

## CASE STUDY

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# Improved Governance, Control and Reporting for a Single Multi-Functional PMO Spells Strategic Empowerment for LightEdge Solutions

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## Benefits Summary

- 40% savings of time spent managing and generating status reports due to KeyedIn's ability to create a PMO (portfolio management office) with a single version of the truth.
- Improved project completion to project approval ratio in both timeline and budget due to execution plans for project managers that simplify activities and align better, giving visibility around deliverables.
- Significant decreases in time spent resourcing, assigning and tracking project tasks because of improved project intake, templates and built-in governance processes to ensure portfolio value.

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## Background

LightEdge Solutions is an enterprise-grade cloud services, colocation and consulting company focused on the needs of businesses and their critical IT requirements. Founded in 1996, LightEdge has been a pioneer in the colocation, cloud and managed IT services arena for decades.

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## Challenges Faced

LightEdge project managers worked in four disparate project categories: product development, IT, consulting and business operations. It took 2-4 days of intensive work each month to reconcile activities and deliver a rolled-up status report to executive sponsors because the information remained siloed in a 100-percent manual spreadsheet from each department. Engineering and product teams used agile software that did not translate well across all departments or offer standardized reporting, thus limiting the project array and making it very difficult to implement governance.

Project intake was also unevenly managed across the company due to lack of specific intake rules for every department to use. Projects were initiated with Salesforce or excel spreadsheet information with no visibility or ability to ensure project intake priorities protected strategic goals company wide.

## Solutions and Impacts

Natalie Stepp, a senior project manager, reports that during vendor review, the team was immediately drawn to KeyedIn Projects' (KIP) easily configurable dashboards; user-friendly interface; analytics and reporting capabilities. Once KIP was chosen, LightEdge created an implementation plan that narrowed the scope of the solution to the "low-hanging fruit" among their feature requirements. These included:

**Work Management** - Task planning and work orders now appear on project team members' home screens, allowing them to see priorities upfront and use execution task lists. These task lists will ultimately become data to plan against for similar projects in the portfolio—they are reliable and repeatable and can be used to determine real-world forecasting budgets. *"We radically changed how we deliver to plan. Everything works so much more quickly and capacity control for the whole company is now within reach,"* adds Natalie.

**Project Intake and Templates** - To enable project requestors with an intuitive process as well as ensure project intake rules protected their strategic goals companywide, LightEdge used built-in KIP templates to compile dependencies from the very beginning of each project by integrating with Salesforce CRM. Today, they have a single, transparent view of how they review each project and each initial resource decision, as well. This solution allowed project intake to run smoother, with repeatable and consistent results and also allowed the PMO to compile proof of concept for each potential project via enhanced governance controls. *"We can actually compare the things that we are doing with priorities in our business strategy. There's no fudging numbers. Our critical priority calculations stop unnecessary projects in their tracks, adding value and benefits realization to the entire portfolio,"* Natalie said.

**Resource Demand Planning** - LightEdge shares resources now in its master KIP-enabled PMO. "From the days when we were logging in at resources being 250% utilized to now—we now get true visibility into what's happening," said Kate Bills, service delivery manager. For example, internal operations people now point to the screen when pulled onto another project and say, *"Look, you have to talk to XYZ person if you need me on another activity. Here are my priorities and current work. I'm booked,"* said Natalie. *"In-flight disruptions are under control. Operations is fully resourced and the people in it are happier,"* said Kate.

**Configurable Reporting** - In the past, it would take two days to get a full picture of the LightEdge portfolio onto a single spreadsheet and in front of sponsors and executive teams. Today, these reports include data points as granular as percentage complete. That brings a new level of comfort so that leadership can focus on strategy.

Thanks to KIP, LightEdge employees have won back the time they spent using manual spreadsheets. From a group of ten initial users they rapidly expanded to over 100 who represent mostly engineers who wanted to have their home screens at login be a manageable dashboard with a task-list and priorities for planned deliverables. *"The decrease in administrative efforts alone is probably thousands each month,"* adds Kate, *"And the level of confusion has decreased considerably. Our people were being pulled in so many different directions, stops and starts, side projects and projects that weren't started for years and put on hold—these are all in the past,"* Natalie concludes.

## About KeyedIn Projects

KeyedIn enables your PSO to be more strategic, more efficient, and deliver greater business impact by allowing you to easily forecast and allocate resources, create and analyze portfolios, gain visibility to all your projects, and discover new insights through dynamic PPM analytics.

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