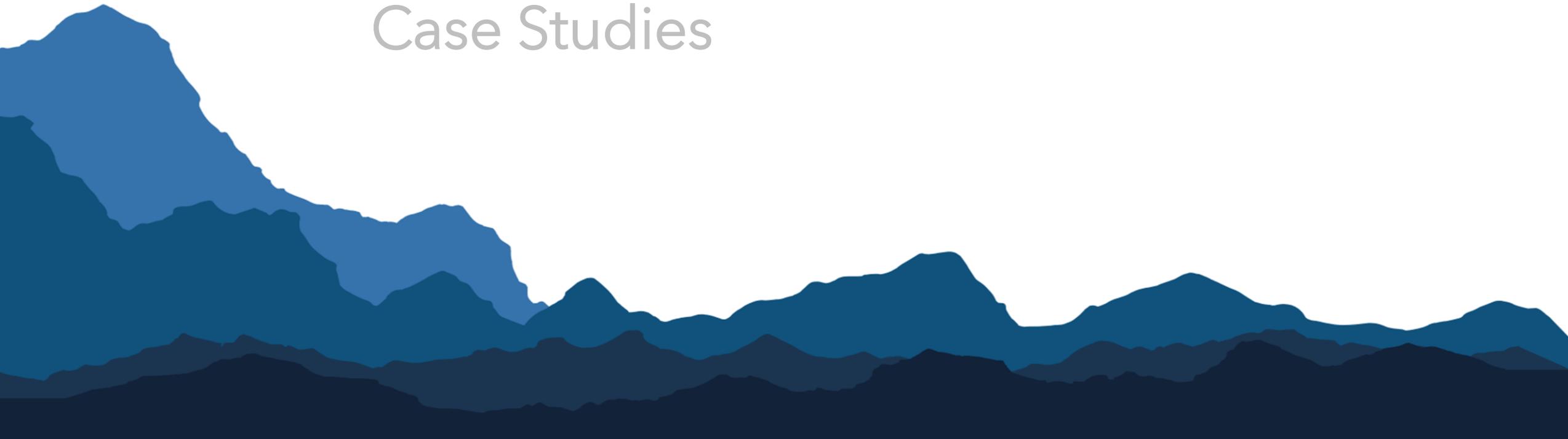


Project Portfolio Management Made Easy

Case Studies



CASE STUDY OVERVIEW

The eight Acuity PPM customers below have shared success stories of solving business challenges with Acuity PPM:

- **Kaiser Permanente**, Health Care (Work Intake)
- **Central Ohio Transit Authority**, Transportation (Capital Planning)
- **Insurance Company**, Insurance (Resource Management)
- **Members 1st Credit Union**, Financial Services (Data Access/Global Views)
- **Austin Industries**, Construction (Status Reporting)
- **Ocean State Job Lot**, Retail (PMO Maturity)
- **Global Performance Nutrition Company**, Retail (Enhanced resource reporting)
- **National Tire Company**, Retail (Improved portfolio transparency)



CASE STUDY (Work Intake): Kaiser Permanente



KAISER PERMANENTE®

Victoria Choo, Data Reporting Analytics Consultant, Kaiser Permanente



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By documenting everything in Acuity PPM, our Project Managers spend 30-40% less time compared to before when they had to touch multiple documents.

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Background: Kaiser Permanente is one of the nation's largest not for profit health plans, serving 12.6 million members across nine states and over 200,000 employees. Our team supports membership and administration and delivers operational reporting. Our team of 8- people includes analysts, data architects, developers, consultants and project managers. We are shared service and we receive about eleven project requests per day, which is about 330 requests per month. And at any given time we have about 25 ongoing projects.

How we use Acuity PPM: We have a cadence to review new requests and categorize them within the system. These requests get prioritized and go to specific team. Larger projects require a certain level of documentation and process (such as new dashboards or a new self service tool for example). Our project management team does discovery work on the priority of projects, business case, return on investment. And then we present those at the monthly steering committee meeting. We use the Work Intake module in Acuity PPM to organize our cadence and projects through our process and we use the prioritization capabilities with four weighted criteria to evaluate the level of effort of the requests.

The result: By documenting everything in Acuity PPM, our Project Managers spend 30-40% less time compared to before when they had to touch multiple documents. Acuity PPM helps prioritize and plan. When we present these requests at our steering team meeting we are helping our executives understand why a certain project might take longer and why we would prioritize one thing over another based on timing and effort. We do all of this upfront work and Acuity PPM is really helpful in helping us plan out the next three months of projects.



CASE STUDY (Financial Capital Requests): COTA



Matt Martin, Sr. Director PMO, Central Ohio Transit Authority



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The big win for us is that now we've got capital planning and our Opex planning together in one tool. We use that now in our annual planning process to arrive at an approved and prioritized portfolio with budget for both Capital and Opex.

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Background: Central Ohio Transit Authority has over 1100 employees with 560 operators to support ridership for over a million residents. When I started three years ago COTA did not have any kind of portfolio project, portfolio management processes, no formal PM practices in place. We were using spreadsheets and Smartsheets and just a mix of things to try to remotely track what we were doing.

How we use Acuity PPM: We started to integrate our capital planning process into Acuity PPM which had previously been outside of our portfolio management process. Once a year we do annual planning to identify our portfolio of projects for the following year and we prioritize that portfolio. But capital planning was outside of that process and we had capital projects as well and we didn't have this combined view. Our capital process was a very manual process with spreadsheets but we took the opportunity to use a better tool (Acuity PPM) to incorporate the process. We created a capital request portfolio within Acuity PPM. As we do capital planning, each division would submit their capital planning requests into Acuity and we would capture the financials of all the requests in Acuity along with other information to help us prioritize the work within Acuity PPM and align to strategic objectives. We use the financial plan within Acuity PPM extensively to capture both the capital side of the request and any operational expense associated with the project as well.

The result: All of those inputs help us prioritize all those requests into an approved, aligned portfolio that we have the resources, dollars, people, etc., to address. This has been really good. So we do all the planning work within Acuity PPM for estimating and budgeting. And so once we have an approved portfolio for each project, we send the financials to our finance team and they incorporate that into our ERP which allows us to do project costing on the backside. And that's been a big win for the organization because now we're starting to get some insights on our projects and what we're spending. And the tracking is a lot easier because we use the Acuity PPM project ID as the key in our ERP system so it is all linked up together. That's been a real win for the team.



CASE STUDY (Resource Management)

Chris C., Director of Project Management

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Resource management with spreadsheets was very painful. We had to get out of the Excel/SharePoint world and Acuity PPM helped us do it.

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Background: When I started 14 years ago, we didn't do any resource planning. Four years later, a new leader wanted to get to a more formal resource planning process. We started off in Excel, which got to be very painful because every developer, QA Tester, and BA each had their own tab. Any time we would add a project, complete a project, close a project I'd have to go into anywhere from 16 to 22 tabs and remove that project or add the project in and make more updates at the beginning of the month. It was very painful and never provided a holistic view.

How we use Acuity PPM: With Acuity PPM, I sit down with my development lead, my QA manager, my BA manager on a monthly basis, and we go through each project individually first and allocate the resources to make sure that everybody's aligned. We look at the resources from a holistic view and then drill into each resource to see what they are working on. I work with the managers to find out who is going to be available and adjust based on the number of days out of the office. This is helpful for our monthly portfolio review. On a monthly basis, I sit down with our C-Level Executives, and we go through each project. I use this as a launching pad to talk about the state of the portfolio to explain what has changed since the last time we met. We categorize our projects so that they can see the projects that they are prioritizing and where they fall into our buckets. As we drill into each active and pending project together, we may discover a brand new project we haven't talked about yet. And that's when we go back and discuss whether we need to add a resource or reassign a resource and how that impacts the portfolio. We determine whether to stop a project, put a project on hold, “slow burn” a project, and activate a new project.

The result: Acuity PPM helps me track resources and is very useful to discuss the portfolio with our executives. We had to get out of the Excel/SharePoint world and Acuity PPM helped us do it.





CASE STUDY (Standard Data Views): Members 1st Credit Union

Angela Wiley, Principal Project Manager, Members 1st Credit Union



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Utilizing the global views of plays an essential role in facilitating access to our organization's information. The global views allow our teams to focus on their own work, and it simplifies data access.

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Background: Members 1st is a member-owned, not-for-profit credit union. And we have about \$7 billion in assets, and we serve over 600,000 members in the central Pennsylvania area. I have over 20 years of experience in the PPM industry and have been utilizing Acuity PPM for four years as the Administrator, onboarded Acuity to our team and configured the instance.

How we use Acuity PPM: We have a work alignment meeting to review what is on deck, what came in, and assess the priority of the new work. We use some of the global views for Work Intake status reporting, and it is very helpful in this meeting. We also have a view for business planning with finance that has various financial fields that cuts out the noise but is only suitable for the finance team to get the information that is important to their area. We use another view for business planning reviews and another for the executive global view, because leadership does not want to get into the details. So we provide those views different stakeholders. On the project side we have a few key views such as: a summary status report view, a project cost report for active and pending projects, and an overall portfolio report view with project percent complete. We also utilize views specific to our PMO so we can filter by Project Manager. Finally, we have a leadership team review with a view to see what is in the pipeline.

The result: Creating those static views that enables you to create those standard layouts as you navigate and work with your stakeholders. It is helpful with meeting collaboration and provides transparency across all teams because other teams and other departments will go in and can get answers to their questions by using the global views to access their data. Utilizing the global views of plays an essential role in facilitating access to our organization's information. We use global views for enterprise wide reporting, and it also provides consistency for all users. It fosters collaboration and the data from all the business units is accessible. The problem that this solves is when you're in meetings and you're talking about the project portfolio in Acuity PPM, everyone has their own views. With global views in Acuity PPM we get consistency in the data we are viewing.



CASE STUDY (Construction Management): Austin Industries

Mike Tomasik, IT PMO Manager, Austin Industries



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Acuity PPM just does a great job of putting everything in one place for us and being able to provide business priorities as well as real-time updates of the actual status of our projects in one place for our stakeholders.

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Background: Austin Industries is one of the largest construction companies in Texas with close to 10,000 employees. We focus a lot of our construction on civil (skyscrapers, large commercial buildings), commercial aviation and industrial construction (such as chemical plants). This has required us to use a lot of different tools, but we were looking at one tool that aggregated our program management and project management into a central location. Acuity PPM does a great job of doing that for us. For software development, we're an Agile organization and use the Atlassian suite; for construction we use anything from Microsoft Project to Wrike or Smartsheets but then we need a way to aggregate all that data. Acuity PPM does a great job of aggregating our data.

How we use Acuity PPM: We use the prioritization module in Acuity PPM with a business priority number for our monthly steering committee meeting. We discuss existing priorities and how new priorities fit in so we can make trade-off decisions and provide the stakeholders with a real-time view of what's coming, what's in flight, and upcoming accomplishments. Our internal development teams run sprints and so depending on which Acuity PPM portfolio you are in, you'll have a blend of project methodologies. By linking to different tools, we've done a pretty good job of using Acuity PPM to provide a full picture of our projects (schedule, real-time status, key information, and requirements).

We also needed to convey current status with the change in percent complete over time so that we could communicate trends to our stakeholders. We came to Acuity PPM and their team was able to develop a really nice looking chart to demonstrate project trends to answer questions (“Is it trending up? Trending down? Is it flat?”). We can then drill into the risk factors of why a project is stalling or going in a good direction. Acuity PPM has done a great job here.

The result: Acuity PPM just does a great job of putting everything in one place for us and being able to provide business priorities as well as real time updates of the actual status of our projects in one place for our stakeholders. Our internal stakeholders will ping me on MS Teams and ask about the status of a certain project. I tell them, the real-time status is there in Acuity PPM and you now have access to it and you're able to go in there and look at it for yourself.



CASE STUDY (PMO Maturity): Ocean State Job Lot

Adam Sykes, Director of Innovation & Process Improvement, Ocean State Job Lot



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We tried to build a PPM tool inside Smartsheet, but outgrew that. We made the switch to Acuity as our PPM tool. We built a new project delivery methodology with a number of different steps, tools, templates. Acuity PPM has been really helpful because it's very simple to use, very configurable, and has been able to grow with us as we're continually evolving our methodology.

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Background: Ocean State Job Lot is the Northeast's largest close-out retailer. We have over 150 locations in nine states with over 5000 associates. We've had 45 years of positive profitable growth and expansion and are approaching a billion dollars in sales. We started the PMO back in 2013 and we used lots of different tools including Google sheets. We tried to build a PPM tool inside Smartsheet. That worked for a little bit, but we kind of outgrew that. As we grew and assumed more responsibilities we made the switch to Acuity PPM as our portfolio management tool.

How we use Acuity PPM: All requests go through Service Now but if we decide that it is a project, it goes into the PMO. Acuity PPM is our system of record for any project within the PMO. Over time we have expanded our responsibilities from traditional software projects, HR, Supply Chain, Financials, to where we are now using Acuity PPM for new store openings, strategy, and process improvement. We love the weekly status reporting in Acuity PPM. That was something I tried to recreate in different tools such as Smartsheet, but couldn't get it right. I was very happy when I found Acuity PPM. We also use resource planning, so every project that we have has resources assigned to it. We're currently growing into that. We also love the custom fields. We've been able to add in some custom fields like project classification, the different phases of our project methodology, and are starting to use the financial tracking options. The tool is primarily used by the PMO and our IT team, but we are looking to broaden that at some point in the future.

The result: A key benefit to our organization is that we have a single source of critical data. So now that we're centralizing this, everyone can see it. The standardization of status reporting and holding ourselves accountable for delivering status reports every week to our customers has really helped us drive our maturity. All of this has been helpful and has built in some uniformity and consistency in how we're operating.



CASE STUDY (Enhanced Resource Reporting):

Global Performance Nutrition Company

The Challenge: A global retail performance nutrition company manages research and development initiatives across multiple well-known consumer nutrition brands. Its R&D organization required stronger portfolio visibility to support end-of-year reporting, better alignment between project value and resource allocation, and a scalable system to support organizational growth. Manual, Excel-based reporting processes and fragmented data made it difficult to efficiently analyze priorities across brands and innovation pipelines.

How we use Acuity PPM: Acuity PPM partnered closely with the organization's R&D team to deliver a flexible, configurable portfolio management solution supported by hands-on expertise.

- **Enhanced reporting and analytics:** Acuity PPM helped configure advanced reports that combined key project attributes—such as phase, process model, planned launch dates, and estimated financial benefits—with detailed resource allocation data. This eliminated manual Excel work and significantly reduced reporting effort.
- **Improved data reliability:** Technical issues affecting report exports and in-application editing were resolved quickly, increasing confidence in the accuracy of portfolio data used for leadership decisions.
- **Scalable configuration:** A separate Acuity PPM workspace was created for a new R&D group, enabling independent governance while maintaining efficient, shared licensing.
- **Responsive support:** Acuity PPM provided timely assistance with user onboarding, access management, and troubleshooting to keep teams productive.

The result: With Acuity PPM, the organization gained clearer portfolio visibility across brands, streamlined reporting processes, and a scalable platform that supports data-driven R&D investment and prioritization decisions.



CASE STUDY (Improved Portfolio Transparency): National Retail Tire Company

The Challenge: A national retail tire company sought to mature its Project Portfolio Management (PPM) capabilities by moving away from spreadsheet-based tracking. While spreadsheets were familiar, they limited executive visibility, slowed strategic decision-making, and created unnecessary administrative burden. Leadership needed a more dynamic and scalable approach to improve efficiency and better align initiatives with enterprise strategy.

Solution: Solution: The organization selected Acuity PPM as a lightweight yet powerful alternative to spreadsheets—providing the right level of structure without the complexity of large enterprise PPM platforms. Acuity PPM became the system of record for project intake, prioritization, and performance monitoring. Executives used the platform to execute company strategy while balancing large initiatives alongside competing operational and strategic priorities.

Acuity PPM enabled dynamic visibility into resource capacity and overallocations, allowing leaders to evaluate resource impact scenarios before approving new projects. The solution also supported improved portfolio maturity through consistent tracking of project financials, expected benefits, and the adoption of best practices such as proposal intake, dynamic prioritization, and structured risk, issue, and decision management by project teams.

The result: Following a successful pilot and security review, the organization entered into a multi-year agreement with Acuity PPM and later renewed the platform. Today, Acuity PPM supports improved portfolio transparency, stronger governance, and more informed decision-making across the enterprise.

