

Leading Marketing Services Company Transforms Its Approach to Work and Collaboration to Save up to 14 Hours per Week

Industry:

Marketing Services

Geographies:

Canada

Employees:

1,500

Planview Solution:

Work Management with
Planview LeanKit™

CHALLENGE

With multiple data teams assigning work to this leading marketing services company Partner Analytics team, there was no way to efficiently track all the requests. Excel was cumbersome and didn't update in real-time, and physical Kanban boards were not mobile, an obvious issue with the effects of COVID-19 requiring many employees to work remotely. Typical work processes were inflexible to the changing world of work, required several steps that delayed execution and value delivery, and lacked transparency.

SOLUTION

In order to adhere to its philosophy of empowering teams to do their best work in their own way to drive its partners' businesses forward, the Partner Analytics team chose Planview's Enterprise Kanban Solution (LeanKit™) because of its lightweight, flexible delivery platform. Now, teams can quickly and easily prioritize and manage work, despite varying work methodologies. A unifying dashboard pulls together all work data for greater transparency and improved productivity and reporting.

"If you're struggling with work prioritization, tracking and the measurement of data, LeanKit is a great tool."

– Manager in Analytics & Insights

Challenge: Streamlining Systems, Processes, and Data

This leading marketing services company captures swipes from its many partner businesses, including gas, grocery, retail and others. Its many Partner teams and Analytics Client Services teams interact with numerous data teams, creating multiple touchpoints and new work requests that required countless emails. With no way to track the requests beyond Excel and physical Kanban boards, this leading marketing services company wanted a more flexible, consolidated solution that offered greater flexibility and transparency into work status while improving prioritization and work efficiency. The emergence of COVID-19 highlighted the teams' process limitations, expediting the need for a dedicated but lightweight project management solution.

Solution: Providing a Consolidated, Flexible Platform to Manage Work

This leading marketing services company selected Planview LeanKit to give users a standardized, visual work delivery platform to make all work transparent, trackable, and measurable, no matter where the work lives or how it is accomplished. "The digital Kanban tool looks like a physical Kanban board, but is light years better than what we were doing to manage work, especially when we have so many people now working from home," says manager in Analytics & Insights at this leading marketing services company. "The drag and drop functionality is compatible with all browsers and doesn't require any installed software, so our teams could use it quickly. User adoption has been phenomenal."

The flexibility of LeanKit means that teams can customize it to fit their exact needs and use it to support individual work methodologies. To date, the use of the tool has grown from a pilot of five users to widespread adoption across Analytics groups, Client Services teams, and Marketing groups, with 110 users logging 33,000 hours on nearly 9,000 cards across 23 boards.

"LeanKit has transformed our business by allowing us to analyze our analysts," explains manager in Analytics & Insights. "We use it as a productivity tool to analyze our day-to-day usage, as a work-tracking tool to provide greater transparency, and as a reporting tool for metadata analysis. LeanKit serves as our record of truth for work prioritization and status, allows us to quickly assign work according to bandwidth, and helps us identify problem areas in our business that impact our ability to drive our partners' businesses forward. All of this was nearly impossible before LeanKit."

Results: Significant Time Savings and Collaboration Improvements

LeanKit has revolutionized the way leaders interact with their teams and how users manage their work. As a result, productivity has soared. "We've saved up to two hours per week not using Excel, about 10 hours per week on recurring items we wouldn't have found without LeanKit, and a couple of hours each week in our prioritization meetings because we aren't spending time updating people on work statuses," says manager in Analytics & Insights. "Users have access to real-time statuses in LeanKit without having to email someone or wait for a meeting. All of this is time spent on more valuable analytics work that benefits our company and our Partners."

Future: LeanKit for Other Lines of Business

With the popularity and rapid adoption of Planview LeanKit in the Analytics and Marketing teams, this leading marketing services company is exploring LeanKit for additional lines of business. Current users are expanding how they utilize LeanKit to manage all kinds of projects. "Associates embraced LeanKit and have been on board since day one, which is rare to see," says Manager in Analytics & Insights. "If you're struggling with work prioritization, tracking and the measurement of data, LeanKit is a great tool."

To learn more about what Planview® solutions can do for your organization, visit [Planview.com](https://www.planview.com).

