



Inviso Consulting Group  
Project Management and PMO



***By establishing sound project and program governance processes for your organization, Inviso's Project Management Office (PMO) experts gives businesses the insight they need to make informed funding decisions and ensure that managers are held accountable for delivering results.***

Inviso consultants can manage your projects as well, ensuring that projects are well-planned, meetings are scheduled, accountabilities are met, and documentation is complete.

**Complex organization operating in silos**

**Inefficient operations**

**Established governance**

**Improved project operations**

**Standardized reporting**

**Project portfolio approach**

**Relevant managers committed**

**Increased impact**

## Corporate Challenge

A sales operations team faced the challenge of driving policies and efficiency into a very large sales team spread across 13 geographies, organized into multiple segments, and serviced by many corporate functions such as finance and customer support. The various departments interacting with Sales operated in silos, causing headaches in the field and inefficiency at headquarters.

The Sales Operations General Manager wanted better coordination across projects, better leverage with vendors, fewer redundant projects and systems, more visibility into project financials, and better insight into prioritization of projects.

## Solution

Inviso worked with the General Manager of Sales Operations to establish and facilitate a governance forum for managing projects. The objectives included elimination of redundancy; better coordination and execution; and broader decision-making, where executives from multiple groups could align strategies and execution.

In addition to better management across departments, the GM also wanted better internal operations. Inviso performed the following:

- Standardized requests, plans and status reports for all Sales Operations' projects
- Recruited executives from multiple departments to participate in the governance forum, and to use the templates.
- Designed and launched a tool for capturing project plans, reporting status, and tracking project financials.
- Worked with project leads and program owners to define plans, track issues and report status
- Worked with departmental directors to prioritize and report on portfolios of programs and projects

The first benefit achieved was better insight into project financials, so managers could correct course to stay on budget. A broader benefit of the governance forum was better consensus and cooperation among executive managers about how to drive change and increase impact. Finally, significant savings resulted from elimination of redundancy.