

EXECUTIVE GUIDE

Tool Consolidation in Mid-Sized Companies

How to break down software silos, cut licence costs and build a true single source of truth with monday.com

30-45%

Licence cost reduction

20%

shorter project lead times

12

weeks to go-live

For managing directors, CTOs, CIOs and PMO
leads who want to end fragmented systems
(Asana, Jira, Excel & co.)


Advanced Delivery
Partner
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Analysis: The invisible efficiency leak

In fast-growing companies, tool sprawl usually happens organically: marketing works in Asana, IT works in Jira, and operations tries to run the day-to-day business across countless Excel silos and SharePoint lists. This scenario creates three critical business risks:



The “context switching” effect: According to common productivity studies, employees lose a significant share of their working day switching between tools and searching manually for information.



Blind spots for management: There is no single source of truth. Data for monthly controlling has to be consolidated manually over several days. The error rate is high, and the numbers are already outdated by the time they are reported.



Spiralling IT costs: Duplicate licences, unused accounts and high maintenance effort for isolated interfaces put significant pressure on the IT budget.

The answer is to move from isolated point tools to a central Work OS (workflow operating system) built on monday.com. The strategic target state draws a clear line between operational execution in the teams and strategic steering at management level.

THE MEASURABLE BUSINESS VALUE

30-45%

Licence cost reduction

Save 30% to 45% of software costs by replacing third-party tools and redundant licences.

20%

Faster time-to-value

Cut project lead times by 20% by eliminating manual coordination loops.

100%

Real-time decision-making

100% transparency on project status, budgets and resource capacity for leadership at the push of a button.

Solution architecture: The hub-and-spoke system

To avoid new silos, monday.com is set up in a scalable hub-and-spoke architecture. The management board (hub) steers, while the department boards (spokes) do the work.

REQUIRED BOARDS



Strategic Portfolio Board (Hub)

The central steering layer for management. Every major project in the company is represented here as a single item.



Department Execution Boards (Spokes)

Operational boards for the business units (e.g. marketing campaigns, service delivery, operations).



Resource Capacity Master Board

A global directory of all project staff for managing workload across departments.

BOARD STRUCTURE & COLUMN LOGIC

Top level (items)	Represents the core deliverable (e.g. “Client project Alpha” or “Product launch Q3”).
Lower level (subitems)	Captures the granular work packages, milestones and to-dos.
Status column	Unambiguous definitions (Pipeline, In progress, Approval, Live, Blocked).
People column	Split into two clear roles: project lead (accountability) and assignee (execution).
Timeline column	For precise scheduling and Gantt visualisation.
Formula column	Automatic calculation of budget status (planned budget – actual cost).
Links & mirror columns (connect boards)	Aggregated progress and costs from the departments are mirrored upwards fully automatically and in real time. Management sees the overall picture without disrupting the teams’ day-to-day work.

DASHBOARDS



Executive Portfolio Dashboard

One central dashboard fed by every workspace.



Battery Widget

Shows the distribution of all project statuses across the company at a glance.



Workload Widget

Visualises every employee's capacity utilisation in real time to prevent bottlenecks.

04

Automations: Efficiency on autopilot

Automations replace the error-prone chasing of status updates and eliminate manual routine work.

STATUS LOGIC & PROCESS AUTOMATION



When all subitems reach the status “Done”, the parent item switches to “Done” automatically. This keeps reporting on the management board accurate and always up to date.



When a new project is created on the portfolio board, the matching task template structure is generated automatically on the execution board.

NOTIFICATIONS & ESCALATIONS



When a status changes to “Blocked”, the project lead is notified immediately. Issues can be resolved before they put the schedule at risk.



When a due date passes and the status is not “Done”, the priority is set to “Critical” automatically and the department head is informed.

monday.com acts as the central nervous system, connecting specialised third-party systems seamlessly instead of creating new silos.

CRM connection (e.g. Salesforce / HubSpot)

As soon as a deal is set to “Closed won” in sales, monday.com creates the operational delivery project automatically. Manual data transfer disappears entirely.

Make.com scenarios for IT & development

If development teams need to stay in Jira for the code repository for a while, a Make.com scenario syncs the status of Jira epics with monday.com every 10 minutes. The business team keeps full visibility without having to use Jira.

Communication (MS Teams / Slack)

Critical system alerts (e.g. budget overruns) are pushed straight into the relevant management channels as structured messages.

06 Governance & roles: Securing long-term scalability

A system is only as good as its governance. Clear enterprise rules keep the platform structured:

PERMISSION MODEL

Workspace level

Access follows a strict need-to-know principle (e.g. HR and finance in closed workspaces). External partners and clients are invited to specific boards as “guests” only.

Board level

The strategic portfolio board is readable for the entire workforce (transparency) but write-protected. Edit rights sit exclusively with the PMO.

OWNERSHIP & NAMING CONVENTIONS



Every board has exactly two defined board owners. Only they may change structures, columns or automations.



All elements follow a strict naming logic: [Department] – Topic – [Year] (example: [MKT] – Core Campaign Delivery – 2026).

Implementation roadmap: To a single source of truth in 12 weeks

The migration runs iteratively so that ongoing operations are never put at risk.

Quick Win

Week 1

Eliminate Excel silos

The first 5 business-critical Excel lists are moved into structured monday boards.

Phase 1

Weeks 2–4

Core Architecture & PMO

Setting up the workspaces, the portfolio board and the central dashboards.

Phase 2

Weeks 5–8

Department Onboarding

Replacing legacy systems (such as Asana) and activating the first automation chains.

Phase 3

Weeks 9–12

Deep Integration & Go-Live

Connecting CRM/ERP and final training for all teams. Switching off the legacy licences.

THE ENABLEMENT APPROACH: TRAIN-THE-TRAINER



monday Champions

Two key users per department are trained as the first point of contact for their teams.



Micro-Learning

Process-specific video guides are provided (no longer than 3 minutes each).



Weekly Office Hours

Open Q&A sessions in the first 6 weeks after go-live to resolve remaining pain points continuously and flexibly.

Why demicon as your implementation partner

A Work OS is only as effective as its rollout. As a certified monday.com partner, demicon guides mid-sized companies from the first architecture decision through to productive go-live including change management, automation build-out and connections to CRM and ERP systems.



Tailored architecture

We build the hub-and-spoke architecture around your existing system landscape instead of forcing a standard template onto it.



Experience from 12-week projects

From kick-off to go-live we support the entire migration, including data takeover from Excel, Asana and Jira.



Enablement, not dependency

We train your internal monday champions so the platform stays alive long after the project ends.



Technical depth

Connections to Salesforce, HubSpot, Jira and other core systems via native integrations or Make.com.

CONCLUSION

Consolidating your tool landscape onto a central Work OS is not an IT project — it is a business lever. You not only reduce fixed software costs, you also create the operational clarity a company needs for real growth. With demicon as your implementation partner, that change becomes predictable, low-risk and sustainable.



BOOK YOUR FREE INTRO CALL

Does this analysis sound familiar?
In a 30-minute strategy call we review your current tool landscape together and outline a concrete roadmap for consolidation — free of charge and with no obligation.



Book a meeting

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