

# Improving Visibility and Reducing Manual Reporting with Project Portfolio Management

*FundSERV Improved PPM Practices with Project Portfolio Management Software.*

## Market Background

FundSERV Inc. is a leading provider of electronic business services to the Canadian investment fund industry. Established in 1993, FundSERV is a private company that operates on a cost-recovery basis. FundSERV has spearheaded the development of what is widely acknowledged to be the most efficient investment fund transaction processing system in the world. Today, the company's focus is on the data standards and security infrastructure that will enable the industry to continue to apply technology for the ultimate benefit of the Canadian investing public.

## Challenge

Prior to the creation of a formalized project management methodology, projects were completed by the MIA construct (Management by Intimate Awareness). People instinctively knew what needed to be done and did it. Although the end result was usually successful, activities were not always coordinated and a great deal of overtime was required to complete projects on time.

- Senior management had limited or no visibility into project progress
- Hard to plan resources across multiple projects due to lack of portfolio planning
- Projects with issues requiring management intervention were not easily visible
- Difficult to measure success in relation to the company's strategic goals
- Over 700 man hours were spent in coordination meetings annually
- Document look-up was very difficult due to the multiple locations

## Eclipse PPM by Upland Solution

Eclipse PPM was installed to provide a single point of access for all project and portfolio documentation and reporting.

## Benefits

- The status of the entire project portfolio is visible to the management team
- Monthly Project and Portfolio Scorecards are quickly and easily prepared
- All project documents can now be accessed from a single source (via Eclipse)
- Upcoming projects are easily identifiable and not forgotten
- Individual project reporting is simplified with the Eclipse reporting features
- There is now a single repository for all projects

## FundSERV Inc.

The Investment Fund Network

### At a Glance

#### Challenges

- Lack of portfolio planning
- Limited visibility of project progress and status
- Time spent on manual efforts
- Various locations of project related documents

#### Benefits

- Project portfolio status visible to management
- Scorecards are quickly and easily prepared
- Single repository to store documents
- Upcoming projects easily identifiable
- Project reporting simplified

*"Eclipse provides a single, easy to use repository for the details and status of all planned, active, and completed projects."*

— FundSERV Inc.

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

## Portfolio Management

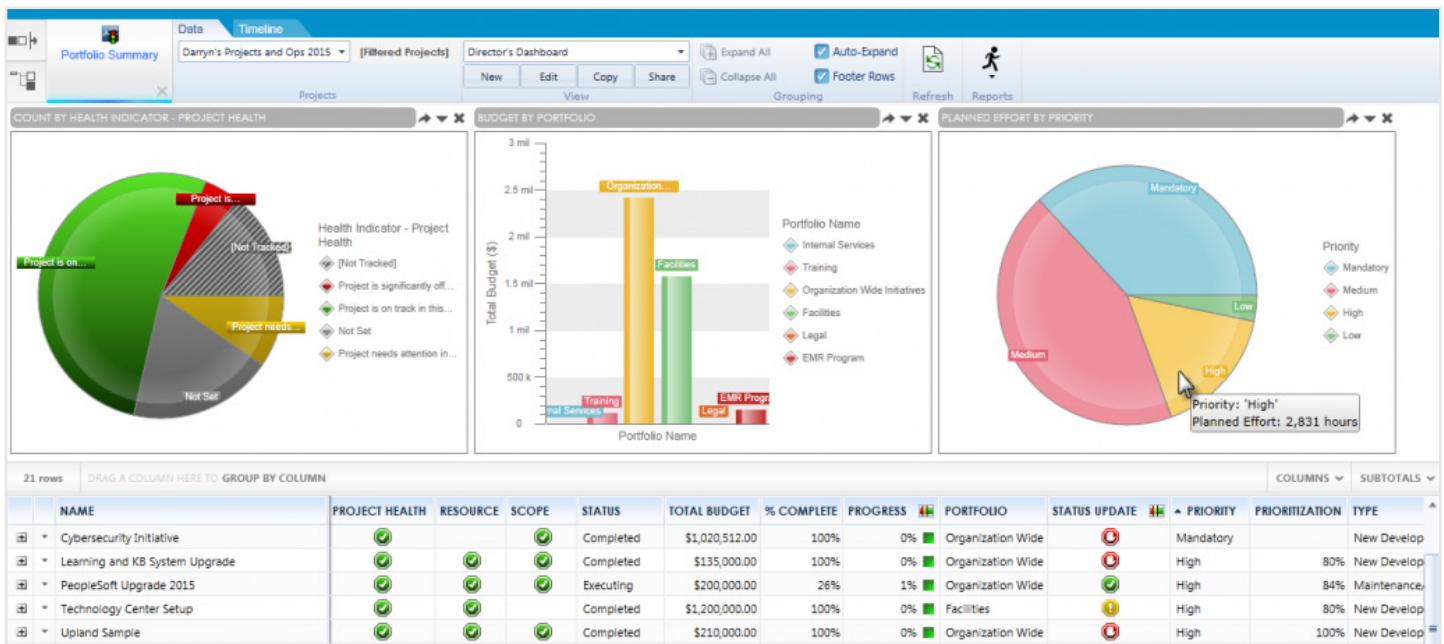
Executive Managers (CEO, CIO, COO, CFO) and Portfolio Managers may be looking at different metrics, but they all need the same thing: real-time portfolio, project, and resource information at their fingertips. Eclipse includes over 25 powerful reports that allow executives, sponsors, and project managers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