

# Emory Healthcare Achieves Greater Visibility in Order to Connect Work into the Portfolio

## EMORY HEALTHCARE

**Industry:**  
Healthcare

**Geographies:**  
Georgia

**Employees:**  
Approximately 21,000

**Planview Solutions:**  
Portfolio Management  
Work Management

**Planview Products:**



### CHALLENGE

With work coming in from every direction and no additional headcount to deliver strategic, maintenance, and ad hoc work, the Application teams in the Information Systems (IS) department at Emory Healthcare needed to prioritize the right work with constrained resources. Manual spreadsheets, outdated boards, and disparate tools provided no way to visualize and manage work, leaving the IT PMO without the information needed to allocate resources appropriately. They looked to their IT PMO to find them an integrated solution.

### SOLUTION

By integrating Planview solutions along with their other project management tools, the Emory Healthcare IT PMO was able to give Application managers what they needed - the ability to visualize and manage work in one place. Now, they have actionable data that facilitates resource management, forecasting, planning, and prioritization so they can focus on the highest-value work with optimized resources.

“We now have real resource management and have clear visibility into how many projects we can do.”

– Alexis Swann, IT portfolio manager at Emory Healthcare

## About Emory Healthcare

Emory Healthcare is the largest health care system and employer in Georgia. As part of Emory University, Emory Healthcare is comprised of 10 hospitals, the Emory Clinic, and more than 250 provider locations. The Emory Healthcare Network has more than 2,800 physicians concentrating in 70 different subspecialties.

## Challenge: Consolidating Information and Making It Actionable

After conducting a thorough assessment of their IS Application teams' operations to discover their problems, current solutions, and requirements, the Emory Healthcare IT PMO found teams across the business were doing the best they could with disparate tools. Projects were managed by Planview PPM Pro™, but work orders, service requests, and maintenance issues were all being managed elsewhere. The IT PMO wondered what it could do to visualize work in one place, particularly with ever-increasing demand, new systems, and constantly changing priorities. A consolidated view of work would make it easier to plan, estimate, forecast, commit to work, and justify adding headcount.

The IT PMO also discovered that without any prioritization capability beyond static spreadsheets and sticky notes on a wall, Application teams had no other option than to complete work that appeared to be most urgent or that simply fell at the top of the list, rather than focusing on the work that offered the highest value to the business. Without the ability to forecast and answer executive questions, the IT PMO was determined to implement a solution for work intake, workflow management, collaboration, and to provide visibility into work progress and results.

## Solution: Pilot an Integrated Solution to Gain Support and Drive Adoption

The Emory Healthcare IT PMO is about solving problems as much as they are focused on portfolio management. After many attempts with other point-tools, the IT PMO began exploring Planview LeanKit™, realizing that it was part of Planview's suite of products like Planview PPM Pro. They found the solution offered cross-team collaboration and the integration of systems and data they needed for a comprehensive view. With the additional layer of portfolio management and work management, the system was actionable and offered true visibility.

"A tool alone will not solve the issues," says Alexis Swann, IT portfolio manager at Emory Healthcare. "You need the right implementation approach and must get the right people on board to convince people they need the solution." To ensure Planview LeanKit was set up for success, the IT PMO piloted the

implementation, first establishing a work model and defining priorities. They focused on production support, then enterprise strategy-driven projects, and finally, all "other" projects.

"One of the best things we did was to build in the priorities with our LeanKit (Kanban) board that is designed to allow everyone to see the big picture," says Swann. "Our advisory groups use LeanKit for prioritization instead of spreadsheets and trust the data to inform decisions."

Because each team has their own way of working, with approaches such as Agile and process-driven, or waterfall and project-centric work, the IT PMO appreciates the flexibility of enterprise Kanban to support all methodologies. This made integration a key selling point. "PPM Pro populates the LeanKit Board," explains Swann. "All portfolio projects have a card on the board. Project managers can enter a child card on a team board to request resources on a project, but the Application manager owns the board and can look at the project card to see what's going on with detailed tasks. They always know the status without sending a single email. Everything they need is right there and people can work in whichever way that helps them be effective in delivery."

## Results: A Big Picture View and Greater Efficiency

Leveraging the power of integrated portfolio management and work management, Emory Healthcare IS teams and the IT PMO are now seeing the big picture. Application managers use LeanKit for work delivery, and project managers capture accurate utilization, forecasting, and budgeting in PPM Pro. "Saying you need more resources is different than being able to show why you need it," says Swann. "We now have real resource management and have clear visibility into how many projects we can do. The cross-team collaboration has never been better or more efficient." Success is growing! In the initial pilot, they saw immediate results decreasing team work backlog by 30 percent within the first 2 weeks, simply by investing in solutions that bring teams together and make work visible.

## Future: Additional Rollouts to More Business Units

The pilot has attracted the attention of other business units throughout Emory Healthcare. The Chief Nursing Information Officer and other leaders have both expressed interest in Planview's solutions for work delivery that can be integrated as part of a complete solution with PPM Pro. No doubt, they will look to the IT PMO to facilitate implementation, seeing the IT PMO as internal consultants who bring real value to the business.

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