



Beam Inc. Teams with Daptiv to Align IT Services with Business Priorities

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Susan Klein, senior director, IT PMO, Beam Inc.

AT A GLANCE

- Beam’s PMO was under pressure to demonstrate value for the money they spent and how their IT programs supported business objectives and superior business performance.
- Beam selected Daptiv PPM based on its ability to provide a total portfolio view of the company’s costs, resources and business outcomes.
- As the company’s IT group saw the value of the product, they expanded their deployment to support business functions. Daptiv PPM is being used to manage facilities improvements for Beam’s distilleries, and to track finance shared services and administration projects.

Beam Inc. (NYSE: BEAM) is one of the world’s largest premium spirits companies, encompassing a portfolio of nearly 100 brands, more than a dozen global operating and commercial facilities and 3,200 employees worldwide. As the leading American spirits company and the fourth-largest premium spirits firm in the world, Beam drives the second-highest case volume in the United States.

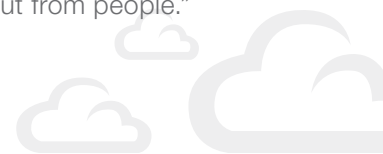
BUSINESS ISSUE

As a company with some of the best-known and widely talked about brands in the world, Beam has centuries of product development, innovation and proven experience in building successful global brands. The company’s program management office (PMO) oversees a variety of projects across the enterprise, ranging from IT projects, such as SAP rollouts and server refreshes, to business projects such as facilities management, financial shared services, and operational improvements.

Like many organizations, Beam’s PMO was increasingly under pressure to demonstrate value for the money they spent and how their IT programs supported business objectives and

enabled superior business performance. “Managing the portfolio and ensuring that IT is aligned with the business—that’s absolutely critical,” said Susan Klein, senior director, IT PMO, Beam Inc. “The funding we get is limited so we need to ensure we’re prioritizing properly alongside the business.”

One of the biggest drivers for the project was the desire to provide executive visibility into the PMO. Providing status updates on projects was a challenge in steering committee meetings. Klein and her team wanted to provide an accurate sense of resources, budget and project momentum but lacked the necessary tools to do so. Without a forward-looking view of how resources were being spent, it was subsequently difficult to evaluate their effectiveness at mapping against the company’s business priorities. Beam also needed to determine resource allocation and gain visibility into where employees were spending their time. “We were unable to answer basic questions such as, ‘What is the status of our high priority projects? Do we have enough resources to take on projects in our pipeline?’ from our CIO,” said Klein. “It was a constant struggle to get that kind of input from people.”



Beam had traditionally relied on office productivity tools like Microsoft PowerPoint and Excel to track projects. Too often team members would spend hours updating slides and worksheets that become obsolete almost as soon as they were developed. Project managers would track their projects in different programs and formats, making it impossible to find a single, consolidated snapshot of the PMO's activity.

SOLUTION—A “SINGLE SOURCE OF TRUTH” FOR IT DECISION-MAKING

After an extensive search, Beam selected Daptiv PPM based on its ability to provide a total portfolio view of the company's costs, resources and business outcomes. Daptiv PPM's easy implementation and configuration were also key decision factors. “Daptiv stood out because it offered a SaaS-based solution, and that definitely influenced our decision from an investment standpoint,” explained Klein.

Daptiv's commitment to soliciting feedback from its enterprise customers also helped in Klein's decision. “We felt having the expertise of a company like Daptiv—that has drawn upon its customers' experiences and made improvements accordingly—was beneficial. The team at Daptiv is always implementing new functionality based on best practices and that's great. We can take that and run with it!”

Beam was up and running with Daptiv PPM in “literally a couple of weeks,” said Klein. Daptiv provided an implementation expert who helped them think through their current pain points and the problems they were trying to resolve. “They worked on configuring Daptiv to fit the various pieces of the PMO puzzle as it were, at the time, and they've continued modifying those criteria as our PMO evolved and moved forward,” said Klein.

However, not everyone at Beam was thrilled about implementing a new PPM system. “People didn't want to get away from the way they were used to doing things,” Klein said, noting it was difficult for users to understand that compared to Daptiv, the “old way” of project management involving slide decks and spreadsheets was time-consuming and inconsistent. As a result, the way Klein's team rolled out Daptiv PPM was critical to the product's adoption. “We didn't force feed everything right away,” she said. Initially, Klein and her team taught users only about weekly status updates, moving on to weekly timesheets for time tracking once they mastered the first skill. Users were then gradually introduced to additional features in the system, and worked their way towards fully managing projects within Daptiv PPM.

Since deploying Daptiv PPM, Beam's user adoption of PPM practices has increased substantially. As the company's IT group saw the value of the product, they began using it more broadly to support other business functions in the organization. Daptiv PPM is now being used to manage facilities improvements for Beam's distilleries, as well as to track financial shared services and administration projects.

Daptiv's Dynamic Applications feature helps to create custom applications that feed data into their ERP system. This minimizes their reliance on using spreadsheets, and instead stores data in a single, central repository that is continually being updated. The data is also accessible in Daptiv's reporting tools and dashboards, which are visible across the entire organization.

Specifically, Beam has implemented a Dynamic Application for best practices around various projects. Project managers are able to enter in the various lesson

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types and categorize it as a “lesson learned” or “success.” This was used to create a comprehensive database of educational materials for training, organizational change management and internal communications.

“Reporting has been a really big win for us,” said Klein. With the push of a button, users can now access weekly status reports and view a list of completed or overdue tasks, key decisions that were made, and issues or roadblocks on each project.

“More than anything, we can now provide visibility into all of the projects, costs and resources. Fundamentally, it’s really about where people are spending their time,” said Klein. “Daptiv’s solution empowers us to effectively support operations, and frees us up to focus on more innovative work around projects.”



ABOUT DAPTIV

Founded in 1997, Daptiv is the leading provider of on-demand Project Portfolio Management (PPM) solutions. Daptiv has helped thousands of companies improve their strategic planning and business execution by offering adaptable PPM solutions and expert professional services. Daptiv’s customers include world-class organizations such as Beam, Chase, Coach, Harvard University, Honeywell, InterContinental Hotels Group, and Virgin Australia. For more information about Daptiv’s PPM solutions, please visit www.daptiv.com.