

Case Study

Reimagining Portfolio Management for Global Visibility and Real-time Insights



An enterprise consulting firm wanted to improve its portfolio management operations in the face of a growing and increasingly complex portfolio. The IT group that supports the company's office buildouts around the globe selected monday.com as its new portfolio management platform and worked with Vizionara throughout the implementation and adoption of the new tool.

The Challenge

Like many teams, the client had been using Excel to track the company's more than 50 active projects, listing some 80 attributes for each from budget status to timelines to project health. The spreadsheet not only had to be updated manually, but it also relied on data that was fragmented and scattered across multiple files, locations, and teams. Reporting and analyzing portfolio information was reactive as questions came up from business executives and tracking processes across the three regions the group served lacked consistency.

At the same time, the company's project portfolio was expected to grow and increase in complexity over the next calendar year. The team was facing a requirement to increase transparency related to project delivery performance across standard metrics to ensure they were meeting agreed upon internal targets.

Overall, the team needed a better way to collect and leverage data to improve forecasting and provide decision support to meet stakeholder and management expectations.



Our Approach

Essentially, the transition to the new portfolio management platform required moving Excel-based tracking of projects and financials to the centralized monday.com tool and enabling collaboration throughout the delivery lifecycle across the three cross-functional teams involved in every project.

While the tool provided an upload feature for data migration, it was important to understand the existing project management hierarchy and priorities prior to moving the data. The processes that were in place and attributes being tracked for projects were reviewed to determine how to set up a centralized data format in the new tool. After working with the leadership team in each region, the most important project attributes were identified to ensure global process and reporting consistency.

Project	Project Manager	Project Phase	Project Budget	Project Timeline	Project Request Board	Most Recent Update
Upcoming projects						
Project Tango		Upcoming	\$150,000	Mar 27 '22 - May 12 '22		Pending resources
Project Fantastic		Upcoming	\$400,000	Apr 26 '22 - Jul 26 '22		Funding under review
Project Alpha		Upcoming	\$240,000	Mar 30 '22 - Apr 28 '22	Project Alpha	On track
			\$790,000			
Current Projects						
Project Whiskey		Planning	\$550,000	Oct 11 '21 - Mar 21 '22	Project Whiskey	Final timeline in progress
Project Romeo		Execute	\$380,000	Apr 21 '21 - Mar 20 '22	Project Romeo	Progressing to plan
			\$930,000			
Closed projects						
Project Papa		Close	\$450,000	Jul 25 '21 - Sep 6 '21		Closed out
Project Papa Viva		Close	\$100,000	Oct 21 '21 - Nov 29 '21		Archived
			\$550,000			

Financial tracking was identified as an area with room for improvement. Based on valuable feedback from team members, several key financial attributes were enhanced to make reporting more flexible and insightful. One notable enhancement was the ability to express financial data in multiple currencies, which was an essential feature for global project

visibility. Additionally, budget attributes were refined to provide a more comprehensive view, including the total project budget, committed spend, and forecasted expenses broken down by categories such as meeting room technology, networks, and servers. These updates have made financial reporting more accurate, actionable, and aligned with the needs of both project teams and stakeholders.

“Automated workflows, reminders, and reporting have streamlined our processes and eliminated delays that previously stemmed from manual updates.” *

Once the new process was defined and the tool configured, regional leadership participated in testing by reviewing the data for accuracy and completeness. With the data in place, users were trained on the new platform and its capabilities, which led to requests for added features as they came to understand the full power available within the tool. To provide advanced data insights across multiple sources, the team added a Snowflake database for structured storage, and integrated Tableau reporting. By 2024, automations and AI processes were layered in, ensuring global consistency and real-time insights to enable strategic decision making.



The Results

Vizionara helped execute the new tool set up in less than one month, resulting in a user-friendly project tracking system that provides a dynamic user experience with expanded interfaces and automation features.

“For the first time, we have a standardized, transparent view of project health, budgets, and delivery performance across all three regions.”

The new tool provides capabilities beyond those of a static spreadsheet, including workflow and process automation. It also offers an array of project tracking dashboards, including a Tableau analysis feature for enhanced reporting that combines monday.com information with data from outside source systems. A key improvement was creating a consistent process and format for tracking information to enable reporting at a global level, while still providing some regional flexibility to account for geo-specific requirements.

“What once took days in Excel is now available instantly, allowing us to answer business questions with speed and confidence.”

With all portfolio data centralized in a single location and automated reporting processes, analysis of company projects, as well as more advanced project modeling, has been accelerated from days down to minutes. As a result, the client gets higher quality data related to project forecasting and decision-making, including cost avoidance and flexibility to adjust to dynamic global market conditions. Regional coordinators now ensure all project data and surveys are continuously captured in monday.com, eliminating reporting lags and providing real-time visibility across regions.

Looking Ahead

The team continues to gather feedback from stakeholders to refine the process and widen the scope to evolve with new business demands. For example, regular project management participant surveys were recently introduced into the tool to track results and automate analysis.

“We are excited to continue evolving this platform—leveraging AI, automations, and Custom GPT integrations—to further enhance forecasting, reporting, and stakeholder engagement.”

The structured environment of the monday.com platform also provides the opportunity to leverage built-in AI functionality and the latest features available. The team is exploring ways to leverage monday.com project data within Custom GPTs, enabling leadership and project managers to ask natural-language



questions—such as how many projects were completed in 2024 by region or what the total budget was—and receive instant, accurate responses without manual data pulls and analysis.

“This implementation has transformed our project portfolio management from a reactive, manual exercise into a proactive, data-driven capability. The foundation established with Vizionara and monday.com ensures we can scale confidently, accelerate decision making, and provide the flexibility to adapt to evolving global demands.”

What began as a tool deployment evolved into a foundation for continuous innovation, enabling the organization to adapt swiftly to changing demands and deliver measurable value across its global operations.

— [Jennifer Oliveira](#), Sr. Consultant at Vizionara

* Above quotes provided by Boston-based IT client as a result of monday.com implementation.



To learn more about how Vizionara can optimize your portfolio management process, [contact us](#) today.