



# A Caterpillar Machinery Reseller brings work automation and business intelligence to their PMO

Optimum works with the client to develop a PMO Maturity Roadmap and deploy a robust and scalable project and work management platform

## Organization

Caterpillar reseller

## Industry

Machine Retail

## Country

United States

## Challenges

A previous attempt at a Project/Portfolio Management Office (PMO) rollout resulted in confusion and a general misperception of the PMO's true value. Also, there was a lack of effective collaboration and portfolio-level visibility across teams and projects.

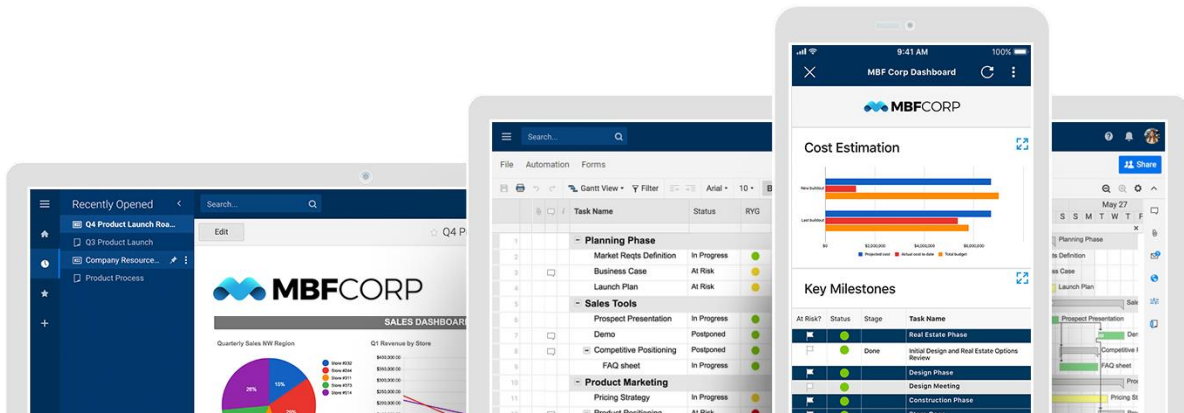
## Optimum's Involvement

Optimum enabled the client to demonstrate the value of their newly-implemented PMO to the corporation. Optimum also developed a robust Smartsheet-based project management solution to support the company's larger Growth and Transform initiatives.

## Deliverables

Tangible steps were recommended to increase PMO potential and companywide acceptance. Smartsheet's software implementation allowed for increased process and portfolio visibility and inter-departmental collaboration.

# Maturity Roadmap provides realistic goals and timeline for PMO maturity



Portfolio/Project Management Offices (PMOs) struggle in their infancy stages to corral key stakeholders together to streamline processes, while also trying to socialize their functional purpose to the rest of the company. The client realized their need for business advisory services to help lead them in the direction to full PMO maturity, through tangible tasks and timelines.

Optimum was engaged by the client to provide project management and work automation consulting services to support the company's larger Growth and Transform initiatives, and a broader rollout of the project management best practices to other groups, beyond the IT PMO.

Optimum's team of Project Management and Technology Experts started the project by evaluating and assessing the organization's current Project Management Maturity Level and processes and providing an enhanced PMO strategy and maturity roadmap.

Through their time spent working with the client, Optimum's Team developed an understanding of the client's major business and PMO processes. Process maps and diagrams were created to illustrate process bottlenecks and other challenges, enabling them to recommend an enhanced PMO strategy, a robust maturity roadmap, and a set of improved processes, standards, templates, and best practices.

# Optimum partners with Smartsheet to overcome portfolio visibility challenges

Optimum also developed robust and scalable Smartsheet template designs and reporting dashboards, based on the client's project management needs and goals, to increase the user adoption, support the company's larger Growth and Transform initiatives, and implement a broader rollout of project management best practices to work groups beyond the PMO.

Some of the key deliverables of the project included:

**Enhanced/New Processes:** including a Stage Gate methodology based on the PMI standards, Project Change Control and Change Management Process, Schedule and Cost Control & Reporting Process, New Project Request Process, New Project Initiation and Planning Process, Project Closeout and Business Handoff Process, and Project Management Best Practices

**New Templates:** including Status Reports, Risk Log, Decision/Action Logs, Change Request Form, Resource Plan, Steering Committee/Executive Status Reports, Project Communication Plan, Testing, Training Documents, Rollout/Transition to Business Plans, and a Business handoff/Sign-off Form.

## About Optimum

Optimum is a modern Software Solutions and Services firm, transforming businesses through the power of People, Technology, and Automated Processes.

By utilizing our expertise and experience in strategic planning, process optimization, and innovative technologies, our clients gain clarity and productivity, reduce operational and labor costs, ensure compliance, and enable business automation and transformation.

Optimum offers a full suite of software services and solutions, including Custom Software Design and Development, Business Advisory Services, Business Process Automation, Systems Integration, Business Intelligence and Analytics, Work Management and Collaboration Solutions, IT Project Management and Business Analysis, and Staff Augmentation. Learn more by visiting [www.optimumcs.com](http://www.optimumcs.com).

## About Smartsheet

Smartsheet is an award-winning, cloud-based project management, work automation, and collaboration solution for managing any project. Smartsheet provides a real-time view into the status of top KPIs, critical trends, and summary reports using easy-to-build visual Dashboards and Scorecards. Smartsheet's Control Center is utilized to streamline and automate approval workflows and the project provisioning. This functionality is possible through seamless, secure integrations with your legacy systems or cloud tools. Learn more by visiting <http://www.optimumcs.com/smartsheet>

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