

NON-PROFIT PORTFOLIO · SWITZERLAND

How Obvita brought all its initiatives onto one platform

A case study in non-profit portfolio management with PPM-Factory

CUSTOMER



AT A GLANCE

CLIENT

Obvita

INDUSTRY

**Non-profit foundation,
disability support**

HEADQUARTERS

St. Gallen, Switzerland

PORTFOLIO

50 projects · 30 users

SOLUTION

PPM-Factory Ready

GO-LIVE

2023

HEADLINE RESULT · ONE VIEW OF ALL INITIATIVES

Before

Scattered tools

spreadsheets and separate tools per department

After

One platform

strategic, infrastructure and IT projects together

THE CHALLENGE

Many departments, many spreadsheets

Obvita runs 50 strategic, infrastructure and IT projects across multiple departments and locations. As the number of projects grew, the information ended up in different tools and spreadsheets.

Obvita is a Swiss foundation that supports people with visual impairments and other disabilities, through facilities, services and support programs in several locations. Scattered data limited visibility and made prioritization and reporting across portfolios difficult.

Before: one portfolio, many sources

Tracked in different tools

Strategic	Infrastructure	IT	Budgets	Reporting
Spreadsheets	Separate lists	Own tools	Per department	Built by hand

WHAT STOOD IN THE WAY

Fragmented data Project information was spread across tools and spreadsheets, with no single version of the truth.	Limited visibility Leaders had no shared view of status, budgets and resources across portfolios.
Hard prioritization Without common criteria, it was difficult to decide which initiatives would deliver the greatest impact.	Time-consuming reporting Reports for stakeholders and governance bodies had to be assembled by hand from several sources.

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Triskell's project management software improves the way we work at obvita. Thanks to the powerful tools, we can manage our projects more efficiently and plan our human resources more optimally. The user-friendly interface and versatile features increase our productivity and help us achieve our goals faster and more accurately."

Mirjam Frick, Organizational Development at obvita.

GOALS SET BY LEADERSHIP

- All strategic, infrastructure and IT initiatives in one platform
- Standard scoring to focus on the initiatives with the greatest impact
- Reliable, automated reporting for stakeholders and governance

THE SOLUTION

One platform, live in 2023

Obvita selected PPM-Factory Ready to centralize and streamline the management of its strategic, infrastructure and IT projects. The deciding factors were a ready-to-use configuration, clear portfolio views, and reporting that serves stakeholders and governance bodies.

WHAT WAS PUT IN PLACE

01 Centralized portfolio management All 50 initiatives in one platform, consistent and aligned with organizational goals.	02 End-to-end visibility Real-time dashboards on project status, budgets, resources and performance across all portfolios.
03 Smart prioritization Standard scoring helps decision-makers focus on the initiatives with the greatest impact.	04 Efficient reporting Automated reports that save time and give stakeholders reliable information.

HOW IT WAS ROLLED OUT

Phase 1 · 2023 Go-live PPM-Factory Ready set up for strategic, infrastructure and IT portfolios.	Phase 2 Roll-out 30 users across departments and locations.	Phase 3 Extend Scoring, prioritization and automated reporting for governance.	
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HOW THE TEAMS WERE KEPT ON BOARD

- **Start ready to use.** The standard configuration gave teams a working platform quickly.
- **One shared platform.** Departments and locations share information in the same place, which improves collaboration.
- **Clear criteria.** Standard scoring made prioritization transparent for everyone involved.



Having one shared platform changed how our departments work together. Everyone sees the same information.

Project Coordinator, Obvita

THE RESULTS

Better visibility, stronger governance

Obvita now manages all its strategic, infrastructure and IT initiatives on one platform, with full transparency, clear priorities and less time spent on reporting.

PROJECT DATA Scattered → Central	PRIORITIZATION Ad hoc → Scored
REPORTING Manual → Automated	PORTFOLIO VIEW Siloed → Unified

WHAT CHANGED

	BEFORE	WITH PPM-FACTORY
Reporting	Assembled by hand	Automated, reliable reports
Data	Tools and spreadsheets	One platform for 50 projects
Priorities	Hard to compare	Standard scoring across portfolios
Collaboration	Information kept per department	Shared across departments and locations

WHAT'S NEXT FOR OBVITA

With reliable data and standardized processes in place, Obvita plans to keep strengthening governance and accountability across its portfolios.

Ready to bring all your initiatives together?

Start with one portfolio. Prove the value, then build on it.

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