QuantumPM

CASE STUDY

QuantumPM Helps Beverage Bottler Achieve Accurate Time Reporting

"Once the system [BI*Advantage*] was put into production, our need for manual review of time entries dropped from 30% of submissions to less than 5% almost immediately. The system uses business rules to monitor adoption, compliance, and performance without human intervention, and errors are corrected by the end-users within days instead of months."

That's according to Mary Morabito, Information Systems and Services (ISS) Project Manager at Coca-Cola Bottling Co. Consolidated (CCBCC), when describing the real-world business benefits her organization has experienced from its deployment of BI Advantage.

BI*Advantage* is a Business Intelligence (BI) solution developed by Englewood, Colo. based QuantumPM, a Microsoft Gold Certified Partner. **BI***Advantage* has the ability to consolidate data from any number of systems (including Microsoft Project Server, which CCBCC uses as its Project Portfolio Management solution), analyze the collected data, and provide specific messages directly to the people responsible for the data input. It also provides reports to the resource managers, project managers, and Project Management Office leaders so they can monitor activities. **BI***Advantage* performs these processes as needed without any manual intervention.

Microsoft Project Server is a flexible on-premises solution for PPM and everyday work. Team members, project participants, and business decision-makers can get started, prioritize project portfolio investments, and deliver the intended business value from virtually anywhere. Project Server facilitates collaboration and communication, increases agility and control, and simplifies IT support. CCBCC extends these benefits with **BI***Advantage*, which gleans actionable business intelligence from the project information stored in Project Server's centralized SQL Server database.

With distribution stretched across 12 states, CCBCC is the nation's largest independent soft drink bottler. Separate from The Coca-Cola Company, its 47 distribution centers and five production centers employ approximately 6,000 people. CCBCC produces 300 different SKUs and sells 22 million cases, or 14% of its annual sales volume, to other Coke bottlers.

The Challenge

The Information Systems and Services department manages a portfolio of ISS initiatives, enhancements and run the business projects. With this heavy volume of operational work to manage, it is critically important that ISS makes sure that everything is well managed, and that project costs and resource workloads are predictable and within expectations. **BI**Advantage's proactive monitoring capabilities coupled with its consistent and accurate reporting tools are key to keeping this department running smoothly.

Specifically, ISS was spending a lot of time reconciling its vendor and internal personnel costs. The organization was using a weekly validation process that included submission of time from hundreds of personnel against various projects and operational activities.

Prior to using **BI**Advantage, manual reporting and reconciliation efforts were completed by several PMs. With **BI**Advantage, the time-entry process is proactively monitored without human intervention. All data submitted to the system is reviewed and validated for accuracy. If a timesheet is not submitted, **BI**Advantage automatically sends out a message to the timesheet submitter and their supervisor requesting action. A summary report is also sent to resource and project managers so they can follow up with team members. Additional analytics and reporting are provided regarding specific projects, work groups, and other categorizations as needed.

"**BI**Advantage simplifies the way we work. It is responsive and adaptable to change. It creates multiple reports at the same time and does so accurately and efficiently. That powerful functionality combined with a company that delivers excellent service and support creates a winning BI solution," Morabito said.

BIAdvantage provides role-based capabilities to oversee a project portfolio, plan and manage work, and report on the status on a real time basis. Individual team members report where they spent their time each week for various projects and administration functions using PWA to enter time against their Project Server system. Project managers then update their projects with actual work consumed while resource managers review and approve all resource work performed.

If everything is working as planned, **BI**Advantage allows CCBCC to better understand how much work has been performed by its internal staff and consulting resources as well as what work remains to be done. ISS departmental chargebacks are also ascertained with the system. Unfortunately, the Project Management Office found itself in the position of manual-intensive weekly reviews to ensure good data. This process was painstaking and uncovered problems including issues with the timesheet entry process, errors in reporting, and discrepancies between planned and actual hours. Project managers were not getting the information they needed in a timely way to effectively manage their projects. Resource managers needed to remind team members every week to report effort which was not always successful. As a weekly process, this required too much effort and was a poor use of time.

"The process to ensure all time was entered was difficult and time consuming. Accuracy depended on getting timely data from the team members." Morabito said. "This resulted in a great deal of effort each week to remind staff, update status, and then start all over again the following week."

The Solution

The resource managers and project managers at CCBCC required an automated way to manage the oversight and shorten the time it takes to ensure the roughly 200 internal and consulting staff members were entering time accurately. They also needed a better way to monitor and eliminate the errors that were occurring with the existing timesheet entry process. In addition, they needed everyone to be on board and to comply with the process so they could provide timely, accurate, up-to-date financial reporting to their executives and project sponsors.

Over the course of four weeks beginning in the fall of 2014, QuantumPM introduced CCBCC to **BI**Advantage. This innovative BI solution assisted CCBCC with the elimination of a time-consuming and error-prone manual process. The summary report generated from **BI**Advantage helped identify the people who did not understand the process and additional training programs were put in place. Training helped improve process understanding and helped battle the resistance to change.

According to Morabito, "There's so much data in the environment, **BI***Advantage* helps by graphically showing the data sliced and diced in various ways to give us the most accurate data and view." Some reports were 'heat sensitive' for a quick glance of Timesheet submission statuses by Resource. Other reports were helpful for System Administration to ensure each team member has an approver and is correctly activated in the system. Other reports were helpful for the project managers to compare Timesheets vs. Project actual hours by team member.

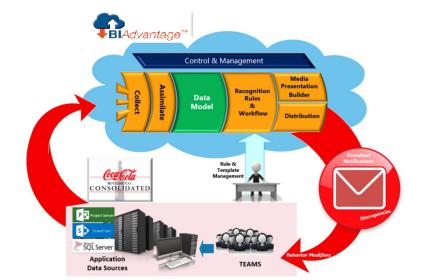## BIAdvantage Yields Measureable Benefits

Coca-Cola Bottling Co. Consolidated is now more efficient with a greater than 90% compliance rate across the board with the goal of 100% compliance. Employees have a greater understanding of the timesheet process and its importance to the company and it's easier for CCBCC to identify where issues exist within the process. Communication has also improved with consulting vendors because CCBCC now has the ability to more quickly reconcile the vendor invoices with resource time-entry.

As an added result of using **BI***Advantage*, project costs are more accurate for financial reporting since a discrepancy report is also sent to project managers on a weekly basis. This report shows project actual hours vs. timesheet hours and has helped new project managers understand how to better manage their projects. With this information in hand, Project managers can easily identify when the process is not followed correctly, shortening the time it takes to reconcile project data.

There are future plans to give resource managers the authority to enter time for their employees, enabling them to be more responsible for their people.

Morabito credits **BI***Advantage* with giving CCBCC the benefits of more accurate reporting of all project costs, including labor; the flexibility to exclude certain team members from compliancy reporting; and the ability to more accurately track labor costs for business partners, all in a more expeditious manner.

"With a business environment as complex and labor-intensive as ours, it's critical our managers have reliable, actionable information on which to base their decisions. **BI-***Advantage* has helped us capture, consolidate and analyze the data we need to run our business," she concluded.

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Mary Morabito
ISS Project Manager

For More Information

For more information about **QuantumPM** products and services, call (720) 221-5471 or visit our Web site at: www.quantumpm.com