

# Key Benefits Achieved with a PPM Tool

*Using project portfolio management software to achieve real results*

## Market Background

Katarina Savic, Vice President, Solutions Delivery and Retail Operation, had come to AGF from a work place already using a PPM tool. There was no doubt that a PPM tool was needed to address a number of key challenges. Although AGF had a license to her PPM tool of choice, Eclipse PPM, it wasn't being used as a central depository for projects and as a result, the company needed to re-address how the tool was being used in order to overcome key PPM challenges.

## Challenge

AGF experienced many challenges from not utilizing the PPM tool to its full potential. The key issues faced were:

- Inconsistency of data
- Multiple versions of a database being used
- Having to re-do spreadsheets for management
- Not knowing who was working on what

As a result of these challenges, the Project Management Office was much less organized and quite disjointed.

## Eclipse PPM by Upland Solution

Eclipse PPM was re-deployed within AGF Management to utilize more of the solution's capabilities.

## Benefits

AGF's primary objective of this initiative was to develop a system for all project information to be created, managed and reviewed in the one place. After re-implementing Eclipse PPM to do more than just time tracking, AGF Management now have a central repository of all project information, accurate start and end dates, customized information for different parties. They have a cleaner source of information, making discussions easier, allowing for better prioritization of projects and better alignment of resources with projects.

The key project stakeholders at AGF have seen a number of benefits resulting from the use of Eclipse PPM. For Katarina, head of the company is PMO, it has largely been the enhanced reporting capabilities, which have allowed for better decision making. The project managers now have one place to do all project updates, which has improved efficiency and reduced time spent on administrative tasks. The executives now have better reporting information, which also allows for better decision making and means they can access this information whenever it is needed.



**INDUSTRY:** Financial Services

**EMPLOYEES:** 900+

**WEBSITE:** agf.com

### At a Glance

#### Challenges

- Inconsistency of data
- Multiple versions of a database being used
- Having to re-do spreadsheets for management
- Not knowing who was working on what
- Lack of visibility through reporting

#### Benefits

- Enhanced reporting capabilities
- Central repository of all project information
- Improved prioritization of projects
- Better alignment of resources with projects
- Less time spent on manual efforts

# Everything you need for PPM success, all in one place

## Portfolio Management

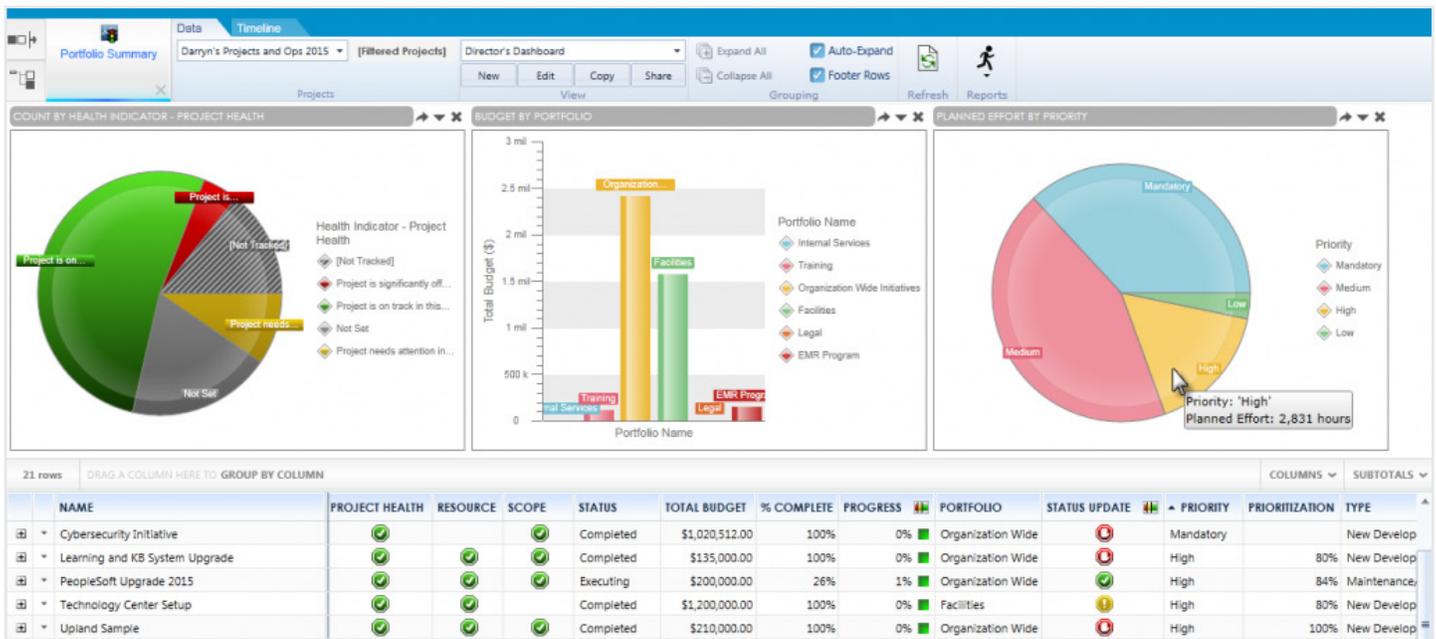
Executive Managers (CEO, CIO, COO, CFO) and Portfolio Managers may be looking at different metrics, but they all need the same thing: real-time portfolio, project, and resource information at their fingertips. Eclipse includes over 25 powerful reports that allow executives, sponsors, and project managers to quickly and easily produce valuable project, resource, financial, and portfolio information.

## Project Management

Eclipse was designed to accommodate and improve your organization's entire project lifecycle. Projects are entered into Eclipse at the idea or request stage. Even the business case for the project can be built in Eclipse, evaluated, recommended, and then delivered. Projects can also be closed and rated upon completion. This intuitive project management interface is scalable, making it easy to plan and manage simple to complex projects.

## Resource Management

Resource Managers need to understand who is working on what, who can take on more work and when. Without a clear picture of resource loading against projects and operational work, you get bottlenecks, burnt out resources leading to high turnover, late projects, and low quality work. Eclipse provides managers with an outline and summary of resources available, planned utilization, capacity variance, and actual time entered. This information can be displayed for a set of resources across a specified time frame or for certain projects broken down by resource.



## About Eclipse PPM

Upland's Eclipse PPM is a purpose-built application for mid-market organizations seeking an easy-to-use, turnkey solution for their project management and portfolio visibility needs. Eclipse PPM helps you see, manage, and measure projects throughout the entire lifecycle, simplifying the selection and execution of multiple projects over the same resources.

## About Upland

*Upland Software provides Cloud Solutions across the enterprise enabling amazing customer outcomes in:*

- + PROJECT & IT FINANCIAL MANAGEMENT
- + WORKFLOW AUTOMATION
- + DIGITAL ENGAGEMENT