

CASE_STUDY

RivanIT Case Study

How a Global IT Services Firm Unified Delivery Operations and Cut Reporting Time by 80%

The Client

A mid-size IT services company with 150+ employees across 4 countries, managing 25+ concurrent projects for clients in financial services, healthcare, and logistics. The organization operates using POD-based delivery (Project-Oriented Development teams) with a mix of fixed-price and staff-augmentation engagements.

Industry: IT Professional Services

Team Size: 150+ employees

Active Projects: 25+

Regions: North America, Latin America, Europe, Asia

The Challenge

The delivery organization faced critical operational bottlenecks:

1. Fragmented Tooling

Project data lived in spreadsheets, financials in QuickBooks, resource allocation in Google Sheets, risks in email threads, and recruitment in a standalone ATS. No single view of the delivery portfolio existed.

2. Invisible Resource Utilization

Directors could not see who was working on what, at what capacity, or when they would become available. Resource allocation was done by memory and tribal knowledge, leading to frequent over-allocation and burnout.

3. Manual Financial Reporting

Generating a P&L report for a single project required pulling data from 4 different

sources. Monthly financial reviews took 2-3 days to prepare across the finance and PM teams.

4. Unmanaged Risk

Risks were identified in meetings but rarely tracked formally. When a project hit trouble, stakeholders learned about it weeks late through escalation emails rather than proactive alerts.

5. Disjointed Recruitment Pipeline

Hiring for project staffing involved BambooHR for candidates, email for interview scheduling, spreadsheets for test results, and Slack for team coordination. Candidates fell through the cracks regularly.

6. No Client Transparency

Clients had no self-service visibility into their project status. PMs spent hours each week preparing status update emails and slide decks for client stakeholders.

The Solution: RivanIT

The organization deployed RivanIT as their unified Agentic Delivery Platform, replacing 6+ disconnected tools with a single system.

Implementation Approach

Phase	Duration	Scope
Phase 1: Core	2 weeks	Projects, Clients, Resources, Contracts, Financials
Phase 2: Risk & Compliance	1 week	Risk Matrix, Mitigations, Change Requests, Notifications
Phase 3: Staffing	2 weeks	BambooHR integration, Candidate pipeline, Dream Keepers
Phase 4: Integrations	1 week	Jira sync, GitHub metrics, Email notifications, Client Portal

Total deployment time: 6 weeks (including data migration and team training)

Key Features Deployed

1. Unified Project Dashboard

Every project has a single dashboard showing phase progress, deliverable completion, team composition (PODs), risk summary, and financial health. Directors see the full portfolio; PMs see their assigned projects.

“For the first time, I can open one page and know exactly where every project stands.”

— VP of Delivery

2. Resource Capacity Planning

The Resource Management module shows every team member’s current allocation, availability, skills, and POD assignment. The system automatically prevents double-booking and flags under-utilization.

Before: 3 hours/week spent manually checking availability in spreadsheets

After: Real-time capacity view with automated conflict detection

3. Contract-to-Invoice Pipeline

Contracts flow through a structured workflow (Draft > Review > Approved > Signed > Executed) with role-based approval gates. Each contract links to billing rates, milestones, and payment terms. Invoices are generated directly from timesheet data and approved through the platform.

Before: Contract creation took 2-3 days across email and document sharing

After: End-to-end contract lifecycle in 4 hours with audit trail

4. Proactive Risk Management

The Risk Matrix (probability x impact) provides a visual heat map across all projects. When a risk is flagged as critical, automatic notifications are sent to the PM, POD leader, and directors. Weekly risk digest emails keep leadership informed.

Before: Risks discovered during escalation meetings, 2-3 weeks late

After: Critical risks trigger real-time alerts within minutes

5. Automated Staffing Pipeline

The recruitment pipeline integrates with BambooHR for candidate sourcing, AI-powered classification (matching candidates to roles by experience, skills, timezone, and salary expectations), automated English proficiency testing

(SpeechAce), technical assessments (TestGorilla), and structured interview workflows. The Dream Keepers feature assigns onboarding mentors to new hires.

Before: Average time-to-fill: 45 days with 30% candidate drop-off

After: Average time-to-fill: 28 days with 12% candidate drop-off

6. Client Portal

A separate authenticated portal gives clients direct visibility into their project status, timelines, and deliverables — without accessing any internal data.

Before: PMs spent 5+ hours/week preparing client status reports

After: Clients self-serve; PMs spend <30 minutes/week on client communication

Results

Metric	Before	After	Improvement
Monthly reporting time	3 days	4 hours	80% reduction
Resource utilization visibility	Manual / weekly	Real-time	Instant
Risk detection latency	2-3 weeks	Real-time alerts	95% faster
Time-to-fill (staffing)	45 days	28 days	38% reduction
Client status report prep	5 hrs/week per PM	30 min/week	90% reduction
Contract processing time	2-3 days	4 hours	85% faster
Tools consolidated	6+ separate tools	1 platform	Single source of truth
Team onboarding (new PM)	2 weeks to learn tools	2 days with onboarding wizard	80% faster

Architecture Highlights

Component	Choice	Rationale
Frontend	React + TypeScript + Vite	Fast iteration, type safety, instant HMR

Component	Choice	Rationale
UI System	shadcn/ui + Tailwind	Consistent design, accessibility, rapid development
Backend	Supabase (PostgreSQL + Auth + Edge Functions)	Zero backend infrastructure, built-in RLS, real-time
Hosting	Docker + nginx	Portable, self-hosted or cloud
Auth	Google OAuth + Microsoft Azure AD	Enterprise SSO with zero password management
Integrations	Jira, GitHub, BambooHR, Brevo, AI	Optional and independently configurable

Lessons Learned

1. **Start with projects and resources.** These are the modules teams interact with daily. Get them right first, then layer on financials, risk, and staffing.
2. **Role-based access is essential from day one.** Directors, PMs, POD leaders, and members need fundamentally different views. Building RBAC early avoids permission debt.
3. **Automated notifications reduce meeting load.** Risk alerts, change request notifications, and assignment emails replaced 3 weekly status meetings.
4. **Client portals pay for themselves.** The time saved on status reporting alone justified the portal development in the first month.
5. **AI classification accelerates staffing.** Automating the initial candidate screening (English level, experience match, timezone, salary fit) reduced recruiter workload by 60%.

Conclusion

RivanIT replaced a fragmented toolchain with a single platform that serves every role in the delivery organization — from directors tracking portfolio P&L to team members logging hours and managing skills. The 6-week deployment delivered measurable improvements across reporting efficiency, resource visibility, risk management, and recruitment speed.

The platform's modular architecture means organizations can start with core project management and progressively enable staffing, integrations, and AI features as their needs grow.

RivanIT - Agentic Delivery Platform For more information, contact your account representative or request a demo.