



## Auto Finance Company Supports Long-Term Success with Better Project Management

### Overview

**Country or Region:** United States  
**Industry:** Financial services—Banking

### Customer Profile

Through its Drive brand, Santander Consumer USA offers automotive financing through a network of dealer partners. Based in Dallas, the company has nearly 1,200 employees.

### Business Situation

Existing project management methods lacked automation and made it difficult for executives to effectively analyze and forecast costs and resources.

### Solution

Santander chose the Microsoft® Office Enterprise Project Management Solution hosted by Project Hosts and implemented by Catapult Systems. The solution integrates with the company's Cognos reporting system.

### Benefits

- Fast implementation, easy usage
- Automated, time-saving reports
- Improved business analysis and agility
- Cost and resource forecasting
- Support for long-term business growth

“Connecting the EPM Solution to our Cognos reporting system saves the manual effort and time in creating key reports.”

Michele Rodgers, Director of Portfolio Management, IT, Santander

Dallas-based Santander Consumer USA is one of the fastest-growing companies in the automotive finance sector. The company was acquired by Banco Santander at the end of 2006. Continued rapid portfolio growth highlighted the company's need for automated and integrated project management methods. The company chose the Microsoft® Office Enterprise Project Management Solution; it used Project Hosts to host the solution and Catapult Systems to implement it. Within 45 days, the company had a customized EPM Solution, including integration with the company's IBM Cognos reporting system. Santander Consumer USA achieved a leap in project management capability with the EPM Solution. Employees save hours each day with increased automation, and the company can analyze the business and forecast resources more accurately. The solution also helps Santander to stay on track with its long-term business goals.



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Michele Rodgers, Director of Portfolio Management, IT, Santander

## Situation

Specializing in automobile financing for consumers with nonprime credit histories, Santander Consumer USA has a \$6.2 billion portfolio originated from nearly 12,000 dealers nationwide. The company, based in Dallas, Texas, has more than 1,200 employees. Santander Consumer USA is owned by leading global bank Banco Santander, which reaches 66 million customers in 40 countries.

Santander Consumer USA continued to grow its portfolio rapidly following its December 2006 acquisition by Banco Santander, based in Madrid, Spain. While projects nearly doubled, the size of the company's IT department remained the same at 70 people. To track projects, the company used Microsoft® Office Project Professional 2003; it separately tracked employee time sheets against projects using a tool developed with Microsoft Office Access™ 2003 database software. Project managers manually created status reports using Microsoft Office Word 2003. Michele Rodgers, Director of Portfolio Management, IT at Santander says, “Using these methods, we were able to see the status of a particular project, but we were not able to look at the portfolio level of the business and see, for example, the status of all originations projects next to our servicing and risk management projects. This made it challenging to provide tracking and analysis for all projects to our business customers, IT managers, and resource planners.”

Santander Consumer USA needed a project management solution that would help the company analyze projects and associated costs, and capitalize on its existing methodology. It needed to automate links in the project management chain—from daily team updates to executive reporting. Because the company used an established “toll gate” project management methodology that mandates that projects pass through five

distinct project phases, Santander needed a solution that would be compatible with this methodology. The company also wanted a solution in place very quickly, so that it could track a full year's worth of business metrics for 2007.

## Solution

Santander Consumer USA turned to Microsoft Gold Certified Partner Project Hosts to implement an on-demand Microsoft Office Enterprise Project Management Solution. The EPM Solution, which includes Microsoft Office Project Server 2007 and Microsoft Office Project Web Access, helps organizations effectively manage projects and resources. “Because our development and time to market tend to be very fast, we needed a solution that would help us manage our projects with minimal administrative effort while being very easy to use—and this was that solution,” says Rodgers.

Santander wanted to engage an experienced partner for the implementation, says Rodgers, “to allow us to continue to focus on our business.” Project Hosts is a leading provider of on-demand Microsoft Enterprise Project Management (EPM), Microsoft Dynamics® CRM, and Microsoft Office SharePoint® Server 2007.

Santander worked with another Microsoft Gold Certified Partner—Catapult Systems—to customize the hosted EPM Solution. Catapult configures and personalizes the EPM Solution to help companies map business goals to project management methodologies.

Despite their prediction of a 60-day implementation, says Rodgers, “With the help of Project Hosts and Catapult Systems, we went from planning to customization and implementation of the EPM Solution within just 45 days.”

“We needed something to take us from A to Z quickly—something that was automated and fast to implement. The EPM Solution gave us that leap in capability in a flexible, easy-to-use tool.”

Michele Rodgers, Director of Portfolio Management, IT, Santander

In January 2007, Catapult worked with Santander Consumer USA to define its enterprise custom fields—which aligned with the methodology in place—and definitions for reporting, delivery, and tracking. “We needed to configure the EPM Solution in a way that would meet our internal project management needs and our external customer needs—and support our existing methodology,” says Rodgers. “To do this, we created enterprise custom fields that matched our methodology phases in place, which include initiation, planning, execution, control, and project closeout. Each phase was integrated into the project plan and used for tracking the progress of the project to the next phase.”

At the customer’s request, Project Hosts set up a nightly raw-data feed that delivers data from the EPM Solution directly to the business intelligence reporting software that Santander uses, IBM Cognos. Daily status reports are automatically sent through e-mail from Cognos to project team members.

By early February, Santander Consumer USA introduced the EPM Solution to a select number of IT employees. By the end of February 2007, the company went live with the solution. The 70-person Santander Consumer IT department uses the EPM Solution, with 19 Office Project Professional 2007 users and 117 Office Project Web Access users.

### Benefits

By using the EPM Solution on demand, the company was able to implement a project management system quickly. The easy-to-use solution provides automated, time-saving reports—including reports fully integrated with the Cognos business reporting system at Santander. As a result, Santander Consumer USA can analyze its business and forecast its costs and resources more accurately. The solution also helps the company to stay on track with its long-term business objectives.

### Fast Implementation, Easy Usage

Santander Consumer USA wanted a boost in project management capability. Rodgers says that the company definitely succeeded in achieving that. “We manage our projects with a quick turnaround time,” she says, “so we needed something to take us from A to Z quickly—something that was automated and fast to implement. The EPM Solution gave us a leap in capability with a flexible, easy-to-use tool.”

### Automated, Time-Saving Reports

“Connecting the EPM Solution to our Cognos reporting system saves the manual effort and time in creating key reports,” says Rodgers. Each night, raw project management data flows directly from the EPM Solution to Cognos, which then sends daily e-mail status reports to associated project members.

### Improved Business Analysis and Agility

Santander Consumer USA wanted a more detailed level of reporting for improved business tracking and analysis. The company now has that. “The automated Cognos reports help us stay up-to-date on tasks and timelines. We use them in our daily meetings to assist in developer updates and see if any adjustments are needed to the progress of the project,” says Rodgers. Because all project managers progress their projects each day, Santander can produce an accurate status report at any time. “We don’t have to wait until the end of the week,” says Rodgers. “We know each day whether we’re on track or not.”

Santander executives and business partners receive weekly dashboard status reports. “The EPM Solution weekly status reports help our internal IT staff and business customers plan ahead. We see each project, who’s working on it, start and estimated finish dates, the current phase of the project, and business hours and costs,” says Rodgers.

## For More Information

For more information about Microsoft products and services, call the Microsoft Sales Information Center at (800) 426-9400. In Canada, call the Microsoft Canada Information Centre at (877) 568-2495. Customers who are deaf or hard-of-hearing can reach Microsoft text telephone (TTY/TDD) services at (800) 892-5234 in the United States or (905) 568-9641 in Canada. Outside the 50 United States and Canada, please contact your local Microsoft subsidiary. To access information using the World Wide Web, go to: [www.microsoft.com](http://www.microsoft.com)

For more information about Project Hosts products and services, call (800) 507-2819 or visit the Web site at: [www.projecthosts.com](http://www.projecthosts.com)

For more information about Catapult Systems products and services, call (800) 528-6248 or visit the Web site at: [www.catapultsystems.com](http://www.catapultsystems.com)

For more information about Santander Consumer USA products and services, call (877) 374-8305 or visit the Web site at: [www.drivefinancial.com](http://www.drivefinancial.com)

## Cost and Resource Forecasting

With the help of the EPM Solution, Santander can capture precise resource costs associated with projects. “The EPM Solution gives us solid financial status on projects—and a baseline for measuring future resource needs,” says Rodgers. In 2007, Santander had nearly 100 projects in the pipeline, and the pipeline will have significantly increased in 2009.

“Another aspect of resource forecasting using the EPM Solution is that we can calculate employee utilization levels based on time spent and work remaining,” says Rodgers. “If utilization is 80 percent, we know we have 20 percent capacity; if it’s 120 percent we know we have to get another resource involved.”

## Support for Long-Term Business Growth

Santander Consumer USA finds that the EPM Solution helps the company to stay on track with its overarching business objectives. “At the start, we associate a project with which corporate theme it supports—for example, to increase market share, optimize profitability or operational effectiveness, or govern effectively,” says Rodgers. “The EPM Solution helps us to stay aligned with these objectives by integrating them into each project that is logged into the system.”

## Microsoft Office System

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For more information about Microsoft Office System, go to: [www.microsoft.com/office](http://www.microsoft.com/office)

### Software and Services

- Microsoft Office
  - Microsoft Office Enterprise Project Management Solution
  - Microsoft Office Project Professional 2007
- Technologies
  - Microsoft Office Project Web Access

### Partners

- Project Hosts
- Catapult Systems