MEISTERPLAN

How a Retail Giant Stays Ahead of the Game with a Lean PPM™ Solution and Strategic PPM Toolbox

The Challenges

Our customer, a well-known athletic apparel manufacturer and retailer, is full of employees who have great ideas around how the company can leverage technology to move the organization forward. However, because their IT resources are limited, that creates the challenge of understanding which projects should be prioritized. The company's IT PMO Program Manager said, "We wanted to make sure that we were focusing on the right investments for our company. Making those decisions could get difficult because the amount of information that we have on the project being proposed in the early stages is limited. Plus, because of our limited IT resources, we don't have a lot of bandwidth to do a lot of discovery around the idea." If they assign IT resources to the new project proposals, that means those people have to be pulled from other potentially more profitable work that the organization already committed to. They needed to answer the question: How do you balance the exploration of new project ideas with current work that has already been prioritized?

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The Initial Solution

The IT PMO had an annual intake process for planning their project portfolio. For their annual intake process, they had a very large Excel workbook that was used to list out all projects. They would estimate the length of proposed projects including proposed start and end dates, and then they would try to identify all of the different types of resources.

The organization then decided to move from an annual to a quarterly intake process. They knew that trying to use that same Excel spreadsheet wasn't sustainable on a quarterly basis. For the annual process, it took them approximately a month just to clean up the workbook and update it with resources before even getting started with their intake process. It was important to ensure that all of the resource data was correct and obtain the latest status on all of the projects. "When we moved to a quarterly intake process, we would have to do this and have to report on the statuses of all the projects. It would take two of us at least a week prior to the meeting just to collect all of the updated project statuses and make sure that they were accurate," said the Program Manager. The retailer's IT department is centralized in northeastern U.S. but, as a global company, they need to work closely with satellite locations around the world. Getting the information on every project from each satellite office made the process even more challenging and time-consuming.

A Strategic PPM Toolbox

Within Meisterplan, the IT PMO collects what they call project demographics. All of the information that was previously manually entered in Excel from project status reports and proposal briefs is now updated directly in Meisterplan. Because Meisterplan is a cloud platform, key stakeholders all have access to the same information whenever they need it, and updating the information in Meisterplan is much easier than their former process. This visibility has helped them understand what can truly get done and determine when they should continue the work they have already committed to or when they have the time and resources to pursue new project ideas. The maintenance of all employee roles, skills and named resources requires much less effort now that it is all contained within Meisterplan instead of in a series of spreadsheets. This enables the PMO to use Meisterplan's "what-if" scenario planning features to resolve resource conflicts and ensure the feasibility of their project portfolio.

> **The visibility Meisterplan brings helps the retailer determine when they should continue with the work they've already committed to and when they should pursue new project ideas.**

Lean PPM™ Solution

The retailer's IT PMO focuses on keeping their PPM process as lightweight and streamlined as possible. Meisterplan's software is designed directly alongside the Lean PPM™ methodology, which makes it a perfect fit for them. The Program Manager said, "Meisterplan has all of the features that we care about. It hits our sweet spot." Because Meisterplan integrates with many of the tools their teams use for project management and work collaboration, they are excited that their project teams can keep using the tools and methods that work best for them. "We are already looking at how we can leverage the Jira integration to include some of our projects that are running in Scrum. And we're also looking at whether we can use Smartsheet and Meisterplan to help us build out some of our dashboarding. For us it is important to look at how we can maximize what we have in Meisterplan instead of looking at a much heavier weight solution," explained the Program Manager.

What Value Did Meisterplan Bring to Your Company?

The IT PMO said that one of the greatest benefits they've gained is transparency. Senior leadership has appreciated the transparency that Meisterplan has brought, particularly once a project gets delivered. They now have the ability to see how much delivering a project costs from a resource perspective. They are now using that transparency to go deeper and ask more questions, such as: How did certain projects do from an ROI perspective? Did they meet their goals? What about from an adoption perspective? The Program Manager explained, "We were investing in all of this great technology but weren't fully adopting it. Because Meisterplan gave us visibility into all of our projects' data and what it takes to execute them, that gave us the opportunity to go a step further and get the answers to those additional questions."

Another benefit is that Meisterplan and the ability for what-if analysis has helped facilitate communication regarding why certain projects cannot be done or what may be going on with a specific project or a project team. "It actually allows me to have a more productive conversation when we're trying to do tradeoffs around projects and also understanding the overall impact to the portfolio if a project slips. We can determine how to optimize other projects, and if it still makes sense to do them all. That has been incredibly helpful for me and also incredibly eye-opening for the organization."

Now, rather than spending eight weeks each year chasing down data across global teams and updating out-of-date spreadsheets, their team can focus on more productive work, like helping teams execute on their plans. The Program Manager estimates that this productivity improvement alone saves the company more than $15,000 every year. In that respect, Meisterplan has already paid for itself.

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