

## Case study

# Memorial Health System Speeds Adoption of Planview Enterprise with Change Management

## About Memorial Health

For more than 110 years, Memorial Health System has been dedicated to providing patient care, education, and research in central Illinois. This community-based, non-profit corporation has four affiliate hospitals that offer a full range of care for more than 700,000 patients annually.

## The Challenge: Promoting Organizational Change and Software Adoption

Memorial Health System IS Project Management Office was spending two to three weeks a month gathering information on projects and resources that was then immediately outdated. The group needed to improve project visibility and increase resource utilization, productivity, and return on investment.

“Project and resource managers were in constant conflict because they didn’t have a larger view of demand versus capacity and resources did not know the scope of work or priority,” said Ana Johnson, Manager, IS Project Management Office.

Knowing adoption would be difficult, the healthcare provider decided they needed a solution for project and resource management that would also enable best practices, processes, and change management techniques for adoption while ensuring ongoing success and maturity of their project portfolio.

## The Solution: Planview Enterprise – Phased Approach to PPM

Memorial Health System’s IS Division chose Planview Enterprise for Project and Portfolio Management for its ease of configuration, competitive TCO, PRISMS Best Practices, Reporting & Analytics, and its professional services approach.



## Overview

### Customer

Memorial Health System

### Industry

Health Care

### Geographies

Springfield, Illinois

### Size

5,900 staff, physicians, and volunteers

Memorial Health System uses Planview Enterprise for time tracking, project management, and resource management.

*“When my customers are asking me why I can’t get that task done, I can look in Planview Enterprise and easily answer when we can get the work done.”*

*– Ana Johnson, Manager, Memorial Health System*

The team engaged Planview Consulting to identify a roadmap for engagement that defined enablement, capabilities, and business outcomes for their approach to communication, marketing, and education for adoption and future state. They broke down their requirements into smaller objectives using SMART Goals method (Specific, Measurable, Actionable, Relevant, and Time) in order to bring the most value to the business with their limited capacity.

The phased approach included time tracking, resource management, and project management.

## Timesheets

Memorial Health System moved forward with processes and training with resource managers and led with the standardization of timesheets.

To overcome adoption barriers, the team conducted a case study with an internal group to identify issues, promote usage, and gain buy in. They created a report using data from Planview Enterprise to represent maintenance, support and project work. At first the results were skewed and representation of work was inaccurate. After a few months, the internal group continued to enter time into Planview Enterprise uncovering the value which led to stakeholder buy in and accurate reporting for decision making.

## Project and Resource Management

The next step was to implement project and resource management. Johnson and team leveraged Planview PRISMS® to define clear goals and promote an integrated education plan to ensure managers got the one-on-one training needed. They constructed standard lifecycle that could be applied to any project and then created custom lifecycles for select projects such as PMO or maintenance projects. Every project manager and resource manager received training on the new system and updated processes.

Project managers now manage their projects entirely in Planview Enterprise and resource managers review and approve resource requests and submit new projects to the Planview administrator to enter into the system.

Memorial Health System improved the likelihood and success of the implementation by keeping it simple, enlisting early change leaders, and establishing constant communication – from newsletters to online communities – to ease this transition and share the value.

## The Benefits: Standardization and Oversight

By anticipating the barriers to change, enlisting top-down support, and generating excitement, Memorial Health System was able to win the tug-of-war with its resource managers’ adoption of Planview Enterprise.

“Everyone can now see the value of having a single tool for timesheet approval, new resource requests, and requirement request fulfillment,” Johnson said.

Using Planview Enterprise, Memorial Health System has realized the following benefits:

- Project standardization for resource managers
- Improved balance with better oversight and insight into projects and resources
- Improved estimating and scheduling to better utilize resources
- Easy-to-follow workflow for adding/closing projects, making assignments, and status reporting

To learn more about what Planview Enterprise can do for you, visit [Planview.com/PlanviewEnterprise](http://Planview.com/PlanviewEnterprise).