



CASE STUDY

Optimizing Healthcare Project Management with Monday.com

Quick Summary

This case study highlights how a healthcare consultancy transformed its project management processes through the implementation of Monday.com. The organization faced challenges in managing projects and resources, which were effectively addressed by CRG Solutions. The resulting solution not only streamlined operations but also significantly enhanced efficiency and collaboration across teams.

About the Customer

The customer operates within the healthcare industry, specializing in medical communications and consultancy. They focus on managing medico marketing projects that require meticulous planning and execution. The organization employs a Project Management Office (PMO) team to oversee projects, while various specialized teams, including science, design, accounts, and HR, collaborate to ensure successful project delivery. The need for change was identified in their project management processes, particularly in resource allocation and business development tracking.

Problem Statement:

The organization faced significant challenges in managing their project workflows and resource allocation. Key issues included:

- **Impact on Processes:** Inefficiencies in tracking business development activities and project management led to delays and miscommunication among teams.
- **Concerns:** Difficulty in generating reports, managing workloads, and tracking project progress created bottlenecks, affecting overall productivity and revenue generation. The existing proposal template lacked crucial information, leading to additional manual work and potential errors.

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Solution:

The CRG Solutions team collaborated closely with the customer to implement a tailored solution using Monday.com. The following steps were taken:

- **Understanding the Problem:** The team conducted a thorough assessment of the existing processes and identified gaps in project management, resource tracking, and invoice creation.
- **Tools Implemented:** Monday.com was customized to automate project management tasks, including time management and resource allocation. Key features included:
 - Automated proposal generation with fields populated directly from the board.
 - Customizable invoice templates that automatically populate with relevant data.
 - A resource management system that tracks actual hours worked and calculates total hours based on project milestones.
- **Impact Made:** The implementation streamlined processes, reduced manual entry, and improved visibility into project status and resource allocation.
- **Technical Details:** The solution involved setting up automated workflows, permissions management, and reporting features within Monday.com. The project took approximately 45 days, requiring around 120 hours of combined manpower from the CRG Solutions team and the customer's teams.

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Business Benefits:

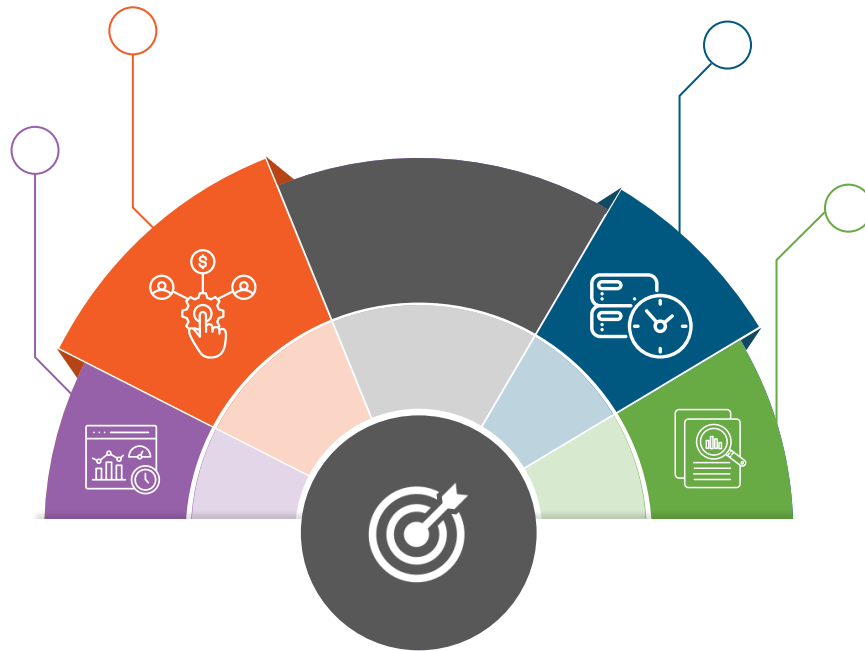
Enhanced Resource Tracking:

The new system provided real-time visibility into resource allocation, enabling better workload management and reducing project delays by 30%.

Improved Collaboration:

By centralizing project information, teams experienced a 40% improvement in communication and coordination, leading to faster decision-making.

Increased Efficiency:
The automation of proposal and invoice generation reduced the time spent on manual tasks by 50%, allowing teams to focus on core activities.



Data-Driven Insights:
The ability to generate accurate reports and track business development activities facilitated strategic planning, resulting in a 20% increase in project win rates.

A Trusted Solution Partner

to achieve

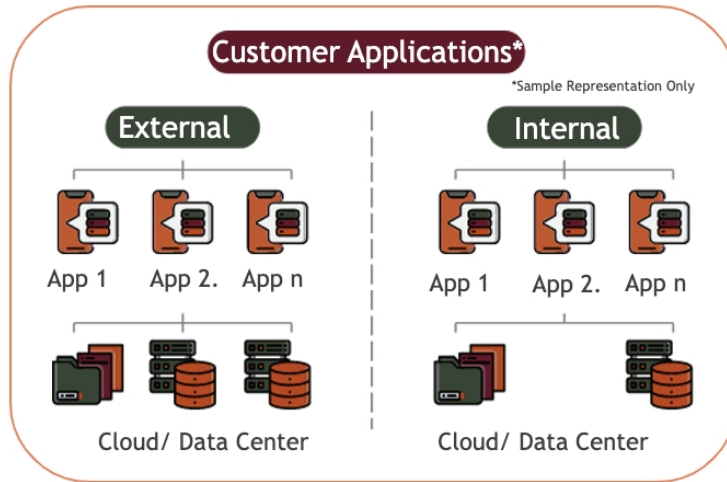
Business Excellence

About CRG solutions

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



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

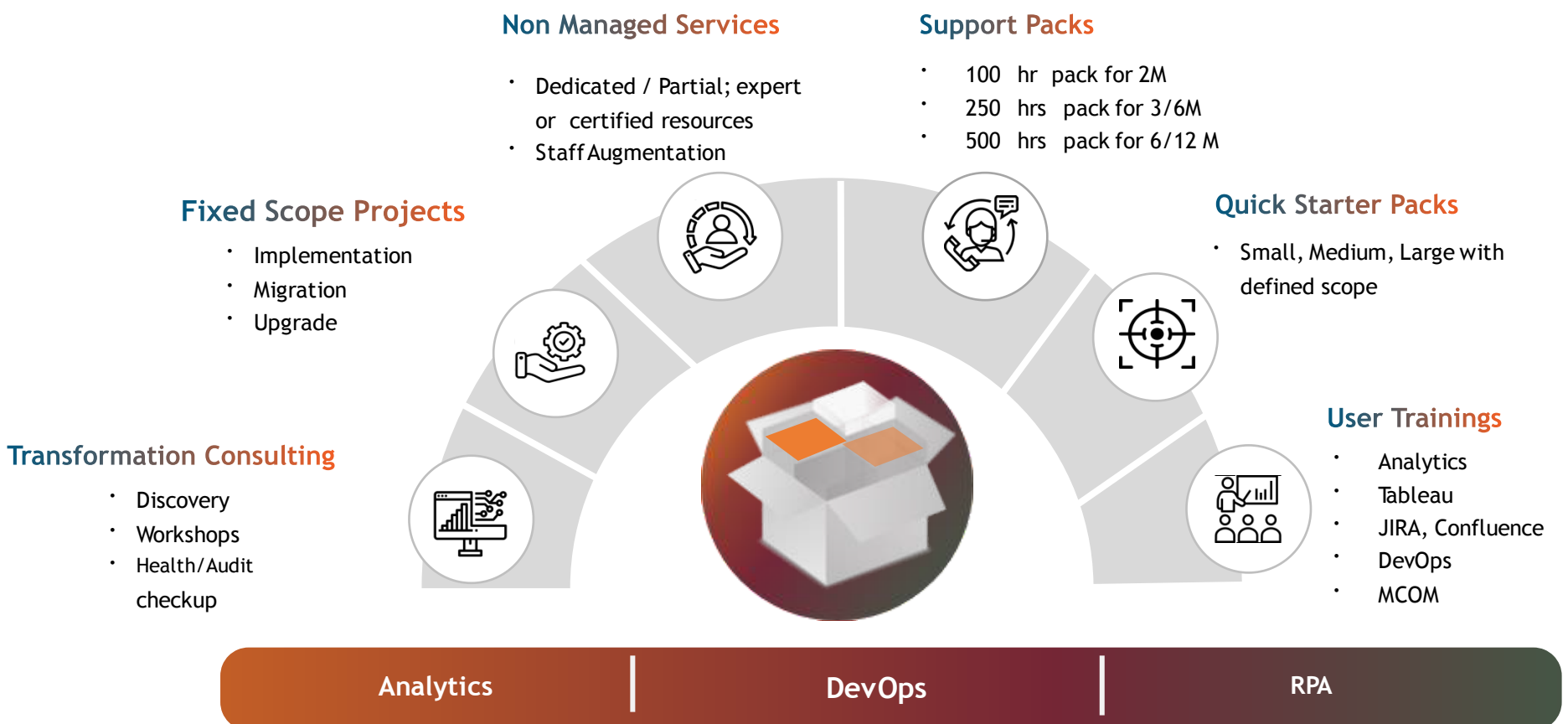


DevOps

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



Services Portfolio



Our Socials



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