



## Abbey Road Group Saves Time, Improves Processes and Delights Clients with Daptiv PPM

*“Being able to centralize all of our projects and operational information in a single source is a huge time savings, which in turn increases our productivity and efficiency twofold.”*

Cassie Porcella, Business Manager

### AT A GLANCE

#### KEY FACTS

- Abbey Road Group had been using Microsoft Excel spreadsheets along with Microsoft Project desktop and Outlook to manage schedules, create reports and manage overall business operations.
- In addition to effective time tracking, robust reporting and collaborative capabilities, Abbey Road Group needed a solution that could mold to their unique processes without added fees or hassle.
- Abbey Road Group sees the biggest value of Daptiv PPM tied to client perception—they can tell that Abbey Road Group projects are put together seamlessly and it helps reinforce that the company is delivering quality solutions as expected, on time.

*“The use of Daptiv PPM enhances client perceptions of the Abbey Road Group’s ability to continually deliver quality solutions.”*

The Abbey Road Group offers complete land-development solutions from residential and condominium projects to commercial, retail, industrial facilities and more. Based in Washington, the company provides a complete range of services to public and private companies throughout the northwest.

The Abbey Road Group is known throughout the local jurisdictions for their superior expertise (the go-to-people) for understanding and facilitating the entire development process, for their innovative approaches, for being environmentally sensitive, and for their ability to deliver turn-key projects on time and within budget.

#### BUSINESS NEED

In 2007, Abbey Road Group was using MS Excel spreadsheets along with Microsoft Project Desktop and Outlook to manage schedules, create reports and manage overall business operations needs. They were ‘only really using MS Project to create Gantt charts’ and they

felt there must be better way to manage their business processes with software tools. “We began looking at the critical areas of the business that needed attention, such as time spent on client engagements as well as having a central source of truth and information that would allow for employees as well as outside architects and engineers to collaborate more effectively,” says Cassie Porcella, Business Manager. “Although we had a few software tools in place, they weren’t necessarily simplifying our processes or allowing us to gain an executive view of projects so we began looking into different project and portfolio management software options.”

#### SIMPLE SOLUTION

Abbey Road Group investigated Daptiv and chose to subscribe to Daptiv PPM as their software solution based on robust reporting provided by Daptiv Work Intelligence™, flexible configuration, project and portfolio management capabilities, global views, and the on-demand delivery model that allows for collaboration. “In addition to robust functionality, we really needed a flexible software solution that could mold to our processes, without the burden of

*“The Daptiv staff is very knowledgeable and they are a wonderful resource to help us ensure that we’re maximizing the value of the software—we left feeling pumped about the direction we’ll be going in the future with Daptiv PPM.”*

Cassie Porcella,  
Business Manager

extra fees,” points out Porcella. “We are a unique business and we wanted a software solution that would adapt to the way we work and the fact that Daptiv PPM was able to meet our needs that way was key.”

Getting started with Daptiv PPM was a simple process. “Our implementation went well and the webinar training was very helpful,” says Porcella. “We’ve also been able to customize our Daptiv PPM environment over the years without much effort on our part, and it’s been great

working with the people at Daptiv who give us ideas on how we can further leverage the solution to improve our business processes as we move forward.”

Currently, everyone at the Abbey Road Group is using Daptiv PPM, from project managers to administrators, department heads in Survey, Engineering and Design to the CEO. All business operations are managed with Daptiv PPM, such as marketing projects, employee time tracking, and client project management.

**Here is an example of a project currently in place:**

The screenshot shows the Daptiv PPM Winter '10 interface. At the top, there is a navigation bar with tabs for Dashboard, Projects, Documents, Reports, Timesheets, PTO Request, PTO Accruals, In and Out Board, and See All. Below this is a search bar and a breadcrumb trail: Back to Projects > Page Options > 09-268, Puyallup/Sumner Chamber of Commerce > Project Home.

The main content area is titled 'Project Profile' and displays the following information:

- Project Name:** 09-268, Puyallup/Sumner Chamber of Commerce
- Description:** US Chamber Accreditation
- Approval Status:** Not Required
- Approval Notes:**
  - Created By:** Shauna Cowan
  - Created On:** 12/1/2009
  - Manager:** Gil Hulsmann
  - Last Modified:** 12/3/2009
  - Project Number:** 12843
  - Parent Project:**
  - Planned Start:** 12/1/2009
  - Planned Finish:** 3/1/2010
  - Priority:** High
  - Budget:** \$0.00
  - Capacity:** Unplanned
- Compact Parking Stalls**
- Site Coverage**
- Storm Drainage Detention (CF)**
- ZONING INFORMATION - See Below:**
- Zoning Designation**
- Comp Plan Designation**
- Density / FAR**
- Minimum Lot Size**
- Minimum Lot Frontage (SF)**
- Parking Requirements**
- Frontage Improvement (LF)**

On the left side of the interface, there is a 'Project (Billable Menu)' with options: Project (Billable Projects) Overview, Home, Status History, Update Status, Customize Home, Admin, Members, Tasks, Documents, and Discussions.

“Our CEO uses the project and portfolio executive views to stay on top of operations, such as project status and employee expenses,” says Porcella. “Our project managers also leverage reports and our department heads in the survey, engineering and design divisions also

rely on Daptiv reports on a regular basis.” Project managers manage client projects with Daptiv PPM—everything from getting projects set up to collaborating with engineers, architects and even the clients themselves.

*“Our CEO uses the project and portfolio executive views to stay on top of operations, such as project status and employee expenses.”*

Cassie Porcella,  
Business Manager

Here is an example of a project status report:

Project Status Report for 08-129, 26th Avenue Short Plat									
<b>Description:</b> Proposed 2 to 3 lot Short Plat/Subdivision of a 6.74 acre lot within Pierce County.									
<b>Contract #2 dated 1-16-09:</b> Preparation and processing of a 6.74 acres 3 lot short plat application in the rural separator zone of the Pierce County and Mid-County community plan area. The existing home and accessory dwelling is proposed to be contained within lot 1. All lots are proposed to be served by public water and individual septic systems.						<b>Project Manager:</b> Roy Snyder			
<b>Start Date:</b> 6/23/08						<b>Finish Date:</b> 7/23/09			
<b>Budget:</b> 0						<b>Priority:</b> High			
<b>Overdue Tasks:</b> 3						<b>Client Name:</b> Ron Bunch			
<b>Completed Tasks:</b> 44						<b>Site Address:</b> 12422 26th Ave E, Tacoma		<b>Jurisdiction:</b> Pierce County	
<b>Tasks Due Next Week:</b>						<b>Total Number of Documents Posted:</b> 13			
<b>Last Status Updated:</b> On Plan									
<b>Updated By</b>	<b>Updated On</b>	<b>Health</b>	<b>Phase</b>		<b>Comments</b>				
Roy Snyder	12/2/09 10:48:35 AM	On Plan	9 Project Management		Preliminary flood plain approved. Received Planning comments. Submitted Wetlands report. 12/01/2009				
53 Tasks									
WBS	Name	Planned Start	Planned Finish	Planned Work	Actual Work	Actual Start	%	Task Status	Task Assignee
1	3202 - Title Report (Update)	2/11/09	3/19/09	1.00	1 hrs	3/26/09	100%	Completed	Tony Musgrove
2	2211 - Water Availability Certificate/Design Coordination	2/11/09	3/19/09	4.00	0 hrs	4/13/09	100%	Completed	Tony Musgrove
3	5100 - Boundary Survey /Boundary Control	2/18/09	3/27/09	13.00	12 hrs	N/A	100%	Completed	Tony Musgrove
3.1	5100 - Boundary Survey /Control (Office Work)	2/18/09	3/27/09	5.00	12 hrs	3/10/09	100%	Completed	Unassigned
3.2	5198 - Survey Crew (2 Person or Robotic)	2/18/09	3/27/09	4.00	0 hrs	2/18/09	100%	Completed	Unassigned
3.3	5199 - Survey Crew (3 Person)	2/18/09	3/27/09	4.00	0 hrs	2/18/09	100%	Completed	Unassigned
4	5130 - Tree Survey	2/16/09	8/31/09	13.00	43 hrs	N/A	100%	Completed	Unassigned
4.1	5130 - Tree Survey (Office Work)	2/18/09	8/31/09	13.00	36 hrs	2/11/09	100%	Completed	Tony Musgrove

## VALUE

“Being able to centralize all of our project and operational information in a single source is a huge time savings, which in turn increases our productivity and efficiency twofold,” says Porcella. “We don’t have to chase down information anymore or use multiple tools, and we’ve been able to improve our business processes.”

The Abbey Road Group has also been delighted to see that their clients are taking notice of the business process improvements. “Ever since we implemented Daptiv PPM, our clients can tell that our processes and projects are put together seamlessly...they can go into their project and see all of their data and stage gates completed. The use of Daptiv PPM enhances client perceptions of the Abbey Road Group’s ability to continually deliver quality solutions, and that’s a huge success and value-add for us.”

Leveraging Daptiv as a business partner has also been an integral part of the value of choosing Daptiv PPM. “We recently visited Daptiv in Seattle to meet with a few consultants and our account executives and it was a great experience,” says Porcella. “We were introduced to further things we can do with Daptiv PPM to make our business run even better—such as creating a global calendar to manage employee PTO. The Daptiv staff is very knowledgeable and they are a wonderful resource to help us ensure that we’re maximizing the value of the software—we left feeling energized about the direction we’ll be going in the future with Daptiv PPM.”

Project managers and team members are the primary users of Daptiv PPM, but the Online Executive and the Editor in Chief of Publishing also utilize Daptiv PPM to analyze resource management. On a weekly basis, Daptiv PPM reports are shared with the CEO to drive conversations about the latest project updates.

## 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](http://www.daptiv.com).

