

Leading Software Developer Uses Enhanced Project Management for Stronger Strategic Positioning

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With the help of an enterprise-level project management solution based on the Microsoft Office Enterprise Project Management Solution, FRx Software is establishing a long-sought-after enterprisewide resource pool, saving significant time and dollars on resource allocation, and establishing a uniform project management methodology. Consequently, the company is better positioned to align development projects with long-term strategic goals.

Situation

Even in the best of economic times, the time-to-market pressures faced by software manufacturers never let up. But when the economy is weak, those pressures are compounded by the need to stretch resources to the limit, making it imperative that managers determine very early in the product-development process just where those resources can be most judiciously applied. The people at FRx Software know this lesson well, and it's one reason their company has become the leading provider of financial analytic software to thousands of mid-market and emerging enterprise organizations worldwide.

But even for a company that understands the importance of determining early how best to apply limited development resources, it's a tricky business to get it right, according to Senior Group Manager Jo Swango. "As the company expanded its operations in recent years, executives spent a great deal of time in yearly planning, but without a clear view into ongoing projects and resource commitments, it was extraordinarily difficult for them to align efforts with goals," she says. "They didn't have the details they needed on projects that were already in the pipeline, so they couldn't accurately gauge the impact a new project might have. As a result, they were often making critical high-level commitments in the dark."

To address this dilemma, Swango and her colleagues began considering a new project management solution for the enterprise. As they envisioned it, such a solution would help them to align projects more closely with corporate objectives, to execute project plans more expeditiously, and to assess resource allocations without having to hold weekly face-to-face meetings of managers and quality assurance professionals—a practice that was costing the company more than \$30,000 and 600 hours of management time each year.



Solution Overview

Customer Profile

Part of the Microsoft Business Solutions group of companies, Denver-based FRx Software Corporation employs 136 people and provides financial analytic software to mid-market and emerging organizations worldwide.

Business Situation

FRx Software needed a way to help managers make better decisions regarding resource utilization, development prioritization, and the alignment of projects with corporate objectives.

Solution

FRx Software deployed an enterprise-level project management solution based on the Microsoft Office Enterprise Project Management Solution.

Benefits

- Establishment of enterprisewide resource pool
- Annual savings of \$30,000 in management costs
- Improved time-to-market
- Foundation for uniform project management methodology

Software and Services

Microsoft Office Enterprise
Project Management Solution
Microsoft Project Professional 2002
Microsoft Project Server 2002
Microsoft Project Web Access
Microsoft SQL Server™
Microsoft Windows® Server 2000

Hardware

Dell PowerEdge 2650
Dell Dimension, Dell Latitude

Partner

Pcubed Inc.



Solution

As leader of the team implementing the solution, Swango worked with her colleagues toward a corporatewide commitment to adopting uniform project management methodology; establishing a Portfolio Management Office, with all project managers reporting into it; and deploying an enterprise-level project management solution. To prepare for solution launch, the team worked with employees throughout the company to establish standard professional portfolio management processes and to demonstrate the anticipated benefits of the solution through training and mentoring.

When it came time to select a technology, they decided to base the solution on the Microsoft Office Enterprise Project Management Solution. According to Swango, this decision was based on two factors: First, FRx Software had worked with Microsoft project management products since the late 1990s and most recently had used them for scheduling development plans and quality assurance resources. Second, after a thorough product evaluation, the team considered the Microsoft Office EPM Solution ideal for providing in-depth online project views, reporting, and analyses in a way that executives, managers, and staff would find easy to learn and use.

As work began, Swango engaged Eric Wilson, Account Executive at Microsoft Enterprise Premier Solution Provider Pcubed, for assistance in introducing portfolio and project management best practices and advice on how to approach the project management portfolio more effectively in terms of resource allocation and capacity.

In its initial deployment at FRx Software, the Microsoft Office EPM Solution is being used by two executives, four project managers, and 50 team members to manage 46 projects. These projects include Service Pack Releases and new product development enhancements as well a number of internal IT implementations. Between 50 and 700 tasks are included in a typical project, and the resource database contains the names of 136 people—the entire FRx Software workforce. Local users access the solution through client software on their desktops, and remote users access the solution a Web site on the company intranet

Benefits

Eliminating Costly Meetings and Improving Time-to-Market

Swango says that even after just a few weeks of use the advantages of the Microsoft Office EPM Solution became evident. “There’s no doubt that the Microsoft Office Enterprise Project Management Solution has improved overall effectiveness, accuracy, and efficiency of resource allocation,” she reports. “It’s helped us to move from individual resource pools to an enterprisewide resource pool, and it’s helped managers to easily identify underused and overused resources. As a result, we’ve been able to eliminate those weekly meetings that were costing us so dearly in management time and dollars.”

Even better, enhanced executive visibility into resource allocation has improved the company’s time-to-market. “The software industry doesn’t have the best record of delivering projects on time, but we managed to do it recently with a major new release,” says Connie Marrs, Vice President of Interface Development and Operations. “I credit the Microsoft Office Enterprise Project Management Solution for this, by helping us connect staff efforts to objectives in a systematic way. And I consider the Portfolio Management Office we created as part of the solution instrumental in helping us to adhere to these practices over the long term.”

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Easier to Prioritize, Align Projects with Company Objectives

Another Microsoft Office EPM Solution plus comes in the area of customization. As Swango explains, the team used the product’s enterprise custom code fields to establish a way of sorting, organizing, and displaying projects so that managers, team members, and other FRx Software employees can know exactly what they need regarding any project at any given time. “Through the Web-access capabilities of the Microsoft Office Enterprise Project Management Solution, people can view projects easily with the help of customized sorting,” she points out. “This enables senior managers to keep track of all the projects their reports are working on and to determine how closely a given project aligns with corporate objectives. It enables other team members to more easily understand where they fit into a project, and it shows employees who aren’t necessarily working on a given project how the progress of that project might affect their work. Consequently, executives find it easier to prioritize projects when it’s time for portfolio review.”

For Swango, being able to make project information available throughout the enterprise is the primary advantage of having a server-based approach, which the Microsoft Office EPM Solution provides. “What we like in particular is the way this approach streamlines project tracking,” she says. “It enables team members to update progress through the solution Web site while at the same time project control remains with the project manager, who can decide which updates are incorporated into the view and when.”

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Jo Swango
Senior Group Manager
FRx Software

Resource Department ▾		Resource RBS ▾											
All Levels		Director of Product Development											
		Months ▾ Days											
		☑ March		☑ April		☑ May		☑ June		☑ July			
Primary Skill ▾	Resource ▾	Work	Availability	Work	Availability	Work	Availability	Work	Availability	Work	Availability		
☑ Account Manager		522.7h	336.0h	212.0h	352.0h	72.3h	352.0h	76.8h	336.0h	193.0h			
☑ Architect		336.1h	168.0h	185.6h	176.0h	96.0h	176.0h			168.0h			
☑ ASP		442.0h	672.0h	473.6h	704.0h	208.0h	704.0h	16.9h	672.0h	3.2h			
☑ C++		38.7h	168.0h	19.2h	176.0h	28.0h	176.0h			168.0h			
☑ DBA		49.6h	336.0h		352.0h					336.0h	8.0h		
☑ Doc Reviewer		215.8h	336.0h	18.5h	352.0h	82.4h	352.0h	90.9h	336.0h	19.8h			
☑ Installations		451.2h	336.0h	38.3h	352.0h	78.1h	352.0h	43.7h	336.0h	37.1h			
☑ No Value		891.6h	1,176.0h	916.7h	1,232.0h	500.5h	1,232.0h	103.8h	1,176.0h	75.2h			
☑ Program Manager		3.4h	168.0h	1.0h	176.0h	1.0h	176.0h	2.1h	168.0h	1.1h			
☑ Project Manager		248.0h	336.0h	207.8h	352.0h	2.4h	352.0h	16.9h	336.0h	3.6h			
☑ QA Tester		647.4h	1,512.0h	154.7h	1,584.0h	954.0h	1,576.0h	958.1h	1,512.0h	419.2h			
☑ Requirements Writer		179.2h	1,008.0h	101.4h	1,056.0h		1,056.0h			1,008.0h			
☑ SQL/DTS		167.1h	168.0h	397.0h	176.0h	166.6h	176.0h			168.0h			
☑ Technical Analysis		51.7h	336.0h	537.7h	352.0h	444.7h	352.0h	19.0h	336.0h	16.0h			
☑ VB		215.3h	504.0h	448.9h	528.0h	652.6h	528.0h	381.2h	504.0h	127.6h			
Grand Total		4,459.7h	7,560.0h	3,712.5h	7,920.0h	3,286.5h	7,912.0h	1,709.3h	7,560.0h	903.9h			

Figure 1 A resource report, as displayed in the Web-enabled capability of the Microsoft Office EPM Solution, informs managers of under- or overallocated resources and enables them to schedule future work according to resource skill availability.

Toward a Uniform Project Management Methodology

The sophisticated portfolio analysis capabilities of the Microsoft Office EPM Solution are another plus, according to Swango. “Even early in the deployment of the Microsoft Office Enterprise Project Management Solution, FRx Software managers were producing analyses at a level they never enjoyed before—and their skills have only grown since then,” she says. For example, in status reports, managers are capturing metrics relating to development and bug-fix times among

FRx Software's 24 partners. With this information, executives can analyze from inception through maintenance how much it costs the company to continue offering an interface to a given partner's software. "This is an excellent way of determining whether a partner remains a cost-effective strategic resource," she adds.

The portfolio analysis capabilities of the Microsoft Office EPM Solution are also helping project management executives in building the influence of the Portfolio Management Office. As Marrs puts it, "We envision the Portfolio Management Office as a way of encouraging a uniform methodology across all projects, which makes it a key objective for FRx Software."

Marrs emphasizes that a uniform methodology makes it easier for everyone—executives in particular—to understand how the company is using resources and to communicate concerns with under- or overallocation. "With a uniform methodology it's easier for executives to take the broad view, to understand commitments and assign or reassign resources at an enterprise level," she says. "That's something I'm really excited about."

"An Excellent Collaboration Tool"

Because of their satisfaction with the Microsoft Office EPM Solution, FRx Software is beginning to make it available in areas beyond product development to include finance, support, sales, and marketing. The company also has begun deploying the solution to external vendors, starting with its documentation providers. As Swango explains, "Already we're able to use the Microsoft Office Enterprise Project Management Solution to post project updates, risks, and issues through the Web and enable these vendors to easily add their own updates. So far they love it, because it frees them from spending time on the phone resolving out-of-date project plans."

Using the Microsoft Office EPM Solution in this fashion also enhances the level of collaboration, Swango says—and not just with the external vendors. "In the past, we depended on e-mail to keep people informed of risks and issues that might arise in a given project, but it was hard to ensure that everyone who needed to know was on the right distribution list," she says. "Now, we're keeping people informed in a much more systematic way."

And that group of people includes both existing and new users of the Microsoft Office EPM Solution, who can be brought on board relatively quickly, according to Pcubed's Wilson. He points out that compared with another widely used project management tool, introducing the Microsoft Office EPM Solution to new FRx Software users has been an easy task. "With Primavera, it takes a course of 40 hours to really get people started," he says. "But with the Microsoft Office Enterprise Project Management Solution, we can bring managers in for just two days and other team members for an afternoon to teach them what they need to be effective."

Swango concurs: "The familiarity of our staff with other Microsoft technologies and the project guide within the Microsoft Office Enterprise Project Management Solution make it easy for project managers to build their plans step by step. The Web-based interface into the solution is also very easy for users to learn. In sum, the product's ease of learning—coupled with its powerful resource allocation and management capabilities, sophisticated portfolio analysis tools, and enterprisewide availability—makes the Microsoft Office Enterprise Project Management Solution an excellent collaboration tool."

Moreover, Swango and her colleagues plan to be using the Microsoft Office EPM Solution well into the future, thanks to what she considers its outstanding extensibility and scalability. "Just consider the stability of the technology, the enhanced resource pool, its strong, enterprise-level

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foundation, and future enhancements that we are looking at,” says Swango, who anticipates a return on her company’s investment in the technology in a little over a year of its deployment. “All of this makes us confident that the Microsoft Office Enterprise Project Management Solution will keep pace with the needs of a maturing organization like FRx Software.”

The Microsoft Office Enterprise Project Management Solution is the world’s leading project management program that helps a variety of users—from general knowledge workers to expert project managers—easily create and track project plans, manage schedules and resources, and share and analyze project information.

For more information about the Microsoft Office EPM Solution, go to:
<http://www.microsoft.com/office/project/default.asp>

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