

## Case study

# Biotechnology Company Refines New Product Development Process and Reporting Across the R&D Group

## Challenge: Unorganized Gate Data and Lack of Accurate Time Tracking Leading to Sub-standard Reporting

The R&D division is responsible for creating new and custom products for the portfolio. The new product development process includes a stage gate process, which divides the process into multiple phases with gate checkpoints between each stage. Project metrics are updated at each gate and tracked to measure changes as the product progresses through the system. However, the division at this company ran into problems with monitoring key data points that were necessary at each gate to validate reporting and decision making based on that data.

“We had so much data but little organization of that information,” says a senior program manager. “We needed better access to relevant gate data, such as the commitments and forecasts from the previous gates. We were also struggling to develop meaningful, concise reports that would help leadership make decisions. However, without full timesheet compliance, we would never have the resource data we need to analyze and base our reports on.”

## Solution: Establish a Foundation for R&D Time Tracking, Trend Analysis, and Dynamic Reports

Planview® PPM Pro (formerly Planview Innotas®) was selected by the division to support the business with its new product development capabilities, and started with onboarding the R&D organization and configuring the solution. The main goal was to ensure adoption by making the application user-friendly and establishing it as the central data repository users could trust.

The division implemented Planview PPM Pro with a three-phased approach. Phase one included planning, configuration, data loading, and training the 150 PPM Pro users. The implementation team prioritized ease of use for the end user, focusing on how they would enter data and time into their

## Overview

### Geographies

Global

### Employees

55,000

The R&D division consolidated relevant NPD stage gate data using Planview PPM Pro, improving efficiencies, reporting for stakeholders, and productivity to improve time to market on the projects that bring the most value to the business.

*“The dashboards allow leadership to easily track portfolio progress and forecasts, monitor progress of program milestones, identify projects or particular phases to focus on for improvement, and compile projected revenue for upcoming years based on individual program data.”*

*– senior program manager*

timesheets, and what the users consuming the reports would want to see. To simplify the rollout process, they performed regular and frequent communication with stakeholders, obtained end-user buy-in, and entered and validated as much data as possible in advance of the go live.

Phase two was the actual rollout, continued training, timesheet compliance, and short-term resource planning. Phase three was portfolio analytics, metric tracking and reporting, and long-term resource planning. Throughout each phase, the team gathered input from users and management, ensuring they had full management support. As users saw how easy the solution was to use and how accessible data suddenly was, timesheet entry became more consistent and more reliable. “Planview PPM Pro is our central data repository and we have achieved near perfect timesheet entry, which helps us answer questions such as ‘What non-R&D work are we doing? Who is doing it? Does it make sense for them to do it?’ From there decisions can be made to align resources to more meaningful and purposeful NPD work,” says a senior program manager

The division configured Planview PPM Pro for stage gate metrics with user-defined fields added for key data points that could be monitored at each gate. This allows for quick and easy access to all project information. Fields can be queried to track time and performance and quickly provide data, dramatically simplifying reporting. The most relevant data is consistently displayed and updated automatically in real time.

Individual reports are created and consolidated in the Planview PPM Pro summary dashboard. “We developed calculated fields to analyze the difference between committed and actuals,” says a senior program manager. “We use filters to compile critical data and get the information into a single view to see where projects are

and answer routine questions. The dashboards allow leadership to easily track portfolio progress and forecasts, monitor progress of program milestones, identify projects or particular phases to focus on for improvement, and compile projected revenue for upcoming years based on individual program data.”

## Results: Meaningful Metrics Around Time Reporting and the Gated Process

Since implementing Planview PPM Pro, the division:

- Identifies, monitors, and improves key performance indicators (KPIs) related to time to market on R&D new product development projects
- Accesses relevant data at each gate, improving reporting accuracy
- Presents leadership with visual, user-friendly reports and dashboards on the stage gate data that they can trust to make informed decisions
- Achieved more than 98% timesheet entry compliance meaning a better understanding of where resources are spending time in R&D versus non-R&D activities
- Identifies gaps in future revenue allowing them to be proactive and determine which projects are needed to achieve annual division targets
- Quickly responds to requests for metrics without asking PMs for the data, saving time

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