

Project resources management system in CSOB Leasing



COMPANY

CSOB Leasing, a.s. provides financing services for both light and heavy transport vehicles, machinery, equipment, computing systems, technologies, including financing of high acquisition value subjects such as wagons, airplanes etc. incl. syndicated financing. The company represents a certainty for its clients due to a strong financial background in CSOB and KBC group. It provides a broad range of high quality and complex services both for its customers and collaborating partners. CSOB Leasing has the broadest branch network in Czech Republic and therefore provides a personal approach also in regions.

CHALLENGE

To stay at top end of the market requires definition of vision, its step by step realization, proper response to trends and readiness to change what the company is doing and how it is doing. Successful companies manage changes as projects. There are tens of projects taking place in CSOB Leasing at every moment and hundreds of people participating in them. Projects represent a large investment from financial point of view and an organizational challenge from managerial point of view. These are two reasons why the project portfolio has to be managed. CSOB Leasing was using a system for project portfolio and project resource management based on MS Project Server and an add-on application. This solution did not suit due to its overall complexity, lack of user friendliness, high operational cost and lack of other functions necessary for project management. The vision embraced a single system enabling a simple resource distribution into the whole project portfolio, detailed planning in particular projects, simple reporting and support for an effective team collaboration.

„We have chosen ObjectGears, because it is a platform, not a particular solution for the given area that despite having better or worse configuration capabilities, always keeps inner limits given by purpose of the software. On the contrary, in ObjectGears we can easily change or extend anything. Full application logic is available to us which eliminates dependency on vendor. We can do further development on our own or we can hire a third party for it. Everything is configured on click or by means of well known and easily manageable technologies.“

*Jakub Maurer,
Application Manager,
CSOB Leasing, a.s.*

SOLUTION

CSOB Leasing decided to use Capacity planning solution based on ObjectGears platform. There are four basic roles acting in the CSOBL Leasing Capacity planning:

- 1. PMO (Project Management Office)**
 - a. Administers project portfolio
 - b. Allocates the total resources approved by the company management
 - c. Ensures reporting and checks alignment of plans with project steering committee decisions
- 2. Project manager**
 - a. Negotiates solution team allocation with team managers
 - b. Assigns particular tasks to particular solvers
 - c. Approves solver timesheets in assigned tasks
- 3. Solution team manager**
 - a. Approves or rejects requests for solution team deliveries
 - b. Before approval verifies particular worker possibilities in context of other tasks
- 4. Solver**
 - a. Fulfills tasks assigned by Project manager
 - b. Escalates task, if there is an issue with its finalization
 - c. Reports time spent on particular tasks

Besides project, also sources used for incidents, catalogue requests and tasks consisting in necessary configuration of current systems (so called planned maintenance) are planned and their utilization evaluated. These are different ITIL processes. However, they are covered by a single solution from the resource planning point of view. Therefore, the company has an overall picture, how much particular systems cost.

The fundamental process course is described in the below scheme:

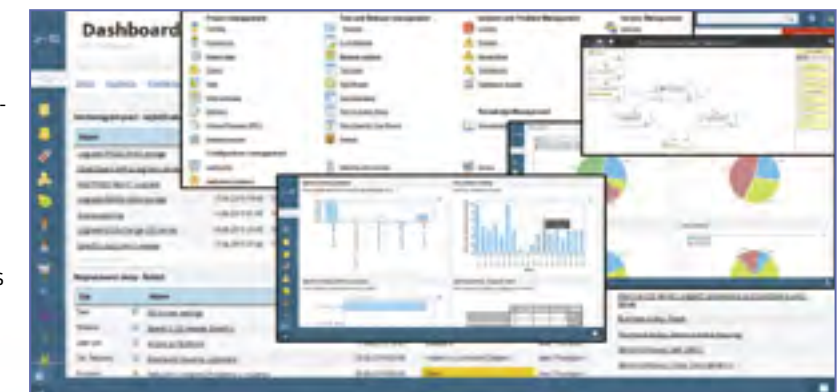


PLANNING AND TIME WRITING IS NOT END OF THE STORY

The solvers communicate with the project manager about the assigned tasks, they record progress and when necessary pass the task to next solvers. Similarly, detailed Requests for change (RFC) evolve within projects. ObjectGears becomes a collaboration platform that replaces disseminated email communication. The company has an overview of effective utilization of its sources from the highest level (allocation to projects) up to the lowest level (course of requirements and task resolution).

WHAT IS OBJECTGEARS CAPACITY PLANNING

Project resources planning is part of the solution for managing IT processes. ObjectGears is Rapid Application Development (RAD) platform for a fast and effective application development. RAD platform, IT processes and project management, Service Desk, Knowledge Base are free for use up to 25 users. In the full version without any further restrictions. Customer can implement also other solutions on the platform - e.g. processes that were supported so far by Excel spreadsheets or applications at the end of their lifecycle. In this way ObjectGears can make new projects cheaper and faster. Moreover, users get new applications in a unified environment that they know well instead of many new applications which work each a in bit different way.



MAJOR CONTRIBUTIONS OF THE SOLUTION

- Overview of the whole project portfolio and its structure – it is clear what particular projects cost.
- Possibility of a detailed team members planning on particular projects – avoiding collisions in resource requirements.
- Support for effective project team collaboration – collaboration tool.

The solution provider is www.objectgears.eu.

