

## Case study

# Agropur Empowers Executives with Business Intelligence Data Insights

## About Agropur

Based in Montreal, Canada, Agropur is a dairy cooperative founded more than 75 years ago. With over 8,000 employees and more than 6.1 billion liters of milk processed annually, the company is a leader in the Canadian dairy industry. Agropur is a top producer of milk, cheese, butter, yogurt, and ice cream products, which make project management a necessity for business. With a 2015 corporate reorganization, it was time to reassess and transform how the organization approached data.

## Challenge: Lack of Enterprise-wide Data Visibility Needed to Fuel Business Decisions

Being a large company with multiple product lines and plants, Agropur executives were struggling to gain a bird's eye view of the enterprise and how programs and projects aligned to strategy. Data and systems were dispersed, reporting was manual and labor-intensive, and managers spent too much time trying to find answers to executives' questions, if the information was even available to answer them at all. At any given time, there were over 600 active projects but no real system to make their statuses visible to key stakeholders.

Project managers did their best with their tool of choice, often using spreadsheets, document management sites, and emails, but there was no centralization of information, much less standardized reporting. In 2016, Agropur decided the reorganization was the ideal time to invest in a single solution with a common directory of projects. Planview Enterprise was chosen for Project Portfolio Management (PPM) and an Enterprise Project Management Office (EPMO) was established. The EPMO's primary mission was to support decision makers with insights delivered via analytics and reporting, tailored to their particular needs and requirements.

Planview Enterprise solved the data centralization and standardization challenges of the business, as well as eliminated all manual report generation and creation efforts with a large catalog of automated out-of-the-box reporting derived from real-time data. While this was a huge step forward for Agropur, executives needed specialized business intelligence to drive strategic initiatives, while maintaining the ability to highlight risks and issues. The EPMO believed they had two options: use Planview reporting capabilities to leverage



**AGROPUR**  
Dairy Cooperative

## Overview

### Customer

Agropur

### Geographies

Canada and Northern U.S.

### Employees

8,000

Agropur leveraged the power of Planview Enterprise data with Microsoft Power BI's analytics and business intelligence platform to give stakeholders the insights they need in compelling formats to make critical business decisions.

*"Our efforts paid off because the data is consistent, and stakeholders can see at a glance the status of what is important."*

*– Cassandra Imbeault, support and improvement analyst, Agropur*

custom-built reports along with standard reports, or leverage Planview's partnership with Microsoft Power BI and feed Planview Enterprise data directly into a robust business intelligence tool to quickly make data-driven decisions and pivot the business when necessary.

## Solution: Visualize Accurate, Dependable Data. Take Action and Make Better Decisions.

The Agropur EPMO wanted to automate as much data collection and reporting as possible to continually feed the data directly into Microsoft Power BI. Planview Enterprise is Agropur's single source of truth, and embedded Microsoft Power BI functionality connects end-to-end data sources into scalable dashboards and interactive visualizations to bring the information to life.

"Instead of spending hours gathering multiple reports from various sources and trying to present the data in a meaningful way, the integration of Microsoft Power BI with Planview Enterprise puts all of the data in one report," says Cassandra Imbeault, support and improvement analyst at Agropur. "The reports provide a quick, visual representation of the health of our projects with the ability to filter the data to adapt it to the person who is consuming the information."

Once the data is in Power BI, Agropur builds and publishes customized reports in Power BI dashboards. The reports and dashboards are easily shared with executives to give full visibility into business performance.

"We use the Microsoft Power BI template in the [Planview] Customer Success Center connected directly into our Planview Enterprise environment," says Imbeault. "We also have built-in queries that enable us to cull the information in Planview Enterprise and bring it into a Power BI file based on a specific portfolio or column set. Once there, we create our report and publish it to PowerBI.com. There we create the dashboard to 'pin' different visuals to get a big picture of the data we have in our reports. We share this data with different consumers who can keep it high level or drill into details that help them make decisions."

The speed of reporting has empowered business leaders with real-time information they have at their fingertips. Every time the EPMO meets with the executives, the meeting is conducted directly within the Planview Enterprise and Power

BI solution for a fully-interactive, visual experience. The solution is so user-friendly that different users at Agropur, such as portfolio and project managers, quickly build their own reports, update them, and use them in their regular meetings and conducting ad hoc analysis.

Imbeault says they were able to implement the Planview Enterprise content pack for Microsoft Power BI quickly, without having specific report development skills. "We were early adopters of the integration because it was the easiest, fastest way for us to satisfy executive-level reporting that brings project, resource, and financial visibility across the enterprise," says Imbeault. "Our efforts paid off because the information in Planview Enterprise is consistent, and stakeholders can see at a glance the status of what is important."

## Results: Relevant Analytics and Reporting for Confident, Improved Decision Making

Since implementing Planview Enterprise with Microsoft Power BI, Agropur:

- Identifies, monitors, and improves key performance indicators (KPIs) related to time to market on new product development projects
- Accesses relevant data at each gate, improving reporting accuracy
- Presents leadership with visual, user-friendly reports and dashboards on the stage gate data that they can trust to make informed decisions
- Identifies gaps in future revenue allowing them to be proactive and determine which projects are needed to achieve annual division targets
- Quickly responds to requests for metrics without asking PMs for the data, saving time

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