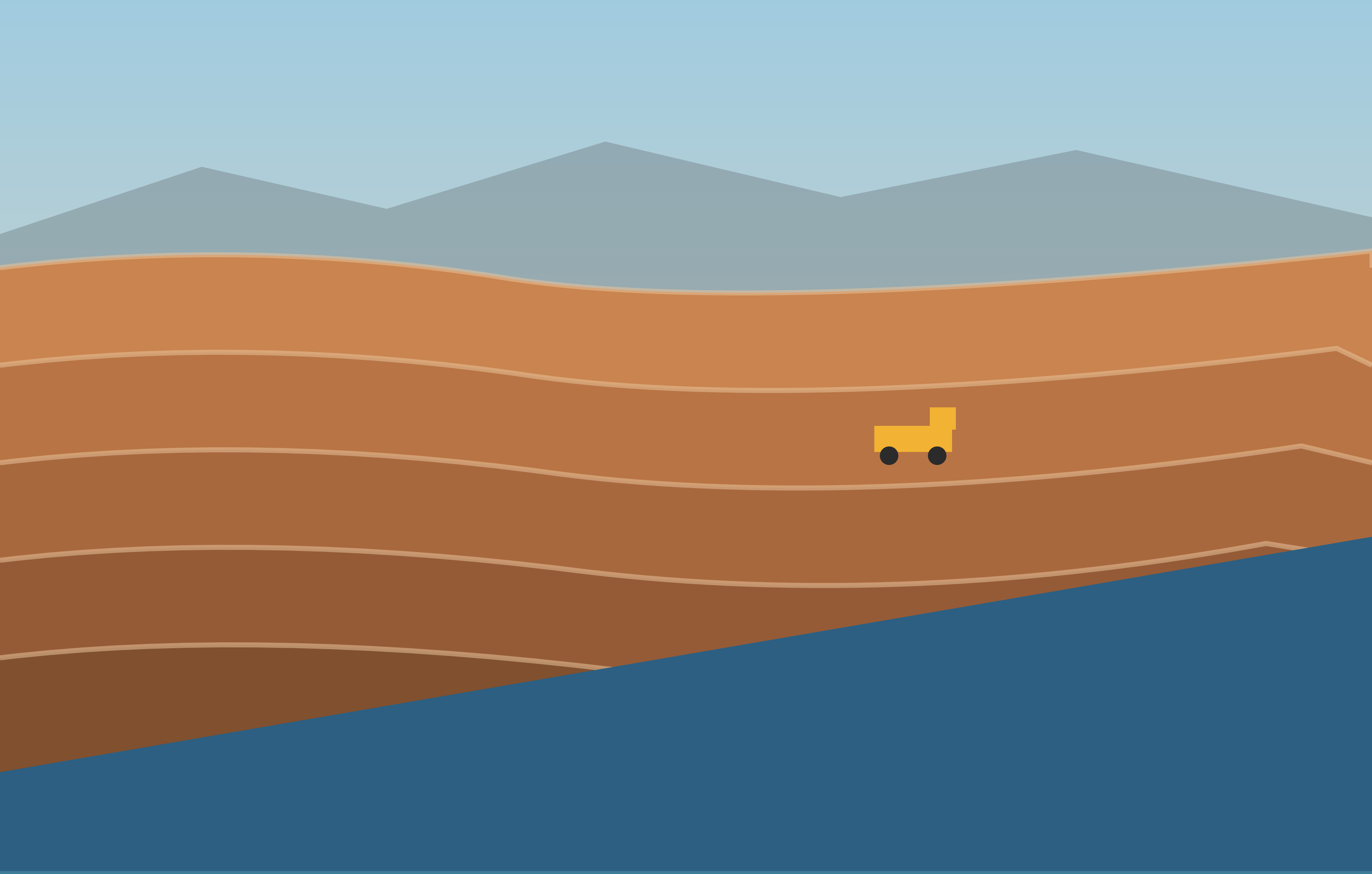

CASE STUDY

Creating One Portfolio View Across a Decentralized Mining Organization

PPM Express

COMPANY DESCRIPTION

The Australian mining company operates as a decentralized organization where individual sites, business units, IT teams, and operational groups have significant autonomy.

THE CHALLENGES

That model works well operationally, but it creates a challenge for portfolio management.

1. The organization did not have a single global IT portfolio.
2. Projects could belong to different organizational areas and use different prioritization criteria.
3. An IT initiative could be a critical dependency for a much larger business or mining project managed in another portfolio.
4. Different portfolios needed to retain their own management logic.
5. Management needed standardized status reporting, historical visibility, and consolidated portfolio reporting.

Separating those portfolios into independent systems would remove exactly the visibility the company was trying to create.

Different portfolios also needed to retain their own management logic. IT might prioritize throughput or architectural importance, while another portfolio might prioritize cost, business value, or delivery against a long-term investment plan.

THE SOLUTION

The company implemented PPM Express as a shared portfolio layer across the organization.

Projects from different business areas were managed within the same environment. Portfolios stayed operationally distinct but still rolled up into a common enterprise view.

1. **SHARED PORTFOLIO LAYER**
   Distinct portfolios roll up into one enterprise view
2. **PORTFOLIO-SPECIFIC SETUP**
   Own processes, layouts, views, fields, and prioritization
3. **VISIBLE DEPENDENCIES**
   Roadmaps and cross-project dependencies between portfolios

VALUE DELIVERED

The company used different processes, layouts, views, custom fields, and prioritization models to accommodate the requirements of different portfolios. Portfolio-specific information could be presented to the relevant users without requiring separate PPM platforms.

Roadmaps and cross-project dependencies provided visibility between portfolios. The organization could now see when an IT milestone, infrastructure activity, or other project deliverable affected a project managed elsewhere in the business.

Custom project fields and prioritization logic replaced spreadsheet-based scoring approaches, while Power BI and PPM Express reporting provided consistent management views.

Monthly status information, RYG indicators, project history, risks, issues, milestones, and other governance information became part of a persistent project record rather than a collection of disconnected spreadsheets and presentations.

RESULTS ACHIEVED

The company established a single source of portfolio visibility while preserving the autonomy of individual business areas.

Portfolio managers could manage projects according to the criteria relevant to their own organization while leadership gained visibility across portfolio boundaries.

Dependencies that previously required manual coordination became visible within the portfolio environment. Projects could be evaluated within their local context while still contributing to enterprise-level reporting.

The portfolio operating model worked with the company's decentralized structure instead of trying to eliminate it. PPM Express provided a common management layer across different project types, methodologies, and business units, and no portfolio had to operate identically to the others.

KEY OUTCOMES

One source of portfolio visibility

Leadership sees across portfolio boundaries

Autonomy preserved

Each portfolio is managed by the criteria relevant to it

Dependencies surfaced

Cross-portfolio impacts no longer need manual coordination

ABOUT PPM EXPRESS

PPM Express is a project portfolio management platform built for the Microsoft 365 ecosystem. It gives PMOs and portfolio leaders one governance layer across projects, portfolios, and resources, connecting the tools teams already use, including Microsoft Project, Planner, Azure DevOps, and Jira.

Organizations use PPM Express to prioritize the right work, plan capacity realistically, and report on portfolio health, with unlimited users at a flat annual price.

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