



CASE STUDY

IBM: Consolidating Processes and Data to Drive Services Efficiency and New Revenue with Planview PSA



INDUSTRY:

Hybrid cloud services

GEOGRAPHIES:

Global

EMPLOYEES:

5,000

PLANVIEW SOLUTION:

Planview Professional Services Automation

CHALLENGE

While IBM Cloud and Cognitive Services (C&CS) was helping customers modernize their businesses, the organization faced modernization challenges of its own. Diverse financial forecasting and project management tools along with disconnected systems and data, made it difficult to predict the future and make strategic business decisions.

SOLUTION

IBM C&CS turned to Planview® PSA to provide a single global set of financial forecasting and project management tools to also accelerate the overall quote to cash process. With Planview PSA, C&CS was able to merge data from several disconnected back-end systems. The PSA solution provided project managers and executives with accurate, real-time dashboard views and reports they could be utilized to improve business decisions and drive efficiencies and new revenues.

"With the Planview PSA solution we have a way to collect and analyze data much more effectively than before and the quality time to do so because people don't have to do all that administrative and manual data work. It's ended the data chase of going to multiple places to get data and consolidate."

– MICHELLE GINTHER,
IBM EXECUTIVE SPONSOR



ABOUT IBM CLOUD AND COGNITIVE SERVICES

IBM's Cloud and Cognitive Services (C&CS) division helps their customers to automate, secure, and modernize their businesses by delivering the global software platforms and solutions as a hybrid cloud service. IBM employs almost 5,000 subject matter experts across Europe, the Americas, the Middle East, Africa, and Asia Pacific countries and are typically involved in 10,000 or more projects at any one time.

CHALLENGE: ELIMINATE THE CHAOS OF DISCONNECTED TOOLS, DATA, AND PROCESSES

Global organizations often contend with various tools, systems, and processes used in different locations, making strategizing and achieving a single global version of the truth a challenge. IBM C&CS was no exception.

"Before we adopted Planview PSA, we had more than 10 different regional home-grown revenue forecasting applications," says Sharon Burton, IBM Executive Project Manager for the Enterprise Operations Team (EOT), "including ones that were spreadsheet-, Web-, and even Lotus Notes based. They were often in competition with each other, making our whole revenue forecasting operation challenging."

Burton works with Michelle Ginther, IBM Executive Sponsor for the C&CS Enterprise Operations Team, tasked with modernizing, simplifying, automating, and transforming the individual business processes that make up the C&CS division's overall quote to cash process. "We knew we needed to come up with a single solution and set of processes to meet our revenue forecasting needs across the business--and a fast, smooth migration to achieve that transformation with minimal disruption," says Ginther.

Burton and Ginther also felt strongly that C&CS needed a simple way to collect and analyze data globally across all the division's back-end systems in real time. "We were spending way too much time collecting and consolidating data from multiple disconnected systems and plugging it into 20-page PowerPoint decks and Excel workbooks, says Ginther. "Our project managers needed real-time dashboards with visibility into all their projects. Our executives needed the global views they could use to make strategic decisions fast. It was all about doing more 'on the glass.'"

Finally, the division sought a way to better understand and optimize its resource use to maximize its service efficiency and grow its talent to the best of its potential.

SOLUTION: A SINGLE SET OF PROCESSES AND TOOLS ACROSS GLOBAL GEOGRAPHIES

After investigating several alternatives, Ginther and Burton chose Planview Professional Services Automation based on its project, resource, and financial management features. "We liked that PSA was highly configurable, which is extremely important in IBM's complex environment," says Ginther. "It had a flexible infrastructure for seamless integration and the capabilities we needed to streamline and automate our data analysis and reporting."

Integrating data from IBM's back-end CRM, HRMS, and other large data warehouses with PSA was sometimes challenging. However, with the help of Planview's professional services team, C&CS was able to build APIs that let users connect and harness all that data directly in PSA for revenue forecasting, project management, and other vital business functions. "We plan to build additional APIs for several other IBM systems and data warehouses in the future," says Burton.

RESULTS: CONSISTENT TOOLS, EASY ACCESS TO REAL TIME DATA FOR DECISION MAKING

Thanks to Planview PSA's solution, C&CS now has a single set of

financial planning tools and processes across all its locations. "Planview's professional services team helped us build out our IBM fiscal calendar and harness Planview PSA's financial planning tools to devise one consistent way to get a financial forecast around the world," says Burton. "We've gotten great feedback about the success of this effort." In the process C&CS has retired more than 10 separate home-grown tools.

Planview PSA has also given C&CS the real-time data dashboards and reporting capabilities it desperately needed. "Planview PSA has provided project managers with real-time visibility into critical KPIs to help them take control of their projects, find ways to do better, and stay accountable for their project revenue forecasts," says Burton.

At the press of a button, all that financial and project data can also be rolled up into the Planview PSA solution to provide executives with global views by geography, market, and business unit, either as dashboards or individual reports. "They can get a single real-time view of the health of all our projects," says Burton, "see a lot of useful KPIs, and drill down for accurate, real-time information that helps them make the right decisions at the right time."

Another bonus is that Planview PSA reporting has helped to expose C&CS's backlog of new revenue opportunities. "Executives have found they can use the data to determine how to best work with customers to sell more software and services and grow our revenue."

Perhaps, most important, Planview PSA has enabled C&CS to establish a standard set of tools and business practices globally across its business units and a single version of the truth. "With Planview PSA we have a way to collect and analyze data much more effectively than before and the quality time to do so because people don't have to do all that administrative and manual data work," says Burton. "It's ended the data chase of going to multiple places to get data and consolidate. Everything happens in the PSA."

In doing so, the PSA has made producing revenue forecasts and other business reports much quicker and easier. "Without (our) PSA, it took one person a week to prepare a monthly management operations report. Now it's literally available at the press of a button," says Burton. This time savings has helped the division cope with a shrinking workforce and bring new skillsets and different ways to do things to the table.

FUTURE: CONTINUAL IMPROVEMENTS TO DRIVE BUSINESS SUCCESS

C&CS has many plans for using Planview PSA to make its business even more successful. "We feel we've just hit the tip of the iceberg in terms of Planview PSA's potential," says Burton. "We're now investigating the resource management and skills inventory capabilities of the PSA that we can leverage to get a handle on our resource use and planning."

C&CS has a project management office focused on developing on a holistic approach to PM. "With Planview PSA, we have an opportunity to build out project management templates and work breakdown structure to give project managers a way to use the PSA better on more complex long-term projects. We're also looking to link up our Salesforce CRM systems and support cases to our PSA projects."

Planview's professional services team has helped C&CS get its employees on board and trained rapidly. "We've built out an enablement Web page for new users," says Burton. "It provides training, information, instructional videos, and a data dictionary to help make the best use of the solution and create reports and dashboards."

Overall, the Planview PSA solution has been a great success that has improved the C&CS business effectiveness "We're at the start of a long journey with the PSA and have already gotten phenomenal feedback," says Burton

"One of our services project managers calls Planview PSA his cockpit," says Ginther. "He can look at all his projects on one screen and get a good idea of how everything is going."

See what Planview solutions can do for your organization. View demos on demand at [Planview.com/demos](https://planview.com/demos).

