

Representative Work

Multi-Business Portfolio Standardization and Task Level
Delivery Visibility



DELIVERED ON MONDAY.COM

ENGAGEMENT PROFILE

A privately held U.S. group operating several businesses under common ownership. Three of those businesses were in scope. Group leadership needed a comparable view of delivery across them.

SELECT RESULTS

-  **3**
Businesses on One Standard
-  **23**
Projects Planned and Tracked at the Task Level
-  **14**
Weeks to Production
-  **80 / 20**
Common Workflow, Room to Flex
-  **MVP**
First Working Portfolio Dashboards

ENGAGEMENT SCOPE

- Common project, task, and status standard across all three businesses
- monday.com environment build, with a workspace and permission model per business
- Task level planning of resources, effort, and timelines
- Change management and training, a common approach with room for local adaptation
- A lean first version of portfolio dashboards, built on the data the system captures

STARTING CONDITIONS

Three businesses, each with its own delivery tooling and conventions, and a group level objective of comparable reporting. Two were already working in monday.com. The engagement set out to establish one shared definition of a project, a task, and a status across all three, and to plan and track work at a level that makes delivery comparable across businesses.

APPROACH

Over a 14 week phase OptiGold PMO and the client's delivery leads defined one delivery standard together and put it into production on monday.com. Work included a common project and task taxonomy, an environment build with a workspace and permission model for each business, task level planning of resources, effort, and timelines, a lean first version of portfolio dashboards, and a change management approach that held a common core while leaving room for each business to adapt. Cut over established monday.com as the system of record for new project work, with migration of in flight projects owned by the businesses.



Standard &
Taxonomy



Environment
Build & Cut Over



Change Mgmt
& Training



Dashboard
MVP

OUTCOMES

- 1 One Place for All Work**
Every new project now starts in monday.com across all three businesses, with one intake point and one structure for the work.
- 2 One Standard, With Room for Difference**
Workflows were built to roughly 80 percent parity across the businesses, with the remaining 20 percent left configurable, so a common standard could be applied without giving up what genuinely differs in their work.
- 3 Planning at the Task Level**
Resources, effort, and timelines are planned up front at the task level on priority projects, which is what makes delivery comparable across businesses.
- 4 Performance Can Be Measured**
Projects created in monday.com carry the planning and effort data that delivery KPIs depend on. A lean first version of the portfolio dashboards went live on that data.
- 5 Change Managed on a Balanced Approach**
Working sessions, training, and hands on support followed a common approach across the businesses, with room for each to adapt where its people and its pace genuinely differed. The same eighty twenty principle that shaped the workflows.