



Success Story

Lean PPM for Project Success



“Meisterplan is now a key element of our portfolio planning. It helps us to make sure that our portfolio is realistic and that we create plans that really work.”

Marzio Locatelli, PhD
Head of Project Management of Trafag

Meisterplan & Smartsheet – the Perfect Combination

Challenge

As a leading supplier of high quality sensors and controls with a broad network of subsidiaries and representatives in over 40 countries worldwide, it is very important to Trafag that they provide high quality, high precision products with the best customer service possible. The high performance of their production and development departments allows them to not only reliably deliver those precision products, but also to develop and implement tailor-made customizations to meet the specific needs of their OEM clients, and to do so quickly.

To maintain those high standards – across 6 different product lines and 25+ development projects per year – requires a clever project portfolio consisting of the right balance of platform development, product development and production engineering projects. On top of that the portfolio must be aligned with the company's significant

growth and technology strategy so that they can make sure that their R&D department can deliver on its promises. Trafag's previous planning process was very tedious and lacked the transparency and flexible resource management that was needed to gain quick answers to their “what-if” questions. Trafag decided that they needed to find a lean, cloud solution that was fast and easy to implement.

Implementation

After searching for the right solution, the Head of Project Management at Trafag, Marzio Locatelli, PhD, said that they “finally [found] the right tool chain,” when Trafag implemented a combination of Smartsheet and Meisterplan to solve their project portfolio and resource management challenge. Trafag uses Smartsheet and Meisterplan together to accomplish multiple important functions of their planning process.

Integration with
Smartsheet

Projects Planned in Meisterplan
~25 annually

License Model
SaaS

Industry

Industrial Automation

Employees
> 200

Founded in
1942

Trafag is a Swiss-based high tech company and a leading international supplier specializing in high quality sensors and controls. With a market presence in over 40 countries, they take pride in offering quality advice, service and products. The three cornerstones of Trafag are technological prowess, manufacturing expertise and a customer-oriented outlook.

Marzio Locatelli, PhD, Head of Project Management at Trafag AG, is a Senior Project Manager with extensive experience in strategic product development and the management of mechatronic projects in leading global companies in the automotive and construction industries with business relationships with European, Asian and North American customers and suppliers.

First, for advanced, real-time resource management and for day-to-day project management:

- Project Leaders plan their projects including task management and basic allocation in Smartsheet using templates.
- The PMO imports that data from Smartsheet into Meisterplan and instantly sees an overview of the status of critical projects and resourcing situations to quickly and graphically identify conflicts or challenges within the portfolio.
- To delve into project details more fully, the PMO then opens the detailed project plans for critical projects from Meisterplan in Smartsheet.

Second, for portfolio planning:

- The PMO imports the latest plans from Smartsheet into Meisterplan.
- The PMO can then add new potential projects, either with rough estimates directly in Meisterplan or with more details imported from Smartsheet.
- The PMO then uses scenario planning in Meisterplan for various scheduling, capacity and project portfolio options for the following year's portfolio to present to the board for approval.

Benefits

From the start, Trafag has been happy with their choice to use Meisterplan in combination with Smartsheet because of how fast and easy it was to implement. In fact, Locatelli said that the "integration works flawlessly." Trafag integrated Meisterplan with Smartsheet and were ready in an hour to expand their project management to include interactive resource management and project portfolio capabilities. The integration is as easy as 1, 2, 3:

1. Create a project summary report covering the relevant projects in Smartsheet.
2. Create an access token in Smartsheet.
3. Establish a data link in Meisterplan, using your Smartsheet access token and by mapping the fields. (Tutorial videos are available at help.meisterplan.com).

Because Meisterplan works so well with Smartsheet, all of Trafag's users get exactly what they need: Smartsheet provides the project management and spreadsheet capabilities that their project leaders need, and Meisterplan provides the graphical and interactive project portfolio and resource management capabilities needed by the PMO.

When circumstances change or challenges arise, Meisterplan's simulation capabilities allow Trafag to quickly redesign their project portfolio, so that they know the best way to react and can ensure that they are able to maintain high performance and continue to deliver exceptional products and service. Trafag can also quickly spot and resolve resource conflicts across teams and departments before they even occur. By using Meisterplan in combination with Smartsheet, Trafag is able to ensure that they have a project portfolio that makes sense for their business and that their projects can be delivered as promised.





MEISTERPLAN

Meisterplan is a software for interactive Project Portfolio Management. The software enables companies to better understand complex dependencies in Resource Management. Meisterplan substantially improves the quality of decisions pertaining to prioritization, budgeting and resource planning.

Meisterplan is a product of itdesign GmbH, which comes with more than 15 years of experience in project and portfolio management. itdesign specializes in consulting, implementation and support of solutions for Project Portfolio Management (PPM) and Customer Relationship Management (CRM).

MEISTERPLAN

A product of itdesign GmbH

Friedrichstrasse 12

72072 Tuebingen

Germany

Phone +49 7071 3667- 7600

Fax +49 7071 3667- 89

mail@meisterplan.com

meisterplan.com