

CHALLENGE

Russell Investments, a subsidiary of Northwestern Mutual, is a Seattle based consulting and investment firm. They staff around 2,000 employees in approximately 20 offices around the globe. Individuals and organizations in more than 40 countries are provided with their investment products and services. Given the firm's global reach and diverse service offerings, consistent and efficient business operations are vital.

The Russell Investment's Marketing Department is a fast paced group that was being slowed down by an unmanageable document and project management process. Under current methods, multiple individuals could request document updates with no formalized versioning system. This resulted in excess administrative work and detracted from the team's strategic and collaborative efforts. At any given time, 5-10 projects would be in progress, with 25 or more different content types. The marketing team had grown 50% over the past year and half, only further necessitating an alternative process. In an effort to improve team productivity, the marketing team sought out a comprehensive [business processes management solution](#).

SOLUTION

Russell Investments turned to Allyis to create a project reporting tool and develop a [content management system](#) to enhance internal communication and collaboration. Microsoft SharePoint was already part of the company's technology infrastructure putting Russell in a prime position to implement further capabilities. The desired solution would be appended to their existing Intranet and designed to improve team operations. Five Allyis team members were dedicated to the project and worked closely with the marketing management team.

Allyis developed:

- **Custom Team Dashboards**

A projects dashboard located on the team's new marketing home page. The dashboard allows team members to quickly view who is working on a specific project, the project's health, timelines and contact information.

- **Custom Workflow Waterfalls**

Being a financial company, it is imperative to obtain specific status updates over distinct project phases. Within SharePoint team members attach their name to a certain project. Members can change a project's status, but are first led through a series of unique fields requiring specific information before a status change is allowed. This process ensures accuracy and the ability to track a project from start to finish without discrepancy.

- **Custom Reports**

Marketing managers desired the ability to efficiently create customizable reports to evaluate and communicate a project's status and manage priorities. To create reports, managers select an individual from a drop down menu and are presented with projects they are working on and the status of each project.

Key Benefits

- Unified solution for all internal team workflows
- A managed solution for handling project requests
- Increase team productivity by enabling a change control process
- Custom workflow, forms and logic developed to support the tracking, delivery, and automation of project statuses for Russell Investments
- Creation of a project dashboard that provides a one stop view of all projects and their statuses

The marketing team smoothly integrated the customized processes and benefit from project versioning, reporting capabilities and an efficient project management system. Allyis worked directly with a specific division, but the solution provided will be implemented across all Russell Investment marketing teams.

Service/Solution Areas

- Content Management
- Business Process Management
- Project Management

Technologies Used

- SharePoint
- Visio

Projects List - Windows Internet Explorer provided by Russell Investments

http://ent-sharepoint/sites/russellindexQA/Lists/Projects%20List/MyProjects.aspx

File Edit View Favorites Tools Help

Projects List

Russell Investments

Russell Indexes QA Product Documentation Research Product Strategy and Management Business Technology Product Development Marketing Market Research Sales and Service Calendar Policy Site Actions

Russell Indexes QA > Projects List

Projects List

ID	Project Title	Requestor Name	Project Types	Campaign	Estimated Delivery Date	Phase Status	View: My Projects
Phase Status: 03. Design/Build (3)							
50	Europe Index - To be put on Hold		Analytics		6/20/2012	03. Design/Build	Reyes, Dorinda
59	Index Creation - Content Development Needed		Analytics			03. Design/Build	Reyes, Dorinda
61	Index Creation - Neither Yes Proof Reading Yet	Arana, Andrew Reyes, Dorinda	Analytics			03. Design/Build	Reyes, Dorinda
Phase Status: 04. Design/Build Review (0)							
Phase Status: 06. Compliance (3)							
63	dorinda test	Reyes, Dorinda	Collateral / Print / Paper			06. Compliance	Reyes, Dorinda
60	Index Creation - Content Development Need 2	Arana, Andrew	Analytics			06. Compliance	Reyes, Dorinda
57	Index Creation - No Analysis or Content Development No 00 External	Arana, Andrew	Analytics			06. Compliance	Reyes, Dorinda
58	Index Creation - No Analysis						Reyes, Dorinda
53	Index Creation - Proof Read						Reyes, Dorinda
55	Index Creation - Proof Read						Reyes, Dorinda
Phase Status: 07. Requestor R							
73	Index Creation - Compliance						Reyes, Dorinda
Phase Status: 08. Publishing (0)							
47	Russell Alternative Energy I						Reyes, Dorinda
79	Test Instructions New						Reyes, Dorinda
Phase Status: 10. Closed-Comp							
78	Demo with Lori						Reyes, Dorinda
56	Index Creation - No Analysis testing with new numbering						Reyes, Dorinda
46	testing phase ordering						Reyes, Dorinda
Phase Status: 11. Closed-Not C							
46	testing phase ordering						Reyes, Dorinda

Welcome Lori Stoner | My Site | My Links

This Site: Search

Home

Home > Projects > Project Submission Form

Project List: New Item

OK Cancel

Attach File | Spelling... * indicates required field

Project Title *

Project Description *

Requestor Name *

Department *

Project Type *

R.com URL

If project type is web, what is the impacted URL?

Category *

New
 Update

Requested Due Date *

Rush

Yes
 No

Rush Description

If yes selected, explain why this is a high priority project

Audience *

Internal
 External

If External Audience, please indicate External type(s) below

External Audience

Academic
 Consultants
 Fund Sponsors
 Media
 Money Managers
 Plan Sponsors
 All
 Other

Notification Opt In

Yes
 No

Do you wish to receive electronic notifications when the project phases are updated?

OK Cancel