

# Occam Project Control Solution

/ CASE STUDY

## occam.

Occam is a market leader in direct marketing management software and services, committed to developing and delivering the industry's most sophisticated innovations. Sustained growth created a need for even greater efficiency in resource and project management and the answer lay in adopting a single enterprise-wide solution.

Since it was established in 1993, Occam has become a successful company employing almost 100 staff with an annual turnover in excess of £10 million.

It has its own marketing management software, Zebra, and a unique cooperative solution for the charity sector; Reciprocate – the largest single source of charity data in the UK. It also develops bespoke direct marketing solutions to solve clients' specific business needs.

With growth came a need for better clarity of resources to improve efficiency and effectiveness across a wide range of projects for clients, including Eurostar, Royal Bank of Scotland, the Ministry of Defence, Kia Motors UK, Fiat, Oxfam and the British Heart Foundation.

As well as fully-fledged projects, Occam also works on smaller, discrete pieces of data cleansing and analysis that may only take a few days.

Having achieved ISO 9001 quality management standard and more recently the international best practice standard for information security management, ISO27001, Occam wanted better and more rigorous processes in the way it worked.

In particular, it sought a single source of information on project data to enable accurate resource and project task management across all its current and planned work, while also supporting the development of project management best practice.

**“The time sheet entry mechanism we had been using was no longer enough because it did not give a real picture of our resource requirement and mix to deliver projects efficiently and effectively,**

**We wanted structure and discipline, with everyone working in the same way and with the ability to retrieve and analyse information in a consistent fashion. We also wanted to build on the good work we had already achieved within our project teams by further developing best practice across the project management discipline.”**

**Julie Goodwin**  
Occam's Governance Officer

## Technology

The Occam Project Management control solution is based on integrated Microsoft technologies including SQL Server 2005, Project Server 2007 and SharePoint.

These are configured using Program Framework's pre-configured solution, *Project Server Framework™* that provides significant out of the box functionality allowing rapid start-up.

*Project Server Framework™* is then personalised to match the customer requirements to provide the fastest possible payback period and highest return on investment.

## Feedback

**“The team from *Program Framework™* was very easy to get along with. They were very proactive and genuinely interested in what we were trying to achieve.**

**“They had a very structured approach to implementing our EPM solution, leading us through what to do and how to do it.**

**“At the end of the process, we were almost self sufficient but there is still a port open if we have questions or problems.**

**“The *Project Server Framework™* solution suited us and we now better understand where we want to go further with our thinking.”**



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Enterprise project management (EPM) seemed the answer as it would support the development and management of Occam's solutions, allow the company to manage risk more effectively and give a real time view of how projects measure up commercially and contractually.

The company chose a solution built on Project Server Framework, a pre-configured implementation of Microsoft's Office Project Server 2007 product set developed by Enterprise Project Management specialists Program Framework. This was then personalised to meet Occam's requirements enabling Occam to deploy the solution more rapidly and at a lower cost.

The EPM system went 'live' with little cultural resistance from those using it. Project teams especially like the flexibility of being able to access all project information easily together

with the approach to information sharing that allows users to tailor a particular project site to how they want it to work.

Julie Goodwin says this is making a tangible difference to Occam's business. "It helped us make sense of what we do and how we do it. Resource managers can see work commitments into the future and it also presents management information that was not otherwise readily available.

It will impact to our bottom line because we can now see where we are expending effort and ensure we have the right level of commercial cover.

Now we have the basic information, we want to go forward with Program Framework to develop the management reporting processes further."

## About Program Framework

Program Framework is a leading UK based consultancy specialising in the deployment of Enterprise Project Management (EPM) and Portfolio, Programme & Project (PPM) control solutions powered by Microsoft technologies. As a Microsoft Gold Certified partner it is one of the top 1 per cent of partners worldwide and has secured an enviable reputation in the UK based on deploying solutions that deliver real business benefit, as evidenced by the long term relationships with clients.

Program Framework's success is built on a team of mature consultants with 'real world' experience, gained from not only deploying multiple PPM solutions, but also having used them as customers before working in consultancy organisations. This experience has allowed the company to develop a pragmatic, best practice approach to creating or enhancing PPM and EPM capabilities for clients. This approach is based on emphasising the people change and process aspects of successful solution delivery in combination with bringing deep technical skills.

While recognising it is a consulting organisation, its values dictate that it will always seek to act as a 'trusted advisor' to clients. This means the team is committed to giving advice that is in the best interests of clients even when this may not be the easiest or most popular message to deliver.

The specialism and depth of experience in the PPM area together with an open and honest approach to client engagement has also led to the establishment of a number of partnerships with other consultancies. This includes Microsoft's own Consulting Services organisation where Program Framework supplement these partners' capabilities with its specific skill sets.

"We take a partnering approach to delivering solutions and our aim with Occam was to focus on the key areas that would make a real bottom line difference to their business.

We held a number of workshops to clarify what could be done, identify the benefits to be gained, understand how the solution would fit in to the business context and how the solution should be configured and personalised to work with existing operating procedures. It was also vital that the solution remained flexible enough to grow as the project management maturity developed at Occam.

The flexibility of *Project Server Framework™* enabled a rapid and robust configuration that could be delivered in tight timescales, reducing the payback period for Occam and ensuring that benefits began to be delivered early in the roll-out process."

James Butler

Senior consultant, Program Framework



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