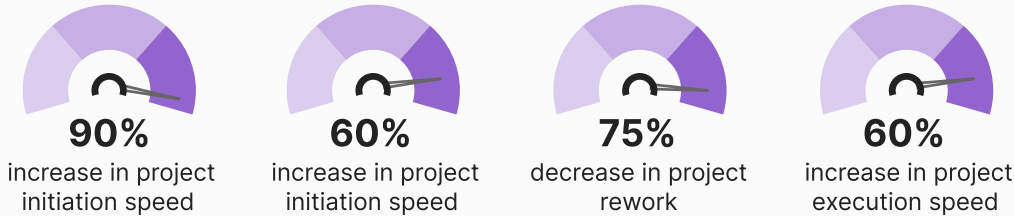


How Birdview PSA Boosted Project Initiation Speed by 90% for a Global Workplace Solutions Company

RESULTS ACHIEVED:



CHALLENGES

The client faced significant challenges in their project management practices, resulting in project delays, over-commitment, and an inability to track and report progress. Projects and tasks were managed ineffectively, leading to scattered project information and difficulties in assigning responsibilities.

Lack of project management

- Before Birdview PSA, the client primarily used Excel and occasionally used MS Project for their projects. Projects and tasks were not effectively managed and were tracked in multiple locations, leading to scattered project progress information and difficulty in assigning responsibilities. As a result, the client lacked the ability to accurately track project progress, making it challenging to identify bottlenecks, make informed decisions, and communicate effectively with the company's leadership.

Lack of time management

- The client did not have a system in place for time tracking and management. This absence of a structured approach resulted in a lack of visibility into how much time was being spent on projects and tasks. Without accurate time tracking, the client faced difficulties in assessing resource utilization, estimating project timelines, and identifying areas where productivity improvements could be made.

INDUSTRY

Digital Services

TEAM FUNCTION

Project Management

EMPLOYEE SIZE

10,000+

COMPANY DESCRIPTION:

The company offers workplace solutions and digital transformation services designed to help manage and optimize information flow across a vast array of industries all over the globe. They offer services to government contractors, government entities, legal entities, and healthcare organizations. The client's product portfolio also includes security software, printers, scanners, and other workplace tools.

WHAT WAS REPLACED

- Excel
- MS Project

Overcommitment to projects

- The client faced the issue of taking on too many projects with limited resources. The imbalance between project demands and available resources led to missed deadlines, incomplete requirements, and overall project inefficiencies. Without proper resource allocation and management, the client struggled to prioritize projects effectively and ensure the successful delivery of all initiatives.

Lack of insightful reporting

- There were difficulties providing insightful reporting and project status updates to leadership in a cost-effective manner. The absence of a streamlined reporting process made it challenging to consolidate project data, generate meaningful reports, and communicate project performance to key stakeholders. This lack of reporting capabilities hindered the client's ability to make data-driven decisions, track project success, and address potential issues in a timely manner.



“Before implementing Birdview, our project and task management processes were scattered across multiple locations, making it difficult to track progress and assign responsibility. Time management wasn't an option, and we often overcommitted to projects. With Birdview, we now have a centralized system where tasks are organized, dependencies are tracked, and progress is easily monitored. It has improved communication, workload visibility, and reporting, allowing us to manage projects more efficiently and avoid missed deadlines.”

SOLUTION

These Birdview PSA solutions provided the client with a comprehensive project management ecosystem. They helped gain visibility, improve decision-making, streamline processes, enhance communication, and optimize the overall project delivery process, ultimately leading to improved project outcomes and organizational success.



Resource Management

By utilizing Birdview PSA's resource management capabilities, the client gained improved visibility into project progress and effectively allocated and optimized their resources across projects. This enabled them to better prioritize projects, manage workloads, and ensure the successful delivery of initiatives, ultimately reducing instances of missed deadlines, incomplete requirements, and project inefficiencies caused by over-commitment.



A Single Source of Truth

By using Birdview, the client eliminated the scattered storage of tasks and documentation. All tasks were consolidated within Birdview, providing a single source of truth for project progress and information.



Portfolio Management

The portfolio management solution provided the client with a comprehensive overview of their projects. It allowed them to track and analyze the performance of various projects, enabling better decision-making and resource allocation. With this solution, the client gained visibility into their portfolio's health, identified potential risks and opportunities, and made strategic adjustments as needed.



Reporting

Thanks to insightful reporting, the client streamlined the process of generating and sharing project reports. It automated the process of collecting data, organizing it, and generating visually appealing reports to share with the company's leadership and the team. The reports can now be customized based on specific metrics, timelines, and stakeholders' requirements. It helped the client to save time, improve accuracy, and enhance communication across teams.



Project Intake Process

Thanks to Birdview's custom forms feature, the team automated the project creation process. Even for new processes where the outcome was uncertain, the team used a template, modify tasks as needed, and ensure important metadata is not missed.



Approvals

Birdview PSA helped streamline the approval workflow, reduce bottlenecks, and ensure that projects progressed smoothly through the necessary authorization steps.



Time Tracking

The client accurately captured and monitored the time spent on various project activities. Employees can log their hours, track tasks, and allocate time to specific projects. By using this solution, the client gained insights into resource utilization, project progress, and estimated completion times. Even though time tracking was used internally and logged hours were not used to bill external clients, this information helped the team improve project planning, allocate resources effectively, and identify areas where productivity could be enhanced.



Task Management

The task management solution helped the client organize and prioritize project tasks. It provided a centralized platform where tasks could be created, assigned to team members, and tracked to completion. The solution offered features such as task dependencies, deadlines, and progress tracking. By using this solution, the client improved collaboration, ensured timely task completion, and enhanced overall project efficiency.

RESULTS

The implementation of Birdview resulted in significant improvements and positive outcomes for the client's project management processes. Project initiation saw a remarkable enhancement, with a **90% increase in speed and completion rates due to the utilization of templates** that standardized the creation process and ensured crucial tasks were not overlooked. Workload visibility was increased through Birdview's centralized task management, enabling managers to have **a better understanding of ongoing projects and reducing the tendency to overcommit resources**.

Birdview's reporting capabilities played a crucial role in providing progress reports and enabling quick status checks on projects. **Improved communication, shared workload visibility, and better time management** were observed as teams became more organized and took greater responsibility for task completion. The approval process within Birdview proved to be valuable in ensuring timely reviews and approvals. Furthermore, Birdview PSA facilitated the tracking of progress, with the occasional use of time tracking as a status indicator and notes to monitor project advancement. The implementation of Birdview led to a **50% increase in the number of projects that were successfully delivered according to the planned schedule**.