



CASE STUDY

# Ingram Micro Embraces Uncertainty, Modernizing and Scaling Global IT PPM for Business Agility



INDUSTRY:

**Information Technology & Supply Chain Services**

GEOGRAPHIES:

**Global**

EMPLOYEES:

**29,000**

PLANVIEW PRODUCTS:



PLANVIEW SOLUTION:

**Planview Project Portfolio Management (PPM)**

## CHALLENGE

In 2021, Ingram Micro was purchased by Platinum Equity, providing the ideal opportunity to evaluate current capabilities, processes and tools, as well as its capacity to adapt to changing ways of working in the Digital Age. Ingram Micro's global IT PMO would lead the initiative to provide insight and solve problems with a balanced approach, with the ultimate goal of evolving methodologies and tools to empower agility in response to inevitable change and uncertainty.

## SOLUTION

Ingram Micro was already a Planview® shop, but the acquisition and subsequent modernization initiative provided license to explore additional Planview platform functionality. The company began with Planview® Portfolios to address application silos, then added Planview® IdeaPlace for solution thinking, Enterprise Architecture for system and enterprise thinking, and Planview® AgilePlace for enterprise optimization. While they have come a long way, the PMO is invested in continuous improvement.



“Planview helps us tie strategies to outcomes and whether or not we’re delivering against those things.”

– ADRIANA CALLERIO, IT PERFORMANCE AND PMO LEADER

## ABOUT INGRAM MICRO

Ingram Micro is an industry leader in technology and supply chain services, helping businesses maximize the value of the technology they make, sell or use. The global organization reported \$54.5 billion in revenue last year and has operations in 61 countries across six continents. In its 40-year history, Ingram Micro has shipped 1.5 billion units per year, manages assets for 300 Fortune 1000 companies, and is an IT solutions provider for more than 170 thousand customers.

## CHALLENGE: INGRAM MICRO WANTED TO TRANSFORM ITS CURRENT CAPABILITIES TO INCREASE AGILITY

Platinum Equity's acquisition of Ingram Micro offered the ideal opportunity for the IT PMO to rethink its approach to work and how it delivers value to the business. They were taking advantage of some of Planview's platform capabilities but acknowledged there was room to evolve to adapt more efficiently to change and uncertainty. The PMO wanted to have conversations with the enterprise architecture and business teams to define value streams, break down capabilities and understand the technical stack supporting them.

"If you can't measure what you have, you can't determine where you can get better," says Adriana Callerio, IT Performance and PMO leader at Ingram Micro. "The first thing was to outline our structure, how we are measuring, and then get better at both. We had to standardize how we defined terms and what performance and value mean in the Agile portfolio, all while keeping a line of sight into value streams, value delivery and outcomes."

The challenge was to ensure cross-team alignment, where everyone can see what's happening peripherally to keep continuity and proper cadence. "Change is inevitable, and we can't fear it," says Callerio. "The key is to transform tools and methodologies because the way we work and the speed of work changes. We must pivot quickly as things shift. We are the ones defining the way of work in the Digital Age, and we have to share our experiences and help our partners build the tools the way we need them to work so those partnerships enable the business to constantly move forward."

## SOLUTION: A BALANCED EVOLUTION JOURNEY

Ingram Micro has PMOs across its regions, and portfolio teams are a dotted line into the central IT PMO. The central PMO started the conversation regarding the implementation of additional Planview® modules by defining a standard language across all countries and regions. With everyone on the same page, it was time to begin the transformation journey.

The central IT PMO began with Planview® Portfolios to address application silos that were causing inefficiencies and redundancies. They looked at the more traditional capabilities of the portfolio tool where they could insert themselves and go from good to great quickly, such as work inventory, request management, work management, and financial reporting.

Next was to address innovation and technology, shifting from traditional dashboards on the financials, ownership,

governance, and resource utilization around Waterfall projects to utilizing more Agile portfolios. They pulled in some of the Agile portfolio, ways of working, and reporting on the health of the portfolio. Strategic alignment remains a focus and they are beginning to understand their Business Reference Model, having data to answer why they are prioritizing certain projects in relation to strategic and portfolio value, and what's next in working with greater agility.

"We added Planview® IdeaPlace to embrace 'solutions thinking.' It centralizes idea management so we can start funneling ideas to the product teams to keep innovation churning," says Callerio. "Planview® Enterprise Architecture enables 'system thinking' with insight into our current technology portfolio and where we need to prioritize investments as we scale. CTM connects the two, giving us greater 'enterprise thinking' to see how different decisions impact the enterprise so we can quickly pivot when needed. Finally, Planview® AgilePlace helps us get closer to our ultimate goal of 'enterprise optimization,' allowing us to structure product teams to solve opportunities our digital transformation is putting out there for our customers."

Throughout their journey, the PMO has concentrated on outcomes management, enterprise thinking and strategic thinking. "We look at Business Architecture and Enterprise Architecture in a way where we are trying to optimize the entire space from strategy to delivery," says Callerio. "Our role is to determine the data model and the data points across the platform that we need to ingest in those high-level business intelligent views that go to the executive committee to add value from the insights perspective."

## RESULTS: AN AGILE PMO THAT ADDS VALUE TO THE BUSINESS WITH THE PLANVIEW PLATFORM

Whether it's a change in leadership or new opportunities, Callerio believes it's critical for PMOs to be flexible and always find ways to add value, even if it means getting out of comfort zones. Every organization's journey will be different, but Ingram Micro's balanced approach to solving problems, recognizing current state and having visibility into desired future state are best practices. Callerio uses a gardening analogy to describe her transformation mindset: "You plant seeds and harvest crops with the understanding that there will be things you can't control," she says. "You do the best you can with what you have. With every season, there will be things you learn, and there should be continuous improvement in your practice. It's not 'when is it going to be done' but 'how are we going to get better?'"

She advises organizations to identify what they're good at, what they can enforce and reinforce that's common and agreeable, try to get better, and then always slip in something new so it keeps the momentum and evolution of the tool moving. "There should always be something you are reaching towards," says Callerio. "It can be confusing at first, but over time, you can solidify and calibrate it, so it becomes something you're good at. We are adding value with the Planview platform, and the Planview configuration support has been the key to our success."

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