

CASE STUDY

Health Care Company Speeds Adoption with Change Management

The Challenge: Promoting Organizational Change and Software Adoption

The Project Management Office (PMO) at this health care company was spending two to three weeks a month gathering information on projects and resources that was then immediately outdated. The group needed to improve project visibility and increase resource utilization, productivity, and return on investment.

“Project and resource managers were in constant conflict because they didn’t have a larger view of demand versus capacity and resources did not know the scope of work or priority,” said a PMO manager.

Knowing adoption would be difficult, the company decided they needed a solution for project and resource management that would also enable best practices, processes, and change management techniques for adoption while ensuring ongoing success and maturity of their project portfolio.

The Solution: Phased Approach to PPM

The division chose Planview® Enterprise One - Portfolio and Resource Management for its ease of configuration, competitive TCO, Customer Success Best Practices, Reporting & Analytics, and its professional services approach.

The team engaged Planview Consulting to identify a roadmap for engagement that defined enablement, capabilities, and business outcomes for their approach to communication, marketing, and education for adoption and future state. They broke down their requirements into smaller objectives using the SMART Goals method (Specific, Measurable, Actionable, Relevant, and Time) in order to bring the most value to the business with their limited capacity.

The phased approach included time tracking, resource management, and project management.

Overview

Industry

Health Care

Geographies

North America

Size

5,900 staff, physicians, and volunteers

This health care company uses Planview Enterprise One - Portfolio and Resource Management for time tracking, project management, and resource management.

Timesheets

The health care company moved forward with processes and training with resource managers and led with the standardization of timesheets.

To overcome adoption barriers, the team conducted a case study with an internal group to identify issues, promote usage, and gain buy in. They created a report using data from Portfolio and Resource Management to represent maintenance, support and project work. At first the results were skewed and representation of work was inaccurate. After a few months, the internal group continued to enter time into the solution uncovering the value which led to stakeholder buy in and accurate reporting for decision making.

Project and Resource Management

The next step was to implement project and resource management. The team leveraged the Customer Success Center (formerly PRISMS®) to define clear goals and promote an integrated education plan to ensure managers got the one-on-one training needed. They constructed standard lifecycles that could be applied to any project and then created custom lifecycles for select projects such as PMO or maintenance projects. Every project manager and resource manager received training on the new system and updated processes. Project managers now manage their projects entirely in the solution and resource managers review and approve resource requests and submit new projects to the Planview administrator to enter into the system.

The company improved the likelihood and success of the implementation by keeping it simple, enlisting early change leaders, and establishing constant communication – from newsletters to online communities – to ease this transition and share the value.

The Benefits: Standardization and Oversight

By anticipating the barriers to change, enlisting top-down support, and generating excitement, the company was able to win the tug-of-war with its resource managers' adoption of Portfolio and Resource Management.

"When my customers are asking me why I can't get that task done, I can look in Planview Enterprise One - Portfolio and Resource Management and easily answer when we can get the work done."

— Project Management Office Manager

"Everyone can now see the value of having a single tool for timesheet approval, new resource requests, and requirement request fulfillment," says a PMO manager.

Using Planview Enterprise One - Portfolio and Resource Management, the health care company has realized the following benefits:

- Project standardization for resource managers
- Improved balance with better oversight and insight into projects and resources
- Improved estimating and scheduling to better utilize resources
- Easy-to-follow workflow for adding/closing projects, making assignments, and status reporting

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