

Ingenia Group uses Clarizen to Expand Project Perspective from Individual View to the “Big Picture”



Ingenia Group is a full-service interactive agency. It offers interactive design, rich application web development, mobile applications, web hosting, interactive marketing, and consulting services. Located primarily in Mexico City with a customer service office in New York, Ingenia Group was founded in 1996 and employs approximately 100 individuals. Clients range from a wide spectrum of industries including food and beverage (Coca-Cola Mexico, Grupo Bimbo), financial institutions (The Mexican Stock Exchange, Visa), retail (Walmart), and consumer brands (Brother, Bubulubu, Rotoplas). The company’s main focus is design and usability, and its work is divided into two main divisions, design and development.

Web Project Director Miguel de Olarte is a computer engineer and is in charge of overseeing all the project managers within Ingenia Group. Miguel has been working at Ingenia Group for over a year now but when he first started working for the company, one of his main objectives was to bring some order to the company’s project management system, which on average involves managing between 50-60 projects in parallel.

Before Miguel starting working on optimizing the project management system, the company’s project management was handled on a task-by-task basis. Ingenia Group had worked with many web-based tools like Celoxis, Cooper Project and open source tools but the team would just not use them. Using their Macs, Project Managers would create their work plans using Merlin. Because Miguel was working with a PC he would aggregate all the individual work plans manually into MS Project. Providing Miguel with a view of the whole company, MS Project was the platform Miguel used to assign tasks, manage schedules, and allocate resources. This was the status quo until both Miguel and Operations Director and CEO, Pablo Hernandez, decided to look for a more cohesive project management solution.

After considering a number of solutions, Miguel was faced with the final challenge of deciding between AtTask and Clarizen. Miguel explains,

The problem with AtTask is that the licenses are very expensive. Plus, after a long research period, we saw that Clarizen has a very strong reputation for managing projects. At the beginning of December 2010 we began working with Clarizen’s trial version and by mid-December we made the final decision to work with Clarizen.

Miguel also wanted his native Spanish speakers to be able to have the Spanish language as their default option. Clarizen’s multi-language support including Spanish would help ensure faster ramp up time.

In charge of introducing Clarizen to the team, Miguel decided to break the integration into stages in order to allow for a smooth transition from the old way of managing projects to the new. Initially, Miguel gave access to the main project managers in order for them to get acquainted with the tool and learn how to use it properly.

In the past, the project managers would create a list of tasks unique to the developers/designers and forward them on to the resources. Now with Clarizen, everyone sees a bigger picture of the entire project. Although this was a positive improvement, initial adoption of Clarizen was mixed. While the developers had an easier time integrating the solution into their work, the designers showed a bit of resistance. As Miguel told us,

I attribute this resistance to a paradigm shift that we made from managing projects from the individual's perspective to managing projects anchored to the project itself. The focus changed and people were suddenly asked to see beyond their individual role, to see a wider perspective.

For Miguel, using Clarizen has already demonstrated some immediate benefits, especially in terms of time management and getting a clear view of the company's resources. He continues,

With MS project I used to spend hours every week updating and checking people's entries and overall projects. With Clarizen I can see all the projects in one view, making it easy to see which people are working on what tasks. This helps me to identify gaps and evaluate workloads in order to optimally manage our resources. With Clarizen, global planning is remarkably easier.

Ingenia Group team members are still learning to use Clarizen. They are very happy with the tool since they have an online collaboration tool that works great, that shows the company the big picture, and has made everyone accountable for their work. Project visibility with Clarizen is great and has truly benefitted Ingenia Group.