

CASE STUDY

# Matisa Gains Visibility and Control Over Projects Across Business Units for Significant Improvements in Project Delivery



INDUSTRY:

**Industrial Products Manufacturing**

GEOGRAPHIES:

**Global**

EMPLOYEES:

**Approximately 600**

PLANVIEW PRODUCT:



PLANVIEW SOLUTION:

**Planview Enterprise Agile Planning**

## CHALLENGE

A lack of effective organization, communication, and collaboration among teams made it challenging for Matisa to deliver products to customers on time. With only complex spreadsheets and email used as project management tools, there was a lack of visibility into project status and progress, and few people knew what was happening, including executives.

## SOLUTION

Matisa chose Planview® AgilePlace to bring order to a chaotic workflow process, providing in-depth visibility into project status and improving collaboration between groups through virtual Kanban boards. The company has reduced its average cycle time by four weeks and increased the number of projects delivered on time.



"For the first time, people have a strong understanding of the goals and priorities of customers and how their particular role contributes to delivering value to the business."

– FRANCK LOMBARDO,  
HEAD OF QUALITY AND CONTINUOUS  
IMPROVEMENT AT MATISA

## ABOUT MATISA

Founded in 1945, Matisa Materiel Industriel S.A. is a Swiss company that pioneered the development and construction of machinery for maintenance and services for trains and tracks. Through design and engineering innovation, the company continuously develops and modernizes a complete portfolio of high-end machinery, exporting its products worldwide.

## CHALLENGE: BRINGING A STANDARDIZED, SIMPLIFIED PROCESS TO A CHAOTIC ENVIRONMENT

After conducting root-cause analysis and mapping their processes to discover why so many of its projects were delayed, Franck Lombardo, head of Quality and Continuous Improvement at Matisa, determined that their challenges stemmed from a lack of transparency, inefficient planning, and poor communication. Bottlenecks and disorganization between the coordinating control tower and groups like R&D and sales resulted in delayed handoffs that made it difficult to deliver value to the customer on time. Tracking work in Excel proved inefficient, and work status meetings often concluded without a complete understanding of work status. Lombardo and his team wanted to simplify and gain better control over their processes by focusing on Lean principles to improve communication, collaboration, and transparency across their production process.

## SOLUTION: IMPLEMENT INTERACTIVE PROJECT MANAGEMENT TOOL FOR TRANSPARENCY, STANDARDIZED WORKFLOW AND UNIFIED COLLABORATION

Matisa purchased Planview® AgilePlace to increase accountability between teams and enhance work visibility to deliver products faster. The virtual Kanban boards create transparency among teams and give executives a big-picture view into their entire portfolio of projects, as well as the work happening within individual business units. "We had to make things simpler and bring people together in one place to deal with issues in real-time," says Lombardo. "AgilePlace was the only tool we found that gave us a two-dimensional view, making it easy to organize and change work, see milestones and KPIs, and identify and escalate issues early on before they cause delays."

Planview AgilePlace allows teams to organize around their critical path to stay on track and ensure work is delivered in a reasonable timetable. They instituted a rule that any card created in Planview AgilePlace has to move from start to finish on the board in six weeks or less, which encourages teams to focus on the products already in process and not begin new work until they deliver those products to the customer. All

projects with associated tasks and documents are visible on the boards, and work follows a standardized process, establishing accountability, control, and ownership.

Teams meet weekly to review their boards and discuss what needs to be done to move work from one step of the production process to the next. "Now that we can see project and staff status, our meetings are more productive because stakeholders can communicate effectively with each other and different business units," says Lombardo. "Projects are moving at a good pace and we finally have the ability to plan with greater confidence."

Planview AgilePlace stores each card and attachment in a document bin, providing a historical record of activity for people with and without AgilePlace access. With virtually every department using AgilePlace, such as R&D, Purchasing, Production, Assembly, and Sales, as well as their customers and suppliers, the platform is providing Matisa with past and present information to help improve future workflows.

## RESULTS: A SIGNIFICANT REDUCTION IN AVERAGE CYCLE TIME AND INCREASE IN THE NUMBER OF PROJECTS COMPLETED ON TIME

AgilePlace has enabled Matisa to improve collaboration and communication across the organization, particularly during COVID-19, something Lombardo said would have been impossible without the tool. The Board of Directors has greater visibility into work status, giving them the information they need to make smarter decisions about where to improve the process to remove bottlenecks and increase delivery speed. Within three weeks, AgilePlace was up and running. Team members were trained in as little as five minutes, speeding tool adoption and driving instant improvement in communication that resulted in a four-week reduction in average cycle time. "We created a KPI to measure our ability to deliver on time," says Lombardo. "Before AgilePlace, we were at 33% and within three months of implementing AgilePlace, we were already at 70%."

## FUTURE: A CHANGE IN CULTURE

While the benefits of AgilePlace are measurable and significant, the biggest change has come with the culture, as people are working in sync instead of in siloes. This change in culture sets the foundation for continual improvement in how the company delivers on its commitments and manages innovation. "We have had an amazing journey from where we were to where we are now," says Lombardo. "For the first time, people have a strong understanding of the goals and priorities of customers and how their particular role contributes to delivering value to the business. People have more control over their own tasks and that has a significant impact on their sense of purpose."

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