

## CASE STUDY

### QuantumPM Helps Laboratory Informatics Consulting Firm Transform their Business with O365 PPM as their Work Management Platform



*“The solution provided by QuantumPM is the foundation for moving our organization forward and has given us a platform to build from. We can do just about anything we want now; we just needed the right tool. That wouldn’t have happened before. None of this could have happened without Project Online and QuantumPM.”*

That’s according to **Jeffrey Swerdlow**, Project Management Office (PMO) Manager at LabAnswer, when describing the real-world business benefits his organization has experienced from its deployment of Microsoft Office 365 PPM combined with BIAAdvantage from QuantumPM.

#### The Company

LabAnswer is North America’s largest independent scientific data management professional services organization. They have offices across the United States with headquarters in Sugar Land, TX, and the largest office location in Orlando, FL. LabAnswer offers services for the full lifecycle of laboratory informatics systems, from strategy to implementation to systems support, and provides project management oversight for single stage and full life cycle enterprise projects.

The Microsoft O365 PPM solution implemented for LabAnswer covers the entire organization across North America. There are 230 total users of the system: 75 Project Managers using Project Pro for Office 365, 143 total users acting as Team Members and 12 Executives using the cloud solution to access reports. All the users fill-out timesheets in Project Online.

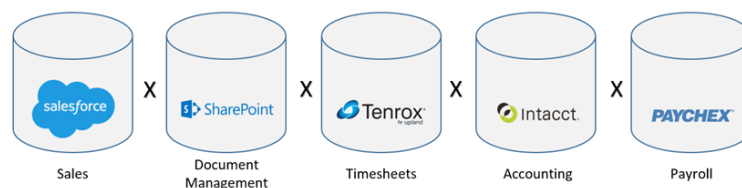


#### The Challenge

LabAnswer is a project based organization and was using Tenrox for project and time management. Key challenges they were facing included:

- Legacy PSA application with limited support & upgrades
- Issues with data integrity resulting in low confidence
- Inconsistent use of the application with very low adoption
- Disparate, disconnected applications

LabAnswer needed to improve their PM Toolset, improve collaboration within the organization and ensure data integrity so they could better estimate project profitability and ensure company stability. In addition, they used SharePoint for document storage only and used other cloud based systems for sales, financials, and payroll. All of the systems were disconnected requiring significant manual effort to move data.



## QPM CASE STUDY

LabAnswer was looking for a solution that could connect and streamline their business processes end-to-end in order to:

- Provide accurate and timely forecasts of resources (Resource Management)
- Capture resource time (Time Management) for payroll and billing
- Estimate sales revenue and profitability by project
- Track actual resource profitability
- Track issues (Issues Management) & risks (Risk Management)
- Capture project artifacts (Document Management)
- Provide accurate reports to different levels of the organization

After extensive research, LabAnswer determined that Microsoft O365 PPM was the perfect project management solution to fit their strategic project management vision. However, they would need to integrate Project Online with their other line-of-business systems in order to make their vision a reality.

A key challenge for LabAnswer was finding an innovative Microsoft O365 PPM Partner that:

- ⇒ Had a depth of technical skill and business knowledge
- ⇒ Understood Project and Portfolio Management
- ⇒ Recognized how PPM could integrate with other line of business system
- ⇒ Appreciated their unique requirements and vision

The challenge was met when they were introduced to QuantumPM.

## The Process

LabAnswer and QPM jointly reviewed the solution requirements to determine which components could be met by Project Online and which would require added capabilities. QPM introduced LabAnswer to their innovative BIAdvantage (BIA) platform and Project Connectors as a complete solution that would work seamlessly with Microsoft O365 PPM to provide the integration platform needed to complete their vision.

In order to make this whole process and solution happen, QPM provided a scalable PPM configuration of Project Online at the Workflow, EPTs, PDPs, Project, Task, Resource and Assignment levels so that data could be analyzed, exported and imported. Timesheet periods and frequencies were defined so that they would integrate with other cloud based systems and current business processes to ensure timely and trustworthy data.

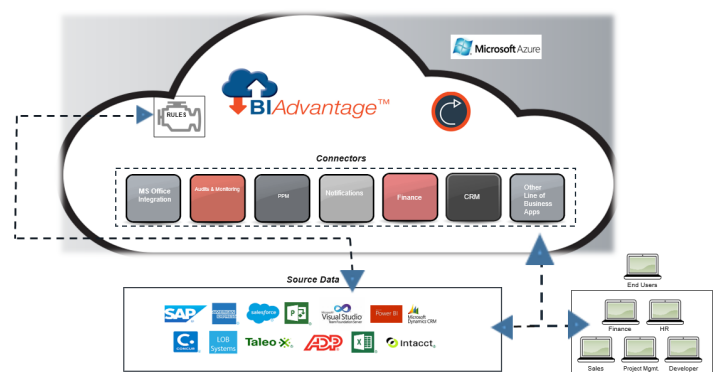
QPM spent a lot of time interacting with the consulting team and the owners of LabAnswer's accounting system to understand that system's capabilities. QPM has strong project management expertise and integration skills and they spent several months on the solution design, development and testing which was critical to verifying requirements and ensuring processes were correct. This was key to the smooth cutover from the old system.

According to **Beth Samaniego** — Controller, this process worked well: *"They anticipate our needs and understand the details of our systems better than we do. They are more like a co-worker to us than a vendor."*

## The Solution

LabAnswer now has a unified work management platform to manage its entire process from the sale, project creation and resource forecast to project completion. Throughout the process, accurate data is needed in key intervals to manage bonuses and payroll as well as customer invoicing.

The solution is built on Microsoft's O365 cloud platform with Project Online at the core. Microsoft Project Online is used to support the full project life cycle for services from proposal through closeout. Workflows are used to progress projects through each stage with e-mail notifications and controls to ensure data quality. The addition of BIAdvantage to the solution provides a seamless inter-



face between all of the required line of business systems that perform critical business functions. Manual intervention is no longer needed to move data between systems, leaving time for LabAnswer to analyze the data and focus on their core business.

System generated notifications are sent out during every step of the process, including:

- Email notification reminders
- Timesheet completion reports
- Time discrepancy reports
- PTO time balance reports



*"Since migrating to the new system, we have had NO data integrity problems. This speaks in large volumes to the way the requirements were gathered and how the development team developed the solution. All the pieces came together."*

**Jeffrey Swerdlow**  
Project Management  
Office (PMO) Manager

## Results

The unified work management solution using Project Online and BI Advantage has eliminated the manual transfer of data between systems. Automation has added flexibility to:

- Set rates for revenue, cost, and profit margins by project and resource. It allows multiple rates and custom calculation of profit margins on a real time basis pulling data from the general ledger.
- Monitor events and create reports on demand through an interactive console.
- Automate timesheet reporting, validation, and reporting
- Consolidate data from SharePoint and Project into one place to improve collaboration. Project Workbooks include project health, trending, phasing, risk management, issues, milestones, change requests, action items, and more.
- Project and resource information is automatically synchronized between Project Online and the company's accounting system.

Automated business rules are used to transform time entered in Project Online into formats needed to support Project Accounting, Invoicing and Payroll systems. These rules streamline the overall process and prevent inconsistent data from being introduced into these dependent systems.

Specific ROI benefits include elimination of manual processes such as the reporting process that used to take about 16 hours a week to complete. Less human intervention allows LabAnswer to focus on data analytics and continual improvement. In addition, LabAnswer now sees:

- ⇒ Improved quality of critical data that is shared between solutions, including: Project and Resource attributes, time entry data used for invoicing and payroll, and operational data used to forecast resource availability and project profitability.
- ⇒ Reduced time required to produce operating and financial reports from days to just a few hours.
- ⇒ Reduced the effort required to maintain project schedules and resource allocations for busy project managers from hours per week to an hour or less.
- ⇒ Streamlined the project profitability forecasting efforts by allowing the business development teams to perform what-if alternative analyses with proposed resources and timelines within the Microsoft Project tool, saving hours of effort when developing the delivery project schedule.

LabAnswer now has the accurate data they need to ensure projects are profitable and, more importantly, that the company is profitable. QPM created a vision and options for rate management that has provided more business control and trust because accounting has confidence that rates are being used properly. They trust the data they receive. Cost margins have been reduced and the employee's understanding of project management, resource rates, project costs and the impacts of those on the organization are more widely understood.

BI Advantage has enabled LabAnswer to now push the organization forward. With a deeper understanding of project management, a flexible solution that can expand and change as needed and an innovative partner that understands their vision and goals and is visionary in their approach, LabAnswer is set to tackle the future.

LabAnswer is now able to gain more insight about the company, visualize data in new ways, see the profitability of each of its projects and the company, and make better decisions to meet the demands of the future. Their ability to realize continued growth is stronger than ever as they continue to expand the solution to connect additional platforms. Visions start to come together and never end as more powerful tools come together using Microsoft O365 PPM capabilities.

## For More Information

For more information about **QuantumPM** products and services, call (303) 699-2334 or visit our Web site at: [www.quantumpm.com](http://www.quantumpm.com)