can be leveraged to deliver powerful, integrated functionality. With the combination of the Campbell requirements, the ServiceNow native capability, and Proven Optics’ deep IT Financial Management knowledge, a modern budgeting solution began to emerge.

Delivered in a blistering 90 day build period, the total build was in production and operational in time to support the budget cycle.

The build was broken down into three major steps: Data Loading, Data Interaction, and Data Reporting through ServiceNow’s dashboard capability.



## Data Loading

The ServiceNow data upload capability allowed for a quick starting point by posting the most current forecast records in an existing table on the platform. This provided a rapid built starting point for the Campbell team to start the budget cycle.



## Data Interaction

With the data now loaded on the platform, Proven Optics worked with the Campbell's team to design the data interaction experience. Leveraging native NOW platform capabilities, user forms were designed to capture new records and modification to uploaded records. Business rules, calculations, and additional configurations automated the administrative tasks Campbell identified as critical to success. Proven Optics brought budget formulation expertise and the build included proven budget capabilities that significantly improved data quality and analysis. All the improvements were linked with ServiceNow native workflow to support and shepherd the various processes.



## Data Reporting

The build effort culminated in a set of purpose-built, self-service, interactive dashboards using the ServiceNow dashboard technology. Interactive charts and graphs provide visible insights which clarify the purpose and intent of each budget dollar. The Proven Optics budget approach aligns budget dollars to meaningful categories to facilitate decision making, identify opportunities, and document risks. Each budget submission includes an automated audit trail that tracks changes and ensures traceability.

## Getting More Than You Bargained For

"I can't overstate how satisfied our IT leadership team and their delegates were with the new process and using ServiceNow. It is universally loved for the capabilities it provides as well as the swift facilitation of decision-making based on the data and dashboard outputs."

- Ryan O'Hagan

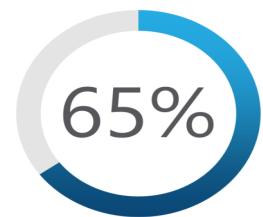
## Automation

One of Campbell's clear requirements was automation. The solution delivered. O'Hagan explains, "The first year of using the Proven Optics solution on ServiceNow made budgeting painless for our IT end users. We automated the manual pre-work to make the budget submission process an update and enhance, not a manual load."

In addition to eliminating manual pre-work, the solution delivered self-service reporting which addressed another manual and time-consuming task. O'Hagan elaborated on this, "Real-time views into the formulation process with the dashboards in ServiceNow enabled IT leaders to drill into their submissions and see the impacts of their position without tasking their team or ITFM to provide a report."

According to O'Hagan, the first pass IT submission took 65% less time than previous years driven by the automation delivered from the Proven Optics solution.

Campbell realized the significant process automation they sought when they initiated the project, but they achieved even more. The implementation delivered three additional unexpected results: improved engagement with the budget process, insightful communications and budget decisions, and improved credibility.



## Improved Engagement

Adoption of a new process or tool is always the hardest part, but that was not the case with the Proven Optics tool on the ServiceNow platform. "The adoption process was surprisingly easy. The change management yielded zero issues or complaints from the IT group as we rolled this capability out.

Stakeholders love going in and using the toolset - especially with the self-service and reporting," according to O'Hagan. He mentioned that the tool was built intuitively, required no real customization, and the adoption was automatic. "We have received nothing but praise from stakeholders," he explained.





### Improved Credibility

A repeatable, sustainable, scalable process helps make a budget defensible. A defensible approach and process delivers credible outcomes and trustworthy insights. Campbell experienced this reality in their very first year using the solution. The ability to align budget dollars to business outcomes with clarity coupled with the ability to describe the impact of reducing funding helped tell a compelling IT Value Story™. The result produced favorable funding outcomes and clearer expectations from both corporate finance and business leaders.

For IT leaders, the traceability of each budget line item gave them greater confidence in identifying opportunities to realign funding and the risks associated with those changes.

For the IT finance team, knowing there is also an audit trail for every line in their budget ensures they know exactly what was changed, how it was changed, how much it changed, and even who changed it. A feature that has not gone unnoticed by other areas of the organization.

### Insightful Communications and Decisions

The implementation of the new tool shifted the communication between IT and corporate finance. With increased transparency, the conversation was focused on what the IT spend was delivering for the enterprise and the impact of cost drivers was clear.

The dashboards built in ServiceNow captured budget expense drivers to create a Year-over-Year Waterfall chart. This automation saved the team the time required to build the chart manually allowing more time for analysis.

“Calculating variance of next year’s submitted budget vs. the current year’s approved budget was instrumental in the communication back to corporate finance as to why our budget was increasing from expense driver metadata,” O’Hagan said.





## The Final Word

### Summary

O'Hagan summed it up best. "Our stakeholders have always said the budgeting process was challenging and complicated, but now we can confidently say that it has transformed to be seamless, straight forward, and streamlined. What Proven Optics has built for us is a sustainable, turn-key ITFM operation. I can see how what they've done can be applied to many financial areas of practice outside of IT. Both our corporate finance and capital finance teams are eagerly exploring how the ITFM model can be applied to their own scope."

### About Proven Optics

Proven Optics is a software and services company that focuses on one thing: Financial Management. We help clients both in IT and Finance organizations implement financial management toolsets on SaaS platforms that leverage our 20+ years of practitioner experience and 100+ Commercial & Federal implementations. Our solutions enable financial management modernization to provide IT & Finance leaders with the necessary analytics and insights to make better business decisions.

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