

## CASE STUDY

# Visibility, Repeatability, and Predictability Help A Growing Software Provider Keep Pace with Increasing Demand



## INDUSTRY:

**Technology**

## GEOGRAPHIES:

**Global**

## EMPLOYEES:

**500+**

## PLANVIEW PRODUCT



## PLANVIEW SOLUTION:

**Planview Professional Services Automation**

## CHALLENGE

As the demand for network security exploded, so did business at Tufin—The Security Policy Management Company. Lacking visibility into projects and repeatable standardized processes, project managers at Tufin were left delivering projects based on individual heroics and ad-hoc methodologies leaving most managers unable to see revenue until projects were completed. Wanting to ensure that the company could sustain its success and grow with the increasing demand, Tufin turned to Planview® software to unify their processes and deliver client projects in a repeatable and flexible way.

## SOLUTION

William Chernock, Director of PMO—Americas and APAC in Tufin's Professional Services group, led Tufin on a journey through a sequential series of mile markers: making things visible, repeatable, and predictable. Implementing Planview's Professional Services Automation enabled Tufin to learn how its teams were building and executing projects, helping the company identify bottlenecks and success patterns. With the Planview solution in place, Tufin transformed its business and achieved scalability through meaningful insight.



"There were many things that had been in a fog when we started the project, and being able to visibly see those things and make management choices based on data was a great transformation—enabled by our partnership with Planview."

— WILLIAM CHERNOCK, DIRECTOR  
OF PMO—AMERICAS AND APAC

## ABOUT TUFIN

Tufin is on a mission to fundamentally change the way organizations manage their security and network infrastructure. Founded in 2005, the security policy company has grown to over 2,000 global customers and manages some of the world's largest networks, including over half of the Fortune 50®.

## CHALLENGE: YOU CAN'T MANAGE WHAT YOU CAN'T SEE

Enterprise networks have become increasingly complex and fragmented, spanning many on-premise, private, and public cloud environments. Overtime, digital transformation and DevOps practices have led to an explosion in software releases requiring frequent connectivity changes. Each new network connection creates a new potential entry point for cyber attackers. At Tufin, escalating demand for its security policy management platform led to the kind of success and rapid growth that can easily turn into chaos.

Managing a high-growth organization requires both strategy and adaptability. "We wanted to make sure we could sustain our success and grow with the business," says William Chernock, Director of PMO—Americas and APAC. William works within the professional services organization—a global team that helps customers maximize the value of the Tufin platform. "As a business, we were growing. And although our projects were getting done, we started to realize that if we continued the current path of scalability, that soon things could potentially become very unwieldy," William continues.

Drawing from 30+ years of experience in team building and process automation, William had seen too many growing organizations crash headfirst into walls trying to cover up complex problems with unsustainable band-aids and duct-tape fixes. "What we needed to do was learn how to deliver projects from a professional services perspective," says William. "The team was delivering projects very much as individuals, there was no standardization amongst our tools, we didn't have a lot of standardized processes, and all of this led to an inability to help each other as a team as projects were being delivered."

William also wanted the capability to create metrics that could track how teams were baselining against Tufin's overall delivery methodologies, help to establish attainable goals, and monitor progress along the way. Tufin was in a big fog when it came to delivery and laying the groundwork for its future required gaining visibility.

## SOLUTION: STANDARDIZED PROJECT DELIVERY PROCESSES WITH A FLEXIBLE APPROACH

William believed that starting with visibility into one aspect of the business would create an opportunity for improvement and repeatability. Repeatability would then provide the ability to predict more accurately, and once you have reached predictability, goals and outcomes can be successfully met with consistency. The strategy was to stay focused on a particular area of need and then move on to the next.

"We took a look at Planview® PSA as a tool that could help us along our journey," recalls William. Planview's Professional Services Automation solution enables organizations to optimize utilization and enhance visibility, making engagements more predictable and profitable. The Planview solution would give William and his team access to real-time data across the entire services engagement lifecycle and the levers to drive continuous improvements.

With Planview in place as the standardized project management tool, William could now start to define where success was happening, where it wasn't, and what he wanted to be able to repeat. "We wanted to learn how the teams were building projects, how they perceived scope, and start to see if we could glean anything from the patterns of success or patterns of struggle," says William.

As the adoption of Planview increased, William was able to dive into the rich data provided by the solution to better understand why certain projects would encounter delays while others were more successful at meeting or beating expected timeframes. From these insights, William was able to build reusable templates within Planview to standardize the project delivery process. "We improved our templates and tools so that the engineers could deliver more quickly on the project work and then have more time to be focusing on the client," shares William.

Once the templates were in place, that is where the creativity of Tufin's project managers harmonized with the flexibility of the Planview solution. William notes, "Once those components are into a particular project, now the PMs have the ability to move and slide those around and change the priority based on what the customer experience ends up being. They've got flexibility within the project itself."

"Then, we were able to forecast through Planview reporting how we were tracking each of those project milestones and the impact those had on our overall revenue recognition," says William.

## RESULTS: VISIBILITY LEADS TO REPEATABILITY, THEN PREDICTABILITY

Planview provided Tufin with the tools to document and track workflows, standardize project delivery, define metrics and reporting, and gain visibility into data that allowed the company to transform the business through meaningful insight. Some of the most significant improvements were realized with the ability to define internal and external kickoffs and standardize those steps. "We were able to better predict what was going to happen where there could potentially be problems with projects and really nip those in the bud upfront to make projects work better," says William.

Other major improvements included revenue recognition. William shares, "Rather than looking at revenue at the end of a project when it completely finished, we could bring this upfront and actually do revenue recognition and invoicing on a milestone-by-milestone basis. A huge transformation from a business perspective," declares William. "We were able to improve our overall forecasting capabilities to a 90-day window as opposed to a 5-week window that we had previously!"

William concludes, "There were many things that had been in a fog when we started the project and being able to visibly see those things and make management choices based on data was a great transformation—enabled by our partnership with Planview."

## FUTURE: INCREMENTAL IMPROVEMENTS FOR SUSTAINED GROWTH

"Our journey does not end there with that first phase of success. We do plan on continuing and mapping out additional journeys going forward," says William. "Phase one was getting the engineers to use Planview on a daily basis to see the benefit of using standardized workflows."

One of the next steps William and his team are most excited about is resource planning. "We were able to get some resource utilization metrics and data through our last phase. We've got a pipeline of projects that we have visibility into. We would like to extend that into resource planning," William shares.

Also, in the plans for future phases is implementing customer-facing status reporting to provide customers with a live look into projects. Additionally, William plans to incorporate some Kanban concepts into the solution for the engineers.

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