

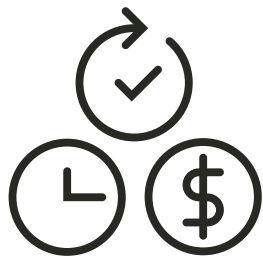
# HOW ONE GLOBAL PMO SOLVED THE SPREADSHEET CHALLENGE



Find out how the Project Management Office for the world's leading aviation trade organization delivers on time, on budget, and within scope.



*The fact that we can modify the board structure as much as we need allows us to use the same tool for not only project portfolio management and team management, but also for managing our own personal work.*



## Global PMO

**INDUSTRY:** International Aviation // **LOCATIONS:** Canada, China, Switzerland

**DEPARTMENT/TEAM:** PMO, Project Delivery, IT Services, Finance Operations

**ROLE:** IT Project Management Office (PMO) // **LEANKIT CUSTOMER SINCE:** 2013

a case study presented by



## RESULTS



Preparing executive reports takes 30% less time than before, saving them 40 hours per year.



Weekly team meetings take just 20-25 minutes – about half the time it could take with list-based tools.



The PMO and project delivery teams achieved high marks of satisfaction from their internal customers for delivering projects on time, on budget, and within scope.

## BACKGROUND

### Serving IT and Delivering Business Value

The project management office (PMO) for the world's leading aviation trade organization supports three project delivery teams in Canada, China, and Switzerland. Their responsibilities include IT project portfolio management, facilitating agile adoption across the organization, and setting the methodology for IT projects (e.g., Kanban, Scrum, Waterfall, etc.). Managing a portfolio of about 45 projects per year, the PMO works with a different line of the business every few weeks, with scenarios ranging from airline financial services to environmental issues to air travel safety.

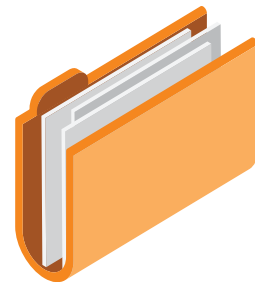


#### WHO WE INTERVIEWED

We sat down with Giorgos, a PMO team member, to learn how the PMO and project delivery teams are using Planview LeanKit® to manage their work and see gratifying results.



**Works across three continents and 12 time zones**



**Manages a portfolio of about 45 projects per year**

## THE CHALLENGE



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***Using spreadsheets with a globally distributed team was actually quite a painful procedure.***

### Spreadsheets Delaying Progress

Until early 2013, the PMO used spreadsheets to manage a portfolio of projects that spanned three continents and 12 time zones. “Using spreadsheets with a globally distributed team was actually quite a painful procedure,” said Giorgos, a team member of the PMO. The project leads had to funnel all of their status updates through the Head of IT Project Delivery, who spent up to three hours per week updating the spreadsheets and compiling that data into usable reports.

Despite this effort, the PMO found that spreadsheets gave them only a snapshot of their progress. It was nearly impossible to get a day-to-day understanding of what had happened overnight in Montreal or what was happening right now in Beijing or Geneva. They needed a tool that would allow them to know what was happening in real time, so they could stay in sync and quickly address risks and issues.

## THE SOLUTION

### Seeing Real-Time Information in Seconds

As an extension of their organization’s agile change management program, the PMO began searching for a tool with Lean and Kanban capabilities. They chose LeanKit because it was easy to use, highly visual, and widely customizable.

“It’s very easy to get started with LeanKit: You can quickly set up a new user, and the user can actually start creating cards with two clicks,” said Giorgos, noting that LeanKit’s ease of use goes beyond onboarding and into daily use. “I don’t have a lot of people struggling with how to use the tool, and I don’t get a lot of questions,” he said. The visual, intuitive interface enables a low-friction user experience.

## THE SOLUTION



*It's very easy to collaborate now. We can collaborate in real time without the need to download local copies of the spreadsheets.*

### Shared Access to a Flexible Tool

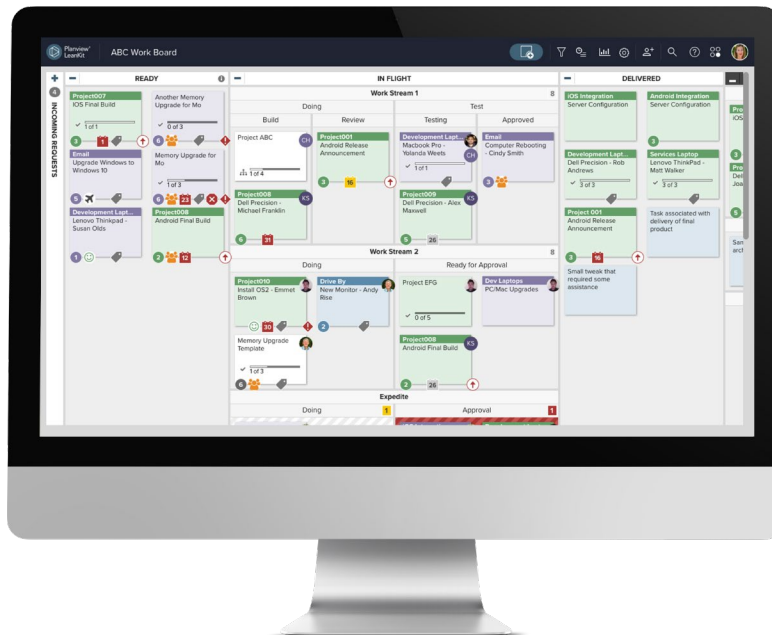
The PMO uses a project portfolio board to track and manage projects, leveraging it as a shared tool that can be updated instantly by the project delivery team leads. Instead of emailing their updates to the Head of IT Project Delivery, the team leads signal their progress by updating their cards on the board. "It's very easy to collaborate now. We can collaborate in real time without the need to download local copies of the spreadsheets," said Giorgos.

To quickly see what's happening around the world, the team uses card tags and board filtering. Each location has a separate card tag. When someone wants to know what's happening in Beijing, for example, they filter the board by the "Beijing" tag. Rather than filtering by a field on a spreadsheet and scrolling through rows of data, searching the board takes a few seconds, and the relevant cards visually "pop" from the board.

The flexible board editor allows teams to model their own complex processes and modify them, as needed – with no limits on board structuring. "The fact that we can modify the board structure as much as we need allows us to use the same tool for not only project portfolio management and team management, but also for managing our own personal work," said Giorgos.

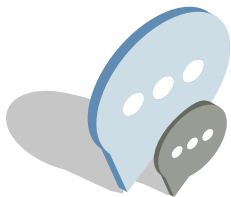


**Planview LeanKit  
main board view**



### Beyond the PMO: 3 Additional Use Cases

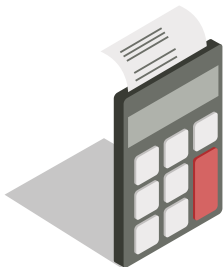
LeanKit's adaptability makes it easy to use for a variety of teams, regardless of their work. In addition to the PMO and project delivery teams, several other departments at the world's leading aviation trade organization rely on LeanKit every day. Here's a snapshot of how teams in Digital Communications, Finance Operations, and IT Services use LeanKit.



#### ASSISTANT MANAGER Digital Communications



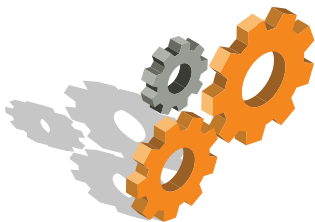
*LeanKit helps us track the progress of our work and make sure we finalize key projects on time. Structuring our board into lanes makes it clear what stage the project is in and who exactly is in charge of it.*



#### SPECIALIST, DATA TRANSFORMATION Finance Operations



*We used to track and process billing data by spreadsheet. It was challenging to share one file between all of us, and filtering the data wasn't easy. Now all of our team uses LeanKit. We can see an overview of all the data and can easily filter information.*



#### MANAGER, WEB DEVELOPMENT IT Services



*Our development team uses LeanKit to track the progress of enhancements. Visualizing the different steps of our process gives us a better understanding of the team's workload and who does what. We can also give our business stakeholders a very transparent view of the work and visibility into our shared projects.*

## THE RESULTS



*By visualizing our project workload, we've been able to reach our goal of delivering on time, within the scope we agreed, and within budget – all of which help make our customers happy.*

### Greater Efficiency, Quicker Meetings, Happier Customers

Using a shared tool for visual project portfolio management has helped the PMO coordinate a globally distributed team with greater efficiency. Since everyone can update cards simultaneously, they no longer need a central keeper of information, and they don't need to wait on a weekly report to determine if there are risks or issues – they can see them immediately.

The delivery team leads and the PMO prepare a bi-weekly report for executive stakeholders, but it takes them up to an hour rather than up to three hours – saving them 40 hours per year. Additional efficiency gains come from their weekly team meetings, which take only 20-25 minutes to review technical risks and change management. "Without the structure and visualization from LeanKit, this meeting could easily take double the time," said Giorgos.

For the first six months of 2017, the PMO and the project delivery teams achieved high marks of satisfaction from their internal customers (i.e., product owners). Giorgos names customer satisfaction as one of their top KPIs, a benchmark that has been influenced by using LeanKit: "By visualizing our project workload, we've been able to reach our goal of delivering on time, within the scope we agreed, and within budget – all of which help make our customers happy."

### About Planview

As the global leader in work and resource management, Planview makes it easier for all organizations to achieve their business goals. We provide the industry's most comprehensive solutions designed for strategic planning, portfolio and resource management, product innovation, capability and technology management, Lean and Agile delivery, and collaborative work management. Our solutions span every class of work, resource, and organization to address the varying needs of diverse and distributed teams, departments, and enterprises. Headquartered in Austin, Texas, Planview's more than 700 employees serve 5,000 customers worldwide through a culture of innovative technology leadership, deep market expertise, and highly engaged communities. For more information, visit [www.planview.com](http://www.planview.com).



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