

## ***eDelta Bermuda* Uses Clarizen to Manage Nearly 100 Projects, an Otherwise “Impossible” Task with MS Project**



Ken Winford is a consultant and co-founder of *eDelta Consulting Bermuda Ltd.*, a partner company to *eDelta Consulting* located in New York. Ken offers governance, risk management, and compliance services to Companies located in Bermuda. His work involves assisting organizations in building, managing, and deploying frameworks and methodologies to address common industry wide challenges in the areas of project management, information security, business continuity/disaster recovery, system development life cycle and program change, and IT Operations.

One of eDelta’s clients is *Capital G*, a small privately owned bank in Bermuda with approximately 200 employees. The company is part of a larger organization called *Gibbons*, a family-run organization that owns 10 international businesses ranging across a number of industries including automotive, banking and insurance.

Recently, eDelta was engaged to work with Capital G in establishing a Project Management Office (PMO) that included a project governance and management reporting structure. Through this work, eDelta was introduced to Clarizen which had already been purchased by the organization and was scheduled to be rolled out. Previously, Ken used Microsoft Project for managing projects; however he always felt that it was a frustrating tool to work with.

*“It was so frustrating trying to run a PMO using Microsoft (MS) Project. When we saw the Clarizen platform and its capabilities we were excited to implement our best practices and methodologies into the tool. With Clarizen, we could do things that we could never do with Project. Specifically, we could concentrate multiple projects and understand the cross-impact of each project on the organization. We could link dependencies across projects and use the roadmap and dashboard modules for project governance and management communication. We were really impressed with how much more robust, flexible and simple Clarizen is relative to MS Project”,* says Ken.

Ken reported that eDelta Bermuda is currently using Clarizen to handle 98 concurrent projects for Capital G. As an example of the scope of these projects, one of these 98 projects is the complete transition from one banking platform to another. Currently Capital G is changing the whole core of its banking system which includes savings, credit and loan, as well as at least a dozen different add-on products such as data warehousing, card services, anti-money laundering, treasury, and investment-based products. The project currently involves 15-20 different interfaces and is being entirely managed with Clarizen.

*“If we had to track all the tasks and report on the progress of 98 projects with a tool other than Clarizen, we would need a team of people”,* says Ken.

In addition to the using Clarizen to manage hundreds of projects/sub-projects at any given time, Ken also enjoys Clarizen's ability to provide an objective view of each project, something that he couldn't find with MS Project.

*"We've always had a big issue with MS Project because it leads you to view your projects in a subjective and/or qualitative way. Clarizen is really great at removing subjective thinking from a project and objectively view what's going on with a project. With Clarizen the status of a project 'is what it is', there's no room for interpretation", says Ken.*

Another feature that Ken finds useful is Clarizen's visual markers for a project's status (green, orange and red icons). By visually communicating the state of a project, everyone using Clarizen can get an immediate sense for the project's progress.

*"Clarizen provides that 10-second view that lets you know what's going on with a project without having to dive into all the finite details. From a managerial perspective, we don't have to stress about the unknown, trying to guess what the status of a project is. With Clarizen it's right there in plain sight", says Ken.*

Ken also finds that Clarizen is helpful in providing a clear view of a project's resource allocation. He says,

*"We found it extremely helpful leveraging Clarizen's resource allocation functionality such as resource load and potential work effort which is used for forecasting. Also, we can easily use it for monitoring not only the projects but related tasks as well. By pulling up the roadmaps for anyone's projects, we can see the status of the milestones."*

#### *Additional Note*

Recently, Ken met with one of his other clients regarding an extensive and complex implementation project which was being handled through MS Project. He was presented the project and asked to load the entire project plan into Clarizen. After transferring the project from MS Project to Clarizen, the managers inquired how long it took to load the entire project, to which Ken replied, ten minutes. Then he showed them the roadmap in order to provide insight into the project's status. The managers were shocked that Clarizen's roadmap functionality revealed that more than fifty percent of the projects were in the "red", while the rest of the other projects were in the "orange".

*"There is something about MS Project that keeps project risks and status in the background whereas with Clarizen, the curtain is pulled back and you can really see what's going on. Clarizen significantly improves the visibility of the entire project and as a result, increases accountability not just of the project, but of the entire organization. Additionally, eDelta has gained a significant advantage in increasing the quality of services it delivers to its clients through Clarizen", says Ken.*