

Viessmann Relies on Planview for Portfolio Management



INDUSTRY:

Heating and Industrial Refrigeration

GEOGRAPHIES:

Germany (Hesse)

EMPLOYEES:

13,000



Planview.
Portfolios



Planview.
ProjectPlace



Planview.
Tasktop Hub

PLANVIEW PRODUCTS:

PLANVIEW SOLUTION:

Product Portfolio Management

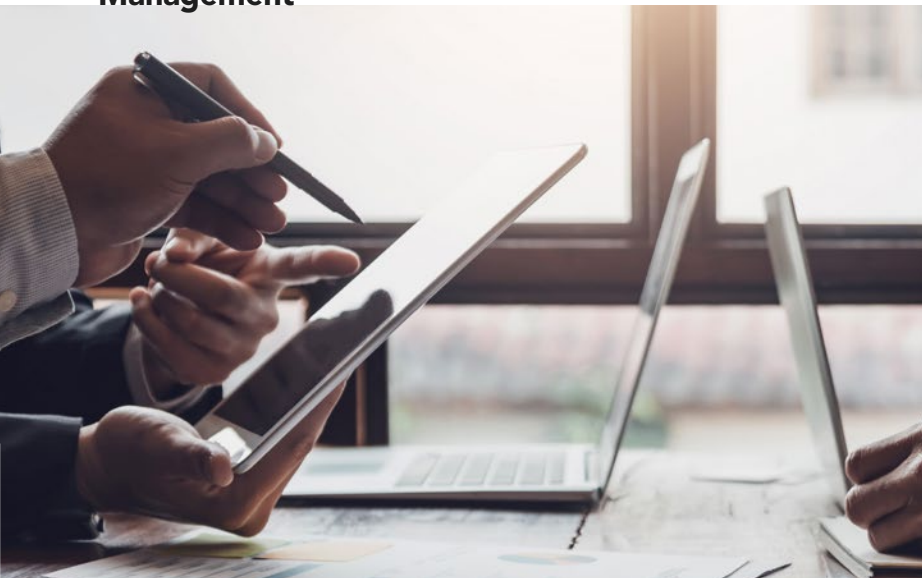
Project Portfolio Management

CHALLENGE

In order to have a better overview of the product lines, be even more customer-centric, and, above all, establish comprehensive resource management, the Viessmann Group was looking for a central platform for portfolio and work management. The goal was to manage projects in the long term so they could be implemented as a continuous process across all divisions. There was a concrete need for action in communication, the prioritization of projects, and in the allocation of resources.

SOLUTION

To increase transparency and to be able to estimate the project-related personnel requirements of the product lines reliably, Viessmann decided to introduce a company-wide portfolio and project management platform. In a cross-departmental effort, they defined a catalog of requirements for the type of solution they would need to map multiple projects and improve resource management and capacity planning. The decision was made in favor of Planview® because the solution best met the company's requirements both structurally and methodologically – project mapping and product planning in one place, support for clear prioritization, hybrid project management, and a basis for realistic resource planning.



“The use of Planview is very important for us from a strategic point of view. All Viessmann Development projects are planned and controlled via this central platform.”

– SÖREN BÖCKLER, PROCESS MANAGER & COMPETENCE LEAD TOOLS AT VISSMANN CLIMATE SOLUTIONS SEO

ABOUT VIESSMANN

Viessmann, a family-owned company, was founded in 1917 as a heating technology manufacturer and is now a global leader in sustainable climate (heating, cooling, water, and air quality) and renewable energy solutions. The integrated Viessmann range of solutions seamlessly connects products and systems via digital platforms and services, creating an individualized feel-good environment for users. All activities are based on the corporate mission statement, "We design living spaces for future generations." This is the responsibility that the 13,000-member Viessmann family faces every day together with its (trade) partners.

THE CHALLENGE: MORE AGILITY IN PRODUCT DEVELOPMENT, GENERATE PROJECT INFORMATION IN REAL-TIME, AND GET KPIs AT THE PUSH OF A BUTTON

The Viessmann Group, one of the world's leading suppliers of sustainable air conditioning and renewable energy solutions, comprises numerous companies. The range of solutions offered by the family-owned company is extensive and consists of a whole series of product lines. In order to be able to grow the individual company and product areas more quickly and in a more customer-oriented manner, Viessmann has set itself up as a modern solution organization. They aim to achieve even more transparency in ongoing projects and processes, in particular, to help them to improve prioritization for crucial product development projects. Holger Gast, Head of Program and Project Management at Viessmann IT Service GmbH: "In the past, we didn't have a central platform that would have given us a perfect overview of ongoing projects. That's why it wasn't always easy to identify dependencies, plan resources and assess project progress."

Insufficient transparency was felt most strongly in interfaces between the various company divisions. This lack of clarity was especially apparent when planning project resources, which caused them to adjust often. "We also wanted a comprehensible assignment of rights, an interface to SAP, and the possibility to better integrate management so that all stakeholders always know the current project status," adds Sören Böckler, Process Manager & Competence Lead Tools at Viessmann Climate Solutions SE.

THE SOLUTION: CENTRALIZED MULTI-PROJECT MANAGEMENT WITH PLANVIEW PORTFOLIOS

Based on a catalog of requirements, which was jointly developed with the Viessmann departments, the search was on for a suitable solution. This solution had to increase transparency, support

parallel planning, control, and implementation of projects, and have an interface for automatic data exchange with the ERP system and other systems used. Böckler: "At the same time, acceptance of the projects should be increased, and therefore the employees should be involved right from the start." It quickly became apparent that only a cloud solution could support project and resource management. In addition, ease of use was a key differentiator.

In the end, Planview offered the most convincing range of services. In spring 2021, Viessmann began preparations for the rollout of the central multi-project and work management solution Planview® Portfolios. Currently, 350 licenses are already in use in the company, but the number is expected to increase over the next few years. Noticeable effects can already be observed today as an overarching standardized process is now applicable to all areas.

THE RESULT: COMPREHENSIVE PROJECT OVERVIEW, RELIABLE RESOURCE MANAGEMENT, AND INCREASED AGILITY

In the past, Viessmann employees used various tools; the introduction of Planview Portfolios has increased transparency and clarity through a uniform system. Gast: "Now everyone can see what colleagues are working on and what progress a project is making. This increases acceptance and the uniform understanding of working toward the same goal - both within a project and in other projects."

Planning, controlling, monitoring, and reporting now go hand in hand, which makes life easier, especially for those involved in multiple projects. Böckler adds, "The use of Planview has influenced our colleagues in a positive way. Now priorities are clear, and everyone knows what contribution she or he is making to the high-priority issues."

In addition, management, team, and functionary leads all benefit from the ability to log into the projects at any time and see the status.

Gast also sees concrete improvements in portfolio planning and explains, "As a rule, planning takes place once a quarter. Reliable resource planning, in particular, has given us a boost in quality and the greater the analytical capabilities become, the better we can forecast and plan."

Viessmann leverages Planview Portfolios, powered by Amazon Web Services, Inc. (AWS). AWS is Planview's preferred public cloud provider, enhancing security and availability for our customers and accelerating innovation in our products.

See what Planview solutions can do for your organization. View demos on demand at [Planview.com/demos](https://planview.com/demos).

