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CASE STUDY

Cengage Learning Improves Planning and Use of Resources

About Cengage Learning

Cengage Learning is a leading educational content, technology, and services company for the higher education and K-12, professional and library markets worldwide. The company is headquartered in Boston, MA with an office hub located in San Francisco, CA. Cengage Learning employees reside in nearly 40 different countries with company sales in more than 125 countries around the world. Within the Global Product Technology department resides the Planning and Operations group, consisting of six people who support 1,350 Cengage Learning employees.

Challenge: Inability to Plan

Cengage Learning is a product development organization, yet it was managing its projects and resources through woefully inept Google spreadsheets. The spreadsheets became so large and complex consisting of 300 rows of projects and 67 columns of metadata. Roadmapping and long-term planning were disconnected from resources or other timelines, making it virtually impossible to accurately forecast capacity.

Those in the Planning and Operations group realized the only fix to the ever-expanding spreadsheets and lack of standards was to centralize data into a single system of record.

CENGAGE Learning®

Overview

Customer:

Cengage Learning

Industry:

Media and Publishing; Education

Geographies:

Boston, MA; International

Cengage Learning uses Planview Enterprise® Investment and Capacity Planning to integrate the planning and execution stages of product delivery and is the system of record for its planning, forecasting, status and time tracking.

Solution: Planview Enterprise Investment and Capacity Planning

Within the planning process, Cengage Learning wanted to leverage the role-based requirements, in terms of estimates, and incorporate it into capacity planning. It called Planview Enterprise "PLANit" and it serves as the company's end-to-end project and resource management solution. It enables Cengage Learning to integrate the planning and execution stages of product delivery and is the system of record for its planning, forecasting, status and time tracking.

"PLANit helps us leverage one canonical list, maximizing resources to bring the most value to our customers," says Amber Meryman, director of Portfolio Planning at Cengage Learning. "It also forces the hands of the product team to rank and prioritize projects so we can be sure we are working on the right projects with the right resources."

Cengage Learning not only uses Planview Enterprise to show executives, with data, what projects can and cannot be done based on capacity, but also to draw attention to certain areas. For instance, in the Balance view within the investment and capacity planning screen shows their dashboard and they can sort by organization and/or role. The report shows which groups are in red, when they were in red, and because of which projects are in red. This color-coded alert system is a quick, visual way to see where they are over or under capacity on any given project. "We look at the Balance view in terms of FTE – the effort we are lacking for the list of projects we have," explains Meryman. "We can drill into detail to see the providing organization, the role and the ranked projects. Planview Enterprise pulls in the rank and shows us projects in order by priority. We always suspected we had capacity issues, but now we have the data to prove it."

The reports shows which groups are performing well regarding capacity and which can commit to work earlier in the planning cycle and where resources are needed. "Planview Enterprise makes it easy to click and instantly change our view," says Meryman. "It's simple to toggle back and forth to see the detail we need."

> "It is a very powerful thing to be able to show the executives, in a data-driven way, all of the great projects we want to do but can't because we lack the staffing."
>
> – Amber Meryman, Director of Portfolio Planning, Cengage Learning

Benefits: Data-driven Decisions and Respect

- Using investment and capacity planning within Planview Enterprise, Cengage Learning is able to:

- Justify capacity restraints to executives using actual data instead of gut feel

- Prioritize projects and push certain projects down the timeline

- Identify which groups are missing FTEs and need new hires or contractors

- Earn the trust of other parts of the technology organization

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