

CASE STUDY

# Southern Water Embraces PPM Best Practices To Grow and Adapt To Change



INDUSTRY:

**Utilities**

GEOGRAPHIES:

**United Kingdom**

EMPLOYEES:

**2,000**

PLANVIEW PRODUCT:



PLANVIEW SOLUTION:

**Project Portfolio Management**

## CHALLENGE

Driving innovation in a highly regulated industry can be a remarkable challenge. Southern Water recognized that to deliver on their promise of creating a water-resilient future against the backdrop of increasing regulation, population growth, and climate change, they would need to cultivate a dynamic business environment that could accommodate adaptive work approaches and provide line of sight from strategy to delivery.

## SOLUTION

By selecting Planview® PPM Pro to support their journey to new ways of working, Southern Water transformed from a disconnected, project-focused organization to one with a centralized view of all programmes and initiatives across the portfolio. This transparency, coupled with their new adaptive approach, has enabled Southern Water to assess, review, and deliver projects with maximum efficiency.



“By leveraging Planview PPM Pro, we are probably a good 6 months to a year ahead of where we were if we had been doing this manually.”

– **STEPHEN BUDD, SENIOR PMO ANALYST**

## ABOUT SOUTHERN WATER

Water is essential to every aspect of our lives. Every day, 2.5 million South East UK residents depend on Southern Water to supply their neighbourhoods with over 532 million litres of clean water. Southern Water is committed to exploring and introducing new ideas, technologies, and ways of working.

### CHALLENGE: ESTABLISHING CLEARLY DEFINED PROCESSES TO MEET FUTURE DEMAND

The UK faces looming water supply challenges. Southern Water serves a water-stressed area, which means that there may not be enough to satisfy demand in the years to come. To meet the current and future commitments to customers, the PMO designated senior PMO analyst Stephen Budd to implement a framework that would empower teams while also providing a comprehensive and easily accessible view into strategic initiatives, resource capacity, and the business analytics needed to make sound decisions and delivering outcomes faster.

Two years of rapid growth created a number of challenges. New hires used their own terminology and standards, which left Southern Water with projects being run on an ad-hoc basis with minimal governance or control. "It was very difficult to manage and get that centralized view of how we are actually performing and getting those answers to questions the senior management team were after," confided Stephen.

Southern Water now aspired to shift away from focusing on projects to a portfolio-focused approach with clearly defined processes and methodologies. Stephen continues, "We're always looking for opportunities to improve efficiency and leverage new tools or techniques to help make the organization more agile. It's those small step changes that lead to the wider implications."

### SOLUTION: THE JOURNEY TOWARDS GREATER AGILITY BEGINS WITH A SINGLE VIEW

Stephen selected Planview® PPM Pro to support Southern Water's new focus for greater agility in their PPM maturity journey. The first order of business was to identify all of the initiatives being worked on across the organization which included working with the various business partner managers to capture that data and load it into Planview PPM Pro. This first sweep uncovered a staggering 450 initiatives!

"It was quite useful to display for the first time the scale of the problem to the executive leadership team. They were aware that there were some challenges within the organization but being able to quantify them with the information from Planview PPM Pro allowed them to work out what really was the most important work and prioritize accordingly," recalls Stephen. With increased visibility and a consolidated view of the portfolio, leadership determined and prioritized the most important work, cutting down the portfolio to just 200 initiatives.

Leveraging these insights and data then enabled Southern Water to pinpoint the projects that most strongly aligned with their overarching strategic priorities and resource capacity. A new hierarchy was established within Planview PPM Pro that moved Southern Water from a project-focused organization to one with the capability to look at the portfolio, programme, and then the project. Now, when a project manager adjusts any agreed-upon milestones, dependencies, or resources, the impact of those changes can be

easily seen at the programme level, ensuring that the entire portfolio is managed in a coordinated way.

Next, the Programme Delivery Team targeted a goal of pushing real-time data to leadership and establishing a repeatable process of effective, well-informed decision-making. "We created a number of reports and dashboards that enabled us to work with the project managers and help them with their projects. So, if they were experiencing issues or challenges, we could easily highlight that and bring them out in project reviews," Stephen notes. "And this is all based on information provided within Planview PPM Pro."

### RESULTS: INSIGHTS AT THE CLICK OF A BUTTON

Southern Water's new approach has enabled them to assess, review, and deliver projects more efficiently, demonstrating to regulators, customers, and stakeholders that they are well-positioned to deliver on their promise of a resilient water future. With Planview PPM Pro, Southern Water has been able to:

- Create and track milestones at the programme and project level
- More accurately determine and allocate resource capacity
- Review, format, and publish reports at the click of a button

Stephen points out, "A weekly report would have taken us 2 days to receive, format, review, and publish. Now with Planview, it takes literally an hour. This allows us focus much more on the content and what's being delivered."

"By leveraging Planview PPM Pro, we are probably a good 6 months to a year ahead of where we were if we had been doing this manually," he continues. "We have changed the role of the PMO from a data collection and visualization department into a much more useful, detail- and data-focused group."

### FUTURE: ACCELERATING SOUTHERN WATER'S MATURITY BEYOND PPM

Southern Water's journey with Planview has led them to a level of maturity where they can confidently drive delivery of their strategy with Planview PPM Pro. Recently, they have identified the next phases of their journey into maturity, namely taking on more complex financial and strategic planning.

Normally, this would require going to market for another vendor's solution. However, Planview's platform of solutions – connecting portfolio management and work management – offers everything they needed to build expertise and competencies in their new PMO, with the opportunity for growth as they expanded capabilities and usage across the business. To help them achieve this, the next phase in their journey is to transition from Planview PPM Pro and expand into Planview Portfolios for enterprise-wide portfolio planning and delivery.

With Planview, they have been able to scope out and address areas of necessary growth as the single source of truth. Southern Water's partnership with Planview has supported their ability to create a sustainable future driven by more visibility, data, and insights into their financials, resources, strategic goals, and more.

Stephen concludes, "Choosing Planview built parallels between the maturity of the organization and (now) supports our increase in maturity as we move forward."

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

