



# Lean PPM That Does Not Cost a Fortune

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# Preface: This Actually Works in Practice...



RIMOWA

voestalpine  
ONE STEP AHEAD.

SIEMENS Gamesa  
RENEWABLE ENERGY

 **BOSCH**

LA PRAIRIE

STADT  MÜNSTER

 **NORDEX**



 **Thalia**

**STADTWERK**  
WINTERTHUR



**KUKA**

**PERI**

**M** / Munich  
Airport

**OXFORD**  
INSTRUMENTS

**BCG** BOSTON  
CONSULTING  
GROUP

**SCHÜCO**

**Fissler**

**HAYS**

Medtronic

**AIXTRON**



 **Fraunhofer**  
ITALIA



**Tchibo**



**SKAN**

 **vodafone**

Frankfurter Allgemeine

**LSE** THE LONDON SCHOOL  
OF ECONOMICS AND  
POLITICAL SCIENCE

# ...Across a Variety of Use Cases



## Customer Project Delivery

**Consistent and reliable delivery due to realistic capacity planning**



## Product Development

**Minimize idle time across teams and reduce your time to market**



## Agile Software Development

**Make reliable forecasts based on all capacity and dependencies**



## Corporate IT

**Increase satisfaction with transparent IT roadmaps**



## Business Transformation

**Move your top projects forward with clear capacity planning**

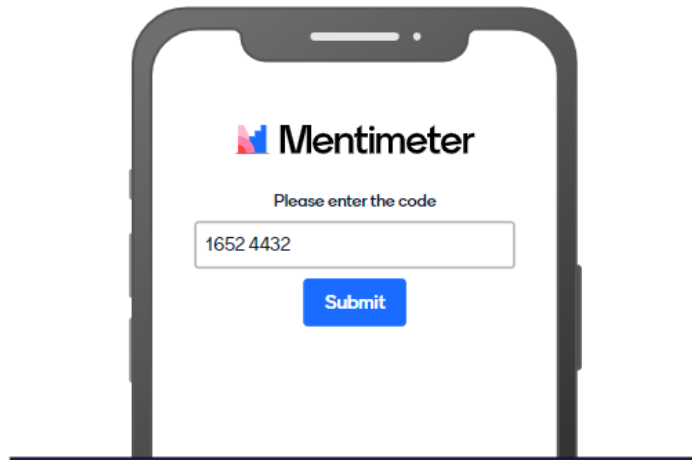
# Poll: What's making Project Portfolio Management so expensive?

(or: too expensive for what you get)



Go to

[www.menti.com](https://www.menti.com)



Enter the code

**1652 4432**



Or use QR code

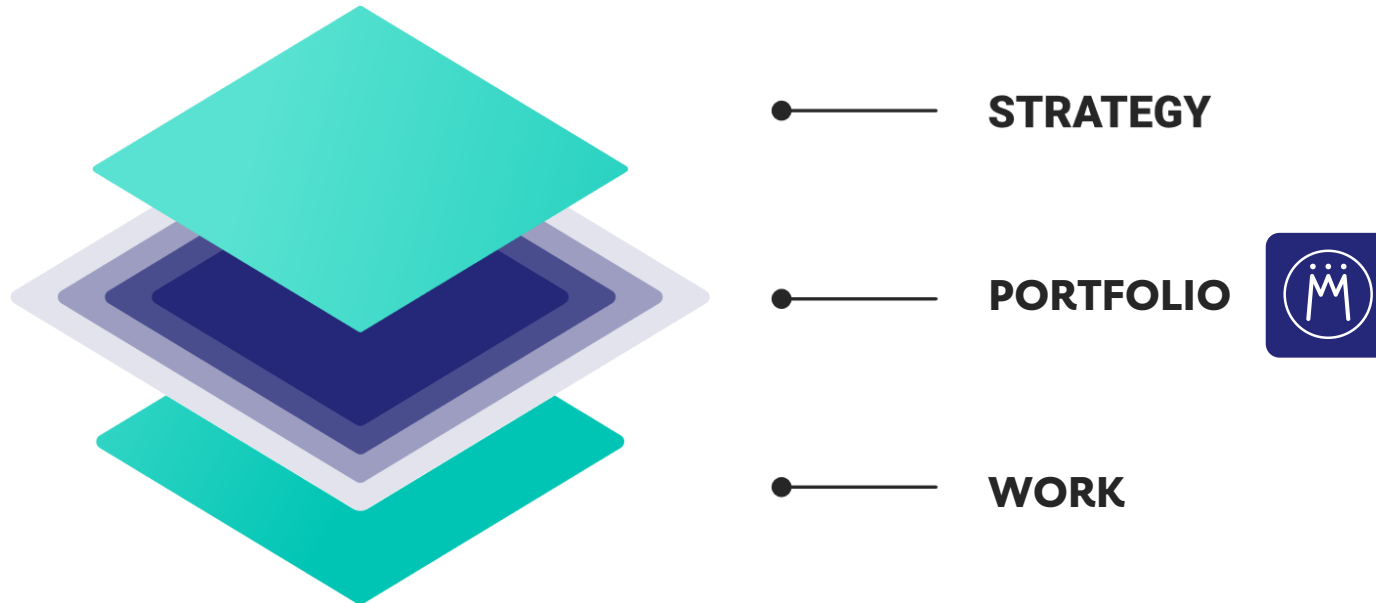
# What's making Project Portfolio Management so expensive?



general organization  
running costs  
change management trainin  
continuous update  
missing management decisin  
lack of coordination  
inadequate staff  
strategie communication  
initial setup  
adaptations to changes  
skilled resources  
consistency

unknowns  
interfaces

# Reducing Complexity: We Look at the Portfolio Level ONLY



# It Does Not Matter How Projects Are Executed



● — STRATEGY

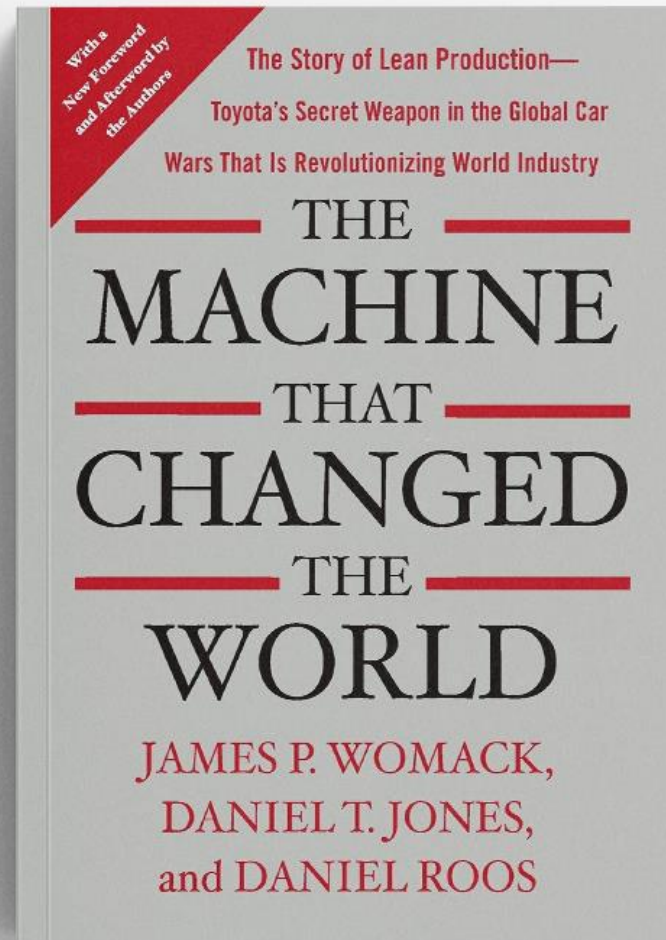
● — PORTFOLIO

● — WORK





# Dynamic Processes: Learning From the Best



# Selected Lean Principles

## Value

Determine what provides most value to the end customer

## Muda

Eliminate steps that do not create value, first time right

## Flow

Create a smooth flow of production, avoiding idle time

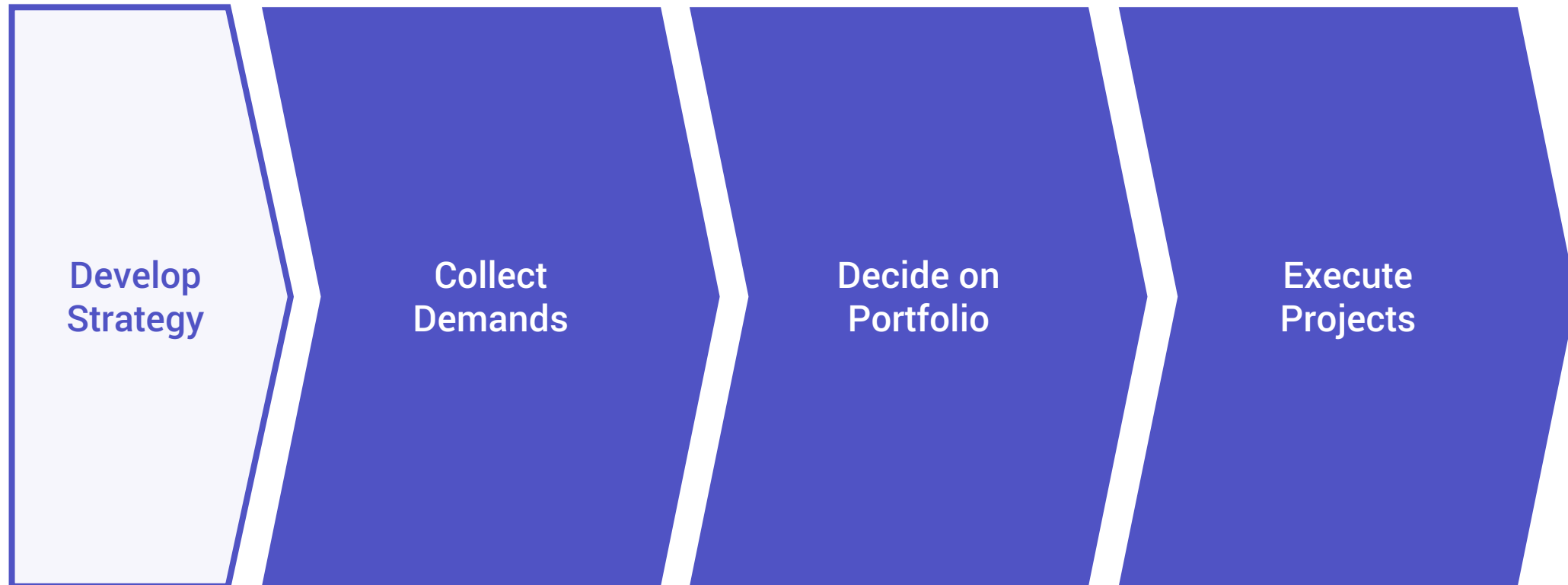
## Pull

Pull tasks from up stream when you're ready, avoiding overload

## Jidoka

Meaningful Automation with a human touch, visualization

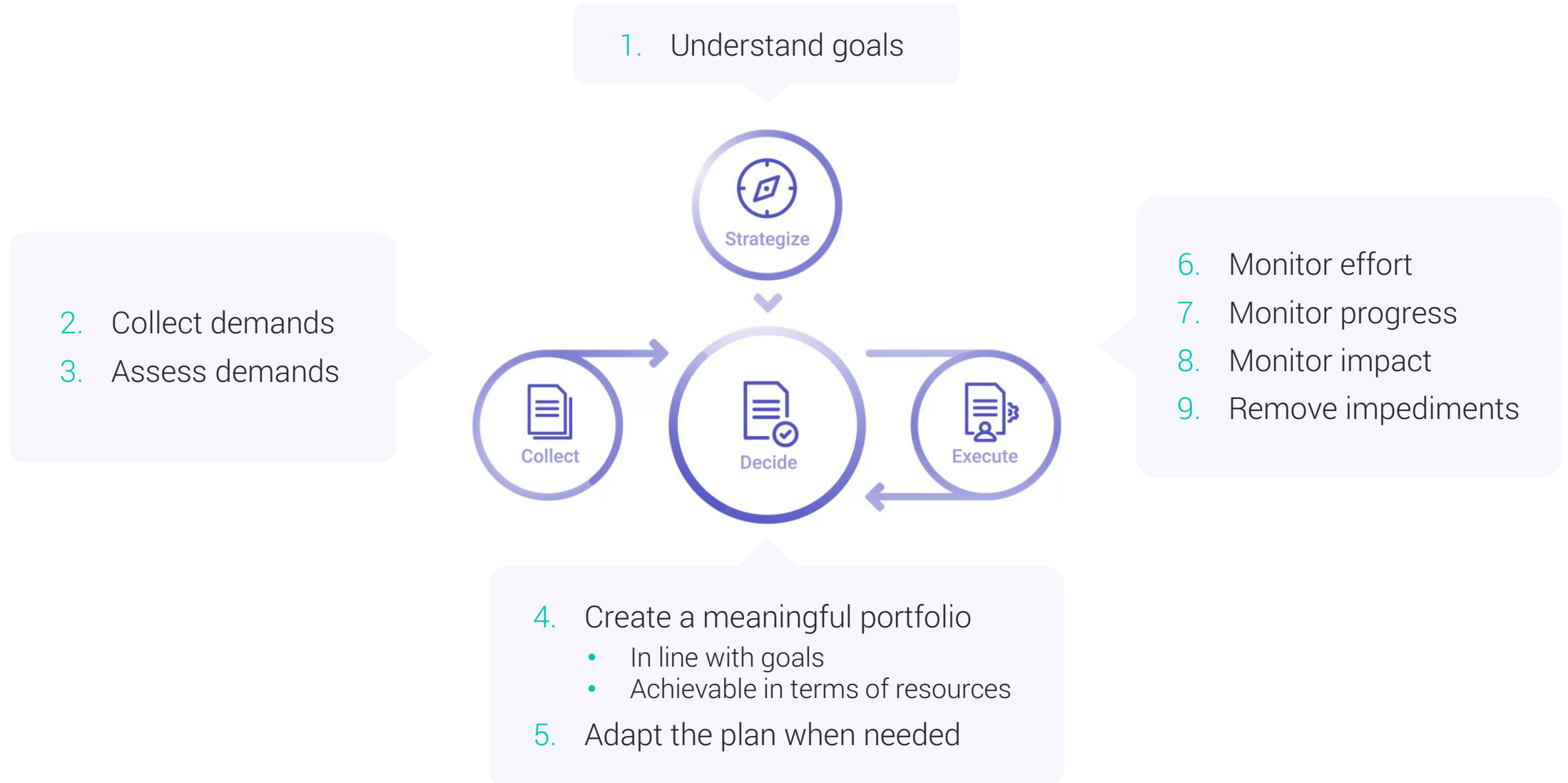
# One Way to Look at a PPM Process



# A Better Way to Look at a PPM Process



# A Set of PPM Activities

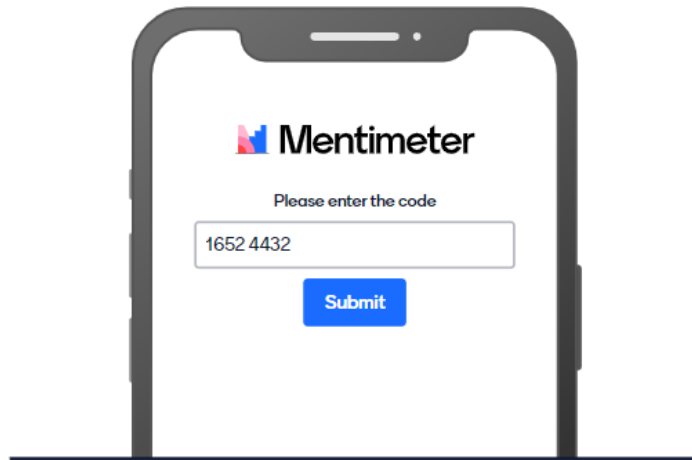


# Your Perspective: What Are the 3 Most Valuable Activities?

(or: too expensive for what you get)

Go to

[www.menti.com](https://www.menti.com)



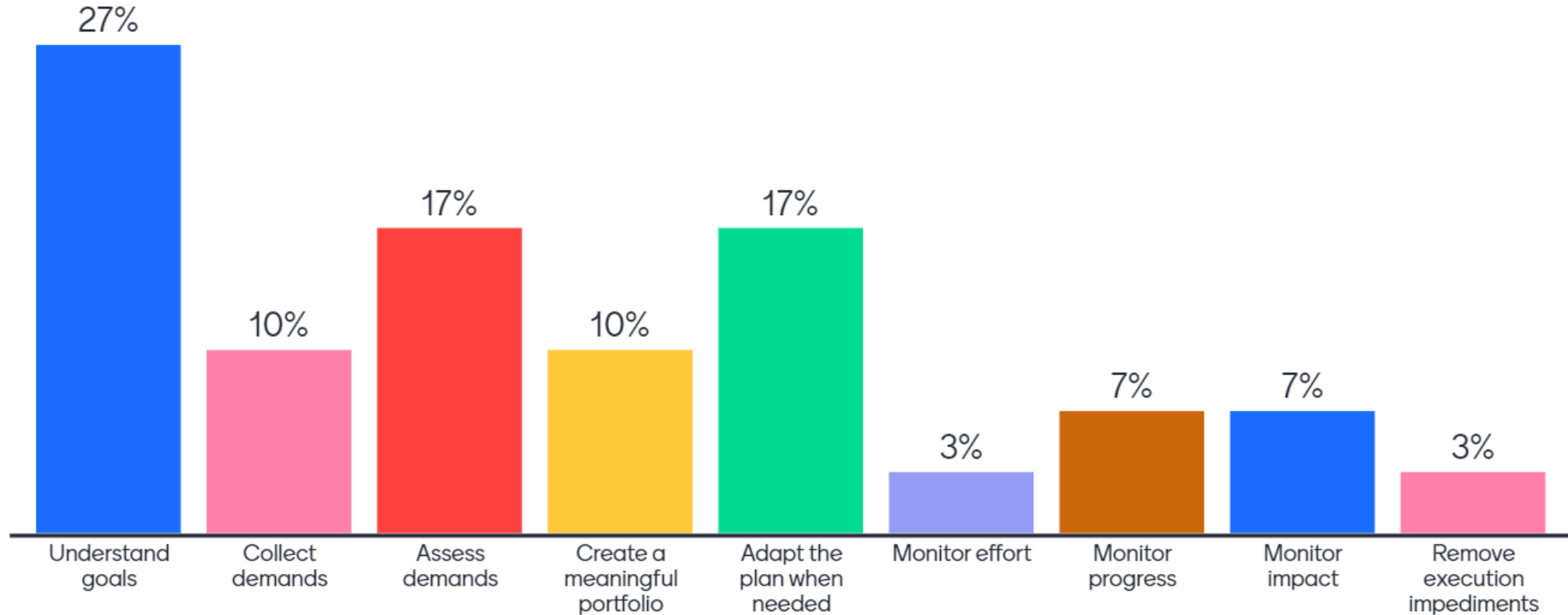
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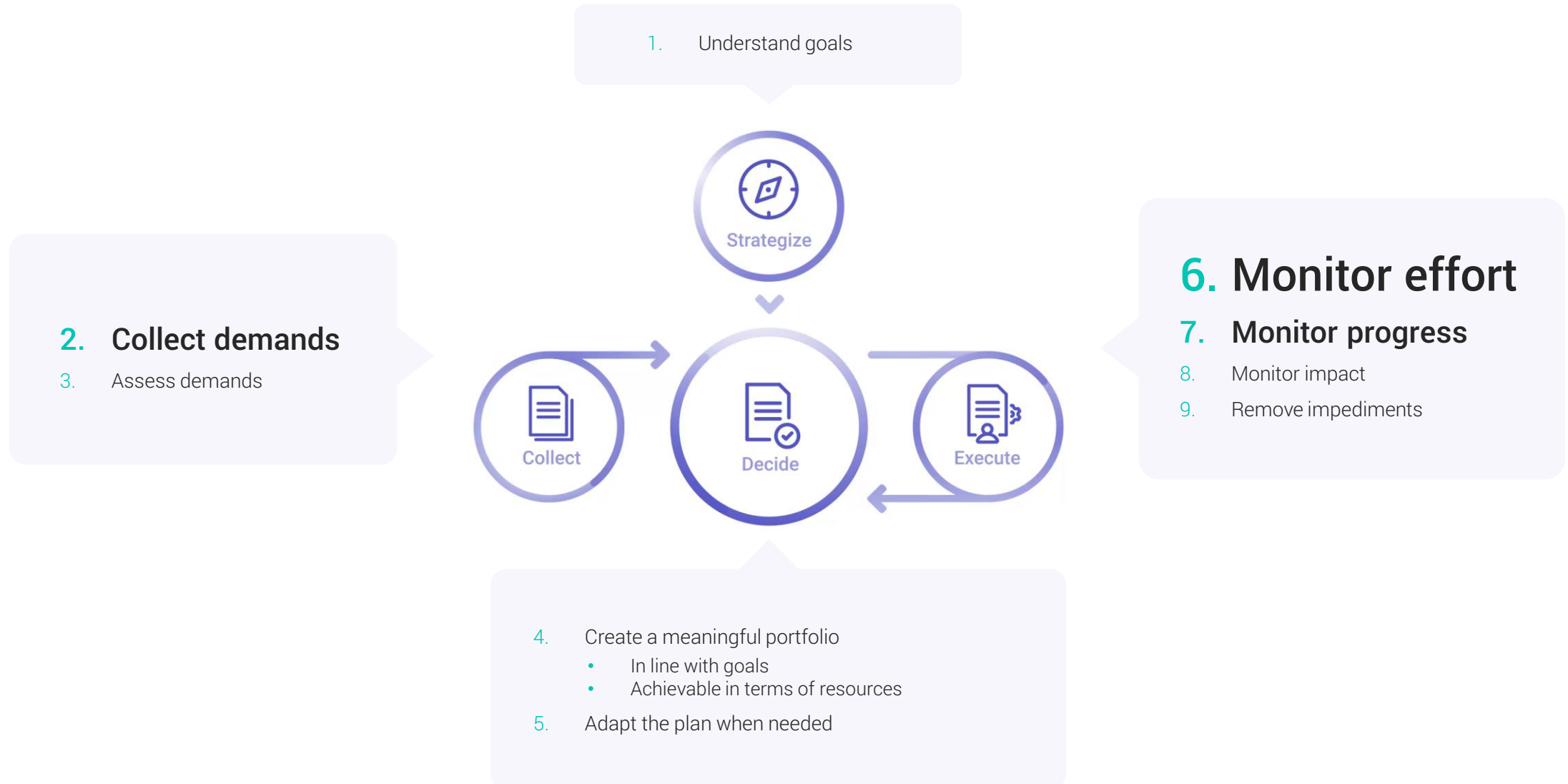


Or use QR code

# What Are the 3 Most Valuable Activities?

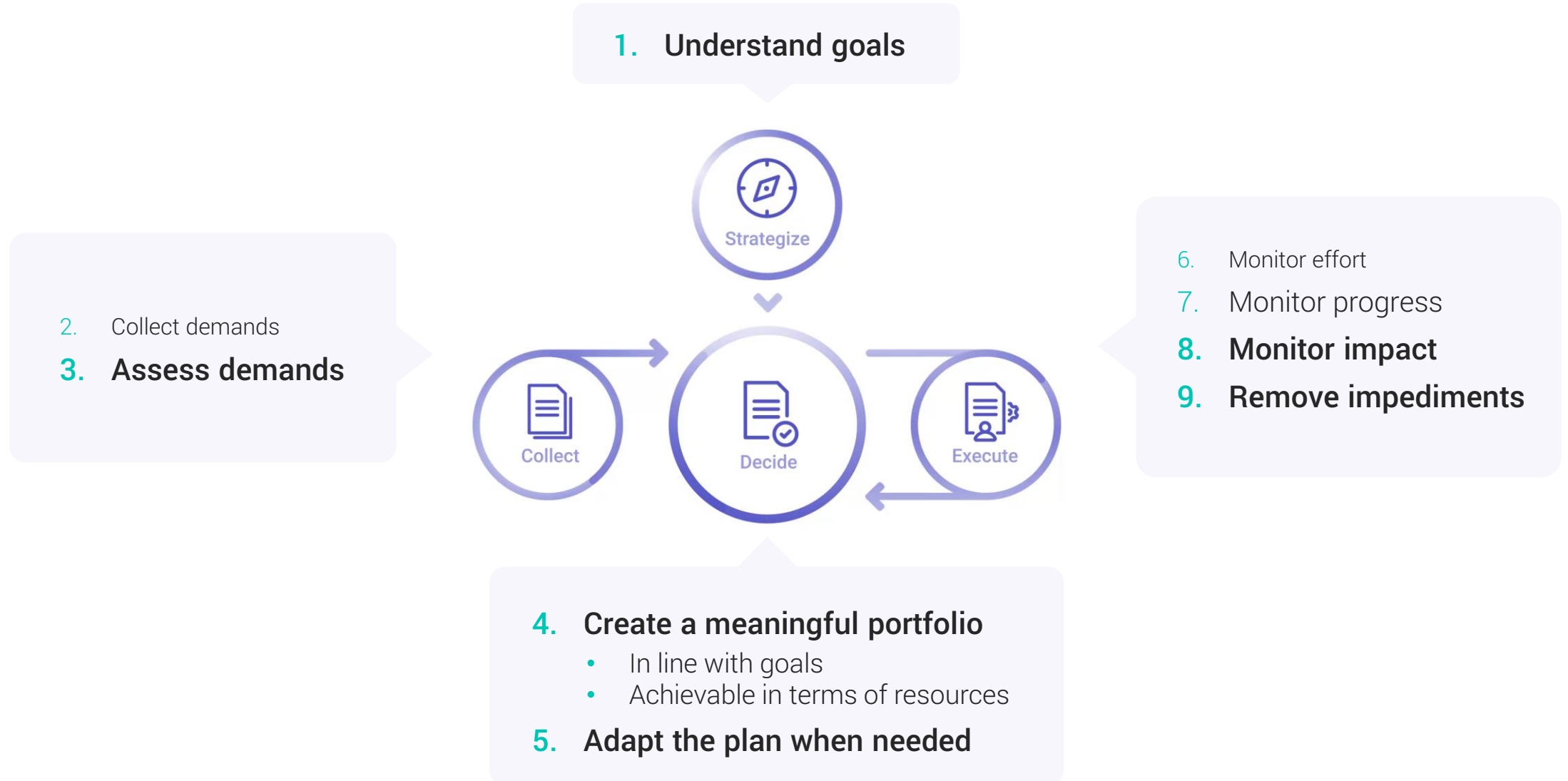


# Reality, Typically





# Wouldn't This Be Better?



# Hear It From the Top Experts



“No one ever got promoted  
for adding another template”

**Laura Barnard, PMP, Prosci, CAL**

Founder & CEO  
PMO Strategies



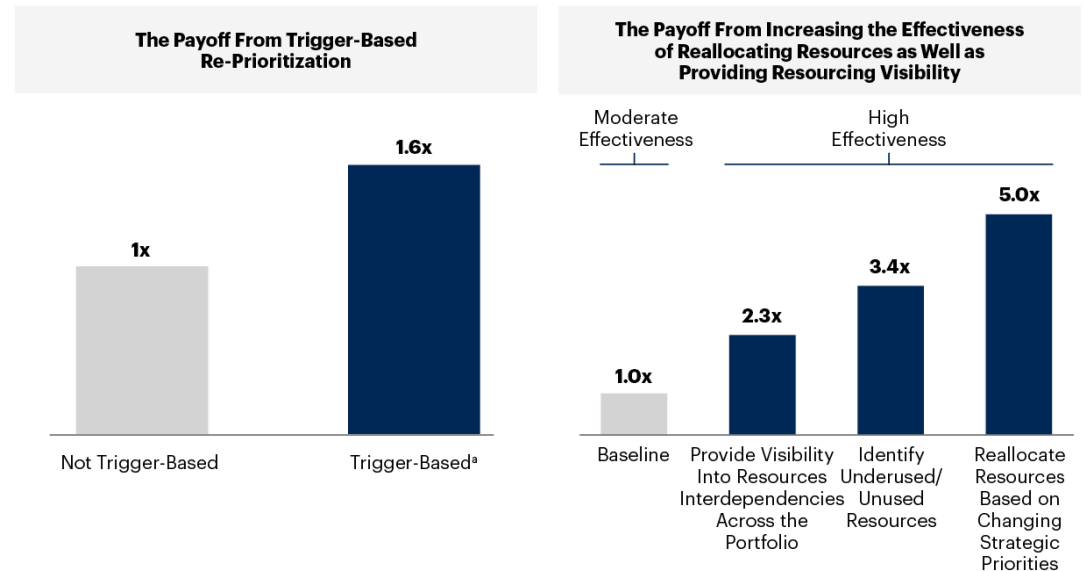
Influencer of the Year 2021  
PMO Global Alliance



# Hear It From the Top Experts

## Augment a Cyclical Re-Prioritization of Resources With an Event-Based Approach

Likelihood of Achieving Effective Strategic Portfolio Management



n = 310 respondents; multiple responses allowed

Q. How frequently is the portfolio re-prioritized (reviewed and adjusted)?

Source: 2020 Gartner Portfolio Management in the Digital Business Survey

<sup>a</sup>These organizations use trigger-based re-prioritization in combination with annual, monthly or quarterly cadence.

749956\_C

n = 309, 310, 310 respondents

Q. In your opinion, how effective was the re-prioritization process in including or informing adjustments and reallocation of resources (i.e., FTEs and/or skills) for the portfolio in the following areas?

Source: 2020 Gartner Portfolio Management in the Digital Business Survey

Gartner

“Organizations that dynamically reallocate resources based on changing strategic priorities are 5X more likely to achieve SPM”

**Robert Handler**

Distinguished VP Analyst  
Gartner

From: Effective Strategic Portfolio Management Drives Better Business Outcomes (2022)

## Value

Focus PPM on core questions:  
how much/who to invest into which topic, when

## Muda

No overprocessing, first time right

## Flow

Avoid resource under-utilization

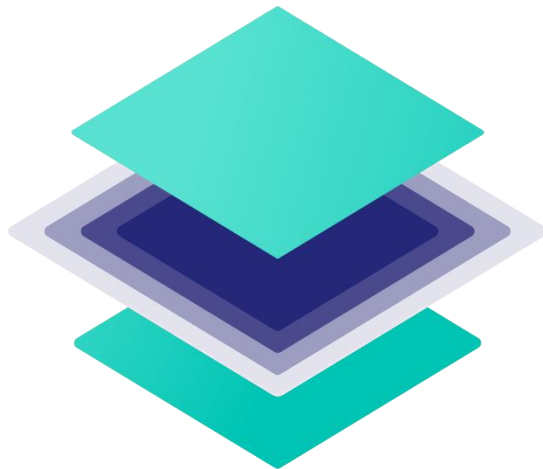
## Pull

Avoid resource overload

## Jidoka

Meaningful visualization, let the Meister plan

# Lean PPM: A Dynamic Process, on Portfolio Level



- — **STRATEGY**
- — **LEANPPM**  
Which projects, when?  
Capacity available?
- — **PROJECT MANAGEMENT**



# Lean PPM: Making Sure All Roles Benefit

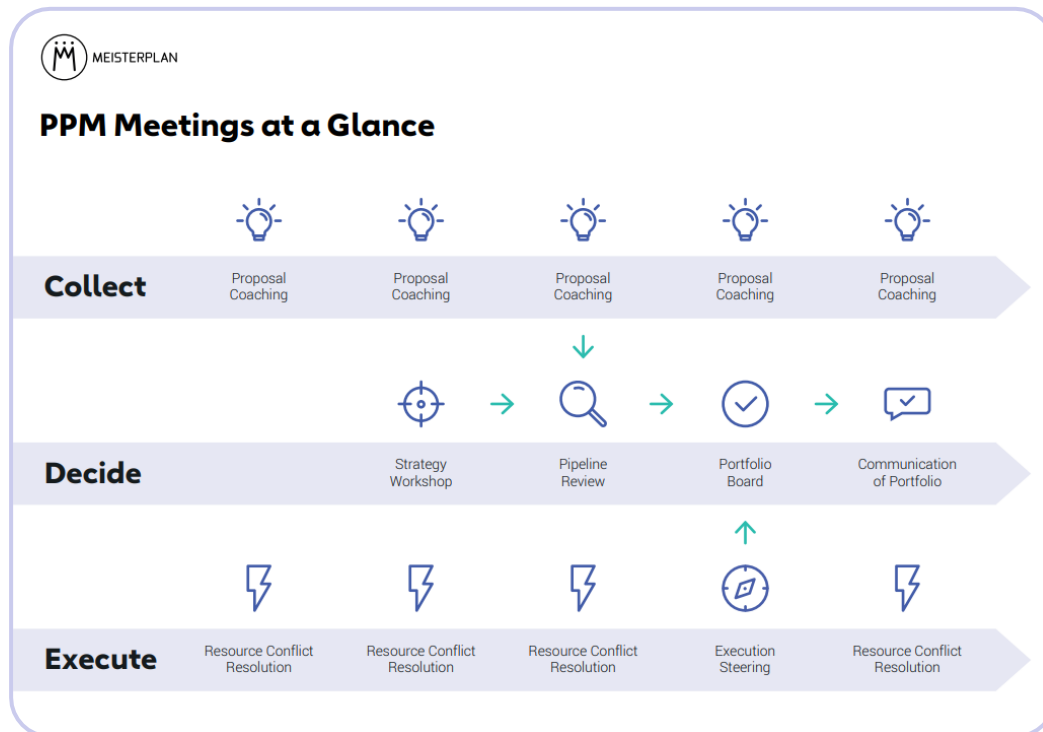
- Team Leads and Team Members
- Project Managers
- PMOs
- Decision-makers



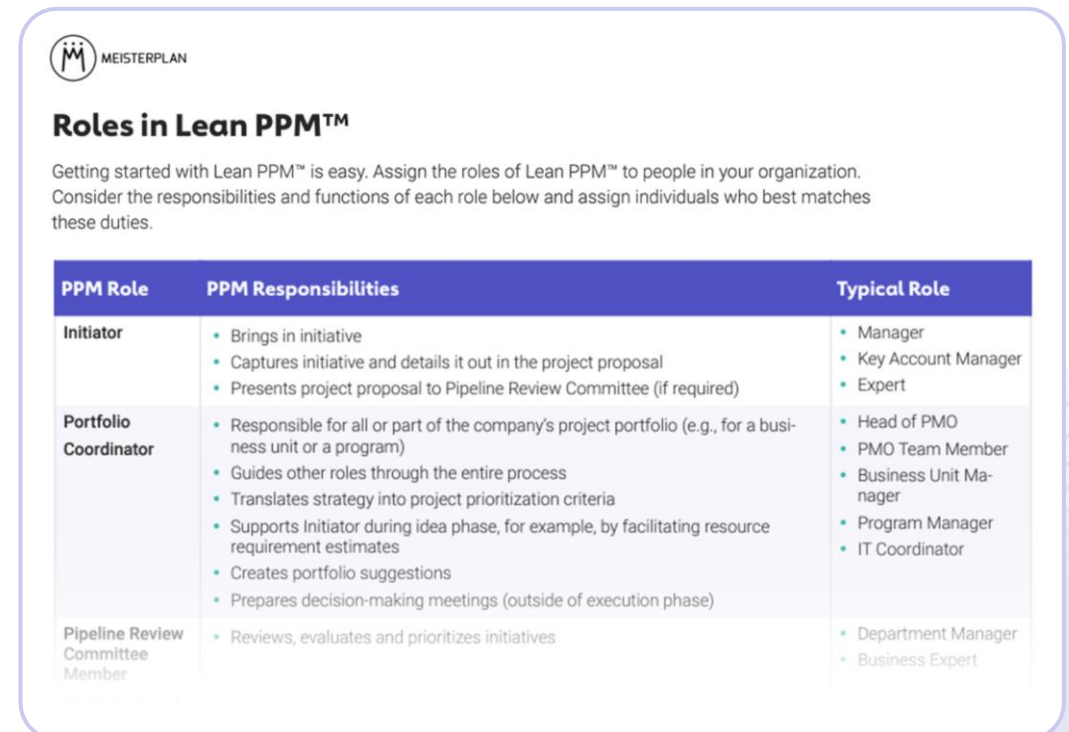
# The Lean PPM™ playbook

All materials available for free at <https://meisterplan.com/lean-project-portfolio-management/>

- Process flow



- Roles



**Roles in Lean PPM™**

Getting started with Lean PPM™ is easy. Assign the roles of Lean PPM™ to people in your organization. Consider the responsibilities and functions of each role below and assign individuals who best matches these duties.

PPM Role	PPM Responsibilities	Typical Role
<b>Initiator</b>	<ul style="list-style-type: none"> <li>• Brings in initiative</li> <li>• Captures initiative and details it out in the project proposal</li> <li>• Presents project proposal to Pipeline Review Committee (if required)</li> </ul>	<ul style="list-style-type: none"> <li>• Manager</li> <li>• Key Account Manager</li> <li>• Expert</li> </ul>
<b>Portfolio Coordinator</b>	<ul style="list-style-type: none"> <li>• Responsible for all or part of the company's project portfolio (e.g., for a business unit or a program)</li> <li>• Guides other roles through the entire process</li> <li>• Translates strategy into project prioritization criteria</li> <li>• Supports Initiator during idea phase, for example, by facilitating resource requirement estimates</li> <li>• Creates portfolio suggestions</li> <li>• Prepares decision-making meetings (outside of execution phase)</li> </ul>	<ul style="list-style-type: none"> <li>• Head of PMO</li> <li>• PMO Team Member</li> <li>• Business Unit Manager</li> <li>• Program Manager</li> <li>• IT Coordinator</li> </ul>
<b>Pipeline Review Committee Member</b>	<ul style="list-style-type: none"> <li>• Reviews, evaluates and prioritizes initiatives</li> </ul>	<ul style="list-style-type: none"> <li>• Department Manager</li> <li>• Business Expert</li> </ul>

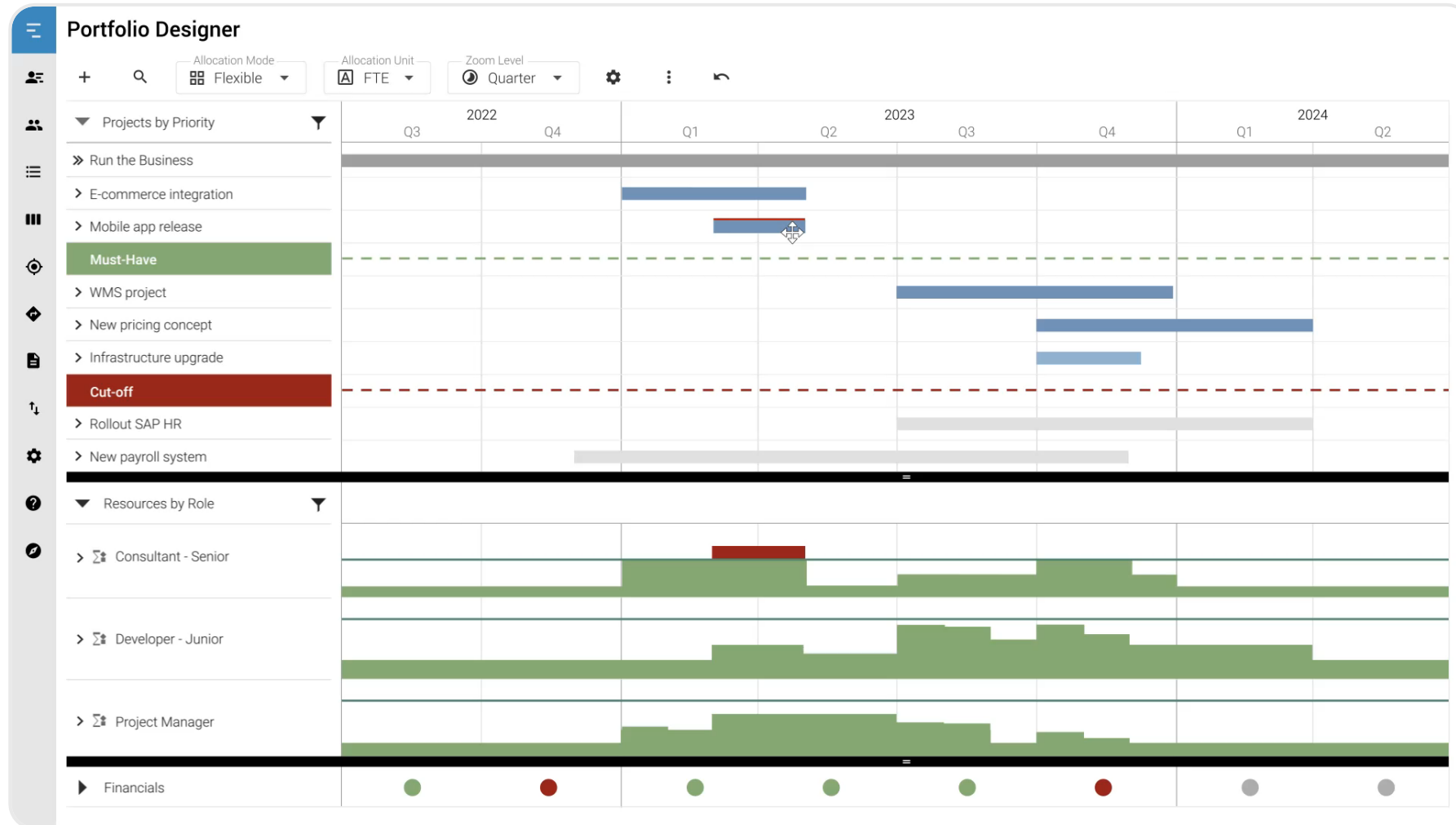
## PPM Meetings at a Glance





# Your Lean PPM™ Solution

Register for your free trial at [meisterplan.com](https://meisterplan.com)

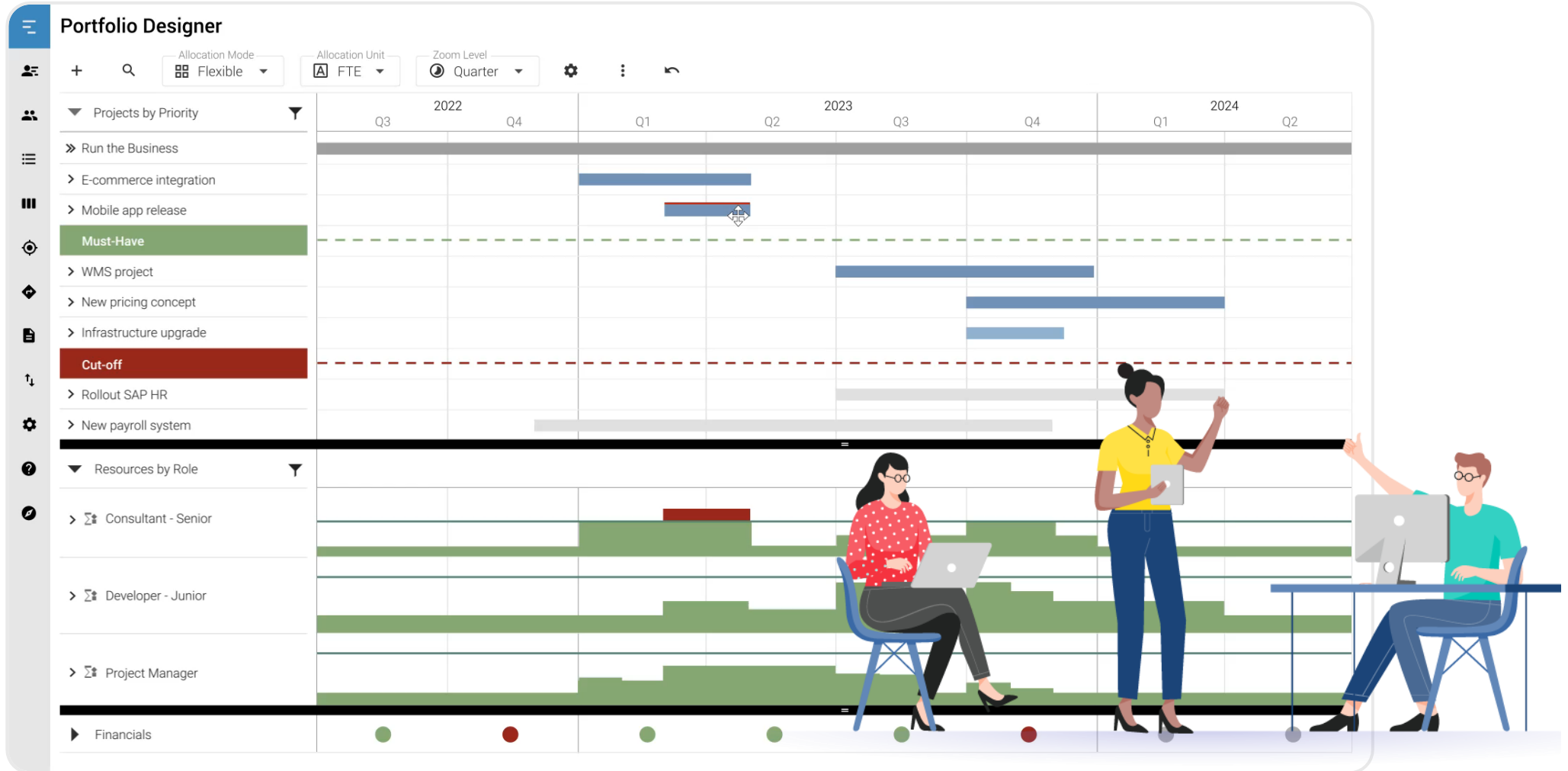


## Questions (inverted 😊)

- How does your organization make decisions on priorities and resourcing?
- How could a Lean PPM approach create visible benefits for your stakeholders?
- How does your portfolio process create value for all roles involved?



# Demo





MEISTERPLAN

MEISTERPLAN  
by itdesign GmbH

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72072 Tuebingen  
Germany

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mail@meisterplan.com

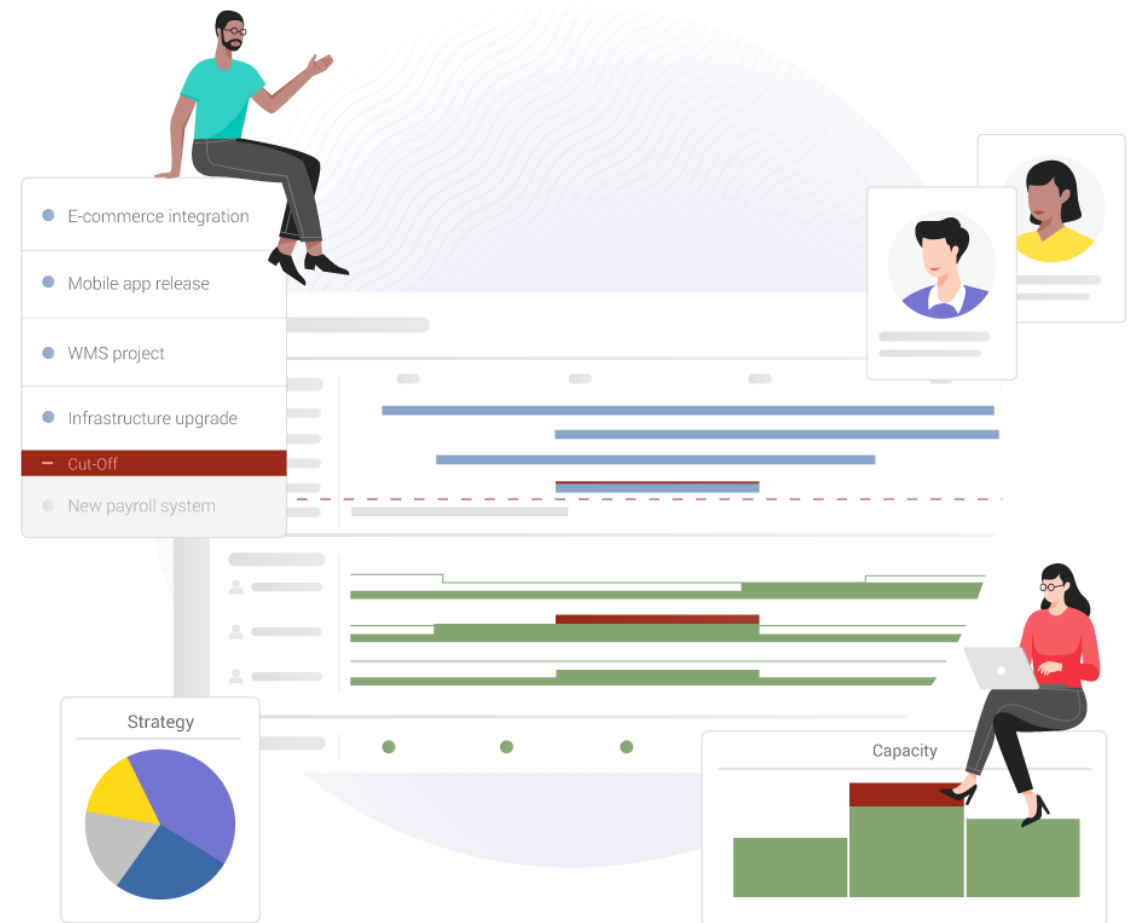
meisterplan.com

# Meisterplan: Resource Management on a Portfolio Level

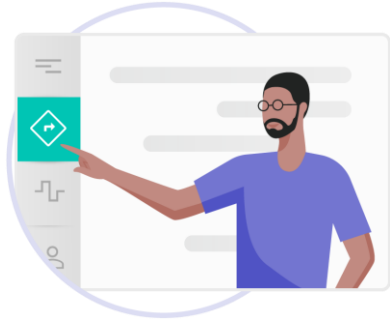


We believe that effectively managing people on a portfolio level is key to moving your business forward.

**That's why Meisterplan focuses on helping organizations manage resources and dependencies across teams and initiatives.**



# Solution Components



## Just the features you need for effective PPM

- Pure-play portfolio management, no tasks
- Unparalleled visualization
- Leads to high adoption rates



## The right people for the right project at the right time

- Tactical resource planning
- Strategic capacity planning
- Leads to more effective, happier employees



## Your success is our mission

- Proven approach (Lean PPMTM), outcome-driven consultants
- Enterprise-ready software
- Leads to short time to value

# Meisterplan Implementation Plan



Step 1: Kick-off / Start	Step 2: Basic Set-up	Step 3: Process Baseline	Step 4: Advanced Set-up	Step 5: Trainings	Step 6: Rollout	Step 7 (+14 days) Post-Implementation	Continuous Improvement
<div style="background-color: #004a99; color: white; padding: 5px; margin-bottom: 5px;">                     Kick-off Meeting  </div> <div style="background-color: #d9e1f2; padding: 5px; margin-bottom: 5px;">                     Key User Demo/Training                 </div> <div style="background-color: #d9e1f2; padding: 5px; margin-bottom: 5px;">                     PPM Assessment                 </div> <div style="border: 2px solid #00b050; padding: 5px; margin-bottom: 5px;">                     Production Data Collection                 </div>	<div style="background-color: #d9e1f2; padding: 5px; margin-bottom: 5px;">                     Basic Meisterplan Configuration                 </div> <div style="background-color: #d9e1f2; padding: 5px; margin-bottom: 5px;">                     How To: Data Import                 </div> <div style="border: 2px solid #00b050; padding: 5px; margin-bottom: 5px;">                     Continue Configuration and Data Import                 </div>	<div style="background-color: #d9e1f2; padding: 5px; margin-bottom: 5px;">                     Lean PPM Process Alignment                 </div> <div style="background-color: #d9e1f2; padding: 5px; margin-bottom: 5px;">                     Data Maintenance Process                 </div> <div style="background-color: #d9e1f2; padding: 5px; margin-bottom: 5px;">                     Roles &amp; Responsibilities                 </div> <div style="border: 2px solid #00b050; padding: 5px; margin-bottom: 5px;">                     Write Your PPM Handbook                 </div> <div style="background-color: #004a99; color: white; padding: 5px; margin-bottom: 5px;">                     Status meeting  </div>	<div style="background-color: #d9e1f2; padding: 5px; margin-bottom: 5px;">                     User Groups and Portfolios                 </div> <div style="background-color: #d9e1f2; padding: 5px; margin-bottom: 5px;">                     Meisterplan Views and Reporting                 </div> <div style="background-color: #d9e1f2; padding: 5px; margin-bottom: 5px;">                     Process and System Review                 </div> <div style="border: 2px solid #00b050; padding: 5px; margin-bottom: 5px;">                     Complete Configuration and Data Import                 </div>	<div style="border: 2px solid #00b050; padding: 5px; margin-bottom: 5px;">                     Prepare Internal User Training*                 </div> <div style="border: 2px solid #00b050; padding: 5px; margin-bottom: 5px;">                     Internal User Training*                 </div> <div style="background-color: #004a99; color: white; padding: 5px; margin-bottom: 5px;">                     Status meeting  </div>	<div style="background-color: #d9e1f2; padding: 5px; margin-bottom: 5px;">                     Wrap Up and Open Questions                 </div> <div style="border: 2px solid #00b050; padding: 5px; margin-bottom: 5px;">                     Start PPM Cycle One                 </div> <div style="border: 2px solid #00b050; padding: 5px; margin-bottom: 5px;">                     Integrations*  <small>Built-In Connectors, Customer Connector (API), BI Reporting</small> </div>	<div style="text-align: center; margin-bottom: 10px;"> </div> <p><b>Refinements:</b></p> <ul style="list-style-type: none"> <li>Review process</li> <li>What works or not</li> <li>Validate Outcomes</li> </ul> <div style="background-color: #004a99; color: white; padding: 5px; margin-top: 10px;">                     Ensure Goals Met  </div>	<div style="text-align: center; margin-bottom: 10px;"> </div> <p><b>Refinements:</b></p> <ul style="list-style-type: none"> <li>Additional Functions</li> <li>New Integrations</li> <li>Set new goals</li> </ul> <div style="background-color: #004a99; color: white; padding: 5px; margin-top: 10px;">                     Success Review  </div>

Action managed by Meisterplan, contribution of customer
 
 Action managed by customer
 

 Meeting with Implementation Team & Sponsors

\* Optionally, these services can be added to your Implementation Plan

# Success Factors and Decision Making Processes Depend on Goal



## Project Portfolio Management

- Preparation of value-oriented roadmap
- High focus on goal-orientation and project evaluation



## Capacity Management

- Maximization of capacity utilization
- Focus on long term capacity planning and binding decisions