UNIVERSITY OF EXETER 'MAKE THE EXCEPTIONAL HAPPEN' WITH ONE SOURCE OF CONSISTENT DATA FOR QUALITY DECISION MAKING

The University of Exeter combines teaching excellence and world-class research with high satisfaction amongst its 26,000 students. Awarded gold in the first university Teaching Excellence Framework, the University is rated 16th in the UK in the most recent Research Excellence Framework, and ranked 12th in The Times and Sunday Times Good University Guide 2021. Its vision is 'to make the exceptional happen'.

INDUSTRY
Higher Education

LOCATION
Exeter, United Kingdom

CHALLENGE
Support investment decision making, resource management, boost project manager productivity, and to provide a single source of information.

PRODUCTS & SERVICES
Microsoft Project Online, Microsoft Power BI

RESULTS
Accurate and consistent project data provision. Manual reporting eliminated. Increased effectiveness of PMO. System license cost saving. Platform for enterprise-wide consistent portfolio management.

Keys to decision making

The University is committed to best value decision-making and resource management. Achieving both requires consistent, accurate, and up-to-date project information. The IT department's existing Project Management toolset was not cost effective and did not easily support quality reporting and project delivery. Project reporting had become a manual process, potentially undermining effective stakeholder decision making and assignment of resources to the right projects at the right time. Project manager productivity and efficiency was therefore a growing concern due to high dependency on manual reporting and a dislike for the current tool.

Helen Cocks was recruited as the IT Portfolio Management Office Team Lead in November 2020 as part of a new in-house IT PMO Team. The team set to work with a focus on enabling change and their mission was to put in place standards, systems, processes and documents to improve decision making, resource management, and project manager productivity for digital and IT project delivery. Ensuring they had the right PPM tool became their priority.

"It was clear we had an issue," says Helen. "The existing PPM tool was far too complex for what we needed, so project managers weren't using it. Some kept their own data on spreadsheets and created manual PowerPoint and Gantt reports. Consequently, there was limited centralised information and no go to view of in-flight projects, who was working on them, what they were achieving, or when they were due to complete."

"Making decisions about those projects or assigning resources was extremely difficult, and project managers were frustrated. Each of the 26 projects due to be discussed at my first IT Portfolio Board took 30 minutes on average to prepare. That was over 20 hours of combined IT PMO and project manager time and I was not keen to repeat that."

Speedy solution

Licenses for the existing PPM system expired at the end of February 2021 and the search for a replacement was made in earnest. Together with the University's Strategic Development Unit, the IT PMO team reviewed three PPM systems and Microsoft Project Online was selected.

"I had used Project Online successfully in a previous role," Helen says. "I knew it was really intuitive and people wouldn't need much training. This was important for project managers who had found the old system so complex to use."

CPS were engaged to support the speedy implementation plan. Before Christmas 2020, CPS presented a demo. They then ran a one-day discovery workshop to understand how the PMO wanted the system to support its work, what was to be provided out-of-the-box and what additions were needed. Project Online went live in early February, providing an opportunity to get used to the new system before the old PPM system was discontinued.

The PMO started with 30 licenses for Project Online, the same number of users as for the previous system. Whereas usage of the old system had dwindled to almost zero, Helen Cocks says that after six weeks 90% of the same users have now loaded project plans into Project Online.

Sharing the truth

Helen says: "I compare my first IT PMO meeting where project managers were saying 'don't even talk to me about the system' with my last meeting, where the team had no questions, no concerns, no complaints, and no negative feedback about Project Online. Members of the team say they have probably been more productive in one week than the entire time we used the old system."

The real test for the new system was the IT Portfolio Board. The February Board, held just a week after Project Online went live, was supported by project data directly from the system. At the March Board, the PMO shared live data and Power BI generated reports with Board members that showed project lifecycle priorities and additional dashboard reporting.

Helen now uses the system's data to assign project manager resource, and the value of that single view is being recognised outside the IT PMO. "I've had approaches from business analysis and change management colleagues," she says. "They say 'I want to be able to do that. When can I have a license?'."

End-to-end insight

Looking ahead, Project Online is planned to be the single central PPM tool across the university. The University's Strategic Delivery Unit is working with CPS to extend the use of Project Online for capturing and prioritising the project pipeline.

"So even if people are using different approaches to project management and practices, at any stage of project adoption or execution, the decision makers will always see consistent reports," says Helen. "There are massive gains for us around transparency and sharing information through Project Online and Power BI."

Business Benefits

- Better decision making from major improvements in project management reporting
- Resource assignment enabled through accurate project data
- Project manager productivity enhanced as manual reporting is eliminated
- £75,000 saving in license costs
- Single information source in place for an enterprise-wide portfolio management strategy.
- Monthly IT Portfolio Boards reports take one tenth of the time, saving 18 hours of PM time per month

A word from the team...

"I am delighted with the system we have and the additional reporting potential from Power BI. CPS turned it around for us in five weeks despite our detailed requirements and often competing internal priorities."

Helen Cocks, PMO Team Lead

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