



## Reference Case



### About Isabel SA:

Isabel SA is the main provider in Belgium of Internet banking for the professional users. Large companies, SMEs and government agencies can choose the best products and services from over 20 banks at the best conditions. The extended multi-user functionalities and seamless integration with accounting software helps our customers to increase their efficiency and to reduce administrative costs. Over 180 million transactions for a value of 1000 billion euro are processed each year over Isabel 6.

Isabel is also to driving force behind Zoomit, the free service in Internet Banking, where one can manage and pay invoices in a few clicks quickly and easily. This way, consumers keep control over the financials and do that little extra for the environment. Each month, 30.000 new consumers choose to start managing pay slips and invoices with Zoomit. Over 7 million documents are already managed in Zoomit.

Isabel was founded in 1995 and has 180 employees. [www.isabel.eu](http://www.isabel.eu) and [www.zoomit.eu](http://www.zoomit.eu).

### Past Situation:

Before Planview was implemented, there was no integrated portfolio management in place within Isabel. Time reporting was supported by the ERP package. As a consequence, project, resource and financial information was dealt with as separated entities and consolidation and reporting was challenging.

### Challenges:

Isabel's business is all about software development produced by releases. Its top management expected insight about the project pipeline (no matter their status) and about the inter-project dependencies. Impact on the resource utilization and the financial follow-up was crucial in order to support timely and in budget delivery. Consolidated and automated reporting was expected to provide real time information about key performance indicators.

### Solution:

Basic project and resource management capabilities were deployed as a first implementation phase. The Agile and Scrum methodology, reproduced in Planview, was adopted and supported by the out-of-the-box Jira integration. Release, financial, risk and issue management were left for a second phase. Once stable project and resource information was fed into Planview, Isabel started to simulate resource/funds supply and demand and to accordingly prioritize, through various scenarios, its project pipeline balancing needs and constraints accordingly.

### Main Benefits:

Planview has created a one single source of truth situation where reliable information and insight are available in real time. Such consistent information supports a confident decision making process where projects are constantly traded off and where the impact on resource capacity is immediately visible and addressed.

Last but not least, project and resource managers are managing their projects and work more efficiently and are, more than ever, able to concentrate in delivering Isabel's roadmap.

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