

## Case study

# Travis Perkins Achieves Portfolio Management Visibility and Governance

## About the Travis Perkins Group

Travis Perkins plc is the UK's largest builders' merchant, supplying building and construction markets for more than 200 years. The Group has more than 21 brands and businesses and a network of over 2,000 branches and stores across the UK.

## Challenge: Unstructured Planning and Project Prioritization Processes

Travis Perkins' portfolio management team had the unique challenge of transforming the structure of its legacy annual planning process. They needed a better idea of how many projects were being executed, in order to measure the impact implementations were having on support teams.

In addition, there was little visibility into how projects were changing in scope, size, and spend or how much resource capacity was available to execute work. Without reliable project prioritization, the team had no way of determining which ideas and projects would bring the most value to the business.

The goal of the team was to improve project return on investment and consistently deliver technology solutions that benefit both the company and its customers.

## Solution: Establish Project Prioritization, Visibility and Governance

The Portfolio Management team implemented Planview Enterprise to align projects and services with company strategy and gain visibility into project costs and scope.

A multi-stage communication strategy was established and involved key

## Travis Perkins

### Overview

#### Customer

Travis Perkins plc

#### Industry

Building Construction and Retail

#### Geographies

UK, Ireland

#### Size

30,000 employees

The Travis Perkins Group has gained visibility in its portfolio with the ability to prioritize projects and monitor costs, statuses, and capacity throughout the gated process.

*“Many of the metrics come from data in Planview Enterprise, which was implemented to support governance, measurement, and transparency of our portfolio. It has become our single source of truth.”*

*- Larissa Whiley, Head of Portfolio Management, Travis Perkins IT*

stakeholders, media, events, and social media efforts. Balanced scorecards containing KPIs and color-coded statuses provide visibility into projects and portfolios. These efforts give leadership a view into how teams and services are performing against availability, reliability, responsiveness, and performance, and helps identify if additional support is needed.

“Our process of measurement uses the balanced scorecard supported by group portfolio dashboards,” says Larissa Whiley, Head of Portfolio Management at Travis Perkins. “We focus on finance, customer, delivery, operations, and people. Many of the metrics come from data in Planview Enterprise, which was implemented to support governance, measurement and transparency of our portfolio. It has become our single source of truth.”

Planview Enterprise enables the team to prioritize ideas and projects across the entire group, ensuring the right work with the best ROI is identified, instead of the favorites among divisions. Work is now prioritized by business need and ROI, regardless of which division or brand is sponsoring it.

The success of the scorecards has resulted in a desire for the creation of scorecards for other supporting teams. “Throughout this next year, we will work with the teams from across IT to provide a clear measure of performance that will connect into the department balanced scorecard,” says Larissa Whiley.

## Results: Single Version of All Projects in the Portfolio

Since implementing Planview PPM, Travis Perkins plc has:

- Increased project delivery success through a gated process that has already closed down 26 projects
- Reduced spend while speeding up project turn times
- Streamlined data and increased collaboration
- Better visibility of portfolio components and health for better and faster decision making

For more information about Travis Perkins plc, visit <https://www.travisperkinsplc.co.uk/>, and to learn what Planview Enterprise can do for you, visit [Planview.com/Enterprise](https://Planview.com/Enterprise).

