

# CASE STUDY: Proof of Profits in Project Management

## EXECUTIVE SUMMARY

Many businesses utilize Microsoft worksheets and SharePoint folders as the standard method of managing projects. There are solutions such as Microsoft Project, Planner in Team, and Monday.com that are more robust and visibly report a project's momentum. There is no singular solution that can provide all business' needs (business rules, industry compliance, etc.) without extensive customization. In many cases, these off-the-shelf solutions require additional per user subscription costs and a steep technical learning curve as well. Our case study applies to INX International Ink Company (INX) has a team of 2 who manages their company projects using highly sophisticated VB coded worksheets with over 100 users (with varying technology skills), and over 60 entry columns per project for each of their locations across the United States. Symply Data improved operational efficiency by creating a data solution using Microsoft tools.

## SITUATION

A simple spreadsheet was created to track their loss elimination projects 15 years ago. With their certification in three ISO standards, they added more details and project charter components to the worksheet. It grew into a tracking solution that included thousands of lines of VB code and Macros to automate. Each plant project needed to be updated monthly by different users in different departments. These projects range in size from process improvements to capital expense projects. The sheet became increasingly difficult to navigate and technologically fragile. Because of its complexity, it became difficult to manage for novice users.

## CHALLENGES

- Create a solution where users can quickly create new projects
- Enable users to enter and store project details such as charter details, root cause analyses, and continuous improvement details (over 100 input fields).
- Enable users to view project progression, project costs, and return-on-investment post completion in real time
- Enable users to manage their projects from start to finish (supporting project workflows such as Projects On-Hold, Projects Rejected, & Projects with delayed start dates) based on their applicable workflow.
- Enable users to update projects as they progress.
- Enable the solution to notify assigned users based on the company's business rules.
- Provide operational and executive reports for strategic alignment with their business goals (i.e. KPIs, KAls, & KMIs)
- Provide dashboards for users, management and executive management to track progress across individual and multiple locations and projects.
- Provide a seamless method for ISO audits to identify and document continuous improvements within the business.
- Enable users to produce PDFs of the Project Charter Details historically and in its current state.
- Create a System Admin module to manage user permissions and accommodate data changes to satisfy current and future requirements

## SOLUTION

Symply Data created a custom web solution using Microsoft's Power Platform (Apps, Automate, and BI) and Azure SQL Server to replace their method of tracking projects. Projects are now created and managed on a Power App. It stores project details in a database for accurate and timely reports. A system admin module was added to enable Project Management Administrators to add new users, inactivate users, and make changes to project components as their business needs evolve. The solution's data model was designed to support Machine Learning models for seamless AI integration should they choose to do so in the future. Using intuitive and responsive pages ensured each project element is documented and calculated (where applicable). An email notification was provided based on the business rules and project inputs for project task completion. Symply Data's solution enabled the business to manage, administer and report all project related activities enabling the business to integrate financial data into their enterprise solution seamlessly.

## RESULTS

INX practices Lean IT and maximizes their resources when possible. They have limited IT resources to support over 900 users. They concentrate on supporting their ERP system, plant communications, technology devices and their infrastructure. Using Microsoft solutions and other subscription-based applications fulfills their administrative needs. As technology moves forward and the user base diversifies, supporting their users becomes difficult. By developing on Microsoft's Power Platform and working with Symply Data, the stakeholders can utilize the solution with minimal support from IT and still be able to scale up and move forward.

As with any development endeavor, scope creep can be expected at any time. The initial development requirements did not include elements of risk assessment, project charters and their expected tasks. Symply Data was able to add all components but the risk assessment process within the allotted time frame. As a resolution, we provided a method for their users to have direct access to the risk assessment documents and findings within their solution with a click of an icon.

INX applies a Japanese Lean Manufacturing methodology with Quality Management which focuses on equipment and people. Elements of this method were incorporated into the solution's design to improve productivity to achieve zero losses and reinforce production foundations. Symply Data, with the INX's business stakeholders, designed a solution that

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- Streamlined their project management tasks by enabling users to document their projects from start to finish and store supporting information in a single solution.
- Removed redundant data points and applied behavior data points for reporting and future AI initiatives.
- Incorporated business rules and automated tasks to minimize data integrity issues.
- Created notifications that document required task completion.
- Applied audit-friendly features to easily display and print project details for compliance needs.
- Developed project financial reports that align with their reporting structure
- Developed a System Admin module to support user access, business rule changes, and project detail expectations.
- Projects related to continuous improvement of their products and/or services are clearly identified with documented effectiveness based on their QMS process.

Symply Data's efforts produced a solution that will no longer require business stakeholders to manage their projects in worksheets. Business rules are incorporated into the project solution to ensure teams apply all required project management protocols. Project Leaders and members can update their projects in a centralized solution. The solution is customized to their business processes and compliance needs. Executives can view high valued projects from reports and review their progress and/or obstacles from the project entries. We delivered a mobile friendly and easy-to-use stable platform for users to enter their information. They also have confidence that their data is consistent and correct. Stakeholders' area able to concentrate on day-to-day tasks more effectively. The business saved over 4800 man-hours per year allowing subject matter experts to dedicate their time back into the business rather than supporting the worksheets and novice users.