



CASE STUDY

UPS Increases Efficiency, Aligns Decision-Making and Funding Across the Organization



INDUSTRY:

Logistics and Transportation

GEOGRAPHIES:

Global

EMPLOYEES:

534,000

PLANVIEW PRODUCTS:



PLANVIEW SOLUTION:

Strategic Portfolio Management

CHALLENGE

Unprecedented levels of growth bring with it new challenges. For UPS, the biggest challenge has been deciding where to invest, where to pull investments, and how to govern it all. The need for better, not bigger, governance reflected the larger need for a solution to achieving and maintaining alignment across global portfolios.

SOLUTION

UPS needed a technology platform that would not just improve their project management discipline, but also provide an opportunity to aggregate different views, to do some capacity planning, and even conduct scenario planning. Consolidating their existing, disparate tools into Planview's Strategic Portfolio Management solution, UPS has unlocked new levels of governance and visibility to answer big-picture questions as they arise.



"We're at a point now in the evolution of our organization where we have to have this type of platform. I don't view Planview® Portfolios, or Planview® ProjectPlace as an application – this is truly a platform that has tremendous and robust capabilities."

– SANDY PITTMAN, VICE PRESIDENT OF EPMO, UPS

ABOUT UPS

Existing over 115 years, UPS is a story of constant reinvention. They deliver over 25 million packages daily and serve over 220+ countries and territories.

Although best known for their brown delivery trucks, UPS does more than just package delivery. They are a comprehensive supply chain and logistics company offering a wide range of services, including transportation, distribution, contract logistics, customs brokerage, insurance, and financing.

A drive for reinvention, or continuous improvement, is built into the fabric of the company culture – an idea founder Jim Casey often referred to as being “constructively dissatisfied.”

CHALLENGE: REDUCE SPENDING, IMPROVE EFFICIENCY, AND DRIVE STRATEGY

The past few years have brought tremendous growth for UPS, with 2022 marking the first year the company reached \$100B in revenue. The challenge now lies in determining how to effectively invest resources and govern such investments to meet strategic objectives.

Sandy Pittman, Vice President of EPMO, outlined the challenge more specifically into six buckets: Decision making, governance, cross-portfolio alignment and prioritization, visibility, resources, and transformation complexity. Governance had become increasingly important as the organization expanded. However, governing such a complex and quickly expanding organization proved to be easier said than done: At one point there were 28 committees involved in making decisions around funding.

The question on everyone’s minds was: How do we find ways to spend less money and make things more efficient, while achieving our strategic objectives? Funding decisions were being made by different groups, different people, and documented in SharePoint, on a homegrown website, Excel spreadsheets, PowerPoint, and on coffeshop napkins.

Pittman shared a question posed to him by the president of US domestic business units: “If we were to look out, for this year and the next couple of years, into all the projects we have that will impact the domestic US business unit, what would that look like? How many projects do we have? How much money are we spending?”

To answer this question, Pittman shared, “(I’d) have to call 100 people, pull up 30 different spreadsheets, a couple of different databases, have to go to the website, go to SharePoint, et cetera. Also, by the time we do that, the information we’re showing you might’ve shifted, might not be on base.”

UPS required more than just improvement in project management; they needed a technology solution that could bring together different perspectives, allow for capacity and scenario planning, and provide real-time dashboards and reports to inform decision-making.

SOLUTION: A ROBUST ECOSYSTEM FOR TURNING IDEAS INTO IMPACT

UPS needed a technology platform that would improve their project management discipline and provide an opportunity to aggregate different views, as well as do capacity and scenario planning. The leaders needed the ability to have dashboards and reports in near real-time to help drive decisions.

UPS’ partnership with Planview® began in 2019, born out of a need to align, aggregate, and synchronize decision-making and funding across the organization. Leadership needed the ability to have dashboards and reports in near real-time to help drive decisions.

“We didn’t partner with Planview just for a better way to manage projects,” noted Pittman. UPS started by linking their financial tools to Planview, which helped to provide structure and visibility into how funding decisions were made – and only grew from there. Planview quickly became the go-to platform for all funding decisions: “If it’s not in Planview, you might not get your efforts funded and resources assigned.”

“We’re at a point now in the evolution of our organization where we have to have this type of platform. I don’t view Planview® Portfolios, or Planview® ProjectPlace, as an application – this is truly a platform that has tremendous and robust capabilities.”

RESULTS: INCREASED VISIBILITY AND INFORMED DECISION-MAKING

Doing this has provided UPS with a single source of truth, enabling strategy and investment planning, transparency in execution process support, financial management of investments, and enterprise governance support. Not to mention a solution that helps the company practice continuous improvement – finding ways to be “constructively dissatisfied” and then working to improve.

Answering important, big-picture questions has greatly improved. Executive leadership now has near real-time access to the status of ongoing initiatives and can quickly determine if they are on track, behind, or ahead of schedule. This saves them time, as they no longer have to gather data from various sources. Now, leadership can instead focus on determining if they are meeting goals and deciding whether to continue, alter, or increase their efforts. Powered by Planview’s Strategic Portfolio Management solution, they’re able to ask the big questions, and get the big answers.

FUTURE: GAIN MORE VISIBILITY INTO TIME AND RESOURCES

In the future, UPS plans to add resource management and time tracking to the capabilities currently managed within Planview. But for now, the company will continue to reap the benefits of a platform built for managing the complexity of global enterprises: With the ability to not just manage projects better, but align, aggregate, and synchronize decision-making and funding across the organization.

See what Planview solutions can do for your organization. View demos on demand at Planview.com/demos.

