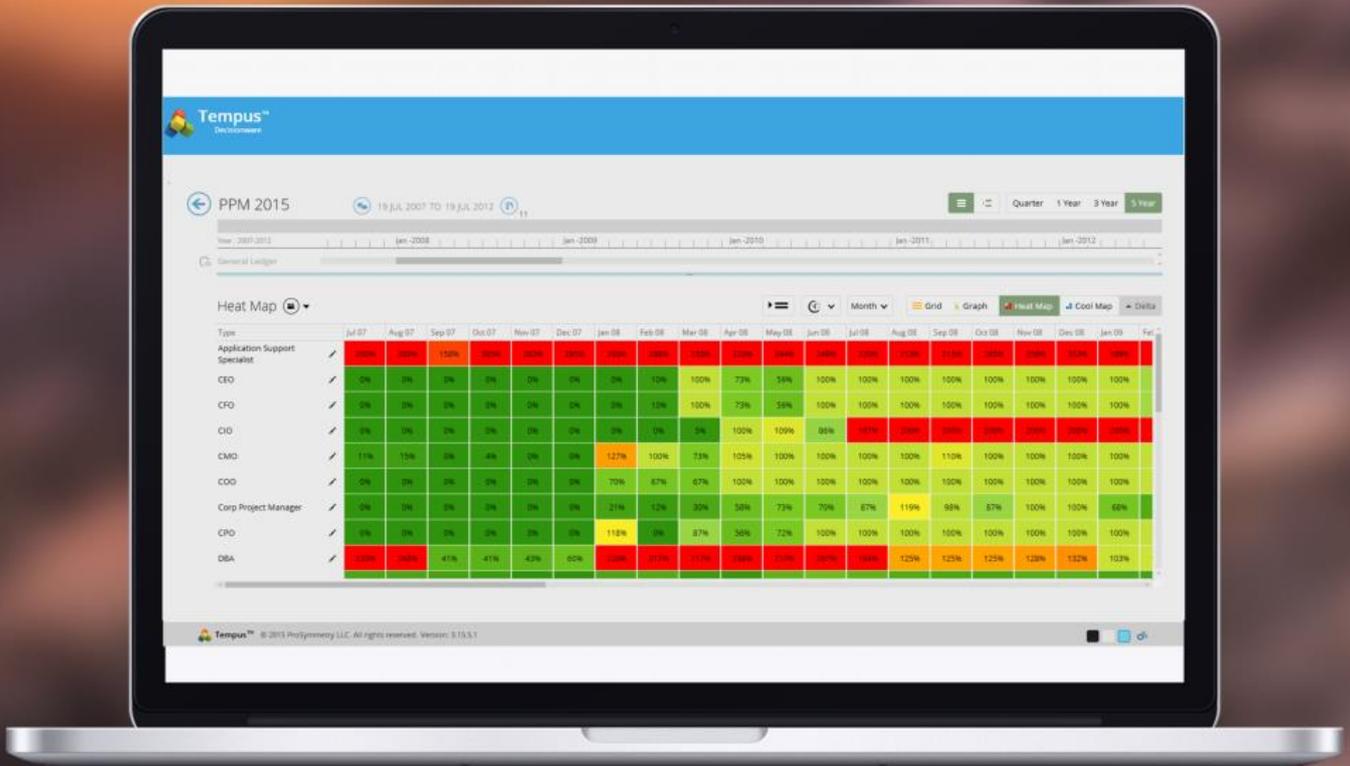


# TEMPUS RESOURCE

PROSYMMETRY | CASE STUDY | JULY 2015



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Yoav Shulman, VP PMO Manager, Fundtech



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# Transforming Capacity Planning for Fundtech

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## Tempus Resource in Action

Thousands of global financial organisations depend on financial technology provider Fundtech for automated transaction and service solutions. For them, Fundtech plays a crucial role in meeting customer expectations as well as industry regulations. So every project must be meticulously planned, properly resourced and delivered on time and to the highest quality.

Achieving these goals involves extensive capacity planning – but mapping resources and project portfolios manually was creating a heavy operational burden for Fundtech. Tempus Resource has provided a slick, user friendly solution that has equipped Fundtech to streamline mid and long term capacity planning - as Yoav Shulman, Fundtech's VP PMO Manager for Israel, explains.

## Getting to Grips with High Level Resource Management

"As a company, we are organised into strategic business units, each of which serves a different sector within the financial industry" says Yoav. "My unit represents around one third of Fundtech's total capacity. We have a headcount of around 500 resources across numerous roles, locations and project portfolios."

Forecasting resource deployment with such a large global team is a significant challenge which, until recently, was being handled manually. "We created an internal resource forecasting process based on Excel" Yoav explains. "But keeping all the spreadsheets up to date was a labour intensive process and our ability to compare and contrast scenarios was very limited. Every time we needed to consider an operational change we had to revisit the different Excel databases, extract the data and bring it back to one consolidated dashboard. That process was taking about half a day every time we did it. Plus, of course, there's always a risk of human error which is something we really can't afford in our business."

Compounding the problem was the fact that Business Unit Managers found the spreadsheet system tricky to use, says Yoav. "There was a strong dependency on my team. When a Business Unit Manager wanted to get a snapshot of the current status,

update plans and so on, somebody from my team had to go through the process with them. It was an inefficient situation both for us and for them.”

## Making Light Work of an Intricate Planning Process

The answer for Fundtech was Tempus Resource – a proprietary software solution offered by award-winning technology providers ProSymmetry. On viewing a demo, Yoav quickly spotted the potential to handle capacity planning in a different way. “We needed a tool that would be robust, easy to use and able to perform fast, flexible ‘what-if?’ scenarios so that we could make decisions in a properly informed way. I heard about Tempus Resource through one of my professional contacts. Once I saw what the technology can do it was a very easy decision to initiate a proof of concept. We began that in October 2014. Within just a couple of months we had developed a strong vision of exactly how we want to use it to best meet our requirements. After that we quickly rolled the full toolkit out so that our strategic business unit could make the most of its capabilities.”

For Fundtech, Yoav says, the advantages of Tempus Resource are clear. “Initially, what struck me was the fact that you get exactly what you’re promised. That created real trust in ProSymmetry as a supplier. It made me feel very comfortable moving forward with it so quickly. It’s really easy to change the structure of the data, to add a project, add a model and move data around to see how different scenarios will impact on our business. For us, the SaaS model is very important. We know that as soon as a new feature or upgrade is released we’ll benefit from it straight away. It’s a light-touch platform. It evolves very quickly to provide the new functionality users are asking for.”

On top of that, says Yoav, Tempus Resource has surprised him with its intuitive design and functionality. “My team had two hours of training and that was all we needed to be fully independent. It’s very easy to create a new project, create or change a model, create custom fields and understand how they will impact the look and feel of our capacity analyses. My own team is already accustomed to these kinds of tools, but even our more senior users like the Business Unit Managers found it simple to use after a short period of internal training. That makes them much more independent in handling their own capacity and resource forecasting activities.”

## A Straightforward Solution with Significant Business Benefits

As well as streamlining operational processes, for Yoav the strategic advantages of Tempus Resource are clear. “Our monthly planning involves collecting all of the different projects anticipated within the next three to twelve months. With Tempus, we can easily capture all the different requirements from the different business units. We can create a high level project plan with a timeline and roadmap of the resources needed to fulfil different functions in different regions. We can look at our actual resources against the likely demand for capacity. It’s extremely useful to have those different views and different scenarios available at the touch of a button. It helps us to make the right decisions. We can understand how best to load resources between our units and global locations. We also use Tempus Resource to inform our hiring decisions. That’s really important. The reality is that we can’t solve resourcing issues on the spot by hiring because of the lead time to recruit and train. With Tempus Resource, we can look as far forward as we choose and deal with these issues before they become a problem. We can establish the expectations, risks and opportunities, so that our management can make the right decisions about whether to create new roles or reallocate internally.”

In addition, Yoav appreciates the ability to experiment with different portfolio models. “It lets us understand what the impact of taking on different sets of projects would be. We can look at the probability of different scenarios and compare all of the possible strategies to decide which the best option is. It’s also very easy to generate different scenarios in a visual presentation format so that our busy executives can quickly understand what’s being proposed and make decisions. I would definitely recommend Tempus Resource for anyone looking to perform fast, powerful resource and capacity planning. It’s robust, flexible and easy to use. It has a great look and feel. But most importantly, it allows us to look ahead and make the right decisions for our company and our customers, in an intelligent and transparent way.”

# More information

Tempus Resource allows users to:

- Run powerful “what-if?” scenarios in real time.
- Quickly gauge over and under-allocations of resources.
- Create fast, intuitive infographic data.
- View the full project portfolio in one place.
- Work with stand-alone data, or import data from management tools such as Project Server.

For more information about Tempus Resource from ProSymmetry please contact:

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## About ProSymmetry



ProSymmetry offer a number of innovative Project and Portfolio Management tools, and is a Microsoft and Nintex Partner.