



CASE STUDY

Evolve Advisory Services Helps Medical Industry Innovator Get Ready to Scale

INDUSTRY:

Medical

GEOGRAPHIES:

Global

EMPLOYEES:

~50

PLANVIEW SERVICES:

Evolve Advisory Services by Planview®

CHALLENGE

With some success under its belt and looking to expand, this small UK-based MedTech company – just out of its start-up phase – needed to redefine its processes for scalability, build quality control into its workflow and create a PPM environment equipped to manage the complexity of global variation.

SOLUTION

In search of a powerful platform with the functionality to support its growth trajectory, Planview® AdaptiveWork was selected as the ideal candidate to deliver on a range of strategic requirements. Over implementation, the company engaged Planview’s Evolve Advisory Services to provide best-in-class practice recommendations based on the organization’s unique needs. This partnership resulted in the successful implementation of the technology, redefined processes in harmony with the company’s requirements, and optimized to its specific business outcomes.



“What I had with Evolve was someone that could listen and understand me at that high level. All of the translation from high-level requirements into supporting required processes and functionality. That’s why Evolve was so invaluable to us.”

– COO, MEDTECH COMPANY

ABOUT THIS MEDTECH COMPANY

Founded in 2015, this UK-based MedTech Company has become one of the world's leading innovators in the personalized medical space, working closely with surgeons to provide patient-specific services and devices.

CHALLENGE: REDEFINING PROCESSES WHEN EVERY PRODUCT IS A PROJECT

Handling supply chain complications, overcoming gaps in distributed work strategies, managing the continued digitization of operations. These are just several of the challenges facing modern COOs in their efforts to drive growth and efficiency. In the case of a small but growing MedTech Company based in the U.K., these challenges became magnified as it transitioned out of its startup phase, looking to expand into new markets and optimize operations.

"Our biggest dilemma is that we're a small business, right? But we have global requirements," said the company's COO. "We work in Europe. We work in the U.K. We're now working in the U.S. Being able to scale is important. Being able to create flexible processes and logic that allows for global variation is really important."

The COO explains, "There's a strange overlap between product and project for us. Really, every product is its own project. There's a new set of requirements, a new set of deliverables, a new set of stakeholders in every single one that we do. We can't just produce thousands of these things and then go, okay we're done."

The Company also faces the same challenges as every distributed business, with work often completed in multiple locations based on the stage of production. "Sometimes manufacturing will happen in one location, design in another, quality control in another. Some projects can last as little as two days, some can last a year." adds the COO.

High quality and safety standards – non-negotiables in the medical industry – add additional layers of complexity to global expansion. "The key is a systematic approach, making sure that you've got clear requirements captured, that you've got very clear design and manufacturing processes, and that it's possible to monitor those throughout their lifecycle. Also, that you've got a clearly defined workflow when it comes to quality control," says the company's COO.

SOLUTION: WORKING WITH A PARTNER WHO SPEAKS THE LANGUAGE OF BUSINESS OUTCOMES

In Planview® AdaptiveWork, this MedTech Company found a software product with the functionality to bring all of its project management and ISO quality certification requirements together in one system; however, "we needed somebody to understand our unusual business and help us to define our processes within that product project management environment," shares the COO. That's where Evolve Advisory Services emerged as a partner.

Evolve Advisory Services is a team of practitioners with 'been there, done that' experience across industries and at all levels of business. The Evolve team began working with the Company to help its leadership define the necessary processes, methodology, and governance as they rolled out the Planview AdaptiveWork product.

"We have aspirations to be big and so everything we're putting in place needs to be scalable," says the COO. "We have engineers who basically double as project managers and we don't want them to have to worry about project management."

Enabling the change that powers growth means optimizing technology to support business outcomes. By delivering best-practice advice, Evolve was able to help define business processes and project management processes in harmony with their requirements and then translate that into the world of Planview AdaptiveWork.

Very quickly after implementation, executive management gained real-time visibility into processes, costs, and revenue that didn't exist prior. "Two or three weeks later we were just getting pages of stuff that was really usable," recalls the COO. "Now, we were early in our go live so it was telling us we had a lot of stuff to work on but that was great. Suddenly, we had visibility in a way that we never had. Here are all the problems we now face, but not in a bad way. In a way that I just thought, this is great!"

RESULTS: TECHNOLOGY OPTIMIZED TO SUPPORT HIGH-LEVEL INITIATIVES

Two years post-implementation and its alignment of processes with business objectives continue to drive growth.

"We need to deliver projects quickly, and if you have too much complexity in what you're doing it's going to interfere with what you're actually trying to get done," says the COO. "The key for us is that the resources on the projects never have to worry too much about the requirements. They are baked into the workflows. And I have confidence that, quite easily, I can build extra levels of logic on top of our basic workflows. We can manage workflows based on customer locale, we can manage workflows based on product offerings that are available in one market but not another."

The COO began with a clear idea about the company's high-level strategic initiatives but how they translated into the inner workings of its technology was a different story. "Basically, Planview AdaptiveWork had the functionality that we needed but more than that, what I had with Evolve was someone that could listen and understand me at that high level. Here are our challenges. This is what it means to be compliant in these areas, here's what we have to do to mask some of the details from our end users. Evolve did all of that. All of the translation from high-level requirements into process definition and eventually functionality. That's why Evolve was so invaluable to us," concludes the COO.

FUTURE: ANTICIPATING NEEDS AT THE NEXT STAGES OF GROWTH

Evolve Advisors have a distinctive vantage point, with one foot in the here and now and another in the future—anticipating business needs at the next levels of growth. The Company's COO provides an example of Evolve's proactive approach when, "towards the end of the implementation, Evolve insisted on defining the resource management best practices for us to execute. I thought we were probably too small for it at the time. Initially, I hadn't practiced it, and then, about six months later, we began doing some work on operational efficiencies."

At the point of expansion where capacity management was essential, the COO found that the processes defined earlier on, along with the supporting functionality and reporting, had already been there and ready for the company to "scale to five times the number of engineers we have." The COO continues, "That's some really powerful stuff right there. I don't think we can live without it now. We've built it into our operations. Our weekly processes now involve discussing the data quality reports, especially the capacity management. It's just kind of instrumental in what we do now."

Evolve Advisors understand that organizations may change processes many times as they uncover additional efficiencies. The key is to ensure that organizations are empowered for future success. The COO concludes, "That's the bottom line. Evolve really changed the way we worked."

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

