NORTH ISLAND UNIVERSITY DELIVERS PROJECTS MORE SUCCESSFULLY, EFFICIENTLY AND CONSISTENTLY WITH PSODA

CASE STUDY: NEW ZEALAND NORTH ISLAND UNIVERSITY

Our universities help shape the lives and communities of people in New Zealand and around the world. The forward-thinking spirit, research-led teaching and cutting-edge discoveries defines them and makes them world-renowned. Most of our universities have large campuses across New Zealand and also offer extensive ranges of distance learning courses.

With many thousands of students and programmes, management, control and governance over activities are key to the success of any university.

At any one time, universities will have multiple projects underway - run by a range of teams representing widely diverse disciplines across the three campuses in as many cities.

From business managers responsible for strategic projects to IT managers looking after essential technology upgrades to construction managers tasked with keeping buildings and facilities running smoothly, the range of people managing projects at the university is as vast as its portfolio of courses.

And while a varied set of project managers are all part of one team, they are not always aligned when it comes to their project management approach.

For a university's council and senior leadership team it is crucial to assert greater control and visibility of how well projects are managed and performing across the organisation - to ensure the continued success of the university and its students.

Psoda worked with a key North Island university to address these challenges, here's how we helped them.

> The **reports** that come out of Psoda give us the **confidence** that there is a good level of **control and rigour** in how we are managing our projects across the university.

THE UNIVERSITY'S PROJECT AND PORTFOLIO MANAGER

THE SITUATION

The university's leadership team set up a strategic project management office to establish a consistent project management methodology for all key projects, and to increase project management skill levels across the organisation.

"A strategic project management office is not just about managing projects - it's also about helping to set direction, standards and methodology," says the Portfolio and Projects Manager in the Strategic Project Management Office (SPMO).

"We also wanted to help ensure our best project managers were working on our most strategic projects. The SPMO is responsible for overseeing and setting the project management framework for two major portfolios - strategic and IT projects, and construction projects."

The ITS projects include typical software development, and system and hardware upgrade work, while strategic projects cover some of the bigger initiatives the university wants to undertake. Construction projects include any new buildings or refurbishment of existing facilities.

All projects across the strategic and IT, and construction portfolios are now controlled by the university project management framework, based mostly on the PRINCE2 methodology. The framework forms the basis of an overall project management policy, approved by the university's senior leadership team.

"The policy is quite detailed in what it prescribes and outlines the steps and stages all projects need to go through," says the Portfolio and Projects Manager. The framework was developed collaboratively between the SPMO, ITS and the Facilities Leadership and senior managers, the office is responsible for ensuring it is kept up to date and managed."

CHALLENGES:

No **clear view** of how well projects were running

No **tracking** against milestones, deadlines and budgets

Stakeholders can't determine if the **information was up to date**

Little consistency across reports from different portfolios

SOLUTIONS:

Psoda provides **advanced project reports** across programmes and portfolios

Psoda can track any projects, milestones or budgets **progress and status**

Psoda is **integrated** with the university's system so the state of the budgets are **visible** to stakeholders

With Psoda as the **reporting tool** for all IT, reports are now all consistent

☼ THE SOLUTION

To help ensure projects adhere to the university's approved project management policies, all strategic, ITS and constructions projects are managed using Psoda as the key project management reporting and governance tool.

Psoda had already been used for status reporting, budget management and forecasting in the university's IT services department for several years and so was judged the best tool to expand to strategic and construction projects.

"We wanted to streamline the reporting tools used across the university and to have consistency in our reports. Psoda fit that bill from a project management perspective. We had also already spent a lot of time and effort to customise Psoda to get it to where we wanted it to be. So, we decided to roll it out to other parts of the organisation."

With Psoda as the reporting tool for all IT, business and construction projects, reports are now consistent across different portfolios.

The senior leadership team involved in governance groups is keen to see reports that are similar across all of the different portfolios. So, if they pick up a report from ITS it looks the same to one from construction.

Psoda has also been configured to match the university's project management framework, making it possible for the SPMO to ensure project managers follow the steps prescribed by the policy.

With Psoda configured with the phases, stages and governance gates set out in our project management framework, it has been very good for ensuring our project management policy is followed.

In addition, Psoda is also integrated with the university's financial management system, which means the actual state of project budgets is clearly visible to stakeholders.

"Having project budget data automatically fed from our financial system into Psoda makes it very easy for stakeholders to track and control budgets in their portfolios. They know what the actuals are and can use that information in their forecasts," says the Portfolio and Projects Manager.

To help ensure smooth adoption and use of Psoda across operations, the university appointed a Psoda Administrator. Training people on how use to Psoda is important so the administrator was brought in to work closely with project managers and help set up and configure the tool.

One of the key areas of focus for the administrator was to remove the fear of the unknown for project managers using a project management tool for the first time.

There is usually a bit of apprehension when people are introduced to a new tool. Project managers are charged with delivery and have data stored in various places. Asking them to make all that data visible in Psoda left some feeling exposed.

The Psoda administrator's role is to support the project managers so that apprehension is removed by recognising their discomfort and making it clear that they were not alone and could talk to me at any time."

Project managers also soon discovered how Psoda could help them highlight their successes.

"Some project managers are very good at delivering but not so good at reporting their progress. We have helped them see how with Psoda they can show off the good work they're doing, as well as highlight risks and communicate any challenges they're having. Now our project managers can see benefit of having all their project information in a central repository," says the Psoda Administrator.

There are now 115 Psoda users across the university's campuses.

PROJECT'S STATUS REPORT FROM PSODA

PROJECT	RAG	SCOPE	SCHEDULE	RISKS/ISSUES	BUDGET	FINANCIALS	PROJECT STATUS OVERVIEW
	AMBER	GREEN	AMBER	GREEN	GREEN	$4,520,000 $3,612,365	
	AMBER	AMBER	RED	RED	GREEN	$1,231,000 $822,431	
	AMBER	GREEN	AMBER	AMBER	AMBER	$52,190,000 $19,976,588	
	AMBER	RED	GREEN	AMBER	AMBER	$61,725,000 $28,634,018	

THE OUTCOMES

With the visibility Psoda provides about the status of key projects across various key portfolios, along with how they are tracking against budgets, the university now has a clear view of how well projects are running. This has helped them to deliver projects more successfully, efficiently and consistently.

Visibility of rigour and control

Governance and reporting are very important for the University. Psoda has given them the ability to run project status, milestone, and forecasting reports relatively easily across all portfolios.

The reports that are run from Psoda give the university the confidence that there is a good level of control and rigour in how we are managing our projects across the university.

"Psoda has delivered a consistent approach to project reporting - with Psoda we now have consistency in our reports to senior leaders across all areas. That gives them good visibility which enables good decision making" adds the Psoda Administrator.

All key project milestones are programmed into Psoda and with red, amber or green (RAG) statuses automated, stakeholders have a clear view of the progress and near real-time status of projects in their portfolios.

Having a single repository of project data gives the leaders the opportunity to see what is going across their whole portfolio. Senior leaders can run a status report on projects in their portfolio at any time.

It's simple for project managers to keep status information updated - it takes just five minutes every couple of days and the team has a very clear view of how all of their projects are tracking. This level of transparency has given project managers greater clarity on what is expected of them.

Project managers are aware of rigour required in how the university manages projects and what questions they can expect from governance boards on what is going on in projects.

Psoda also helps 'accidental' project managers keep on top of their projects. There are a few accidental project managers - people who are not project management professionals but who run projects from time-to-time. They use a light version of Psoda, which makes it easy to manage their projects.

Local knowledge and support

One of the greatest benefits of Psoda is that it is a New Zealand-based company, and that the university has direct access to Psoda founder and CEO Bruce Aylward and his development team for support issues or change requests.

"The ability to talk directly to the owner of a software company is huge - don't underestimate that!" Says the Project and Portfolio Manager. "A big benefit is that Psoda is easy to deal with. Working with Bruce and his team means we are working with the people who built the tool and know it intimately. They also understand project management and how we work in New Zealand. That level of local support and knowledge is of great value to us."

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MINUTES EVERY COUPLE OF DAYS TO KEEP PSODA UPDATED

KIWI OWNED AND OPERATED

Being able to work directly with the Psoda team makes it simpler and faster for the university to customise the tool for its needs, especially for reporting or building interfaces into other systems - and at a reasonable price.

It's important for the universities project managers to know their feedback is being heard. Psoda's support has been extraordinary. They are always so responsive, and Bruce is exceptional at understanding what we need as a business" quotes the Psoda Administrator.

A community of users

A further benefit of working with Psoda is the large community of users across the country.

Project and Portfolio Manager says "What works really well for me is that we have a community of Psoda users across New Zealand. Ideas for changes or new features from one client are often rolled out to all users if Psoda decides it will be valuable to us all. So, we may not pay the full cost of development for changes we want to make".

Psoda hosts regular user community forums in Wellington where users can learn from each other and share how they use the tool.

In conclusion

Overall, being able to exercise better rigour and control over how it runs projects, has been one of the greatest benefits of using Psoda for the university.

"Psoda has given us more visibility and control over our projects. The more visibility and control you have, the more opportunity you have to save costs and bring projects in on time. That has been of great value to us," says the university's Project and Portfolio Manager.

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