



Daptiv 90210: The City of Beverly Hills Uses Daptiv PPM to Manage Work Across Departments

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Megan Roach, Senior Management Analyst

AT A GLANCE

KEY FACTS

- The IT department had developed an in-house Access database, but the system created some pain points. It was difficult to gain insight into reports when needed, except on a quarterly basis. In addition, processes weren't streamlined. Each department had their own tracking mechanism so there wasn't any consistency in methodology.
- The City wanted an easy to use SaaS solution with reporting capabilities. In addition, they wanted software that would facilitate collaboration and help to improve work processes.
- Overall Daptiv Value for City of Beverly Hills: improvements in synergy, culture and processes, along with better data integrity and work accountability.

Beverly Hills is located in the middle of Los Angeles County, surrounded by the cities of Los Angeles, West Hollywood, Santa Monica and Culver City. Within its 5.7 square mile radius, Beverly Hills has approximately 35,800 residents with a business and commercial base that ranks next to cities with a population of several hundred thousand. Globally, Beverly Hills is known for its distinctive hotels, retail stores, restaurants and entertainment and headquarter businesses, but it also happens to be one of the safest cities in America. Its strong economy reaches approximately \$20 billion with the convergence of retail, spending and earning power blended with strong employment forms the underlying foundation of Beverly Hills' economic strength.

OUTGROWING AN IN-HOUSE DEVELOPED TOOL

The City of Beverly Hills is comprised of nine different departments, which includes Policy & Management, Administrative Services, City Clerk, Community Services, Community Development, Police, Fire, Public Works and Information Technology (IT). The City's IT department had developed an in-house Access

database, which allowed employees to input project data and create reports on a quarterly basis. However, the in-house database created some pain points—it was limited in functionality and difficult to generate reports from when needed, except on a quarterly basis. In addition, workflow processes weren't streamlined and each department had their own tracking mechanism so there wasn't any consistency in methodology. Reports were generated by a select group of analysts. “Staff was limited by the functionality of the database because they couldn't track the progress of the projects over time and they were not updating the progress of their project tasks until it came time for quarterly progress reports,” says Megan Roach, Senior Management Analyst. “We needed a solution that would facilitate process improvement for managing workflow and generate cross functional synergy.”

The City Council employs the City Manager to carry out Council policies and to serve as an executive officer for the City (a for-profit business equivalent of a CEO). It was critical for the City Manager to be able to create accurate reports as needed and the Access database hindered data visibility and ease of report creation.

SOLUTION FOR EVERY DEPARTMENT AND USER

The City of Beverly Hills needed a solution that was flexible enough to work with two different types of users:

- **Project Managers:** Needed a solution that could help them set up a template tool to focus on work plans and capital improvement project updates. Particularly for these users, it was critical to have a standard process.
- **Executives:** Needed the ability to request status updates regularly from project managers and generate project progress reports.

The following solution requirements were top priority:

- **Ease of use.** It was important to find a solution that was easy to learn so that as resources shifted, there wouldn't be the burden of extensive training.
- **Facilities collaboration.** Allow different department members to work together on projects and overall improve synergy. An example is the City's efforts to enhance customer service through the development of guidelines and a training program, a project spearheaded by the City Manager's Office. Team members from every city department are involved in the project so it is critical that team members and managers collaborate together.
- **Robust reporting capabilities and the ability to generate budget reports on the fly.** This is critical for quarterly and yearly updates.
- **Software as a Service (SaaS).** The City didn't want installed or "packaged" software because they knew that SaaS solutions cut down on infrastructure and maintenance costs. Finding an on-demand solution became top priority to free the City's resources and stick within budget.

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Katie Lichtig,
Assistant City Manager/COO

When evaluating vendors, the City of Beverly Hills considered several solutions, but found that most were not user friendly or intuitive. Then they evaluated Daptiv. "We really liked Daptiv PPM's ease of use, reporting capabilities and on-demand model that helps to facilitate cross-functional collaboration," says Katie Lichtig, Assistant City Manager/Chief Operating Officer. In particular, the City's IT department was happy about Daptiv PPM's SaaS model. "City-wide, everything seems to be headed in the SaaS direction, so SaaS played a big factor in our decision to go with Daptiv," says Lichtig. "As a municipality, we need to be fiscally prudent. Finding a solution like Daptiv that requires no maintenance, fewer staff hours, and adds convenience to our schedules...it's aligned with our need to reduce cost."

Currently, the City is taking advantage of Daptiv PPM's Dynamic Applications capability to track data that was hard to capture before:

- **Capital Improvement Projects:** Two Dynamic Applications were created to track detailed budget information, specific to project funding and the consultants (usually engineers and architects) hired to work on these projects.
- **Service Indicators:** There are approximately 550 service indicators that the City currently tracks with Daptiv Dynamic Applications. Service indicators detail performance measures so the City can benchmark how they're doing. An example of a service indicator measured is the amount of grant funding secured by the City, and they can track this funding each quarter with the help of Daptiv Dynamic Applications.

"What's great about Daptiv Dynamic Applications is that not all data we're tracking fits into a "project" mold,

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particularly since we function differently as a municipality. But you can track anything you like with a Dynamic Application and it’s incredibly quick to set up—we were impressed,” says Roach.

ON-DEMAND VALUE

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In how Daptiv PPM has impacted the City of Beverly Hills, Lichtig comments, “We’ve seen the biggest improvement in standardization of processes, accountability and data integrity. We now see real-time information and people are being held accountable for ongoing work

management. At any given point, we can log into Daptiv PPM and see updated tasks and know exactly where we stand and it has changed our perception of what project management is for the better. Overall, Daptiv PPM has changed our culture, and that has helped us to get more work completed than before.”

Reporting in particular has drastically changed from the days when the City had to generate reports from their Access database. “People are now very proactive and engaged with their work now that they’re using Daptiv PPM and Daptiv Advanced Report Builder,” says Lichtig. The City Manager and other executive staff members can now see the status of projects, see important information in a simple view and pull reports at any time, without having to rely on a select group of analysts. Lichtig continues, “Residents of Beverly Hills expect to see results of our work and we can do that effectively with the help of Daptiv PPM by sharing city progress reports on our website. We’re able to reach a broader audience through ease of use.”

ABOUT DAPTIV

Founded in 1997, Daptiv is the leading provider of on-demand Project Portfolio Management (PPM) solutions. Daptiv has helped thousands of companies improve their strategic planning and business execution by offering adaptable PPM solutions and expert professional services. Daptiv’s customers include world-class organizations such as Beam, Chase, Coach, Harvard University, Honeywell, InterContinental Hotels Group, and Virgin Australia. For more information about Daptiv’s PPM solutions, please visit www.daptiv.com.

