



CASE STUDY

Loyola University Maryland Credits 51% Higher Project Success Rate than Industry Average to Results-Driven PMO Philosophy and Nearly Decade-Long Workfront Deployment



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At a Glance

Challenges

- Improve existing processes
- Support for a new philosophy
- Reconcile costs with resources

Benefits

- 51% higher project success rate than industry average
- Real-time access and simplified reporting
- Increased collaboration
- Improved accountability
- Reduced time
- 30%–35% reduction in team email and more efficient meetings

Many organizations struggle to bring in project wins, Loyola Technology Services and Loyola Marketing and Communications excel at achieving successful project outcomes.

Only 29% of projects are successful, reaching the modern resolution—meaning they are on time and on budget with a satisfactory result—says The Standish Group in its most recent CHAOS Report of 50,000 software development projects around the world. Loyola University Maryland now consistently achieves an 80% success rate and attributes the notable difference to a commitment to total success, accountability, and transparency—all of which are facilitated through the Workfront Work Management

solution. Workfront has increased project transparency, accountability, efficiency, and collaboration for the university since its deployment in 2009.

Loyola University Maryland is a Jesuit, Catholic university that inspires students to learn, lead, and serve in a diverse and changing world. Founded in 1852, today Loyola offers majors and minors in more than 40 academic fields as well as graduate degrees at the master's and doctoral levels in a wide range of programs and areas of study. The University has more than 6,000 students and is located in Baltimore, Maryland.

The Challenge

In 2008, after a number of high-profile projects had failed, Loyola leaders teamed with a consultant to better understand project management processes and identify potential areas of workflow improvement in the Technology Services department. When each group in Technology Services was asked to compile a list of its current projects, the exercise resulted in a consolidated spreadsheet of more than 180 projects. Most important, it revealed differences in the way projects were defined and significant redundancies across lists. Loyola moved quickly after the review to create a single portfolio, and in the process, identified the need for a Project Management Office (PMO) and a project portfolio management (PPM) system.

“After working through the basic question of what defines a project for Loyola, we consolidated the list and organized it into a spreadsheet. That spreadsheet was our first project portfolio,” explains Richard Sigler, Director, PMO since 2009. “Manually updating a spreadsheet meant that it was out of date as soon as it was created. We knew we needed a tool that would empower project managers and aggregate the data for real-time

“We use Workfront for all of our project portfolio management and all of our scheduling. We use it for all of our project document management and for approvals. It’s been a revolutionary process and now we’re an extremely effective PMO.”

– **Richard Sigler, Director, PMO, Loyola University Maryland**

reporting and dashboards. We took a hard look at all the leaders in the PPM space and decided on Workspace. I’m glad we did.”

Improve existing processes

The PMO was officially commissioned in May of 2009. Starting with baby steps—templates for charters, establishment of a basic methodology, and the procurement of Workfront—the PMO began to experience success.

Since 2009, the use of Workfront has continued to grow and yield effective results. Starting with the retirement of Microsoft Project and Excel in favor of Workfront and recently migrating all project team sites from SharePoint into Workfront, each step has continued to improve Loyola’s effectiveness.



The Workfront Solution

Nearly a decade after deploying Workfront, Loyola's complete project management process and methodology is encapsulated in the work management solution—from project proposals and business case generation to project scoring, portfolio maintenance, dashboard reporting, document management, status reporting, and much more.

“We always have a business case investigation with behind-the-scenes calculations that estimate the amount of work in hours that a project will take to complete,” explains Scott Sax, associate director of Loyola's PMO. “Our estimated hours are based on prior projects and interviews with subject matter experts, so now we have more accurate information up front.” The team records scores against business cases in Workfront to enforce project governance.

The Workfront solution provided support for the PMO to adopt a new philosophy as well. The office has adopted a results-driven PMO philosophy that advances a total success on-time, on-budget, on-feature mindset, total transparency, and total project management accountability.

“Workfront has become a cornerstone of the PMO,” says Sigler “We use it day-in and day-out to manage every aspect of our operation. I'm pleased to see that Marketing and Communications has experienced similar success.”

Dashboards provide updates

Workfront dashboards have been customized to provide executives with complete visibility. They are available “real time” via the web and are also sent weekly as PDF files. Executives, project managers, and team members can drill into the details of each project and managers can identify bottlenecks and overtaxed resources, which helps support requests to fill new positions.

“When someone looks at an online dashboard, they're seeing aggregated data being pulled directly from our system. They're not looking at a snapshot or a spreadsheet prepared days ago. They're immediately seeing the latest data as reported,” explains Sigler. “You can't get that kind of information using Excel.”

Budget tracking and reports show progress

At every project stage, Loyola project managers and engineers enter hours associated with a project into Workfront, so that Technology Services can accurately track budget based on both hard and soft costs.

Loyola also fully leverages Workfront's unparalleled reporting capabilities. Users have complete access to project details and dashboards are distributed automatically, which keeps management better informed. “The power of a portfolio management system is that it aggregates data from all of the different tools necessary for project management and allows you to report in whatever ways make the most sense for your organization,” says Sigler.

Adoption expands from tech teams to other departments

The success of Loyola's Technology Services department with Workfront to manage projects and other operational tasks, including request queues and time tracking, has led to the adoption of the work management solution by other departments on campus including marketing and communications, facilities, and undergraduate admissions.

"We've eliminated email and the use of spreadsheets for many tasks," says Sax. "Our facilities department, for example, was using a spreadsheet and meeting regularly to update it. Now all of that team's information is in the work management solution, updated in real time, and easily distributed in reports. The facilities system of record is Workfront, and people are happy because they no longer have to edit spreadsheets."

Marketing and Communications department strengthens collaboration

Similarly, Loyola's Office of Marketing and Communications has adopted Workfront as its system of record for tracking all official project requests and approvals from departments across the university. Workfront replaced an existing project management system that worked well for scheduling public relations and publications tasks but lacked robust collaboration and reporting features for Loyola's expanding communications functions, including creative services, web communications, videography, and social media.

"The old system kept people siloed, so most communication was still going through email," remembers Gary Epstein, traffic manager in the Office of Marketing and Communications.

"As we have grown, matured, and changed our processes, Workfront has been there with us, making updates. We have become more successful together and the flexibility along the way has been really nice."

**– Scott Sax, Associate Director, PMO,
Loyola University Maryland**

"Our team has doubled over the past decade, and our requests have grown exponentially. We were doing much more work and that higher volume of work demanded stronger collaboration between our disciplines," he says.

Today, Marketing and Communications team members rely heavily on key Workfront features to complete the nearly 1,000 projects the team receives each year:

- Templates streamline regular tasks – The department leverages 15 different activity templates to avoid starting jobs from scratch and make work flow faster.
- Resource features help balance workloads – The traffic manager can get an at-a-glance view of capacity to ensure assignments are appropriately distributed.

- Real-time commenting within projects helps ensure visibility – With Workfront’s social-media style communications wall, team members can continually collaborate, update, and tag each other as projects progress.
- Digital proofing prevents jobs from being delayed – The team trusts automated online review workflows to keep work on track, saving time on proof feedback.

“We put a great deal of effort into constantly reevaluating the systems we have in place to ensure that what we are using makes us more efficient and more productive users of tuition dollars and donor dollars, and we want to also ensure that the systems themselves are not over burdensome,” says Nick Alexopoulos, associate director of media relations and social media at Loyola. “Workfront helps us be more efficient.”

Innovative use case tracks undefined work

Loyola is pioneering a public relations (PR) use case with Workfront, relying on the solution to track diverse, wildly unpredictable, and undefined request work. Now within Workfront, the team has created several larger projects to track miscellaneous requests that may or may not have a final product—from providing a spokesperson quote for an article to reviewing partner promotional material to supplying campus photos for a story—in an effort to understand what might be negatively impacting existing deadlines or causing team members to incorrectly prioritize projects. Before Workfront, PR had no solution to track requests in a centralized location.

“Workfront gives us dynamic PR visibility, and that helps us to report what we worked on and why we may have missed something else.”

– **Nick Alexopoulos, Associate Director of Media Relations and Social Media, Loyola University Maryland**

“Sometimes in PR, we’ll do a ton of work, especially for media requests, and have no deliverable to show for it. That takes far more time than anyone knows. Now every request is a sub-task and we have a running list of what comes in so when management asks what we’re up to, we can accurately answer,” says Alexopoulos.

Because of Workfront, Marketing and Communications staff can access information faster, and know exactly what is on to-do lists every day. By eliminating desktop folders, team members can reduce work volume, packing more into work weeks compared to when everything wasn’t visible.

“I encourage people to look at Workfront at least once a day. I call it 7 minutes of success,” says Epstein. “If they do that every morning they can see what’s coming their way and never be in doubt.”



Benefits

Nearly a decade into its work management solution deployment, Loyola has experienced productivity and efficiency benefits including the following:

- **51% higher project success rate than industry average** – Loyola’s project success rate hovers around 80%, nearly triple the industry average. “Our success is the result of embracing a results-driven PMO mindset and fully utilizing Workfront to support it,” says Sigler.
- **Real-time access and simplified reporting** – Loyola relies heavily on Workfront’s automated dashboards and reporting capabilities for project transparency. Because information can be updated and accessed in real time, Sax believes reporting is one of Workfront’s real strengths.
- **Increased collaboration** – Across departments, Loyola staff and administrators appreciate Workfront’s time-saving collaboration benefits. Rather than going through emails, employees can quickly log into cloud-based Workfront to look for

“Workfront has made our meetings more effective. We’ve instituted more planning sessions to build schedules and strategies. There are definite time savings with it.”

– **Gary Epstein, Traffic Manager, Office of Marketing and Communications, Loyola University Maryland**

documents or provide feedback. “Status updates, commenting, and online approvals definitely make us more productive. We’re now able to get people to sign off on schedule documentation using the solution, and it’s easy to track,” says Epstein. “We’re not doing that through emails or spreadsheets; that’s all part of the project in Workfront.”

- **Improved accountability** – Loyola puts information at people’s fingertips. The PMO conducts project reviews weekly, looking at schedules in Workfront to see if and where tasks are behind, compare budgets against hard dollars to understand current spend, and review soft dollars against costs. By housing invoices and POs in the work management solution, the university is holding people accountable. “When an invoice comes into Loyola, it’s immediately entered in Workfront by our financial analyst, so our current spend is always available, in real time, for every project in the custom dashboard,” says Sax.

- **Reduced time** – Workfront replaced SharePoint Team Sites and reduced the manual requirements of generating project artifacts. According to Sax, API work drafts of project charters are now automatically generated from Workfront into Microsoft Word format using business case data.
- **30%–35% reduction in Marketing and Communications team email and more efficient meetings** – Workfront’s commenting features have reduced the number of departmental emails while improving communications. Colleagues can tag or update one another about items days,

or even weeks, after they’ve been entered into Workfront. “This is indispensable to maintaining a clutter-free inbox,” says Alexopulos.

Looking Ahead

Loyola continues to innovate with Workfront. “From automatic charter generation based on the business case to providing just the right reports to just the right people—there are so many ways to innovate inside of Workfront and that’s especially good for us because we want to constantly improve the services we offer using existing systems,” concludes Sigler.



Devour Your Team’s Work Chaos With Workfront

Meet the King of Work Management. With real-time work planning, tracking, collaboration, and reporting, Workfront enables enterprise teams to:

- Drive greater productivity by automating repetitive manual tasks
- Increase communication and transparency through social-style updates and dashboards
- Reduce project failure with real-time views into project progress and resource workloads
- Provide data-driven insights for constant improvement