CASE STUDY

invatron

Invatron uses PPM Express to optimize project portfolio management, boost efficiency, and improve project portfolio visibility with data-driven analytics.

invatron

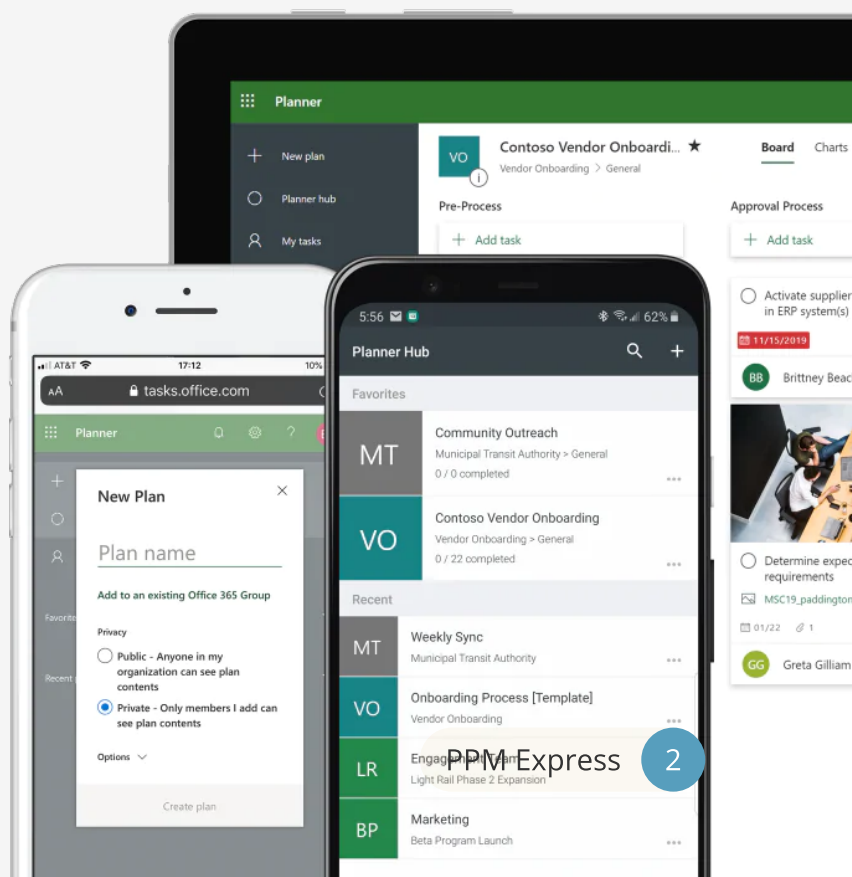**Industry:** Computer Software
Size: 50-100 employees
Country: Canada

Based in Mississauga, Canada, Invatron Systems Corp is a leading technology company providing **Fresh Item and Scale Management software solutions** for the food retail industry. Invatron's Periscope and E-Plum solutions are deployed collectively in over **20,000 supermarket stores worldwide**, actively supporting the in-store execution of Fresh operations across order replenishment, production planning, scale management, inventory management and compliance & regulations. The company enables its customers to maintain strong leadership in their fresh food offering by providing predictive demand forecasting, data integrity and decision support tools to increase sales, reduce shrink, and improve margins. Invatron's software solutions empower food retailers to achieve efficient operational practices to keep the "fresh" in fresh throughout the day, all while maximizing financial performance in the highly competitive grocery market.

Initial project management environment

Invatron offers a broad set of solutions for retailers that help grocery retail chains with fresh ordering management, production planning, financial inventory, and more. These are sophisticated products with multiple teams working on them. Invatron also provides unique setup and maintenance services to skyrocket customer success. All that needs to be managed properly, and Invatron team has chosen Planner as a system where they manage most of their work.

Microsoft Planner as a project management tool has its advantages. Invatron team appreciates it as a lightweight, easy-to-use solution, which requires none or minimum adoption period, and at the same time it seamlessly integrates with Microsoft Office 365 ecosystem, including Microsoft Teams, One Drive, and other software.

A need for business intelligence and visibility

As Invatron's solutions offering was growing and so was the customer base, the company's executives and project managers started looking for a project portfolio management solution, that would provide more detailed executive reporting, as well as portfolio visibility and the 'big picture' that reflects the actual status of all projects.

> *We were looking for a solution to integrate multiple Microsoft Planner projects in one consolidated view to help with Resource Allocation, and we found PPM Express. A tool that integrates MS Planner, uses the data and through Power BI provides great analytics.*
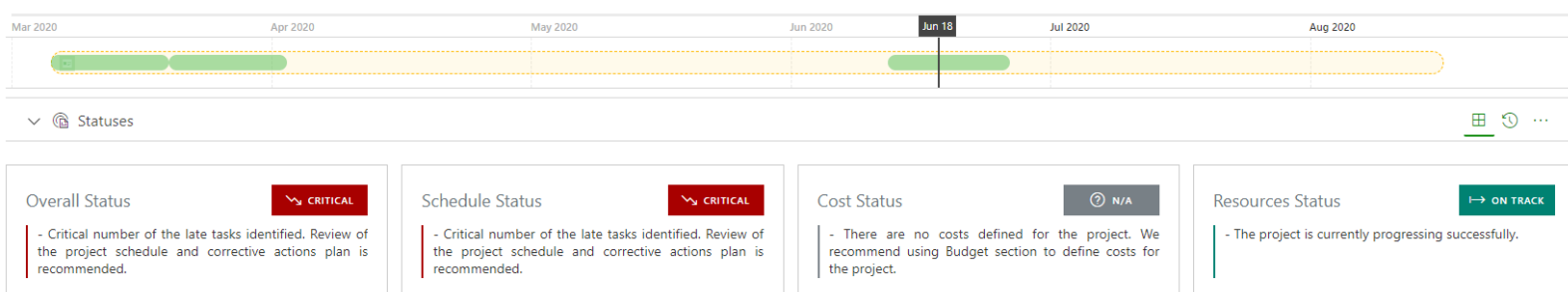
Paola Bobbio, Senior Project Manager

Despite Planner's proven advantages, the following limitations of its functionality became critical for Invatron:
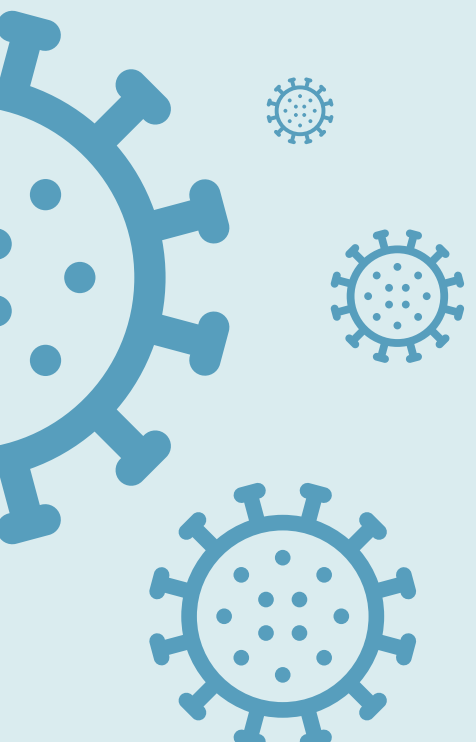
- Planner offers quite a modest reporting functionality;

- it has no budgeting/cost management features;

- there is no way to implement project portfolio management processes within this environment.

Mar 2020	Apr 2020	May 2020	Jun 2020	Jun 18	Jul 2020	Aug 2020

∨ 🗋 Statuses

Overall Status ↘ CRITICAL
- Critical number of the late tasks identified. Review of the project schedule and corrective actions plan is recommended.

Schedule Status ↘ CRITICAL
- Critical number of the late tasks identified. Review of the project schedule and corrective actions plan is recommended.

Cost Status ⊘ N/A
- There are no costs defined for the project. We recommend using Budget section to define costs for the project.

Resources Status ↦ ON TRACK
- The project is currently progressing successfully.

Also, Invatron wanted to find a way to reduce the number of manual processes involved with executive reporting and daily/weekly status reports. The decision was made to implement a platform that would automate these processes and provide up-to-date insights on a daily basis.

Data-driven approach to project management

Invatron has chosen **PPM Express** as a solution that provides an effective approach to challenges, they previously had with Microsoft Planner. The idea of going through a painful process of switching to a new, more complicated, PPM system is no more on the table since PPM Express fills the gaps related to executive reporting, portfolio visibility and budgeting.

At the same time, during the 2020 coronavirus pandemic, when all Invatron's employees were working from home, PPM Express helped the company to adapt to those new circumstances, minimize productivity loss, and maintain transparency across all business units.

" *We are currently using PPM Express as our Portfolio Management Platform. The reports and Dashboards provide valuable consolidated information at different levels, and the beauty of this is that it's just connecting information we already have and getting all the possible value from it.*

Paola Bobbio, Senior Project Manager

Invatron's executive team uses PPM Express as a budget and cost management tool to plan project budgets and make sure there are no overruns.

Moreover, with PPM Express Invatron team is getting **maximum value and insights out of project data**, which streamlines the decision-making process and boosts the overall efficiency of the project delivery. Project Managers and **executives spend up to 30% less time on project administration** and routine reporting, which makes it possible to focus on the products, clients, and new business opportunities.

Contact PPM Express

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