

## Case study

# UT System Scales Execution of Strategic Initiatives Across its 14 Institutions

## About UT System

The University of Texas System (UT System) is a state university system with a governing body over eight academic institutions and six health institutions, including world-renowned MD Anderson Cancer Center. The UT System employs 105,000 employees across Texas with 839 personnel in System Administration.

## Challenge: Align Institutions towards Organization-wide Strategic Initiatives

In 2015, UT System board of directors appointed retired Admiral, William McRaven, as Chancellor. With the support of students and faculty, McRaven and his staff defined eight bold, strategic initiatives called Quantum Leaps. These Quantum Leaps are transformational programs and goals, requiring business process and capability changes across its 14 academic and health institutions.

The importance of building a plan and having a structured approach to drive results wasn't lost on McRaven due to his military background. He realized UT System lacked a project management culture and the tools to manage the Quantum Leaps. There was no way to communicate the progress of these initiatives or how they were being operationalized.

Donna Thomas was hired as director of project management to establish repeatable project management processes. Part of the task included finding a technology solution to facilitate Quantum Leap projects and programs. "Our goal was to implement an easy, intuitive solution that our education professionals - without a project management background - can use to manage projects and leverage that data to make informed decisions," she says. "It was imperative that the solution offered enterprise reporting capabilities to ensure strategy execution can be communicated across the 14 institutions."



THE UNIVERSITY of TEXAS SYSTEM  
FOURTEEN INSTITUTIONS. UNLIMITED POSSIBILITIES.

## Overview

### Customer

The University of Texas System

### Geographies

14 institutions across Texas

### Employees

105,000

Using Planview Enterprise, UT System has transformed its institutions by executing strategy into initiatives called Quantum Leaps. The Chancellor and decision makers at its 14 institutions have status into the health of projects and programs, realizing benefits that drive strategic initiatives which allow them to advance into a university system with global impact.

## Solution: Planview Enterprise® to Operationalize Strategy and Drive Transformation

Planview was able to deliver ease of implementation deployment with Planview FastTrack and personalized configurations and reports, getting the organization on board and realizing outcomes quickly. "We agreed that within two weeks, we wanted our first status report and by the end of the month, a monthly status report that was robust and detailed enough to be sent to executives and presidents," explains Thomas. "The first status report wasn't perfect, but by the end of the month, everyone had bought in and we had a solid report to send. It was a huge accomplishment that Planview helped us achieve."

Thomas was able to aggregate all of the project data, summarizing program and project financial data for all strategic initiatives into a quarterly assessment. Planview helped Thomas and her team personalize many additional reports so they are consistent with the look and feel of the manual reports that the higher education professionals were used to. This helped improve adoption and reduce the learning curve.

By configuring Planview Enterprise to the unique specifications of a higher education institution, UT System was able to evolve to a team-of-teams approach within the institutions that allowed them to manage projects by milestones and deliverables (versus project plans) and incorporate agile decision processes to communicate status and make decisions quickly. This approach has brought visibility into project status, issues and risks, budget, and schedule in real time which gives insight into the health of each Quantum Leap. UT System has now established a central location for all of the Quantum Leap outcomes and measures, giving leaders the ability to determine if value is being delivered for strategic initiatives down to project level detail, and identifies areas that may need leadership attention. Dashboards allow program contacts, purpose, and mission for each Quantum Leap initiative to remain in the forefront of every linked project.

"The enterprise strategic roadmap gives the Chancellor a quick and easy way to see all of the work being done for all of the institutions under one strategic initiative. It also shows how well the different institutions are doing at delivering on their commitments," says Thomas. "Planview Enterprise gives us a single source for all of our program and project data. Equally valuable is that we can finally connect our strategy execution to projects and can communicate how we are operationalizing the strategy."

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*– Donna Thomas, director of project management, UT System*

The team-of-teams culture has fostered higher collaboration across the institutions, enabling capabilities such as cross-communication, forming integrated tactical project teams, greater participation in outcome delivery, and sharing best practices. Success in transforming the University of Texas System with Planview Enterprise has spread across the broader organization. UT System continues to scale Planview into new departments and institutions, gaining a holistic view of strategic initiatives, and creating capacity to deliver new Quantum Leaps.

## Results: Delivery of Quantum Leaps Bringing Strategy to Life

Since deploying Planview Enterprise, the University of Texas System can:

- Connect strategy execution to projects and communicate how it is being operationalized
- Summarize program and project financial data to see financial health of projects to proactively address risks and issues, see which projects are delivering on value
- Access institution-specific data in real-time
- Align project goals and measures to desired outcomes
- Identify resources participating by institution on all projects, optimizing resource capacity and improving utilization
- Collaborate across the institutions, sharing data, and best practices

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

