

## Case Study

# SYNOVUS LEVERAGES PLANVIEW ENTERPRISE RESOURCE MANAGEMENT TO GET IT DONE

### About Synovus

Synovus is a financial services holding company with approximately \$34 billion in assets based in Columbus, Georgia. Synovus provides commercial and retail banking, as well as investment services, to customers through 30 banks, 332 offices, and 466 ATMs in Georgia, Alabama, South Carolina, Florida and Tennessee. The company focuses on a unique decentralized customer delivery model, whereby its banks operate under separate charters, local CEOs and local boards of directors. With the support of a multi-billion dollar holding company, the Synovus family of banks provides customers with a broad array of specialized products and solutions that matches offerings from large regional and national competitors.

### The Challenge: On a Quest for Resource Management

Synovus' search for resource management began with a series of self-directed organizational questions to better define the current and ideal resource capacity management at the bank holding company's IT division: "Do we have the necessary resources to complete current and future projects?" "Are we assigning the right people?" "How can we extend the planning horizon?" "What operational bottlenecks are affecting our organization's productivity?"

The technical definition for resource capacity management is that it determines resource utilization and availability, anticipates new demands, and performs analysis to design optimal resource configurations for a given organization. But Synovus has a simpler definition. "We define resource capacity management as ensuring you have enough resources to complete the right work and if you don't, developing a mitigation plan to obtain more resources, becoming creative with project scope, or removing low-return work from the portfolio," explains Annette M. Blankenship, PMP, IT Analyst Lead at Synovus. "With resource management, you have a finite amount of resources. Taking on more work than resource has availability results in disgruntled employees, diminished returns, and missed deadlines."

Blankenship and her team realized they needed to balance IT's portfolio with a comprehensive resource management solution. They asked project and resource managers, team members, and resource portfolio analysts to provide input into what features and functionality they would like to see in a toolset. Based on these requirements, Synovus chose Planview Enterprise® for its Resource Management capability.

### The Solution: How IT is Done

The Planview Enterprise® solution was implemented but challenges remained regarding complete adoption by the IT department. With the new Resource Management process, project managers, resource managers, team members, and resource portfolio analysts enter work and time into Planview Enterprise. Data may include historical work information, small enhancement work, "lights on" work, break/fix work, project work, operational work, and vacation schedules. All of the information is shared and visible, bringing accountability and ownership to the process.

"There is a bimonthly process for new work efforts," says Blankenship. "Statements of work and change control are submitted and reviewed bimonthly after being entered into Planview Enterprise. Resource utilization is reviewed and risks are documented. If resources are over-allocated, we document risk and discuss with a board of various managers. We try to mitigate the problem and rework the plan if necessary. If approved, the work effort moves to an IT steering committee with senior level leaders who ensure the effort is on track with the plan, is properly prioritized, and is aligned with company goals."

The resource management process goal is to provide the desired balance and is what drives the resource portfolio. Reaching this goal gives executive management confidence that the projects are being handled for customers. Project managers can execute work plans more effectively and resource managers know the work is being completed. Portfolio managers can ensure their portfolios are executed on time and team members can finish their work without overtime because there is better planning.

#### CUSTOMER:

Synovus

#### INDUSTRY:

Financial Services

#### GEOGRAPHIES:

United States

#### USES PLANVIEW ENTERPRISE TO:

Manage and plan resource allocation effectively to extend the planning horizon, complete projects efficiently, ensure the right people are working on the right projects, and avoid operational bottlenecks to improve organizational productivity

*"The tougher the economy, the more important it is to know what your resources are working on and when. Planview Enterprise gives us visibility into projects and resources so we can be proactive instead of reactive."*

Annette M. Blankenship, PMP  
IT Analyst Lead  
Synovus

Using Planview Enterprise, Synovus can see 6-12 weeks out for project work, giving them the same amount of time to refine estimates based on historical and real-time data. Resources can be allocated and re-allocated if necessary, so that by the time the project commences, it can flow through the process with minimal unforeseen risk. "What if" scenarios have been considered for resources, funding, and change management.

## Lessons Learned

Blankenship is pleased with the success of the implementation and continues to press towards total adoption. She believes others can benefit from her lessons learned. "The tougher the economy, the more important it is to know what your resources are working on and when. Planview Enterprise gives us visibility into projects and resources so we can be proactive instead of reactive," she says. "Using historical information can help you make sure your resource management techniques are on track. Performing weekly analysis of current work at the team level as a control point between resource and projects managers ensures a balanced portfolio. Finally, for maximum adoption, I recommend creating various views of data (graphs, charts, and numerical- and text-based) that include dashboards and reports at the high and detailed level."

## What's Next

Now that resource management is functional at Synovus, the bank holding company's IT division is creating processes using various "sandbox" scenarios for capacity management and reporting. It is also in the initial stages of strategic management by business lines. "Planview Enterprise is a robust solution that offers valuable components for helping us streamline our processes across the enterprise," concludes Blankenship. "What began as a resource management exercise has morphed into a full-scale enterprise portfolio management endeavor that is making us a more efficient company."



For 20 years, Planview has been advancing the discipline of portfolio management, helping our customers change the way they manage people and money to make better business decisions. With a singular focus on portfolio management, Planview is the only company that combines customer-driven software, unmatched domain expertise, and proven best practices to solve each customer's unique business problems. For more information, visit [www.planview.com](http://www.planview.com).

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