

## Out with the old and in with the new

*Upland's Powersteering drives cross-functional collaboration and automates Project Life Cycle methodology across Church Pension Group.*

### Business Needs

After implementing a PPM tool from a PowerSteering competitor, Church Pension Group's Project Management Office (PMO) started to realize that their previous application did not fit the needs of the organization. CPG decided to make a change and reevaluate their current application decision with a new selection process featuring multiple vendors.

### The Solution



Twelve Church Pension Group team members tested and evaluated several different Project & Portfolio Management offerings. The twelve CPG employees overwhelmingly voted for Upland's PowerSteering.

### Benefits

- PowerSteering's critical capability integrated the strategy, performance and budget data into a single application.
- PowerSteering enabled the automation of the existing Project Life Cycle (PLC) methodology across all projects, ideation, resource and annual planning, including multi-year strategy planning, across the organization.
- With PowerSteering, CPG evolved from being an IT heavy project management implementation to looking beyond IT to include cross-functional team resource planning on non-IT projects and analyzing planning budgets versus actuals.



The Church Pension Group (CPG) provides pension benefits and services, life and disability insurance, health benefits, and property and casualty insurance to Episcopal clergy and lay employees and their families as well as Episcopal churches and institutions.

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**INDUSTRY:** Nonprofit  
**HEADQUARTERS:** New York, NY  
**WEBSITE:** [cpg.org](http://cpg.org)

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*"The PowerSteering team listened to our needs, adapted to our requests and met our timeline. We have a great working relationship."*

— **Ellen Taggart, Vice President, Project Management Office, Church Pension Group**

## Time for a change

CPG previously implemented a PPM tool from a PowerSteering competitor. Their Project Management Office (PMO) later realized that this application did not fit the organization's needs.

Twelve CPG employees from different functions across the organization evaluated PowerSteering against several of its competitors. The evaluation sought to use the software in many different test cases. At the end, CPG users voted overwhelmingly for PowerSteering. The CPG team knew that PowerSteering was the best tool to fit its diverse needs.

## Results that matter

PowerSteering has enabled the Church Pension Group to automate their existing Project Life Cycle (PLC) methodology across all projects, ideation, resource and annual planning, including multi-year strategy planning across the organization. Originally an IT heavy project management implementation, CPG has evolved to look beyond IT to include cross-functional team resource planning on non-IT projects. PowerSteering has also empowered CPG to properly analyze planning budgets versus actuals.

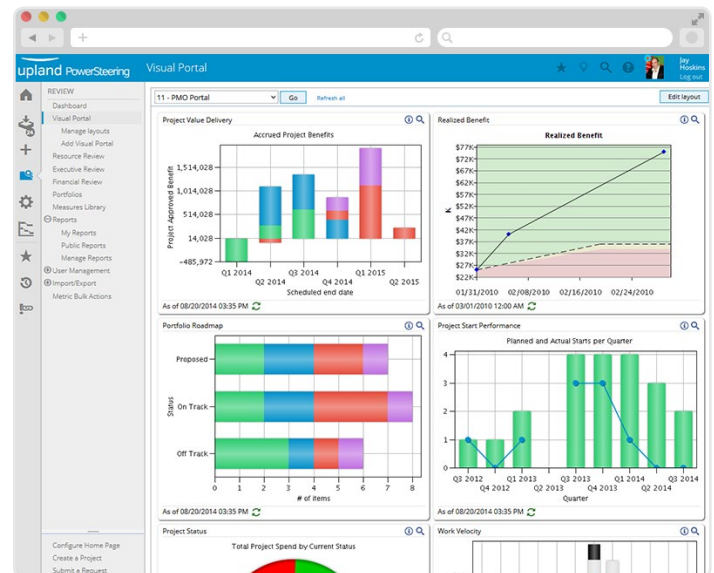
## Valuable lessons learned

The Church Pension Group gained some important knowledge and experience during their first PPM tool implementation that helped make the PowerSteering rollout successful:

- 1. Use a slow-go thoughtful methodology** that doesn't try to implement all of the tool and functionality at once. CPG took a year to 18 months to do the full implementation.
- 2. Focus on using the functionality** that enables more efficiency at the start and less on using all of the tool.
- 3. Start with a small team of heavy users**, add and engage the executive leadership, and then roll-out to more users and utilize additional functionality.

### Top-down, visual view of the complete portfolio

Obtain top-down visibility into projects, work and investment with Upland's PowerSteering application.



### About PowerSteering

Upland's PowerSteering enables powerful, scalable and uniquely flexible top-down program and portfolio management without requiring granular task and resource tracking. It is a cloud-based software application that combines the robust program and portfolio functionality demanded by global organizations, and provides class-leading analytic and financial tracking capabilities.

### The Upland Product Family



Upland's family of cloud-based enterprise work management software helps every team in your organization do their best work. See what you can do with Upland. Contact us at 855-944-7526 or info@uplandsoftware.com.