

# PerfectServe Case Study

Accelerating Product Management Success

## Overview

PerfectServe, healthcare's most comprehensive and secure care team collaboration platform, realized that to achieve their business goals they needed to invest in their Product Management organization, but needed guidance in how to best align their PM team with their business strategy.

With an introduction from PerfectServe's controlling investor and based on Egress's track-record of helping technology firms achieve excellence in Product Management, PerfectServe chose Egress Solutions to perform a Product Management Team Assessment. The objective of the assessment was to inspect PerfectServe's PM organization, craft recommendations for change, and build a playbook PerfectServe could implement.

## The Project

Egress provided an unbiased third party review of PerfectServe's PM organization. The engagement included an internal online survey to key stakeholders of the company on their perceptions of the Product Management organization. The survey served to expose key themes which were explored further through in-person interviews with a subset of the stakeholders. Egress also performed review of key artifacts which provided clarity on the sophistication of the PM team's use of technology and their PM discipline.

## The Results

The project culminated with an in-person presentation and report to the senior leadership team of PerfectServe, providing them with:

- A scorecard on the PM Organization's strengths and weaknesses
- Prioritized recommendations based on effort level and impact to the business
- A newly designed organizational structure
- A focused Product Management Charter with responsibilities crafted to empower the team to achieve success

Most importantly, PerfectServe received full knowledge transfer on the data collected and the observations made by Egress. This provided clarity on not only what PerfectServe needed to do going forward but why.

## Key Benefits for PerfectServe

- Comprehensive PM Team Assessment performed rapidly and on-time
- Achieved cross-functional clarity on PM Charter for success
- Ability to immediately execute on Playbook of Recommendations
- Clear deliverables and knowledge transfer
- Trusted PM experts - Intend to use Egress Solutions again

PERFECTSERVE'S CEO &  
PRESIDENT, TERRY EDWARDS  
THOUGHTS ON EGRESS

“Egress provided a thorough assessment identifying strengths, weaknesses, and gaps along with recommendations for what we need to do to transition our PM team to excellence. The Egress final report provided the framework we needed to move forward and we are well on our way to executing their playbook of recommendations. They know their stuff and we intend to do more work with them in the future.”