



How TEC360 Improved Visibility, Budget Tracking & Portfolio Management With ProjectManager

Case Study



Challenges

- No automated system in place to track budget or costs
- Difficulties tracking and planning project pipelines or performance
Limited project transparency

Solutions

- **Increased visibility** across the company's workload through a color-coded workload chart
- **One source of project truth** aligns a team that is spread throughout Mexico
- **Enhanced reporting features**, real-time data and portfolio roadmaps help the company define its objectives

Results

- More accurate project pipelines
- Company-wide visibility
- Real-time data access

TEC360 consults with companies on essential technologies such as cloud computing, cybersecurity, artificial intelligence, the internet of things and blockchain. TEC360's mission is to support large and medium enterprises in their digital transformation through robust SaaS solutions.

Santiago Lasso is the PMO and consulting director of TEC360 and is responsible for managing the team that implements software once a solution is sold to a customer.



Why Did TEC360 Choose ProjectManager?

TEC360 has been around for six years, but for most of that time, they had no true system in place to manage their budget or track costs. “We were using Excel,” Lasso said. “That wasn’t practical for us.”

Lasso had no way to accurately track his project managers and the time their teams spent on tasks. It was nearly impossible for him to accurately track project pipelines or performance. A year ago, when TEC360 first started to shop around for project management software, Lasso had two goals: manage the budget and increase transparency.

“The goal was to measure how long it took to complete an implementation,” he said. “Before that, we had no idea how long it would take.” Lasso added that he had to make estimates without concrete data to back it up. As a result, he couldn’t track the actual hours each implementation required.

TEC360 was very thorough when looking for project management software to meet its needs. Lasso worked with his team to gather key software requirements, which were then used to rate the performance of various vendors. Of all the software tested, ProjectManager received the top score, excelling at collaboration, portfolio management and budget tracking.

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ProjectManager Gave TEC360 Visibility Across the Company

One feature that was particularly important to TEC360 was the color-coded workload chart, which helps Lasso keep his team's workload balanced when he's making assignments. It also helps him manage his hourly costs. In addition, timesheets are essential for keeping track of hours spent on tasks.

Transparency was a must. If consultants or project managers were using MS Project, they would have to send files back and forth, which was not easy. "Now, all the information is on the platform," Lasso said. He has one source of truth, which is especially helpful as his team is distributed across Mexico.

Lasso lives on the My Work page where he can get an overview of all the projects he is overseeing in one place. He also likes the portfolio roadmap and reporting features, which provide him with real-time data. "Before I had no data," he said. "Now I have tons of data."



Helping TEC360 Save Time and Money

ProjectManager is changing the way that TEC360 manages its work, but it has also helped the company define its objectives and key results based on easy data access.

"We can save money because we can monitor our costs and track projects in real time," he said.

While everyone on Lasso's team is using ProjectManager to manage their projects and connect in real time, Lasso would like them to use the tool for all of their work. He's helping his team adapt the software's task management features to work more efficiently.

Currently, all of the departments at TEC360 are using ProjectManager except for operations and finance. "We're on the Business plan," Lasso said, "but we're thinking about moving into the Enterprise plan to get everyone using ProjectManager."

"We can save money because we can monitor our costs and track projects in real time."

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The screenshot displays the ProjectManager interface for a project named "Govalle Construction". The interface is divided into several sections:

- Task List:** A list of tasks categorized by phase. The "Contracts" phase includes "Contracts" (60%), "Proposals", "Documents Review", and "Bid Date". The "Design" phase includes "Design Work" (75%), "Construction Start Date" (75%), "Stage Completion" (75%), and "Final Completion" (50%). The "Procurement" phase includes "Hire Crew". The "Construction" phase includes "Order Equipment", "Order Materials", and "Hire Crew".
- Task Status:** Tasks are marked with progress indicators (bars and percentages) and due dates (e.g., Apr 18, Apr 14, Mar 29).
- Gantt Chart:** A visual representation of the project schedule showing task dependencies and durations. Key tasks shown include "Contracts 100%", "Proposals 100% Mike Cranston", "Documents Review 100% Mike Cranston", "Bid Date 100% Mike Cranston", "Feasibility Study 100% Jenni", and "Apply for Permits 100%".
- Navigation:** A sidebar on the left provides navigation options for "To Do", "Doing", "Ready for Inspection", and "Done".