

How Eco-Energy Adapted to Hybrid Work with ProjectManager

Case Study



Challenges

- Traditionally managed complicated projects through spreadsheets
- Rapid growth and an increasingly hybrid workforce made it difficult to collaborate on work
- Team members gravitated toward different work styles
- More recently, the advent of hybrid teams has added more complexity to the delivery of enterprise projects.

Solutions

- **Increased transparency** allows for more understanding of who is working on what in real time
- **Single collaboration tool** to easily pinpoint roadblocks and provide a single source of project truth
- **One-click reporting** allows for budget tracking and the ability to compare actual versus planned costs

Results

- Increased collaboration
- One-click reporting

Tim Berry is Eco-Energy's IT director with more than 20 years of project management experience.

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"As we continue to grow our revenue streams and our product portfolio, we felt the need to, number one, centralize project information and create a single repository," said Berry. "We needed to have the ability for our teams to easily access projects and tasks, instantly make updates and most importantly, collaborate."

Why Did Eco-Energy Choose ProjectManager?

That led to a product evaluation and selection process, which took a detour once the pandemic changed how everyone does business. “We suddenly recognized that we needed a product that could help with the transition from being in the office to remote work while managing different work styles in the single platform,” Berry added.

During the evaluation process, it became clear that ProjectManager had the integrated tools to help during that transition. “ProjectManager lets Eco-Energy prioritize and manage the time frame for a project and gives us a working understanding of who’s working on what, when and where,” Berry said. “We can see where we are in real time, whether we’re tracking an individual task or the broader portfolio.”

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Eco-Energy Gets More Done, Faster

ProjectManager's one-click reporting feature was also critical. It lets Eco-Energy see where they are financially by monitoring and tracking their budget, including comparing actual costs versus planned costs.

There are also reports on workload that help with capacity planning for resources, including the project team. All reports can be filtered to show only the data they need, and those reports can be easily shared for stakeholders.

Berry also loves the live dashboard, which automatically collects and displays several project metrics in real time, including task progress and the overall health of the project. "We have to see metrics on the status of tasks, the budget, progress, etc., all in one view for project portfolio management," Berry said.



DONE	TASK NAME	ASSIGNED TO	STATUS	PROGRESS	PRIORITY	DUE
<input type="checkbox"/>	Design	GP	To Do	69%	Medium	Apr 18
<input type="checkbox"/>	Prototyping	GP	To Do	30%	Very High	Apr 20
<input type="checkbox"/>	Pre-production	GP	To Do	5%	Critical	Sep 1
<input checked="" type="checkbox"/>	New Production Equipment	GP	To Do	100%	Medium	Apr 25
<input type="checkbox"/>	Product Documentation	SC	To Do	0%	Medium	Aug 30
<input checked="" type="checkbox"/>	Production Operator Training	MG	To Do	100%	High	Sep 1
<input type="checkbox"/>	Compliance	MG	To Do	0%	Medium	Sep 9
<input type="checkbox"/>	Safety & Regulatory Inspections	MG	To Do	0%	Medium	Sep 9
<input type="checkbox"/>	Product Marketing	GP	To Do	0%	Medium	Sep 12

Collaboration Is Key

But most important to Eco-Energy, according to Berry, is collaboration. ProjectManager has multiple project views that allow each user to work the way they want, unlike other software which dictates the way you can use it.

Teams can plan and collaborate how they want, wherever they are. Work is updated in real time, which is reflected across all project views so everyone is always working on the most current data. There's only one source of truth.

Berry says that “if you have a single tool that provides collaboration, including real-time updates on comments or activities, that really increases visibility. You know what needs to be done now. As a project manager, I can go in and address those things that are either behind or have roadblocks associated with them.”

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At-a-Glance Analytics Keeps Stakeholders Informed

Berry likes that he can see the percentage complete of any project or task and has the ability to add comments, task priorities and files all in one place. He adds that the sheet view gives him more screen-space to view project variance, resource costs and more. Plus, he can add as many customized columns as needed for the project.

“We have multiple business units, and when presenting to the executive team, we can use ProjectManager to assign project priorities on individual projects and show the relationship to the overall portfolio,” Berry said. “That helps drive the discussion of what a project needs.”

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Bridging Hybrid Teams Across the Company

ProjectManager is being used by Eco-Energy's project managers, of course, but also by departments that aren't following a project management methodology—such as Eco-Energy's security and infrastructure team. "They have checklists or task items that they need to complete when installing hardware or software," Berry said. "They can manage their priorities and we can monitor that work."

Berry adds that ProjectManager is very visual and digestible by the leadership team. "We like this tool because it provides a way for us to collaborate effectively in a single tool, and it supports different methodologies, whether it's agile, waterfall or just task-driven activities."

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Ready to try ProjectManager for yourself?

Start free trial

Want to talk to our expert sales team?

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The screenshot displays the ProjectManager software interface for a project named "Govalle Construction". The interface is divided into several sections:

- Dashboard:** Shows task categories and their completion percentages: "Design" (75%), "Construction Start Date" (75%), "Stage Completion" (75%), "Final Completion" (50%), and "Project Closing Phase".
- Task List:** A table listing tasks grouped by phase:

ID	Task Name	Phase
1	Contracts	Contracts
2	Proposals	Contracts
3	Documents Review	Contracts
4	Bid Date	Contracts
5	Award Date	Contracts
6	Design	Design
7	Feasibility Study	Design
8	Apply for Permits	Design
9	Start Design Work	Design
10	Complete Design W...	Design
11	Procurement	Procurement
12	Order Equipment	Procurement
13	Order Materials	Procurement
14	Hire Crew	Procurement
15	Construction	Construction
- Gantt Chart:** A visual representation of the project schedule. It shows tasks as horizontal bars with their completion status and assigned users. Key tasks include "Contracts 100%" (Mike Cranston), "Proposals 100%" (Mike Cranston), "Documents Review 100%" (Mike Cranston), "Bid Date 100%" (Mike Cranston), "Feasibility Study 100%" (Jenni), and "Apply for Permits 100%". A milestone is marked for "3/29/2022".