Microsoft Project Online Case Study

ACCA

"The PMO needed to standardise its project and portfolio management procedures via a single platform…"

Overview

Customer

ACCA

Products and Services

Microsoft Project Online
Power BI
SSRS

Organisation Size

Large (1,000 - 9,999 employees)

Country

United Kingdom

Industry

Accountancy

Education

Wellingtone
PPM Intelligence

Microsoft Partner

Microsoft Partner
Gold Project and Portfolio Management

Specialist Competency

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Microsoft Project Online Supports an Innovative Mixed Methodology Approach for ACCA

Since 1904, the Association of Chartered Accountants (ACCA) has pioneered strategies to build skills, qualifications and transparency across the accountancy sector worldwide. Today, the organisation's 1,500 plus staff serve the needs of more than 200,000 fully qualified members and 486,000 students. ACCA offers a wide range of accredited training and qualifications online – a key component of a comprehensive portfolio of projects and services that demand robust support from the organisation's IT functions. The Portfolio Management Office (PMO) is responsible for delivering between fifty and one hundred IT transformation projects every year. To do so, it adopts an innovative mixed methodology strategy that flexes to the nature of different projects – from service delivery to business improvement. When the PMO needed to standardise its project and portfolio management procedures via a single platform, Wellingtone played a key role in ensuring that the transition was configured to fit not just the PMO's application of multiple methodologies, but also ACCA's overarching business strategy.

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> **Sarah Olliffe, Senior PMO Analyst - ACCA**

A Bespoke Configuration to Support Mature Portfolio Requirements

Sarah Olliffe is the Senior PMO Analyst for ACCA's PMO. She explains the complexity of her department's role in delivering the organisation's strategy. "Most of our projects are IT-based," she says. "Across the portfolio, we are tasked with ensuring that the correct level of governance is applied, and that our projects deliver the right benefits to support both ACCA's growth and our members' and students' needs. We need clarity and measurement across those deliverables. In support of that, we need total visibility across our project's budgets and resources, as well as the dependencies that might affect our ability to deliver."

To achieve this, the PMO adopts a combination of Waterfall, Agile and Lean Six Sigma methodologies – a forward thinking approach with the capacity to optimise benefits delivery. "We were using quite a few different systems to manage all of this," Sarah recalls. "The information was held in different places, so we had to devote lots of time to copying, pasting and replicating information to get an overall picture. We wanted to streamline that, and to standardise our resource management, reporting and documentation procedures. We were attracted by Project Online's ability to automate a lot of the manual labour – but we needed help to configure it to our way of doing things. When we looked at suppliers, we felt that Wellingtone offered a transparent business model. They were clear about what they could offer, they gave us an accurate picture of what their services would look like, and that made them an easy choice for us."
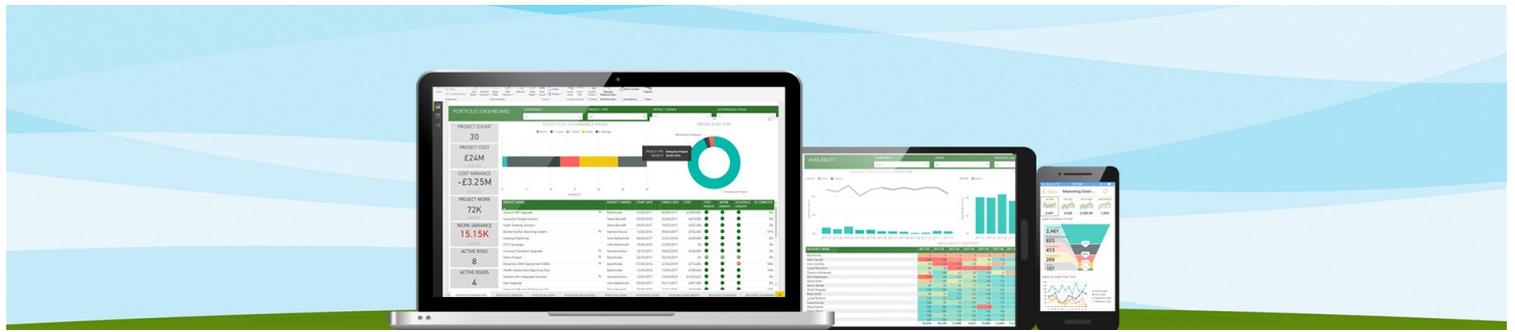
Wellingtone delivered an initial proof of concept phase, designed to enable the PMO to test Project Online's parameters and decide on how the tool might best be configured to help Project Managers work efficiently and effectively. That equipped the PMO to move to a full requirement gathering phase, also facilitated by Wellingtone. The Project Lead at Wellingtone recalls the specific challenges attached to this process. "It was important for us to get under the skin of ACCA as an organisation and work out how Project Online could support a portfolio managed via multiple methodologies. The goal was to create a single source of truth for ACCA, but within that we also had to meet some very specific requirements – not least how to map dependencies between programmes as well as projects, how to streamline the resource management and reporting processes, and how to refine the requirements so that each methodology was being optimised. For example, using stage gates and defining completion in Agile is very different to doing so in Waterfall, and we had to configure Project Online to ensure that it delivered in each of these areas."

Benefits

- *Improved visibility of project performance.*

- *Increased project management performance and throughput.*

- *A cloud-based SaaS PPM solution, meaning no upgrade costs.*

- *Better informed decision making by government and management boards.*

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An Interactive Partnership to Facilitate User Adoption

Over a period of two months, Wellingtone worked closely with ACCA's PMO to refine and configure these requirements, before deploying the solution and rolling out training. Because Project Managers were engaged in the requirements gathering process, they had the chance to test functionality prior to deployment. As a result, buy-in rates to the new system were higher, says Sarah. "Having had the chance to engage with the transition at an early stage, by the time we moved to rollout and training some of our Project Managers already had an understanding of the system," she says. "The familiar aesthetic and usability of Project Online, as it was a Microsoft application, certainly helped. People found it easier to work with than our previous tools. We phased the introduction, both in terms of transferring projects over from our other systems, and ensuring that we had the resources to support people in using the new technology. At this stage, around 95% of our portfolio is integrated into Project Online, and we're looking ahead to explore how we can further maximise its potential. We're aware that cloud-based software is always improving, so we recognise Project Online's capacity to support our strategy as it evolves. For that reason, we're now considering a full move to Office 365 in the future."

A positive experience makes Wellingtone the likely choice to support these future developments, according to Sarah. "We're currently rolling Project Online out to more users, so we're bringing Wellingtone in to conduct that training. We also intend to ask them to help us with any further bespoke configurations or reports that we may need. We enjoyed our experience of working with them. They're very approachable. They're pro-active – making sure that they stay in regular contact to monitor how we're getting on and how they can support us. We found Wellingtone's approach refreshing. It felt more like a partnership than a supplier relationship, and they delivered on what they had promised. I would recommend them to anyone who's considering making the move to Project Online."

To learn more about ACCA, visit www.accaglobal.com