

## 2023 Non-Project Work Tasks and Definitions for Allocations and Time Tracking

### Guidelines

- Use the following definitions when determining where to allocate and track time for non-project tasks.
- Sr. Managers and below are expected to have allocations and track time.
- Contact the appropriate Project Manager any allocations or time entry set up for project-related work.

In general, there are four purposes for allocations and time tracking.

1. To ensure we Care for Our People in their efforts to improve their skills, grow and achieve their dreams.
2. To ensure workloads allow Our People to be effective in their roles by forecasting how much time we can commit to the various types of work.
3. To be able to recognize and justify when additional staff is needed in a given area.
4. To forecast project labor costs and report on actuals.

### For general use

\* Driven by the People Gauge

Project / Task Names	Description	Recommended Base %	Purpose
IT: Administrative	<u>All Time Trackers</u> Time spent managing miscellaneous emails, attending non-project meetings (department meetings, All Hands, Town Halls, WIG sessions, etc.) and company events (lunches, Halloween, etc.)	Employees: 10% Contractors <10%	To understand how much time we spend on “non-productive” activities and possibly identify inefficiencies.
IT: Employee Development *	<u>Employees Only</u> <ul style="list-style-type: none"> <li>Time you spend <b>upskilling yourself</b> for professional growth. e.g., training of any kind, attending conferences, being coached or mentored, goal setting, 1-on-1s and performance reviews.</li> <li>Time you spend providing coaching, training and/or mentoring <b>others</b>.</li> </ul>	5%	To ensure we are making time for Our People; to improve their skills, grow and achieve their dreams. *  To understand how much time we spend Cultivating Our People. *
IT: Resource Mgmt	<u>Resource Managers ONLY</u> . Time spent in 1-on-1s with their staff, setting staff goals, preparing/giving performance and/or work reviews for their staff, allocation management, interviewing, onboarding, etc. Excludes coaching/mentoring/training others	Up to 3% per staff member	To understand how much time Resource Managers spend on staff management and better plan/staff for our managerial workload. *
IT: Time Off *	<u>All Time Trackers</u> <ul style="list-style-type: none"> <li>PTO/Sick, Floating Holiday, Early Out, Jury Duty, Bereavement</li> <li>NOT for observed Company Holidays</li> </ul> <i>As scheduled, time off is entered in your Resource Calendar (instructions <a href="#">here</a>). your allocation should be reduced.</i>	Add for new staff. $6\% = 15 \text{ days}$  Annual load from Workday will be done for existing.	To help ensure Our People are maintaining a life-work balance. (Should align with Kronos entries.)

## For staff outside the IT Service Operations organization

Project Name	Description	Recommended %	Purpose
IT: Corp Sys Enhancements	Time spent by any member of IT working on enhancements requests made by any of the following Business Segments: Finance, People Care, Product, Real Estate, Risk Mgmt SBS.	TBD by Mgr	To ensure we are setting aside time to continuously improve our products and track how much time is spent on enhancements for these areas as compared to our plan.
IT: New Rev Enhancements	Time spent by any member of IT working on enhancements requests made by the New Revenue Business Segment.	TBD by Mgr	
IT: Omni Enhancements	Time spent by any member of IT working on enhancements requests made by either the Omni or Store Ops Business Segments.	TBD by Mgr	
IT: IT Enhancements	Time spent by any member of IT working on enhancements requests initiated by the IT Business Segment.	TBD by Mgr	
IT: KTLO	Time spent on non-enhancement work required to keep our systems running and secure and support our customers. <u>Only work NOT being done within a project.</u> Examples include: Ticket/production support, proactive maintenance, monthly performance testing, PCI audits, legal obligations, critical updates, etc.	TBD by Mgr	To ensure we are setting aside time to complete these expected activities and track how much time we spend keeping the lights on.
IT: Strategy & Engagement	For use by those people associated with IT Engagement and/or developing IT strategies and standards (e.g. Enterprise Architects, Engagement Leads/Mgrs).	TBD by Mgr	
• Engagement Mgmt	Time spent engaging in road-mapping, Book of Business management and identifying/framing new projects ("left of study").	--	To ensure we are setting aside and understand how much time is being spent in IT/Business engagement.
• IT Strategy/Standards Development	Time spent building strategies, evaluating potential partners or solutions not associated with an active / approved project.	--	To ensure we are setting aside and understand how much time is being spent in strategy work.
IT: Unplanned	This will be an allocation only to reserve time for the unknown; <u>no time entry</u> ,	15%	A cushion for those unplanned activities that come up to minimize OT/excess hours when they do.

**For IT Service Operations staff ONLY**

Project / Task Names	Description	Recommended %	Purpose
<b>IT: Service Operations</b>		Sum & set at this level	To segregate standard operational demand and capacity
• <b>Invoices/Purchasing</b>	Time spent on purchasing and invoicing activities.	TBD by Mgr	Because team members are often shared across functions these tasks were identified to track how much time is being spent in that discipline/area regardless of which team within the IT Service Ops organization the person doing the work is on.  Other areas not represented will obtain their data through ServiceNow statistics.
• <b>Shipping/Receiving</b>	Time spent shipping/receiving equipment and inventory.	TBD by Mgr	
• <b>IT People Admin</b>	Time spent on org charts, staff aug SOWs and recruiting	TBD by Mgr	
• <b>Process Specialists</b>	Time spent on Change, Incident, Problem, Release or Knowledge Mgmt, Six Sigma activities.	TBD by Mgr	
• <b>New/Remodel/Close Stores</b>	Time spent on stores being opened, remodeled &/or closed.	TBD by Mgr	
• <b>Cust Support: Level 1</b>	Time spent on the Service Desk.	TBD by Mgr	
• <b>Cust Support: Level 2</b>	Time spent on Application Support, Config Team, Strike Team, NOC and IT Ops work.	TBD by Mgr	
• <b>Cust Support: Level 3</b>	Time spent on ServiceNow development and Monitoring.	TBD by Mgr	
• <b>Contracts - Other</b>	Time spent on renewal and enhancement related contracts.	TBD by Mgr	