CASE STUDY
COMMUNICATION CONSERVATION

portfoliON

SITUATION

An established Software Consultancy organisation were having difficulty juggling multiple projects with limited resource. This lead to a disconnect with communication channels across the Programme. It became increasingly difficult for the Project Manager to keep on top of reporting and make sure that key deliverables were being prioritised effectively.

Project Managers rarely found time to implement structure or provide decent documentation or regular reporting to executive sponsors without it being a pain-staking activity.

Teams relied on tracking their own workload or share progress without being provoked. Often they did not know the priority or value of key deliverables.
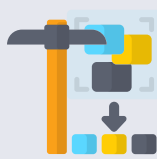
Most of the team's processes were very manual, information was either missing or incorrect, which was time consuming to make sense of and report upon progress.

CHALLENGES

TIME CONSUMING PROCESSES

Manual processes offer more room for human error and this can be costly and exhausting to resolve, especially when there is a lot of data to wade through. Manual reporting can be a painstaking activity, always with a deadline for completion.
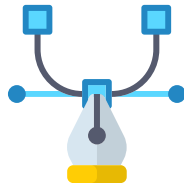
SPORADIC COMMUNICATION

Limited communication across project teams make it challenging to drive the project and remain within scope. Internal teams rarely talked to each other, which had an effect on maintaining quality assurance on project outputs.

MANAGING TRACABILITY

As actions were mostly sent via email and recorded in a spreadsheet that was updated solely by the Project Manager (PM), this meant they spent most of their time chasing others for information and updates.

SOLUTIONS

DOWNLOADABLE & DIGESTABLE DOCUMENTATION

After importing all project data into portfoliON, there are many ways of how to display data, with metrics and dashboards available across the site. This made a huge difference on generating useful reports in just a few clicks. Ready-made and customisable templates helped the Project Manager submit reports quickly and easily as well as being to download an automatically generated Statement of Work.

CLOUD BASED SHARING

As portfoliON is hosted securely on the Cloud, you can share your portfolios with anyone within your team (internal and external). You can share documents, tag people in comments, assign actions, send meeting invites and allow them to download their own reports.
All of which can send a notification to their email from portfoliON so everyone who needs to be can be in the know.

STRUCTURED MEETINGS

Using or simple to use Calendar tool you can plan your meeting agenda in advance and send out your invites, whether your colleagues have a portfoliON account or not. During these agenda-based meetings you are able to record minutes easily, set and delegate actions which will integrate with the project's Activities board. This introduces an inclusive way of working supporting team members through a more structured way of approaching meetings.

ACTIONS

- Reporting was made so much simpler by being able to pick and choose what data to include for Project Status reviews. The Project Manager also took advantage of the ready-made reporting templates that they were able to customise.

- Executive sponsors were delighted with the look of reports that were digestible for the rest of the board.

- Actions were easy to trace on the Activities Board, to show what tasks were in what stage, who was working on them and how much time was spent on them.

- Team members were given ownership of their tasks by being able to use portfoliON to keep on top of their tasks, be sent notification when they are delegated an action, and pass them onto other team members when finished, whilst being able to record their time dedicated to each task.

- The project team found it much easier to communicate by being able to tag colleagues in comments and tasks, which would send them a notification to that person's email.

- As portfoliON is so easy to customise the company were able to ad their own branding and personality into the tool with customisable templates and fields.

RESULTS

AUTOMATED & ACCELERATED REPORTING

As all project/portfolio data is held within portfoliON, it is easy to extract the information you need and report on what is necessary. Taking hours out of admin work and making it effortless to reach reporting deadlines.

OPEN COMMUNICATION CHANNELS

It is very easy to communicate when using portfoliON, as anyone you wish to can have access. This gives people the ability to manage their own work, comment on updates & escalations and notify colleagues of any changes using portfoliON.

SHARED VISION

The Project Manager finds it easier to oversee projects, keep on top of project milestones and that everyone is on the same page and working together towards the same goal.

ACCOUNTABILITY & OWNERSHIP

Team members can keep on track of their own actions and record time to them without the need to provide constant updates. This provides a sense of accountability for their work and taking ownership of their responsibility to the project.