

IT & STRATEGIC PORTFOLIO · ITALY

How Banfi brought IT, projects and strategy onto one platform

A case study in portfolio and strategy execution with PPM-Factory

CUSTOMER



AT A GLANCE

CLIENT

Banfi

INDUSTRY

**Wine, agriculture and
hospitality**

HEADQUARTERS

Montalcino, Italy

PORTFOLIO

50+ projects · 100+ users

SOLUTION

PPM-Factory Adapt

GO-LIVE

2020

HEADLINE RESULT · ONE INTEGRATED PLATFORM

Before

Partial coverage

one project tool with limited configuration



After

One platformIT services, projects and strategy execution
together

THE CHALLENGE

One tool could not cover the whole picture

Banfi runs 50+ IT, finance and transformation projects alongside its wine, agriculture and hospitality operations. Leadership needed them aligned with strategy, but the existing tool covered only part of the need.

Banfi already used a project management tool, but its configuration options were limited. As business transformation became a priority, the company needed one adaptable platform for IT services, IT projects and strategy execution, able to support teams at very different levels of maturity.

Where the old setup fell short

Covered by the old tool: projects only

IT services	IT projects	Transformation	Strategy	HR & Safety
Outside the tool	Partly covered	Outside the tool	Outside the tool	Outside the tool

WHAT STOOD IN THE WAY

Disconnected strategy Project management was not linked to strategy execution, so alignment with business goals was hard to show.	Limited flexibility The existing software offered little room for configuration, so processes had to bend to the tool.
Uneven resource planning Resource allocation and capacity planning were handled inconsistently across teams.	No home for transformation Transformation initiatives had no central platform, which made them hard to track and coordinate.

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...did not cover all needs, and its limited configuration possibilities were also an obstacle.

Gabriele Mazzi, CFO, Banfi

GOALS SET BY LEADERSHIP

- One platform for IT services, IT projects and strategy execution
- Real-time visibility of project status and financial performance
- IT projects and services aligned with strategic objectives

THE SOLUTION

One platform, live in 2020

Banfi selected PPM-Factory Adapt after an extensive evaluation. The deciding factors were no-code configurability, IT services, projects and strategy execution in a single platform, a lower cost than separate systems, and a proven implementation method.

WHAT WAS PUT IN PLACE

01 IT service management ITIL-based incident and problem processes, live within about a month as the first MVP.	02 Project portfolio management IT, finance and transformation projects with real-time status and financial performance.
03 Strategy execution Strategic objectives linked to the projects and services that deliver them.	04 HR and safety management Further processes brought onto the same platform, one MVP at a time.

HOW IT WAS ROLLED OUT

Phase 1 · 2020 ITSM MVP IT service management live in about a month, in a few iterations.	Phase 2 PPM & strategy Project portfolio and strategy execution, each with its own MVP and roll-out.	Phase 3 Extend HR and safety management on the same platform.
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HOW THE TEAMS WERE KEPT ON BOARD

- **One MVP at a time.** Each solution went live as a short MVP and was then rolled out, so teams absorbed change step by step.
- **Configure, don't develop.** No-code configuration fitted the platform to Banfi's workflows without custom development.
- **Work side by side.** Consultants worked closely with Banfi's teams to resolve issues quickly and support different maturity levels.

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Starting each solution with a short MVP let our teams see value quickly and adopt new processes at their own pace.

IT Manager, Banfi

THE RESULTS

One platform from IT services to strategy

Banfi now manages IT services, projects and strategic initiatives on one platform, with real-time visibility on project status and financial performance.

PLATFORM COVERAGE Projects → IT to strategy	PROJECT VISIBILITY Periodic → Real time
STRATEGIC ALIGNMENT Implicit → Tracked	IT INCIDENT HANDLING Ad hoc → ITIL-based

WHAT CHANGED

	BEFORE	WITH PPM-FACTORY
Reporting	Built from several sources	Advanced reporting from live data
Data	Spread across tools and files	One platform for ITSM, PPM and strategy
IT services	Handled outside the project tool	ITIL processes for incidents and problems
Strategy	Not linked to projects	Objectives linked to projects and services

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We now see how every IT project and service contributes to our strategy, and we decide faster with real-time data.

Banfi

WHAT'S NEXT FOR BANFI

Banfi continues to extend the platform one solution at a time, building on the same integrated foundation.

Ready to bring IT, projects and strategy together?

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

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