CASE STUDY

A Midwest Healthcare Organization (MHO) Enhances Efficiency, Accuracy and Financial Visibility with Projecto Software

After implementing Wizard Software's Projecto™ capital program and construction management software, a Midwest healthcare organization has significantly improved project visibility, streamlined complex approval and close-out processes and boosted reporting accuracy, all while managing over $1.6B of projects. With Projecto's out-of-the-box and customized reporting, the healthcare organization no longer spends hours building reports in Excel—improving their overall productivity.

PROJECTO BY THE NUMBERS

230+
active projects managed per month

50
standard, scheduled and custom reports

32
approval routes

4
different cashflow reports generated per month

THE INITIAL CHALLENGE

An early customer of Wizard Software Solutions, this healthcare organization managed their healthcare design and construction projects using Projecto, valuing its efficiency and flexibility. After undergoing a change in leadership, the organization implemented a new construction management software tool, but this solution lacked the intuitiveness and ease of Projecto.

Because this organization has complex reporting needs, its planning, design and construction (PD&C) department required a system that could analyze and extrapolate various types of data effectively. Since the new software couldn't properly handle data, the PD&C team needed to use Excel spreadsheets to fill in the gaps, doubling their workload.

Returning to Excel also complicated month-end reporting, with the team having to consolidate numerous spreadsheets and troubleshoot formula errors to preserve data integrity.

> "With Projecto, we can extract and use the data we have seamlessly. We can find the answer to any question we have—and we know we can trust it. That's incredibly powerful."
>
> — Operations Lead, Planning, Design & Construction Department (PD&C)

THE WIZARD SOLUTION

When the organization's leadership sought a new tool to improve productivity, the PD&C team advocated for, and ultimately reimplemented, Projecto due to its ease of use and accuracy.

The right information at their fingertips

The integration of Projecto with PeopleSoft gave the organization visibility into critical financial information, including invoices, purchase orders and funding. Documents processed in PeopleSoft are automatically exported to Projecto nightly, so current information is readily available every morning.

Since Projecto is always up to date, it keeps the PD&C team compliant with corporate policies and prevents them from overextending on projects by checking for authorized funding and halting contract routing if sufficient funding isn't available. Plus, Projecto houses a thorough audit trail, ensuring there's a permanent record of approvals that the team can reference.
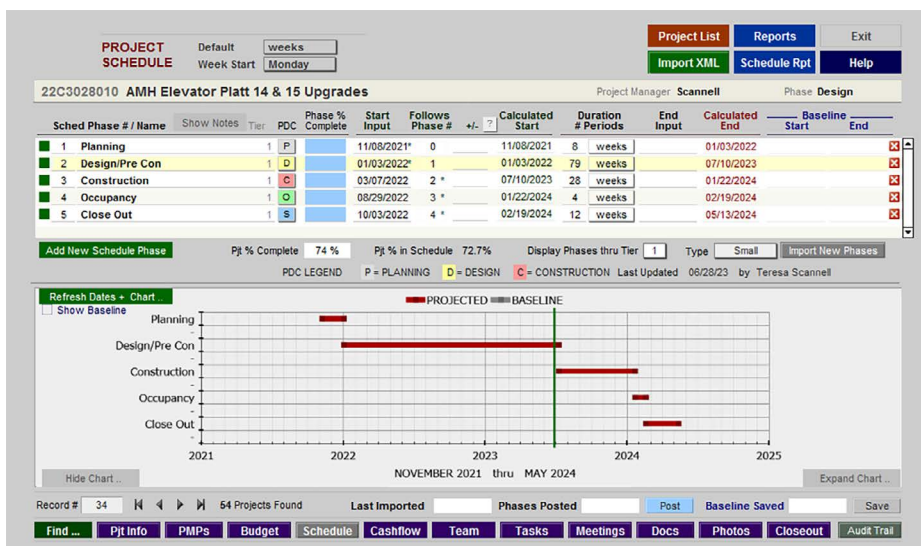
And while contractors run their own project schedules, Projecto enables the organization to use a hybrid schedule that syncs with contractors' schedules and contains milestone and occupancy dates. These 5-line schedules keep the PD&C team informed and aligned, so they can accurately run cashflow reports and communicate progress to leadership.

Complex processes made easier

Before Projecto, the MHO's close-out process was based in Excel and required multiple team members to manage it, creating a disorganized and lengthy process. The MHO repurposed Projecto's checklist into a close-out checklist, where all financial data, from commitments to final expenses, are integrated into one place. Now, they can easily check whether all the work is completed and the budget is spent to close out a project.

The MHO simplified approval routes in Projecto as well, turning a confusing process involving specific qualifiers into a one-click task. After setting up each approval route in Projecto, the PD&C team can now select the right route based on the project criteria.

Currently, the MHO is collaborating with the Wizard team to gain better control over RFPs by managing them in Projecto's Bid Management, instead of over email.

Project Schedule Detail

"Being able to generate cashflow reports and see our 5-line schedule, budget, and spend all in one place has been extremely beneficial to our organization as a whole."
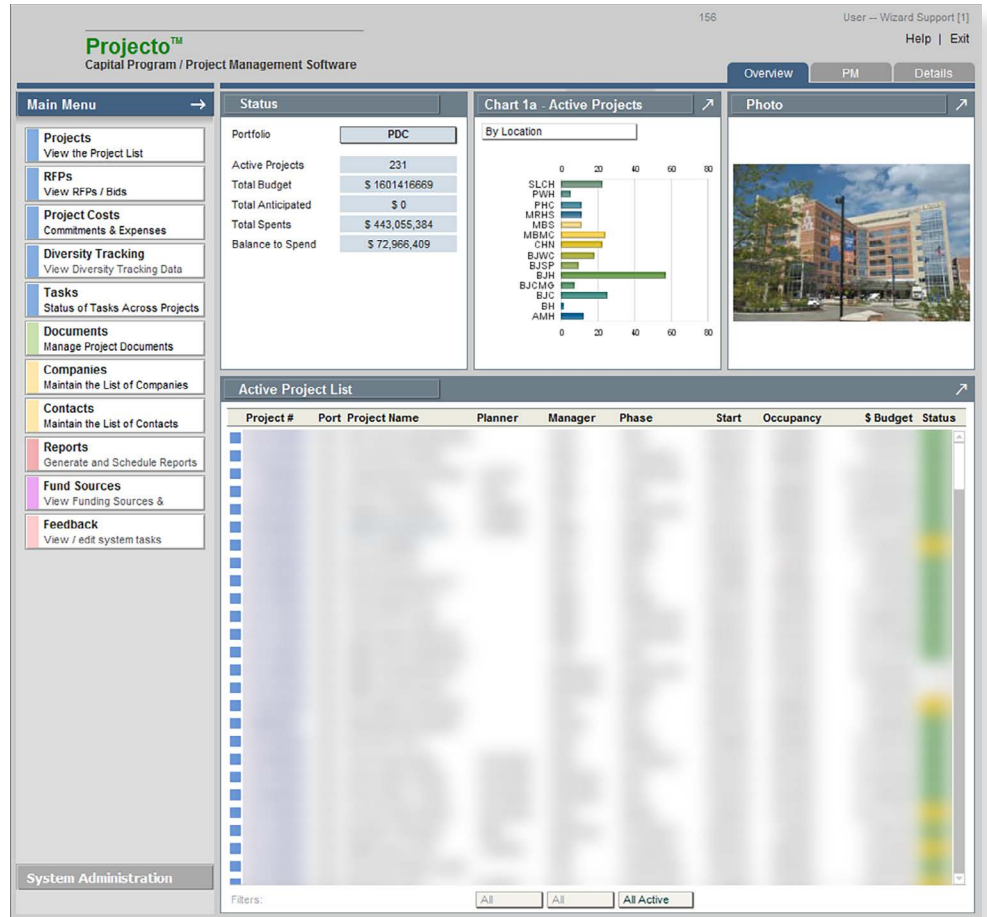
— Operations Lead,
PD&C Department

Custom reports boost accuracy and productivity

While they primarily utilize Projecto's out-of-the-box features, their team works with the Wizard Software Solutions' delivery and support teams to develop custom reports that streamline the way they work.

Projecto's flexibility has enabled the MHO to create scheduled reports they can send to hospitals, vendors, or other groups that need to see project updates. Additionally, the PD&C team has developed monthly performance review reports and active project reports so they have a complete understanding of how far a project has progressed vs. how much is left to build.

"The Wizard team is always open to our ideas, and they're skilled at quickly coming up with solutions that steer us to where we need to be. Anything we can think of, there's a way to create it within Projecto. So, we've always ended up with a solution that's benefitted us.""

— Operations Lead,
PD&C Department

Homescreen

Wizard Software delivers solutions that are simple to use, with powerful feature sets, yet flexible enough to be tailored to the specific needs of capital project managers, facility managers, and lease administrators.

Our solutions are unique because our clients are. For 30+ years, Fortune 1000 corporations and major healthcare systems, universities, and state and local governments have trusted us to deliver software solutions that align with the way they work.