

Case Study Daptiv PPM



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Ooba Sees Immediate Results with Daptiv PPM and Daptiv Advanced Report Builder

ooba (previously MortgageSA) pioneered home loan origination in South Africa and today is the country’s leading home loan facilitator. The company provides a turn-key solution from property search, right through to financing the purchase, obtaining insurance cover and servicing.

Need for a Cohesive Business

ooba’s Strategic Business Enablement (SBE) division is responsible for the enablement of strategic business initiatives as well as the operational systems and facilities maintenance. The SBE Program Office, responsible for project management and delivery, resource planning and control and cost management had an in-house developed process of managing projects. “We had MS Project but there was no cohesiveness to the project management methodology and it was clear that we needed to manage our projects with more control and visibility,” says Owen Meredith, Program Manager. Two key teams - the Program Office and the Architecture and Systems Administration teams - needed to gain a better understanding of resources, how they were being deployed and the costs involved in order to be on point with their project planning.

Solution

A significant reason why ooba chose Daptiv PPM was that it is a hosted solution with seasonal updates. “I’ve worked with hosted tools before and I was converted – I knew that finding a hosted solution would be the best match for us,” says Meredith. Specific to the roll out process and implementing Daptiv PPM, Meredith says, “Daptiv PPM is quite intuitive and quick to pickup. Despite the fact that we are in South Africa, Daptiv’s team was able to work with our time difference, set up conference calls and training sessions without a hitch.” Other tools that were helpful to the Strategic Business Enablement group are Daptiv’s forums and the Daptiv community site where they were able to engage with other customers and ask questions.

Here are some specific examples of how ooba uses Daptiv PPM:

- Go to market initiatives. The Program Office will go into the Daptiv PPM project environment and use resource planning, control allocation and cost management to plan for go to market initiatives.
- Restructuring insurance products. The Program Management and Planning teams use Daptiv PPM’s time sheets, dynamic applications and discussion boards to help re-develop core insurance applications.

Key Facts

- Despite the fact that MS Project was in place and IT had an in-house process for managing projects, ooba's Strategic Enablement Division wanted an on-demand solution with greater functionality.
- Daptiv Advanced Report Builder is used to generate reports for upper management to disseminate information in a snapshot view of performance, resources and costs.
- With Daptiv PPM and Daptiv Advanced Report Builder, ooba now has more control of resources and overall project information. They can find information now that either wasn't accessible or was too hard to find.

ooba also uses another key functionality – Daptiv Advanced Report Builder – to help create ad-hoc reports. In a snapshot, one can easily grasp how projects are performing and figure out which resources are being deployed and how financials are stacking up. Daptiv Advanced Report Builder is particularly helpful in disseminating information to upper management so they have a greater understanding of project status.

Value

For ooba, the benefits of Daptiv PPM are:

- Central source of truth. Having one place for all project information and any related documents and discussions.
- Greater control of resources. There is no question about who is working on projects, when they are working on them or how.
- Forward planning. Knowing what's feasible for future projects.
- Accuracy of project status. Getting a clear picture of what's going on: change management, budget changes, time sheet continuity.

In addition to Daptiv PPM, ooba also draws value from their Daptiv Advanced Report Builder license. "Before, I would spend hours pulling data and now I can do it in minutes," says Meredith. "Daptiv Advanced Report Builder saves us a massive amount of time." With Daptiv Advanced Report Builder, Meredith can easily manipulate data and present it in a way that is simple yet comprehensive. "I love that I can now find information that wasn't accessible or was too hard to find before implementing Daptiv PPM."

Daptiv Advanced Report Builder

Daptiv Advanced Report builder allows you to create ad-hoc reports without developer skills, another step in functionality to work with Daptiv PPM. With Daptiv Report Builder, you can:

- See the report while you build it
- Create reports, charts and graphs using native or custom data
- Create charts and graphs - data visualization
- Sort, filter, group and add calculations
- Export to multiple formats or schedule email delivery