

## Case Study

### UNIVERSITY OF MICHIGAN HEALTH SYSTEM GETS SMARTER ABOUT ITS PROCESSES – AND ITS RESOURCES

#### About University of Michigan Health System

The University of Michigan Health System (UMHS) is an award-winning health care system made up of three hospitals, approximately 40 health centers and 120 outpatient clinics throughout Michigan. The Medical Center Information Technology (MCIT) is the information technology provider for UMHS that supports 333 applications, 400 databases, and nearly 21,000 core devices. It oversees customer application management, device engineering and support, infrastructure and systems operations, process management, human resources, and compliance.

#### Reinventing the PMO

In 2001, with the help of Planview Enterprise, MCIT established a Project Management Office (PMO), and successfully put many PMO best practices in place. But with personnel changes in 2005, MCIT had to put the project on hold and recreate itself.

By 2007, a new PMO office had been formed, complete with a PMO manager, project manager and a Planview Enterprise administrator. The office introduced a 3-year, 5-level strategic plan that would address the people, processes, and tools necessary to first begin the pilot process and eventually establish organizational standards and institutional processes. MCIT determined it could take advantage of some of the unused functionality of its Planview Enterprise – Enterprise Portfolio Management solution implementation.

“We moved towards a project management methodology so we could leverage the robust functionality of the Planview solution,” explains Dawn Brennan, PMO manager at MCIT. “We found Planview Enterprise to be easy use once we had all the people and processes in place.”

#### Process Change for Better Resource Management and Capacity Planning

MCIT, which was using time tracking for its resource allocations, wanted to take advantage of automated metrics for advanced resource planning, and realized it would have to change its processes to do so.

“We wanted metrics for fields such as requested finish variance, cost variance, and schedule variance and were asking project managers for status reports,” explains Brennan. “Allocations gave us valuable details on resource availability and provided us with accurate percent complete based on actual effort – something authorizations just couldn’t do. If we wanted to utilize Planview for true project portfolio management and resource management, then we would have to change over to allocations.”

By fall of 2007, phase 2 began. MCIT looked at lessons learned and best practices, and developed a new work structure and work categories. Using allocations instead of authorizations, it conducted a pilot study which gleaned valuable information. “By reorganizing the work structure around applications, infrastructure, and devices, the PMO was able to determine how much effort was being spent in each of these areas through the Planview Enterprise reports,” says Brennan.

According to Brennan, much of the implementation was about communication, training, and documentation. Her team provided project management training and conducted resource manager meetings. Project managers already knew how to add projects into Planview, but they needed training on how to use allocations. “It requires more time in planning and estimating,” Brennan says, “but we now have the resource management we need for accurate capacity planning.”

#### AT A GLANCE

**CUSTOMER:**  
University of Michigan Health Services

**INDUSTRY:**  
Healthcare

**GEOGRAPHY:**  
North America

**USES PLANVIEW ENTERPRISE TO:**  
Improve Project Prioritization and Resource Investment Decisions by Leveraging Planview Enterprise to Implement Standards and Processes

“We now have portfolio management and resource capacity management with automated reports and metrics. This information not only gives us visibility into the status and cost of projects but is a tool that keeps everyone accountable and helps us better allocate resources.”

**Dawn Brennan**  
Manager, Project Management Office  
Medical Center Information Technology  
University of Michigan Health Systems

Her team educated resource managers as to the value of Planview Enterprise for resource management and prioritization. “We showed them that by using the tool to extract fact-based data, projects could be prioritized and executives would have the information they needed to make better resource investment decisions.

“We now have portfolio management and resource capacity management with automated reports and metrics,” she continues. “This information not only gives us visibility into the status and cost of projects but is a tool that keeps everyone accountable and helps us better allocate resources.”

MCIT’s next phase will include the rollout of Financial Management in Planview Enterprise. Brennan says project managers will use scripted dialogs, configured screens, and increase automated project management, portfolio management, and resource management reports. “Planview Enterprise offers us many features we can grow into,” she says. “And with each new feature, we are better able to manage our project portfolio at the enterprise level.



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