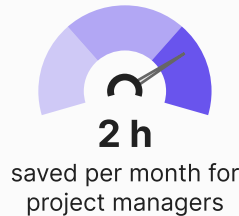


# Improving Resource Planning using Birdview PSA

## RESULTS ACHIEVED:



## CHALLENGES

Before adopting Birdview PSA, Intrahealth relied on a combination of unconnected tools for project/task planning, time tracking, resource management, reporting and documentation. These tools operated in silos, leading to inefficiencies in supporting the organization and overall marketplace growth objectives. The lack of a centralized system made it difficult to track resource utilization, forecast project needs, and ensure time tracking compliance.

### Lack of a centralized system

- Intrahealth relied on multiple disparate tools for project tracking, resource management, and reporting, leading to inefficiencies and a lack of visibility.

### Inefficient resource planning

- The absence of a dedicated resource management tool made it difficult to track resource availability and utilization.

### Time tracking and compliance issues

- Employees struggled with compliance in submitting time-tracking data due to the complexity of existing tools.

### Scalability and implementation speed

- Intrahealth needed a solution that could be implemented quickly and scaled efficiently without extensive customization.

### Customization and globalization needs

- The organization required a system that could accommodate different jurisdictions, such as varying statutory holidays across regions.

## INDUSTRY

Software development

## TEAM FUNCTION

Professional Services

## EMPLOYEE SIZE


80

## COMPANY DESCRIPTION:

Intrahealth is a healthcare software company specializing in enterprise-grade healthcare management solutions tailored for complex medical environments. Founded in 1997 in New Zealand, the company has since expanded globally, with headquarters now in Vancouver, Canada. Now a subsidiary of HEALWELL AI Inc., Intrahealth provides its flagship product, Profile EMR, a scalable electronic medical record system designed for interoperability and efficiency.

## WHAT WAS REPLACED

Multiple tools



*One of the biggest benefits we've seen is the consolidated view of all our project work - internal, client, and product development. Birdview has given us the outcome we were looking for in terms of having one place to see utilization, resource planning, and time tracking across the organization. The out-of-box functionality from Birdview PSA meets 85-90% of the requirements of a professional services organization. The quick implementation timeline was a key factor for us. We were able to get Birdview up and running in under a month, which was critical given our limited resources and requirements to align business units.*

**Nick Choo-Hum**

**Director of Professional Services**

## **SOLUTION**

After evaluating multiple solutions, including Monday.com, MS Project Online and ServiceNow, Intrahealth selected Birdview PSA due to its out-of-the-box functionality and ease of implementation. Key factors influencing the decision included:

### **A single source of truth**

Birdview PSA provided built-in resource management, project tracking, and reporting without requiring additional modules or extensive customization.

### **Ease of use**

The platform allowed users to onboard quickly with minimal training.

### **Rapid implementation**

Intrahealth was able to deploy Birdview PSA within a month, significantly reducing the time required for a full transition.

### **Canadian-based support**

The preference for working with a North American company added an additional layer of confidence in Birdview PSA's ability to meet Intrahealth's needs.

### **Customization**

Birdview PSA worked with Intrahealth to make minor adjustments, such as modifying portfolio colors to better align with project health indicators.

## RESULTS

Intrahealth successfully transitioned to a **scalable, comprehensive project and resource management solution** with Birdview PSA, leading to significant efficiency gains and future-proofing its operations. The organization achieved **improved resource planning and visibility**, consolidating all project-related data to enhance decision-making at the leadership level. **Time savings** were notable across multiple areas: **leadership planning is estimated to save half a day per month**, financial reporting is anticipated to **save one full day per month for executive leadership** by streamlining CAPEX reporting, and project managers are expected to **save 30 minutes per week through improved reporting and tracking** capabilities.

Additionally, the user-friendly interface led to **higher compliance rates for time tracking submissions**, ensuring more accurate data collection. Looking ahead, ongoing work on Business Intelligence (BI) reports is expected to provide deeper insights and further efficiency gains. Birdview PSA's roadmap also includes **operational enhancements**, such as increased global organization support and a structured approach to project change requests, aligning with



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