Microsoft Office Enterprise Project Management (EPM) Solution Delivers Strong Business Value

Abstract
This document reviews current trends in enterprise-wide project and portfolio management, providing specific examples of the ways in which organizations have successfully used the Microsoft® Office Enterprise Project Management (EPM) Solution to save money, strengthen the alignment of investments to strategic priorities, identify and mitigate project, program, and portfolio risk, and improve the visibility and transparency of project information and reporting.

February 2009
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Executive Summary

“First-come, first-served” project management can limit an organization’s ability to effectively evaluate, prioritize, select, manage, and assess its portfolio of past, present, and future projects. Many organizations have discovered the importance of actively managing strategic investments as a portfolio of projects, rather than on a project-by-project basis, to improve and deliver results in areas from technology to business process improvements to human resource management.

To enable users to effectively manage projects and project portfolios across their entire lifecycle, Microsoft® developed the Microsoft Office Enterprise Project Management (EPM) Solution, combining and integrating functionality from Microsoft Project Professional, Microsoft Project Server, Microsoft Project Web Access, and Microsoft Project Portfolio Server.

From the creation of a project portfolio, to the evaluation and selection of projects within a portfolio, to detailed resource planning, to project management and strategic oversight, the Microsoft Office EPM Solution delivers the right tools and information to give managers valuable insight to their companies’ project portfolios, maximizing return on investment.

Customers representing a variety of industries and functions have successfully utilized the Microsoft Office EPM Solution to address differing problems across the portfolio lifecycle. Customer examples are included in the body of the document by portfolio lifecycle phase to demonstrate the tangible and intangible benefits realized through portfolio management using the Microsoft Office EPM Solution.
Introduction

Companies and their employees must juggle a myriad of projects and investments simultaneously, all competing for limited financial resources and management time. From strategic initiatives to IT investments, many organizations have approached the management of their projects on a “first-come, first-served” basis, initiating projects based on the timing of the request or the requestor’s organizational power, rather than on the project’s relative strategic value.

First-come, first-served project management can limit an organization’s ability to effectively evaluate, prioritize, select, manage, and assess its portfolio of past, present, and future projects, with significant consequences:

- 84% of companies either do not conduct business cases for any of their IT projects, or perform them only on select, key projects
- 89% of companies are flying blind, with virtually no metrics in place except for finance
- 84% of companies are unable to adjust and realign their budgets with business needs more than once or twice a year

Furthermore, 66% of large scale IT projects will not achieve their stated business objectives, are delivered late, or are substantially over budget.

To address these challenges, decision makers are increasingly turning towards portfolio management to effectively manage and evaluate their entire portfolio of projects, rather than each project in isolation, to maximize value. The value of a portfolio can be thought of across two dimensions: the ability to select projects with the greatest strategic potential (portfolio management), and the ability to effectively execute projects to realize business value (project management). As Figure 1 illustrates, focusing solely on selecting the right projects (Point A) or project execution (Point B) is a suboptimal use of resources, decreasing the overall business value of the portfolio. By optimizing both the selection of investments and promoting effective project management (Point C), portfolio management allows a company to identify and maximize the value.

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1 “What’s Really Driving the Importance of IT Portfolio Management?” by Mike Gruia, DM Direct Newsletter, February 27, 2004
2 http://www.gartner.com/it/products/consulting/program_mgmt.jsp
Focusing on portfolio management provides an organization with a number of both quantitative and qualitative benefits, as highlighted by CIO Magazine:

- **Fairer decisions about funding.** Both initial project approval and ongoing management are based on a holistic view of total investments prioritized by relative benefit to the enterprise—not on a project sponsor’s political muscle.
- **Optimal mix of investment risk and reward.** Portfolio management facilitates the balance of riskier, higher-reward projects versus safer, lower-reward ones because it categorizes, prioritizes, and monitors new and ongoing investments.
- **Better communication between IS and business leaders.** Portfolio management gives IT and business leaders a common language and platform for communication because it is a financial model.

According to a Center for Business Practices’ survey of 54 senior-level project portfolio practitioners on their organizations’ use of project portfolio management practices:

- 70.4% agree or strongly agree that “Our projects are better aligned to business strategy,”
- 57.4% agree or strongly agree that “We work on the right projects,”
- 46.3% agree or strongly agree “We are spending in the right areas,” and
- 42.6% agree or strongly agree that “PPM has led to increased cost savings.”


Misaligned projects surface quickly.

- **More efficient use of human resources.** The number of IT staff and managers allocated to various projects becomes more visible and comparable.
- **Fewer redundant and overlapping projects.** The portfolio view exposes redundancy.

**Review of the Microsoft Office EPM Solution**

To enable users to effectively manage projects and project portfolios across their entire lifecycle, Microsoft developed the Microsoft Office Enterprise Project Management (EPM) Solution, combining and integrating functionality from Microsoft Project Professional, Microsoft Project Server, Microsoft Project Web Access, and Microsoft Project Portfolio Server. The Microsoft Office EPM Solution allows users to effectively manage and prioritize projects and resources across the enterprise, and is designed for organizations that require strategic portfolio capabilities, strong team coordination, standardization in managing projects and programs, centralized resource management, as well as high-level analysis and reporting.
From the creation of a project or an organization’s project portfolio, to the objective evaluation and prioritization of competing investments, to detailed portfolio and project planning and management, the Microsoft Office EPM Solution provides an organization with the tools and insight necessary to optimize investments, reduce and manage risk, and drive shareholder value across the entire portfolio lifecycle (Figure 2).

**Improvements in the Enterprise Portfolio Management Lifecycle**

The following sections highlight representative examples by portfolio lifecycle phase where past and current Microsoft customers successfully employed the Microsoft Office EPM Solution to improve project management, overcome business challenges, increase performance, and achieve results.

**Creation**

In the first phase of the portfolio lifecycle, the Microsoft Office EPM Solution allows organizations to develop and capture critical data across all types of projects (that is, both IT and non-IT projects) that can be used to guide portfolio development, including resource requirements, cost estimates, benefit forecasts, a strategic alignment assessment, risk assessment, and phase and milestone planning. All project requests are captured within a central repository using business case templates to standardize the data collection across the organization, and can range from simple, “lightweight” project plans designed to clarify an idea, to elaborate and complex plans to drive a major initiative. Pre-defined workflows further ensure the projects are subjected to the appropriate governance controls throughout their lifecycle, from proposal to post-implementation.

![Microsoft’s Solution and the EPM Life Cycle](image_url)

**Figure 2:** Microsoft’s Portfolio and Project Management Solution covers all stages of the Portfolio and Project lifecycle.
Foley & Lardner LLP, a law firm with offices and clients throughout the world and six-time recipient of the CIO Magazine CIO 100 Award, wanted to adopt a model of IT Governance, aligning IT goals with business objectives. Toward that end, the firm’s Program Management Office (PMO) needed enterprise-wide control of all IT projects. But without adequate tools or formal processes, project managers found it difficult and time-consuming to schedule, track, and report on projects. A dozen or more stand-alone programs and systems were available to project managers, but none offered comprehensive or centralized project management features, and none was compatible with any other. The group also lacked consistent project management procedures, so it was difficult to keep projects on track and on schedule. “Each project manager would handle a project differently. One might use Microsoft Excel, one might use Project, or one might not do a project plan for a short project,” says Kathy Boden-Benson, Manager of Projects & Applications, Foley & Lardner.

To address these challenges and improve overall project management, the company turned to the Microsoft Office EPM Solution. Now with the EPM Solution, the PMO manages all projects and resources centrally, project managers use consistent processes and procedures to create, publish, and track projects using a single system, and executives have immediate access to project information. The new EPM Solution has allowed Foley to eliminate high-risk projects, take on higher-value projects, manage projects consistently and efficiently, and provide directors with solid, real-time data for critical decision making.

Furthermore, project managers’ increased efficiency also translates to time and dollars saved. “Previously it might take 20 hours just to create a project schedule, but with the project templates, now I can do it in four or five hours,” says project manager Willes. Given the PMO’s average annual project load, 15 hours saved per project translates to more than U.S. $40,000 annually. PMO Manager Boden-Benson is confident the PMO will be able to measure even greater efficiencies in the future. “Creating a schedule is a relatively small portion of an overall project, but if our project managers can complete this single task 75 percent faster now, imagine how much more efficient they are overall,” says Boden-Benson.

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Customer Example 1: Creation – Foley & Lardner LLP

Foley & Lardner LLP leveraged the Microsoft Office EPM Solution to improve and standardize project planning in the early phases of the project lifecycle, reducing workload and saving more than $40,000 annually.

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<td>Wisconsin-based law firm Foley &amp; Lardner LLP has offices in the U.S., Brussels, and Tokyo. With more than 1,000 attorneys, Foley provides legal services to clients representing many industries.</td>
<td>The firm’s technology department lacked consistent project management procedures, and the stand-alone tools it used hindered its ability to manage projects centrally or comprehensively.</td>
<td>Foley implemented the Microsoft Office EPM Solution to gain control of projects, establish sound management processes, and align IT goals with business objectives.</td>
<td>• Improves department efficiency • Reduces costs • Enables strategic management • Provides data to Management</td>
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Through the implementation of the Microsoft Office EPM Solution, Foley & Lardner was able to standardize and enforce IT Governance and improve overall performance. “The EPM Solution forced us to come up with a unified project management process, which makes us more productive, more thorough, and better project managers overall.” Karina Willes, a PMO Project Manager at Foley & Lardner.

Canaccord Capital Inc. is Canada’s leading independent, full-service investment dealer, offering clients comprehensive investment advice and products. Canaccord has experienced rapid growth over the last five years, including expansion into the United Kingdom and the United States, which has made the tracking of planned and ongoing projects even more challenging. While boosting its competitive edge, the company still lacked a standard governance process for tracking and reporting on projects. As a result, much of this activity was done in an ad hoc fashion.

Customer Example 2: Creation – Canaccord Capital Inc.

Canaccord needed a way to streamline project portfolio management and align investments in technology with strategic priorities. To do this, Canaccord implemented Microsoft Office Project Portfolio Server, which led to improved project portfolio tracking, enhanced communications and increased productivity.

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| Canaccord Capital Inc.| With rapid growth, including expansion internationally. Canaccord needed a way to effectively manage the diverse portfolio of projects and align investments with strategic priorities. | Canaccord implemented an integrated Microsoft EPM solution to formalize portfolio management, improve project portfolio tracking, enhance communications and increase productivity across the company. | • Improved Project Portfolio Tracking  
 • Enhanced Communications  
 • Increased Productivity |

The company needed to standardize and formalize the definition and prioritization of projects. Canaccord also needed a way to better track governance and progress of projects through the lifecycle in order to better manage portfolio performance. Canaccord sought a project and portfolio management solution for the IT Department that would bring visibility to the project portfolio as well as increase discipline in the project governance workflow and approval processes. This would ensure that executives and IT management have accurate and timely information, as well as full insight, visibility and control across the IT project portfolio.

To address these issues, Canaccord implemented an integrated Project Portfolio Server solution, a key component of the Microsoft Office EPM Solution, to formalize portfolio management, improve project portfolio tracking, enhance communications and increase productivity across the company. With Microsoft Office Project Portfolio Server, Canaccord can identify, optimize, select, manage and deliver portfolios aligned with business objectives and strategy. The customized solution offers a standard interface for capturing business case parameters, including: scope, resources, budget, potential benefits, risks and strategic alignment, for each planned and active project. After this
information is captured, it can readily be analyzed, making it easier to ensure projects are strategically aligned with corporate goals.

By implementing a solution that encompasses a governance process, Canaccord now enjoys more consistent tracking and reporting across the portfolio. The project repository identifies the status of each project. This allows Canaccord to monitor the state of active portfolio projects while prioritizing pipeline projects in order to maximize efficiency. “Consolidation has been a key element that has improved our tracking,” said Maguire. “The repository defines our pipeline and active projects, and tracks their status. This helps us prioritize based on their contribution to our business goals, which makes the company more efficient.”

Project Portfolio Server has improved communication across regions in two ways; defining and identifying all on-going and proposed portfolio projects and updating project status within the tool. With current and planned projects captured more consistently, there is a better method of aligning related projects. “Since the implementation of Project Portfolio Server, activities such as reporting and monitoring that used to take weeks to complete can now be done with the click of a button. Not only has this solution made operations more efficient, it has made them more effective,” said Maguire. “This solution has improved corporate transparency and provided a clearer view of the project portfolios, allowing management to make more informed decisions.”

Selection

To facilitate the selection of projects within a portfolio, the Microsoft Office EPM Solution helps objectively prioritize business strategy for the upcoming planning horizon, drive consensus between key stakeholders, and evaluate and prioritize competing investments from multiple dimensions. Using embedded best practice prioritization methodologies and tools, organizations can derive common scoring criteria for projects, programs, and applications, enabling “apples-to-apples” comparisons among dozens or hundreds of competing investments along factors like strategic value, financial value, and overall risk. The Microsoft Office EPM Solution further provides tools and embedded best practice methodologies, including the Business Alignment Framework, to optimize budgets and recommend portfolios that best align with the organization’s business strategy. This objective process enforces a rational rather than emotional approach to portfolio selection, helping to ensure that the selected investments deliver the maximum business value.

AXA Financial Inc., a subsidiary of the financial services firm AXA Group, had successfully used IT as a differentiator in the market, but recently found its IT investments taking up a larger and larger share of the company’s net income. With the downturn in the economy following September 11, 2001, AXA Financial faced pressure to increase earnings and ensure that the company was making the most of its investments.

The responsibility for getting a better handle on the company’s IT investments fell to the Director of Enterprise Governance, Paul Bateman. “When I got here, the whole model of asking for money was based upon what I referred to as ‘emotional appeal,’ ” recalls Bateman. “...whoever had the most passion behind their pleas generally got the higher levels within the budget.”
One of AXA Financial’s first steps was to take an inventory of all of the current projects that were underway. “I discovered there were a number of projects behind schedule and over budget and, more important, that all projects were created equal. There was no hierarchy of improvement. There was no sense of how these projects related to our vision, mission, long-term, short-term—any kind of objective you wanted to define,” says Bateman.

### Customer Example 3: Selection – AXA Financial Inc

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<td>AXA Financial Inc.</td>
<td>Increasing external market pressures led to increased internal demand for demonstrable returns on all IT investments.</td>
<td>AXA worked implemented a portfolio management approach to facilitate the identification, evaluation, prioritization, and selection of IT investments.</td>
<td>• Estimated $5–$10 million in savings during first year of implementation&lt;br&gt; • Strengthened visibility and insight&lt;br&gt; • Improved strategic alignment of investments</td>
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<td>provides financial protection and wealth management services and is the $7.6-billion U.S. subsidiary of the Paris-based financial-services conglomerate AXA Group.</td>
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To address this challenge, the company turned toward portfolio management as a methodology with which to assess, prioritize, and select projects that aligned to AXA Financial’s strategic goals. By deploying the Microsoft Office Project Portfolio Server, AXA Financial was able to empirically evaluate current and prospective projects against a number of factors, including strategic alignment and anticipated cost. The tool further allowed the company to perform “what if” analysis to optimize the portfolio of projects for a given budget allocation and maximize the return on a given investment.

By using the Microsoft Office Project Portfolio Server Solution, AXA Financial achieved dramatic results. “I bet we saved $5 million to $10 million in the first year alone,” Bateman says, “on projects that would have automatically gone through before.”

In addition to the financial benefits of their portfolio approach to project management, the company realized a number of additional benefits through the use of the tool. “There are ways that [portfolio management] has helped that I couldn’t even put a dollar amount on, because in a way it’s actually changed the culture of the way we operate,” Bateman says. “It gives you the ability to look at any aspect of your portfolio, whether it’s people, whether it’s timing and launch, whether it’s actuals versus plan or approved

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5 Customer example based on the case study “The Efficient Frontier: AXA Financial Inc.” by Peter D. Henig, CIO Insight, June 1, 2004

6 Technology referenced in the case acquired by Microsoft from UMT and incorporated in the Microsoft Office EPM Solution in January 2006.
rates, or return on investment,” Bateman says. “Everything from end to end, the holistic process viewed through one microscope.”

In consolidating management of its IT projects, the Metropolitan Government of Nashville and Davidson County (Metro) in Tennessee found that its 52 departments had been engaging in IT-related projects that had no common focus and sometimes were at odds with each other, lacking processes to prioritize those projects or ensuring that projects were progressing as they should.

Usually, the greatest resources were directed toward those departments with the budgets and high profiles necessary to command attention. Projects were started with little or no documentation or official approval, and it was difficult for the organization to maintain a comprehensive portfolio of current projects. “Basically, if you had the resources and the inclination, you could go ahead with a project, even if it didn’t align with our organization’s IT business objectives,” recalls Margaret Keck, Manager of ITS Enterprise Services for the Metropolitan Government of Nashville and Davidson County.

After establishing a Project Management Office and solidifying its project management methodology, the organization deployed the Microsoft Office EPM Solution to support its new culture of effective project management. The EPM Solution provided Metro with better visibility into its array of projects, along with real-time reporting to promote faster, more reliable decision making and smarter use of human and financial resources—ultimately delivering better service to citizens.

Previously, Metro had no ability to see the full spectrum of projects in or awaiting production. Some mission-critical projects took a back seat to

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Customer Example 4: Selection – Metropolitan Government of Nashville and Davidson County

Decentralized project and investment management decreased visibility and limited the Metropolitan Government of Nashville and Davidson County’s ability strategically prioritize potential investments. Through the use of the Microsoft Office EPM Solution, the organization can strategically prioritize potential projects and increase its return on investment.

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<td>The Metropolitan Government of Nashville and Davidson County serves 570,000 citizens with 52 departments that provide everything from parks and libraries to healthcare facilities and public safety.</td>
<td>As it worked to unify its decentralized IT activities, the organization found that it was without the processes or tools for prioritizing, tracking, and reporting the status of its various projects.</td>
<td>To support new project management processes, the organization chose the Microsoft Office EPM Solution. Four departments currently use the system, and the others will join them soon.</td>
<td>• Better visibility and resource management</td>
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<td>• Real-time reporting</td>
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“...A seemingly minor project may be more business critical than some of the large projects for higher-profile departments...”

Margaret Keck, Manager of ITS Enterprise Services, Metropolitan Government of Nashville and Davidson County
other projects for departments with larger budgets, occasionally leaving smaller departments without key capabilities. Today, the organization has full visibility into its entire portfolio of IT projects, giving Metro the ability to make smart decisions with regard to project prioritization. “Smaller departments aren’t always able to be the squeaky wheel that gets the grease,” says Keck. “However, a seemingly minor project may be more business critical than some of the large projects for higher-profile departments that previously were getting pushed through ahead of other requests. The new visibility and prioritization abilities that we get from the Microsoft Office EPM Solution definitely help when it comes to fairness of resource allocation throughout our organization.”

“The EPM Solution has really helped us evaluate project priorities accurately, rather than having to guess what was most important,” says Marsha Gilbert, Manager of the ITS Project Management Office.

KeySpan Corporation is the largest natural gas distributor in the Northeast, with $12.6 billion in assets, 2.5 million gas customers and more than 12,000 employees. As the largest investor-owned electric generator in New York State, KeySpan operates the Long Island Power Authority’s electric system and supplies approximately 25% of New York City’s capacity needs.

With regard to its technology investments, KeySpan faced challenges ensuring strategic alignment and enforcing effective governance. IT had limited visibility and perceived value within the organization, and there was a low correlation between business strategy and discretionary spending. Additionally, IT business cases were relatively weak, leading to more subjective rather than quantitative investment decisions. “There was little trust and a great deal of uncertainty about our alignment with the business,” said Frank La Rocca, CIO, KeySpan Energy.

To address these challenges, KeySpan turned to the Microsoft Office Project Portfolio Server to deliver an effective project and portfolio management solution. Through the deployment of the Microsoft Office Project Portfolio Server, KeySpan followed a seven-step process that enabled the company to define and prioritize its strategic business drivers, build and assess project business cases (including strategic “impact statements”), and optimize its portfolio of projects. The Microsoft Office Project Portfolio Server allowed KeySpan to evaluate and perform “what-if” selection analysis on projects in a uniform manner across a variety of dimensions, from costs and benefits to risk, cash flow, and most importantly, strategic impact.

The portfolio approach to project selection changed the way KeySpan made investment decisions. “There was much less skepticism about the value of the projects and a richer dialogue about IT and business strategy,” said La Rocca. “I think it’s re-established our credibility and trust and has allowed senior officers to get engaged with IT at a much more strategic level.” Through the use of portfolio management, La Rocca was provided with additional money for discretionary IT spending through transparent, ROI-focused business cases.

The value of the redesigned selection process, enabled through the use of the Microsoft Office Project Portfolio Server, was further echoed by KeySpan’s COO, Robert Fani. “I

7 “Case Study: IT Portfolio Management Software Gives Utility a Jolt” by Thomas Hoffman, Computerworld, March 1, 2005
have been involved in IT project selection in KeySpan in some way or form for the past 25 years, this is by far the best analysis I have seen,” says Fani. “All my business units need to be this thorough and transparent and use this model.”

### Customer Example 5: Selection – KeySpan Corporation

KeySpan Corporation leveraged the Microsoft Office Project Portfolio Server to effectively align investment decisions with strategy, elevating the value of IT in the eyes of leadership and building the case for an increased IT budget based on proven strategic value.

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<tr>
<td>KeySpan Corporation</td>
<td>KeySpan lacked a consistent, transparent mechanism to evaluate, compare, and select projects based on their respective strategic value.</td>
<td>The company deployed the Microsoft Office Project Portfolio Server to assess, optimize, and select its IT project portfolio.</td>
<td>• Project portfolio selected based on strategic value</td>
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<td>• Elimination of low value “pet projects”</td>
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<td>• Increased decision making transparency</td>
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### Planning

Following portfolio selection, the Microsoft Office EPM Solution enables an organization to develop detailed project plans, assign named resources to projects and tasks at the skill level, and define the interdependencies within and across projects and the portfolio as a whole. A dependable, scalable offering, the EPM Solution provides a high-performance, manageable infrastructure for the enterprise that organizations can use to efficiently manage resources and work from simple projects to large programs. The solution is further extensible and programmable, providing the flexibility to meet evolving business requirements.

“The EPM Solution makes it so much easier to allocate resources that we’ve decreased our time-to-completion of projects... We expect to complete projects up to 20 percent faster because of a shorter offering phase.”

Johnny Raetzo, System Engineer, Swisscom IT Services

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Swisscom IT Services, a subsidiary of Swisscom, is a leading Swiss IT service provider with 2,100 employees based in Bern-Ostermundigen, Switzerland. Swisscom IT Services needed to find a way to manage its resources across divisions and gain visibility into resource management and capacity planning throughout the organization. Its disparate methods for resource management left Swisscom IT Services with no easy way to generate reports for executive decision making. In the past, Swisscom IT Services conducted its resource and portfolio management through a variety of methods, including Microsoft Access™, Microsoft Project files, and Microsoft Excel in Office XP, leaving the organization unable to view its entire project portfolio, easily generate reports, or make projections based on complete, timely information.

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8 Microsoft Presentation at the Gartner PPM Summit by Mike Angiulo, June 2006
Determined to achieve better control over resource skill-set management in particular, Swisscom IT Services sought to implement a solution that would give the organization an overview of all its internal resource allocations at the skill level. “Before, it was up to the individual departments to determine how to perform resource management, so we had no view of our entire project load, making it difficult to determine if we had the capacity to handle that load,” says Johnny Raetzo, System Engineer for Swisscom IT Services. “Gaining the ability to make more efficient use of our human resources was the main catalyst for looking for an enterprise-wide solution.”

The organization implemented the Microsoft Office EPM Solution for its more than 2,100 employees, giving them the tools to manage resources and produce comprehensive reports. Today, Swisscom IT Services managers have a single source for comprehensive resource-related information and can assemble the right teams of people to get the job done, regardless of their familiarity with the organization. “The EPM Solution makes it easy for our managers to deliver on projects because they can find the right skill sets without having to go from office to office to ask for help,” says Raetzo. “The solution also simplifies the process for sharing accurate resource information because we’ve gotten rid of the cumbersome planning tools that we used in the past.”

Customer Example 6: Planning – Swisscom IT Services

Through effective project and portfolio planning using the Microsoft Office EPM Solution, Swisscom IT Services significantly increased visibility into the management and use of its resources across divisions, cutting time to complete projects by 20% and labor savings in excess of $50,000 per month.

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<tr>
<td>Swisscom IT Services, a subsidiary of Swisscom, is a leading Swiss IT service provider with 2,100 employees based in Bern-Ostermundigen, Switzerland.</td>
<td>Swisscom IT Services had no standardized solution for resource management within its Software Development and Delivery divisions. It lacked the ability to view resource management enterprise-wide.</td>
<td>The organization implemented the Microsoft Office Enterprise Project Management Solution to gain insight into and management of project and resource information across the organization.</td>
<td>• Holistic view for better planning and 20 percent faster project completion • Easy-to-use system for greater efficiency • Enhanced project quality • Increased project management maturity</td>
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“The introduction of the Microsoft Office Enterprise Project Management Solution is already changing the culture at Swisscom IT Services,” says Raetzo. “The EPM Solution makes it so much easier to allocate resources that we’ve decreased our time-to-completion of projects, which means happier customers. We expect to complete projects up to 20 percent faster because of a shorter offering phase.”

Soon, Swisscom IT Services will be shifting to a central repository for resource-related information. This consolidation from more than 30 isolated storage sites to a single repository will save money for the organization while reducing management time. “Having centralized administration of our documentation will cost us less,” says Raetzo. “We anticipate that requiring fewer software licenses and limiting our operating costs will save Swisscom IT Services 320 hours per month, which translates into a cost savings of U.S. $50,000 per month.”
The transportation solutions company of J.B. Hunt employs more than 17,000 people and offers services in the United States, Canada, and Mexico. J.B. Hunt provides end-to-end transportation of full truck-load, dry-van freight, and the company also holds contracts with most North American rail carriers to facilitate transportation by rail. J.B. Hunt has approximately 30 remote offices, called terminals, throughout the United States. These terminals serve as regional outposts that provide fleet support services for the entire company.

## Customer Example 7: Planning – J.B. Hunt

By implementing the Microsoft Office EPM Solution, J.B. Hunt will save time and money; provide increased visibility, thus facilitating better allocation of resources; and give the company the tools it needs to be more competitive in its industry, with project managers saving roughly 520 hours annually.

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| J.B. Hunt is a transportation solutions company that provides services throughout North America. The company employs more than 17,000 people and is headquartered in Lowell, Arkansas. | J.B. Hunt managers had difficulty tracking the status of the company's numerous high-value projects and making informed decisions about resources and scheduling. | J.B. Hunt implemented Microsoft Office Project Portfolio Server to track and gain visibility into its portfolio of projects, saving time and money. | • Saves money  
• Improves employee efficiency  
• Allocates resources accurately  
• Affords centralized visibility  
• Enhances competitiveness |

J.B. Hunt manages several high-value projects at any given time, completed by a combination of employees, consultants, and contractors. The variety and complexity of business objectives of J.B. Hunt make it difficult to attain a comprehensive view of its projects. Even when the company engaged in a project-by-project assessment, they were not able to review an overall analysis of how the individual projects affected the company as a whole. J.B. Hunt used Microsoft Office Excel spreadsheet software to evaluate the projects and make decisions based on compartmentalized viewpoints. "We were trying to understand the scope and complexity of our portfolio by tracking it with Office Excel spreadsheets. It was a very manual and decentralized effort. We needed a central repository that would give our project managers and our executives a place to evaluate the portfolio data and see how it was performing," says Leslie Coston, PMO Manager at J.B. Hunt.

J.B. Hunt decided to implement Microsoft Office Project Portfolio Server in June 2006, and worked with a partner to set up Office Project Portfolio Server in a production environment in April 2007. J.B. Hunt expects to increase employee efficiency and save money, as well as improvements in the accuracy of its allocation of resources because of the enhanced visibility provided by the solution. Ultimately, the benefits of Office Project Portfolio Server will help the company become more competitive in its industry and provide enhanced customer service.

Office Project Portfolio Server will provide valuable insight to J.B. Hunt managers in regard to specific projects and help them make informed decisions based on quantifiable information. "Prior to using Project Portfolio Server, evaluating whether we were running ahead of schedule on a job would have been based on the project manager’s gut feeling."
We simply didn’t have access to the detailed data. It would have been risky for that manager to move people off the job. Now it will be quantifiable. We can say exactly how many people we are going to need and then take a look at another project that might be running behind and transfer those individuals. It results in cost avoidance, “ says Coston.

Furthermore, J.B. Hunt employees will save time by using Office Project Portfolio Server, translating into a direct money savings. The 10 project managers who use the solution on a regular basis will experience the most direct benefits. “The time our project managers will be saving by using Project Portfolio Server will result in a cost savings of approximately $25,000 dollars annually,” says Coston.

Chiron Corporation, one of the world’s largest biotechnology firms, creates products that improve human health. The company’s three major divisions—biopharmaceuticals, vaccines, and blood testing—develop products designed to treat and prevent disease and to ensure that stored blood is free from disease.

Customer Example 8: Planning – Chiron Corporation

Through the implementation of the Microsoft Office EPM Solution, Chiron Corporation was able to improve the information regarding and utilization of its resources, allowing for the completion of 8-12 projects per year, up from 3-5 projects per year prior to EPM implementation.

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<td>Chiron Corporation is a biotechnology and pharmaceutical company based in Emeryville, California. The company employs more than 5,000 people at facilities in 18 countries on five continents.</td>
<td>Chiron needed to improve its time-to-market performance. It wanted better insight into project scheduling and resource allocation, along with uniform project management to help reduce project delays.</td>
<td>Chiron worked with a partner to implement the Microsoft Office EPM Solution to help the company streamline its project management practices.</td>
<td>• Improved data analysis for better project planning • Increased product capacity • Easy deployment and low training costs</td>
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Although it had successes, Chiron experienced difficulties with project management integration and the resulting project delays and increases in time-to-market for new products. Project managers in the company’s Blood Testing Division used different project management styles and methods, creating schedules and allocating resources using separate versions of Microsoft Project without accurate resource availability data or information regarding potential problems. “We had very little reliable information coming in,” says Eric Morfin, Director of the Project Management Office of Chiron’s Blood Testing division. “Most of the project data came from someone’s mind or from their own project management plan—a situation that is sketchy at best... We needed a solution that integrated better project and resource management to help us improve the way we develop projects and help get more projects implemented in time.”

To address these issues, Chiron deployed the Microsoft Office EPM Solution to help centralize project management and produce accurate data through its interconnected project software, and began to see benefits almost immediately. Project management became more consistent and resources were better tracked and used through the centralized gathering and accurate reporting of data, helping the company keep tasks and products within deadlines. “Now projects are better planned, resources are assign
Eric Morfin, Director of Project Management Office, Chiron Corporation

“We have eliminated the perception that the only way we can get things done is by adding more resources.”

The clearer picture has helped with better forecasting and improved handling of potential issues before they can become big problems. Chiron’s Blood Testing Division completed between three and five projects a year under its old project management system. As the actual project data and costs became clearer, the division realized that it could do far more and estimates the completion of 8 to 12 projects a year, a net increase of 5 to 7 projects annually.

“Since implementing the EPM Solution, we are beginning to have better project insight, clearer understanding of the effort it takes to conduct our projects, and a better ability to forecast problems,” says Morfin.

Management

The Microsoft Office EPM Solution provides organizations with easy to use, familiar tools and functionality that offer significant visibility and insight into a company’s project portfolio, promoting collaboration among project teams across the organization. Managers can easily find, analyze, track, and report on all types of project information, from ad-hoc projects to complex programs and portfolios. Users can create real-time project and portfolio performance dashboards and scorecards to ensure decision makers gain visibility, insight, and control across the project portfolio, utilizing intuitive generators to define and publish enterprise templates to standardize and streamline project management and reporting processes organization-wide. In addition to active projects, users can now see the entire project lifecycle from before initiation as Proposals to after project completion as Operations Work.

As a major world provider of semiconductors, LCD screens, and mobile technologies, Samsung must deliver its products in a timely and cost-effective manner. Both research and development of new products play a pivotal role in the company’s strategic focus. Samsung runs an average of 45 to 50 concurrent research projects each year, most of which take nearly two years to complete. Its larger projects often span several years, involve thousands of tasks, and require as many as 200 project managers, project leaders, and team members, all of whom work full-time on a single project for its duration.

With more than 1,000 team members working on various R&D projects and storing data in numerous locations on 45 different servers, the employees in the Device Solution Network Division could not access or analyze crucial project information in a timely manner. Although all project managers were responsible for reporting project status on a regular basis, executives did not have an enterprise-wide view of projects throughout the company and could not quickly take action when a project ran over schedule.

“Without a unified system, members of the management team could not easily see what
adjustments needed to be made when problems occurred,” says Joon Mo Son, Director of Samsung’s Project Management Organization.

As a result, Samsung slipped on its research deliverables 85 percent of the time, with an average delay of two to three months. “With extensive product slippage, we faced the possibility of revenue loss when our competitors released new products before we did,” says Joon. “When we do not meet a deadline, it affects the whole company’s progress, because it delays transition to manufacturing and marketing.”

“With extensive product slippage, we faced the possibility of revenue loss when our competitors released new products before we did.”

Joon Mo Son, Director of Project Management Organization, Samsung

Samsung wanted a unified project management system that would help its employees ensure that research projects were completed on time and provide greater business analysis and planning capabilities. After evaluating several project management tools, Samsung deployed the Microsoft Office EPM Solution to 1,000 employees in the Device Solution Network Division, and anticipates that the EPM Solution will increase the efficiency of its R&D deliverables by 50 percent over the next year and a half and help the company achieve its goal of releasing 20 new electronics products by 2010.

Joon attributes this growth to the ability to more accurately manage project schedules and eliminate the slippage of deliverables. “The Microsoft Office EPM Solution is exceptional for project tracking,” says Joon. “Before we implemented it, members of the executive team never knew the reason for project delays and were at a loss as to what action to take. But now they can see red flags when there are problems and quickly take action.”

Customer Example 9: Management – Samsung

Samsung used the Microsoft Office EPM Solution to significantly enhance visibility into its project portfolio to improve on-time completion of research deliverables, increasing its R&D efficiency by 50%

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<td>Based in Seoul, Korea, Samsung is a global leader in semiconductor, telecommunications, and digital convergence technology, employing 70,000 people throughout 47 countries.</td>
<td>The Device Solution Network Division at Samsung wanted to be able to view information for its research and development projects, which were run by project managers throughout the company.</td>
<td>Samsung deployed the Microsoft Office EPM Solution to 1,000 project team members, project leaders, project managers, and executives.</td>
<td>• Reduces communication time with team members by 20 percent  • Increases R&amp;D efficiency by 50 percent  • Enhances business analysis  • Aligns resources with strategic R&amp;D initiatives</td>
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Through the use of the EPM Solution, Samsung has realized significant portfolio and project management benefits, and anticipates continued results moving forward. “The Microsoft Office EPM Solution drastically improves our resource allocation and scheduling,” says Joon. “In the months that we have used the Microsoft Office EPM Solution, it has significantly improved our project management. It’s already helped us streamline our research projects, and I can only believe that it will continue to improve our research processes over time.”

The Milwaukee Journal Sentinel, the largest newspaper in Wisconsin, offers both paper and online issues. Based in Milwaukee, the company employs 900 people and has a daily circulation of 217,000 and a Sunday circulation of 384,000. It is organized functionally, with groups divided according to expertise such as IT, newsgathering, finance, and advertising.

Customer Example 10: Management – Milwaukee Journal Sentinel

By implementing the Microsoft EPM Solution, the Milwaukee Journal Sentinel was able to streamline total work management, provide visibility and accountability, increase employee efficiency and involvement, simplify reporting compliance, and help the Journal increase its competitive edge in the news reporting industry.

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<td>With 900 employees, the Milwaukee Journal Sentinel is the largest newspaper in Wisconsin. The Journal offers daily and Sunday editions in both online and paper formats.</td>
<td>The Journal has a decentralized project management structure and wanted a simple, tailored project management solution that would address its exact needs.</td>
<td>The Journal implemented the Microsoft Office EPM Solution in January 2007 to help manage its companywide project workflow. The EPM Solution went live in May 2007 and now has more than 60 users.</td>
<td>• Streamlines total work management • Provides cost-effective project management • Increases employee efficiency • Cuts reporting compliance time • Helps increase competitive edge</td>
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The company’s two-person Project Management Office (PMO) team is responsible for project management guidance throughout the company and is part of the 40-person IT department that generally runs 12 to 15 projects concurrently with budgets that range from U.S.$5,000 to $2 million. Project management is decentralized, with many individuals outside the PMO acting as project managers. “Before a more structured idea of project management was put in place, it was very disjointed,” says Jeffrey Roe, Manager of the IT PMO for the Journal. “The success of a project was dictated by who exactly was running it—it could be political, or might just be because of the expertise of that particular person. It was hit or miss.”

The Journal used Microsoft Office Excel spreadsheet software to track projects. “We would print a chart and that was our project plan in total. Each department had its own documents that were never collected, assembled, or saved,” says Roe. “We got everybody updated information by having a lot of meetings, but there were problems in communicating and the most current information was not being communicated through the various e-mail messages.”
In November 2006, the PMO evaluated various project management options including Clarity and externally hosted services. It determined that the Microsoft Office EPM Solution was the best fit for the company. “We chose the EPM Solution because of the very tight integration it has with other Microsoft products, its cost-effectiveness under our Enterprise Agreement, and because our employees have experience with Microsoft technology, which shortened the learning curve and increased acceptance,” says Roe.

Under the old system, the company couldn’t tell exactly how its employees spent their time. With the timesheet functionality in the EPM Solution, this information is readily available. “A lot of eyes were opened when we started tracking the time of the IT staff. We were spending too much time on what we call administrative tasks—not work that is for projects or maintenance support,” says Roe. “With the EPM Solution timesheets and corresponding visibility, we were able to bring employee time spent on administrative tasks down by 10 percent from last year.”

Additionally, the visibility provided by the EPM Solution has increased employee productivity. “Time spent now is tangible. The EPM Solution gives us tremendous visibility, and visible people work better. Employees are inclined to complete projects faster because their name is publicly associated with it,” says Roe. The EPM Solution also increases productivity by making it easier for employees to contribute. “In our company, everyone who is working on a project also has his or her ‘regular jobs’ to do. Making the project management process fit within that reality by using the EPM Solution makes it easier for people to find what they are looking for, contribute, and move on,” says Roe.

Founded in 1877, Rodenstock is a leading manufacturer of progressive and plastic lenses, camera lenses, optical lens elements, photochromic lenses, sports eyewear, and sunglasses. The company has production plants in Germany and internationally. Headquartered in Munich, Germany, Rodenstock has 4,600 employees.

Customer Example 11: Management – Rodenstock

To gain company-wide consistency and efficiencies, Rodenstock deployed the Microsoft Office EPM Solution, which it uses in conjunction with Microsoft Office SharePoint Server. Rodenstock now has fast access to project data that is always up to date. The company’s workflows proceed more quickly, which translates to a faster time-to-market. The solution also provides improved administration of access rights.

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<td>Based in Germany, Rodenstock develops, manufactures, and markets ophthalmic lenses and spectacle frames in Germany and internationally. The company has 4,600 employees in ten countries.</td>
<td>Rodenstock used a stand-alone, labor-intensive method for planning projects that included entering data into spreadsheet files and exporting data to a central multi-project file.</td>
<td>The company deployed the Microsoft Office EPM solution. It uses the solution in conjunction with Microsoft Office SharePoint® Portal Server.</td>
<td>• Fast access to up-to-date data  • Faster workflows and time-to-market  • Improved access rights</td>
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Rodenstock is always working to improve the quality of its optical products. To be able to bring innovations to the market quickly and achieve a competitive advantage, Rodenstock must efficiently coordinate its research and development (R&D) and engineering efforts. For project planning and coordination, Rodenstock used stand-alone systems including Microsoft Office Excel spreadsheet software. The company entered data into many individual Office Excel files and used a macro to merge these into a single central file that displayed all projects. Starting in 2004, Rodenstock also began to maintain data in Microsoft Project 2003 Professional; it exported and merged this data into the central Office Excel file.

“This very complicated method involved quite a bit of coordination and effort,” says Dr. Herbert Zinner, Director of Project Coordination in the Research and Development Department for Eyeglass Lenses at Rodenstock. “For example, when a single detail changed, we needed to rerun the macro to update all files. So the plan frequently was outdated before it was finished.”

The company needed a project management solution that was more efficient, and that provided increased business intelligence. Ultimately, Rodenstock chose to implement the Microsoft Office the EPM Solution. The solution, which includes Office Project Server, Office Project Professional, and Office Project Web Access, helps organizations to effectively manage projects and resources.

By using the EPM Solution in combination with Office SharePoint Portal Server and SQL Server 2005 Enterprise Edition, Rodenstock now has fast access to project data that is always up to date. Company workstreams proceed more quickly, which translates to a faster time-to-market. And the EPM Solution provides improved access rights administration. “If an interim goal is achieved, the project manager fills out a form through Office SharePoint Server and sends it with an electronic signature to his or her own manager;” says Zinner. “As soon as that person electronically signs the document, this next planning step is released. This is significantly faster than the previous method of sending faxes between locations,” says Zinner.

With the EPM Solution, all Rodenstock employees work within a single database, for a company-wide view of project data. “We can create reports significantly faster than before,” says Zinner. “And data is always up to date.” The company can also quickly export data to other formats, including Office Excel spreadsheets, for presentations. “It’s much easier to gain an overall view of company projects with the EPM Solution. This helps us to respond intelligently to project concerns in a much shorter time frame,” says Zinner.

With 8,963 employees, Kumba Resources Limited is among the world’s largest exporters of iron ore. It accounts for roughly 80 percent of South Africa’s iron ore exports and 4 percent of the world’s iron ore seaborne trade. Kumba Resources’ Research and Development division controls projects in the organization, conducting feasibility studies that explore new processes for extracting minerals or that improve production processes to be more efficient, cost-effective, and lower maintenance.

The Research and Development division needs to recover all the costs that it incurs. Until recently, the division relied on numerous disparate IT systems to manage up to 50 projects running at any one time, which made it almost impossible to see where money

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9 Kumba Resources Limited reorganized in 2006 and is now Kumba Iron Ore
was being spent in each project. “At no stage could we tell the actual costs of a project or the income we recovered. We couldn’t see if a project was on schedule. And we couldn’t access enough detailed information that would help us allocate resources according to employee competency,” says De Witt. “This led to poor project management and performance. We were unable to recoup up to 50 percent of expenses on our projects.”

Customer Example 12: Management – Kumba Resources Limited

To improve project management visibility and project expense recovery, Kumba Resource Limited’s Research and Development division deployed the Microsoft Office EPM Solution, increasing project expense recovery from near 50% to 116%

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| South African–based Kumba Resources Limited is an independently managed, diversified mining company that boasts a portfolio of world-class assets spanning Africa, Asia, and Australia. | Kumba Resources’ Research and Development division relied on disparate IT systems to manage its feasibility projects. Lack of visibility of information made it difficult to recover as much as 50 percent of project costs. | Kumba rolled out the Microsoft Office EPM Solution including Microsoft Office Professional Edition and Microsoft Office Project Web Access. | • Greater project data ownership  
• Advanced resource planning saves costs  
• Customer satisfaction up  
• Up to 116 percent of costs can be recovered  
• Integrates easily with other technologies |

The division engaged Microsoft Certified Partner Fulcrum Business Solutions to help it roll out a Microsoft EPM Solution. “We chose to work with the Microsoft Office EPM Solution because it is a known product in the business, and it could easily support our business processes. It meets all the requirements we have identified and is a lot more cost-effective than the others we examined,” says De Witt.

With the adoption of the EPM Solution, Kumba has realized significant benefits. Before the solution was implemented, project leaders were unable to see which employees were available for projects, and were forced to outsource work. Resource balancing and planning features within the technology give leaders the information necessary to identify skills shortages or available resources in advance. “We don’t have to use contractors anymore,” says De Witt. “We can now cut our costs significantly by using internal resources because we can see their availability.”

With access to real-time performance management features, project leaders can see exactly how teams are performing on every project. De Witt says, “All team members have access to relevant project information. Every member knows their responsibilities and what activities are allocated to them. The solution prompts them and helps them plan their days more efficiently, keeping up the project’s momentum.”

De Witt says, “The EPM Solution has improved our performance substantially. We can set clear, realistic timelines, deliver on customer needs first time around, and manage our projects properly... Using the solution’s income recovery planning features, we recovered 116 percent (of costs incurred) in the last six months.”
**Conclusion**

As an increasing number of companies turn to portfolio management as an effective mechanism to maximize return on investment, the Microsoft Office Enterprise Project Management (EPM) Solution provides users with an end-to-end project and portfolio management solution to create, select, plan, and manage investments that drive performance and deliver results. The Microsoft Office EPM solution allows an organization to enhance project identification, strengthen the alignment of a project with strategic goals and objectives, increase the visibility and transparency of project management, and reduce the risks and costs associated with project management.

For more information, about the Microsoft Office EPM Solution, please go to: http://office.microsoft.com/en-us/epmsolution/FX101935291033.aspx
http://www.epmconnect.com

**About the Authors**

Value Prism Consulting, LLC is an independent consulting firm that provides strategic, financial, and operational consulting services to companies facing the challenges of industry, market, and technological change. Value Prism assists clients with valuations, business case development, and decision support analysis. Its solutions provide accurate and supportable information that lets a company or a decision maker act on opportunities and avoid costly pitfalls. Value Prism solutions measure the results of business process improvement, capital investments, and major budget spending decisions.

Please go to http://www.valueprism.com for more information.
Appendix: Customer Descriptions and Links to Selected Case Studies

Foley & Lardner LLP is a Wisconsin-based law firm with offices in the U.S., Brussels, and Tokyo. With more than 1,000 attorneys, Foley provides legal services to clients representing many industries.

Canaccord Capital Inc. is Canada’s leading independent full service investment dealer, providing investment products, brokerage services and investment banking services to its retail, institutional and corporate clients.
http://www.microsoft.com/canada/casestudies/canaccordcapital.mspx

AXA Financial Inc. provides financial protection and wealth management services and is the $7.6-billion U.S. subsidiary of the Paris-based financial-services conglomerate AXA Group.

The Metropolitan Government of Nashville and Davidson County in Tennessee serves 570,000 citizens with 52 departments that provide everything from parks and libraries to healthcare facilities and public safety.

KeySpan Corporation is the largest natural gas distributor in the Northeast, with $12.6 billion in assets, 2.5 million gas customers, more than 12,000 employees, and offices in New York, Massachusetts, and New Hampshire.

Swisscom IT Services, a subsidiary of Swisscom, is a leading Swiss IT service provider with 2,100 employees based in Bern-Ostermundigen, Switzerland.

J.B. Hunt is a transportation solutions company that provides services throughout North America. The company employs more than 17,000 people and is headquartered in Lowell, Arkansas.
http://download.microsoft.com/download/1/f/2/1f200333-2e00-4509-861b-e0d4ba613cfb/JBHunt_EPM_Final.doc

Chiron Corporation is a biotechnology and pharmaceutical company based in Emeryville, California. The company employs more than 5,000 people at facilities in 18 countries on five continents.

Samsung is a global leader in semiconductor, telecommunications, and digital convergence technology, employing 70,000 people throughout 47 countries.

Milwaukee Journal Sentinel is the largest newspaper in Wisconsin and offers daily and Sunday editions in both online and paper formats.
http://download.microsoft.com/download/8/6/3/8638c14b-2f2c-4749-8e4a-c70f3131d671/MilwaukeeJournal_EPMSolution_Final.doc

Rodenstock develops, manufactures, and markets ophthalmic lenses and spectacle frames in Germany and internationally. The company has 4,600 employees in ten countries.

Kumba Resources Limited is a South African–based, independently managed diversified mining company that boasts a portfolio of world-class assets spanning Africa, Asia, and Australia.

For new and additional case studies please go to: http://www.microsoft.com/casestudies.