

## Case study

# New Zealand Government Creates a Consolidated View of the Portfolio Resulting in Improved Project Delivery

## About New Zealand Government

The New Zealand government serves approximately 4.7 million people. It oversees matters that affect the entire country, while local governments consisting of regional councils and territorial authorities provide community-level support. Central government leaders are determined by democratic vote every three years.

## Challenges: Disparate Systems and Data with Constantly Changing Initiatives

The potential for frequent changes in leadership in the New Zealand government may ensure fresh ideas, but as far as initiatives are concerned, it presents a few challenges. As most governments can attest, pushing projects through the system can be slow work. Data is rarely shared and there is little collaboration on projects. With government leaders potentially transitioning in and out every three years, priorities frequently change with them. Slower projects are often halted, were significantly delayed, adding costs and draining resources.

In 2008, New Zealand experienced a significant government shift in leadership. The newly-elected brought a greater focus on managing infrastructure and large project spend, that coincided with the growth of Portfolio Management Offices (PMOs).

The Treasury Department needed a tool to better understand and track the large number of projects they managed. A variety of tools were being used by 40 different departments and over 200 government agencies, but there was no consistency or integration. "We realized, in order to understand what projects we're doing, we needed something more sophisticated than spreadsheets," says Ricky Utting, former Manager Investment Management and Asset Performance at the Treasury. "You can run hundreds of projects in spreadsheets, but it's a pain in the neck."

The Treasury Department was determined to get control of the Government investment portfolio - to monitor investments, understand what investment decisions were coming up, identify and manage risk, and balance the

## New Zealand Government

### Overview

#### **Customer**

New Zealand Government

#### **Industry**

Government

#### **Geographies**

New Zealand

Planview Enterprise has given the New Zealand government a single source of truth, with reliable data that can be analyzed and shared for more effective decision-making that ultimately impacts every resident of New Zealand.

*“No other solution enabled us to perform such detailed analysis on our portfolio. We knew our spreadsheets were completely ineffective in this area.”*

*– Rick Utting, Former Manager Investment Management and Asset Performance*

portfolio to make sure certain sectors weren't missing out. A common tool would make moving data easier and ensure it had the required transparency across the department. Further, a flexible, scalable solution could provide a structure that would stand the test of time and establish a value-based framework that could survive the many changes in government.

## Solution: A Consolidated View of the Portfolio

After the Ministry of Social Development created a technical checklist of 400 requirements, Planview Enterprise was chosen. “Planview Enterprise’s portfolio functionality is impressive,” says Utting. “No other product enabled us to perform such detailed analysis on our portfolio, and we knew our spreadsheets were completely ineffective in this area.”

Planview Enterprise automates what the Treasury Department was spending time and resources doing manually. Planview Enterprise is now used as the Department’s common source of knowledge for its more than 600 significant projects. “Our Finance Minister needs to be abreast of every major project,” says Utting. “Like other countries, New Zealand has a history of significant project failures, so the more government can understand its projects and put in controls, the more comfortable the government ministers can be in lowering risk.”

Today, the Treasury can produce detailed reports out of Planview Enterprise, such as pipeline status, risky areas, associated current finances and those coming up in the next budget cycle. Treasury also uses the reports when looking at individual projects.

“Planview Enterprise tells us when projects will land and when projects are being evaluated by business case,” says Utting. “We always have data we need to make decisions and it is useful in a number of our processes. We share this data with other government agencies to get a big picture

view of how we are meeting our goals and spending our constituents’ tax dollars.”

“Planview Enterprise has been invaluable,” Utting concludes. “Without Planview Enterprise, we would be back in the Dark Ages.”

## Results: One Solution that Provides Portfolio Data to Drive Strategies, Programs, and Projects

Since implementing Planview Enterprise, the Treasury Department has:

- Reliable data that gives Treasury the ability to create effective investment strategies for the benefit of the people of New Zealand
- A single solution that has the strategic information to manage and deliver its major projects
- The ability to prioritize projects and maximize resources increasing success and minimising risk
- Progressed evidence-based reporting to justify investments and demonstrate outcomes vs goals improving the decision-making process

To learn more about what Planview Enterprise can do for you, visit [Planview.com](http://Planview.com).

