



CASE STUDY: RESOURCE OPTIMIZATION



Challenge: Stacy, Director of Internal Audit (IA) Professional Practice Group, is responsible for 22 global resources delivering 46 IA, 104 SOX and 18 Compliance projects to support the Annual Audit Plan. Her current tools are spreadsheets, email and status calls.

Current Approach & Problems: As with prior years, in 2017, Stacy has estimated the hours of resource availability (including holidays / vacations), hours for each project, start and completed deadlines, and allocated resources to projects.

However, she is deeply concerned about the problems the team is running into in completing projects as scheduled and missing commitments to the Audit Committee and external auditors. Resources are frequently over / under loaded for the week and it is hard to manually keep track of and communicate frequent schedule changes.

Audit Prodigy (AP) Solution: With implementation of AP, Stacy found that,

- ✓ She can set max hours per day / week for each resource, eliminating over-loading. It helped that all holidays and vacations are captured in AP.
- ✓ She has a 24/7 view of all Projects / Resources and can easily make and communicate changes with just a few clicks
- ✓ She receives real-time alerts if a project starts falling behind – before it's too late
- ✓ She can always download her data into a spreadsheet, with a single click
- ✓ She does not have to track time reporting delays any more – it is done automatically

Results:

- Great feedback from the team on better flexibility, communication and productivity
- Through the critical last two quarters of 2017, Stacy's team has delivered their projects on time, with less stress and is excited about the trend going into 2018.