CASE STUDY

Revolutionizing Project Management : A Journey to Enhanced Efficiency and Collaboration with Monday.com

Quick Summary

The company's project management was revitalized with CRG Solutions' expert intervention. By addressing inefficiencies, empowering employees, and optimizing financial systems, The company achieved a 40% improvement in efficiency, 30% better collaboration, and 15% cost savings. This transformation enabled the organization to align projects with its strategic goals, fostering growth and scalability.

About the Customer

A new age maker's Institute of technology is a trailblazer in education, preparing students for the demands of Industry 4.0. As part of its mission, the organization adopted a project management approach to streamline academic and administrative operations, leveraging cutting-edge tools and real-world problem-solving.

The company identified improvements required in its project management framework, which disrupted workflows, hindered visibility into project progress, and slowed decision-

To stay at the forefront of innovation, they sought a solution to modernize operations, enhance collaboration, and align projects with strategic objectives.

Problem Statement:

The company faced multi-faceted challenges affecting operational efficiency, employee productivity, and financial outcomes.

1. Process Challenges

- Inefficient Workflows: Disconnected and manual workflows disrupted smooth task management, resource allocation, and scheduling.

- Limited Visibility: Stakeholders lacked real-time insights into project progress, causing delays in addressing risks and bottlenecks.

- Inconsistent Processes: Fragmented practices across departments led to poor collaboration and misaligned priorities.

2. Employee Challenges

- Unclear Roles: Employees faced confusion about responsibilities, affecting efficiency and accountability.

- Limited Training: Inadequate knowledge of existing tools led to underutilization of features, further decreasing productivity.

- Collaboration Issues: Lack of a unified communication platform created silos, making teamwork challenging.

3. Revenue Challenges

- Resource Mismanagement: Poor allocation resulted in overutilization or underutilization, increasing operational costs.

- Financial Integration Gaps: Disconnected systems caused discrepancies in budget tracking and reporting.

- Missed Opportunities: Delayed reporting reduced the ability to optimize portfolios or take corrective action in a timely manner.

Reporting and Task Management Hurdles:

The company struggled with generating accurate reports, tracking project milestones, and evaluating portfolio performance. This lack of reliable insights prevented effective task prioritization and hindered the organization's ability to align projects with strategic goals.

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Solution:

CRG Solutions proposed a comprehensive transformation strategy using Monday.com Work Management to tackle the company's project management challenges.

1. Discovery Phase: Uncovering Pain Points

The CRG Solutions team conducted an in-depth assessment through:

- Stakeholder Workshops: Identified inefficiencies by engaging with project managers, team leads, and executives.

- Process Audits: Mapped workflows, reporting mechanisms, and task-tracking methods to find inconsistencies.

- Technology Reviews: Analyzed existing tools and systems to pinpoint integration gaps.

2. Solution Design: Tailored Workflow Creation

Collaboratively designed a workflow to address identified issues. The proposed structure ensured:

- Clear roles and responsibilities for all team members.

- Centralized and consistent task management practices.

- Tools aligned with the company's strategic goals.

3. Implementation: Bringing Solutions to Life

CRG configured Monday.com to transform the company's project management processes:

- Custom Boards: Developed task tracking, sprint planning, and milestone tracking boards.

- Real-Time Dashboards: Provided comprehensive views of resource utilization, budget compliance, and project progress.

- Automations: Simplified processes with triggers like task completion notifications and deadline alerts.

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4. Enablement: Empowering Teams : CRG's training session's upskilled employees, ensuring smooth adoption of the new system.

5. Custom Integrations: Integrated Monday.com with the company's existing tools for seamless data sharing across financial, CRM, and HR systems.

6. Predefined Templates: Standardized workflows through templates for recurring tasks, ensuring consistency and time savings.

Effort and Timeline: The solution was implemented within 8 weeks with the involvement of a 3-member CRG Solutions team.

Effort Breakdown:

- Requirement Gathering and Design: 20 hours

- Implementation and Integration: 80 hours

- Training and Enablement: 20 hours

- Testing and Optimization: 10 hours

Impact of the Monday work management : The Solution Implemented on Monday work management tool delivered measurable improvements across several dimensions:

Operational Efficiency:

- 40% reduction in manual tasks through automations.

- 25% improvement in resource utilization via optimized allocation.

Visibility and Decision-Making:

- Real-time dashboards enabled stakeholders to monitor project progress and risks effectively.

- Early identification of bottlenecks supported proactive resolution.

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Collaboration:

- Unified tools enhanced cross-departmental communication, reducing delays by 30%.

- Seamless integration with platforms like Slack and MS Teams improved teamwork.

Financial Outcomes:

- Budget overruns reduced by 15% through integrated financial tracking.

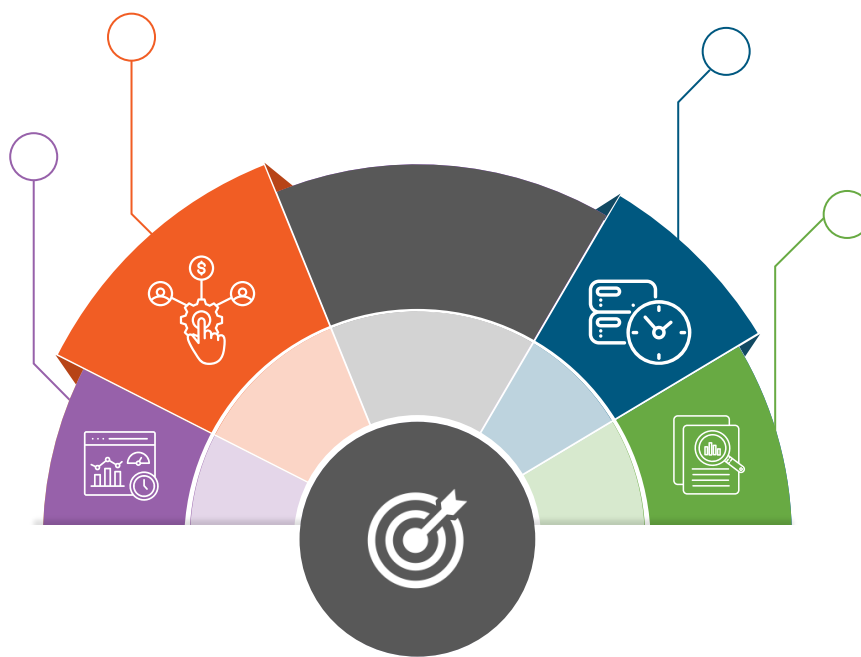- Timely and accurate financial reporting improved profitability.

Business Benefits:

Scalable Portfolio Management:
Enhanced capacity to manage multiple projects led to increased revenue opportunities.

Agility:
The organization adapted more quickly to market demands, leveraging better resource and risk management.

Customer Satisfaction:
Improved on-time delivery of projects built client trust.

Faster Project Delivery:
Reduced project timelines by 20%, achieving faster turnarounds.
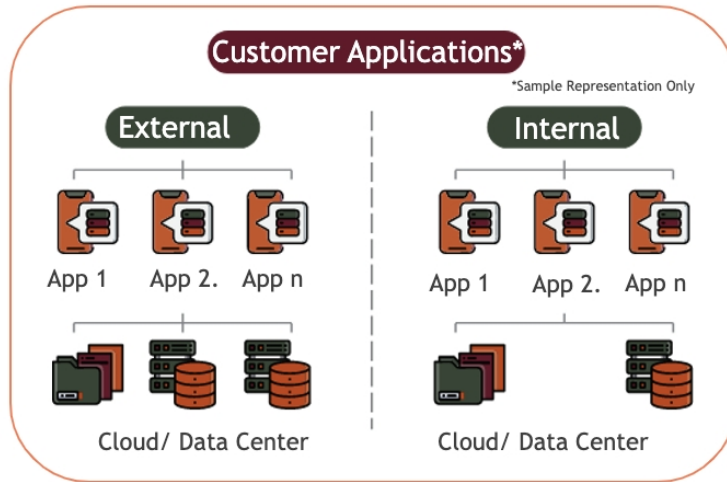
A Trusted Solution Partner

to achieve

Business Excellence

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We Cover

Analytics

We setup practices, tools to derive insights (**customers, products, apps, teams**) **to enhance** or optimize business effectiveness with the help of products like Tableau, Alteryx, PowerBI, Cloud and MLOPs

+ableau alteryx

Microsoft USEReady
WE EMPOWER PEOPLE TO SUCCEED WITH DATA

Customer Applications*
Sample Representation Only

External

App 1   App 2.   App n

Cloud/ Data Center

Internal

App 1   App 2.   App n

Cloud/ Data Center

RPA

We automate all high volume and mundane tasks to reduce manual errors and to increase efficiency with the help of products like AA (Automation Anywhere), Yellow.ai
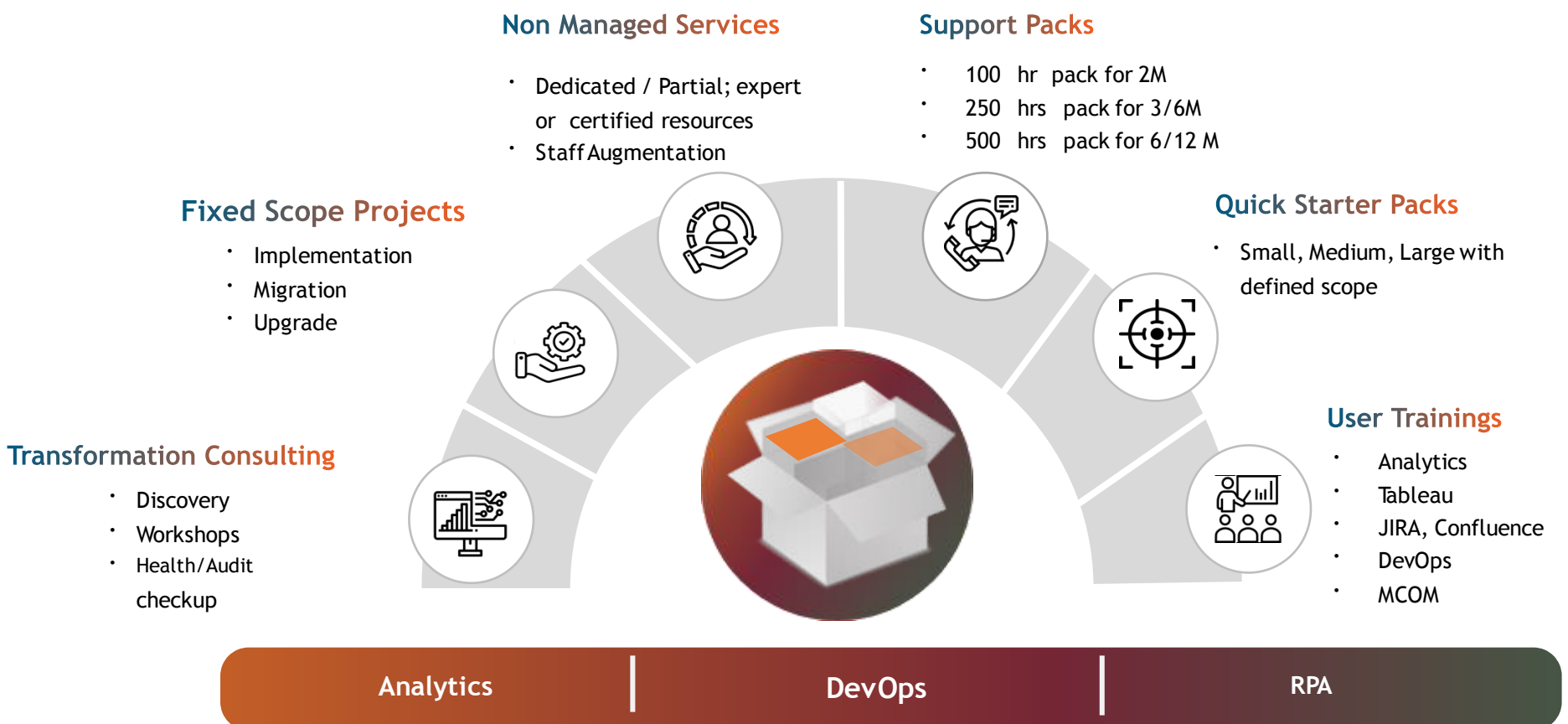
AUTOMATION ANYWHERE   yellow.ai

DevOps

We help streamline the application development and maintenance processes with custom project management practices and implementation of world class software tools like JIRA, Azure DevOps, Azure Cloud to improve team productivity

ATLASSIAN   Microsoft

Services Portfolio

Non Managed Services
- Dedicated / Partial; expert or certified resources
- Staff Augmentation

Support Packs
- 100 hr pack for 2M
- 250 hrs pack for 3/6M
- 500 hrs pack for 6/12 M

Fixed Scope Projects
- Implementation
- Migration
- Upgrade

Quick Starter Packs
- Small, Medium, Large with defined scope

Transformation Consulting
- Discovery
- Workshops
- Health/Audit checkup

User Trainings
- Analytics
- Tableau
- JIRA, Confluence
- DevOps
- MCOM

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