From Strategy to Project Execution

How Planview supports us in our strategic projects

Endress+Hauser

People for Process Automation

Agenda

1	The Endress+Hauser Group
2	Our Strategy 2027+
3	Project Type Classification
4	Objectives and Prerequisites
5	Solution

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The Endress+Hauser Group

- Partner for process improvement

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Part of our lives

The world is full of process engineering

- Many everyday goods are produced with the help of process engineering
- Endress+Hauser products enable safe and reliable supply

5.3 bil. people

come into contact every day with products that are manufactured using our measurement technology

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What drives us

Our heart beats for measurement technology

- Careful use of resources
- Safe supply of goods
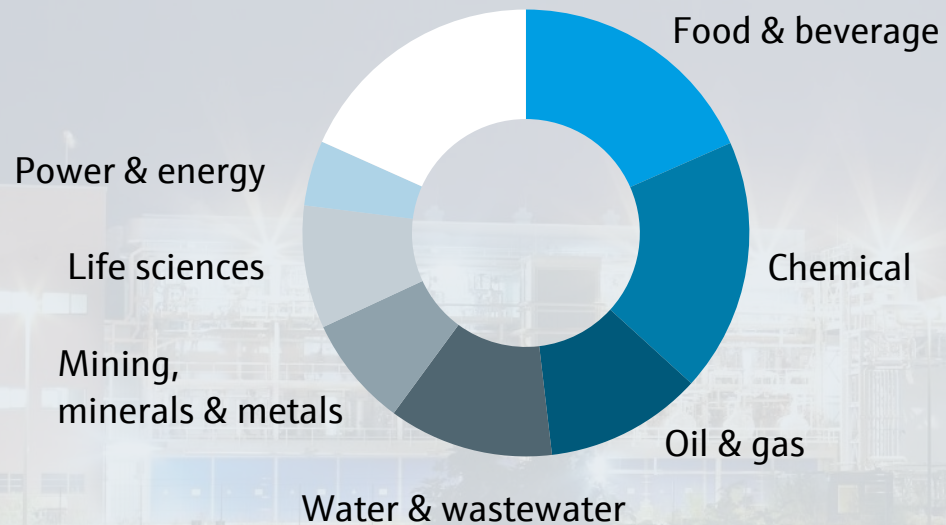- Protection of our environment

3 mil. sensors

Endress+Hauser delivers annually

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Strategic focus on industries

Our business by industries

Our offer covers a wide range of requirements and needs

- Food & beverage
- Chemical
- Oil & gas
- Water & wastewater
- Mining, minerals & metals
- Life sciences
- Power & energy

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Partner of the process industry

Process engineering is our world

- Process and laboratory measurement technology
- Automation solutions and services

125 countries

with their own sales centers and representatives

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From the region, for the region

Global production network

- Customer-specific manufacturing in major economic regions
- Partnerships with key suppliers
- Efficient transport logistics

35 sites
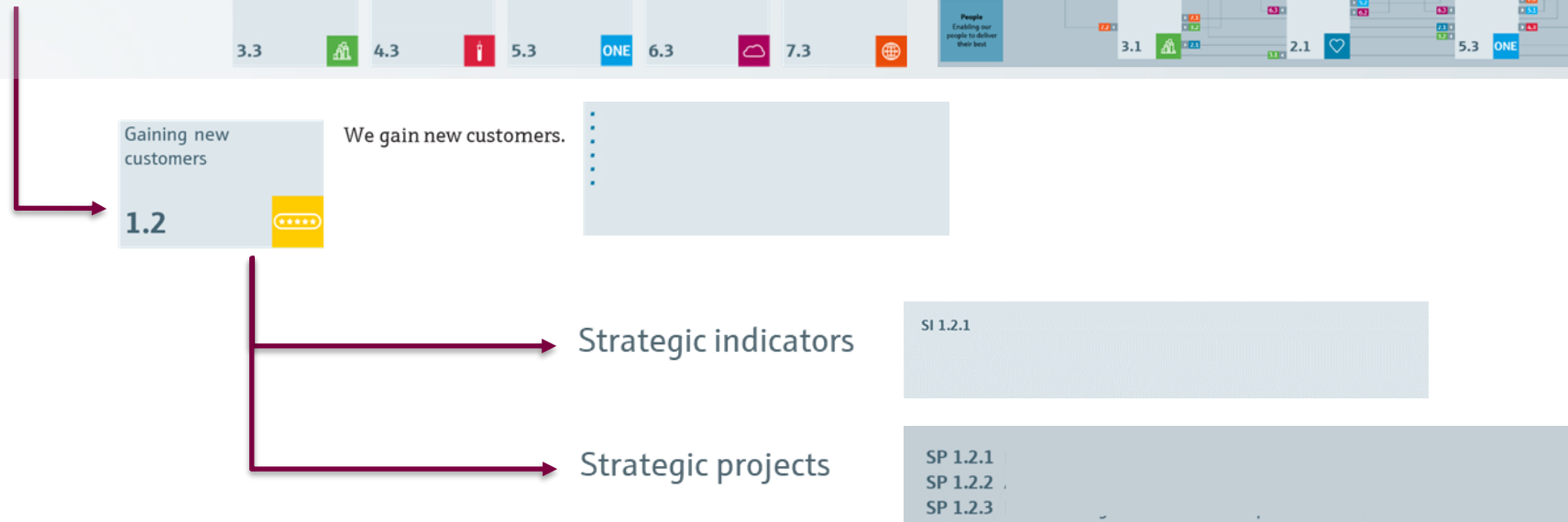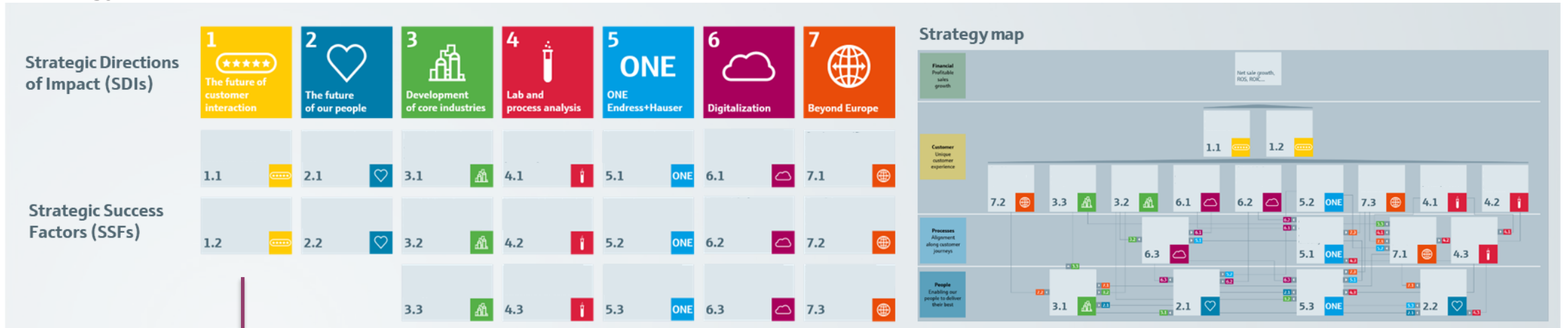
for production in 11 countries and on four continents

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2022 facts & figures

15,817
employees worldwide

80%
equity ratio

€240 million
investments

€3.35 billion
net sales

16%
sales growth

€304 million
net income

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Our Strategy 2027+

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Strategy 2027+

Strategy 2027+

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Project Type Classification

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Project Type Classification
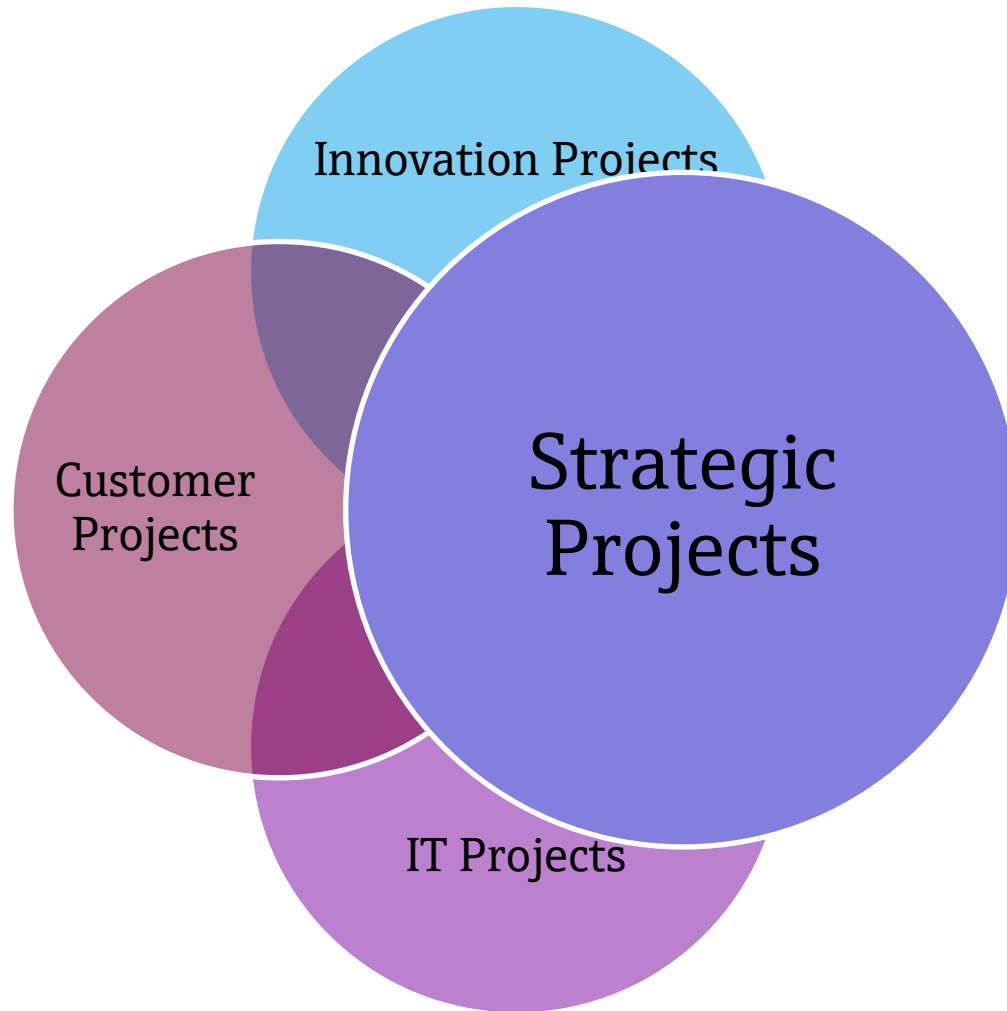
- Different project types in various entities are supported by the Planview Platform at Endress+Hauser.

- Today we focus on the area of the strategic projects

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Objectives and Prerequisites

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Objectives

We actively manage and review our *Manage project portfolio process* for Strategic projects, Improvement projects, and IT projects

We operate a world class Enterprise PMO in the 15 largest entities. We have standardized our organization, operations, process, tooling and training.

We have a world class tooling for portfolio management, project management, strategy implementation and agile working implemented in the 15 largest entities.

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Prerequisites for tooling selection

Link to strategy (SDIs and SSFs) is a must

Bottom-Up (How do I contribute with my project to the Strategy) and **Top-Down** View (which projects in which entities support my part of the Strategy) is a must

Project Managers are "part-time", so a tool with an **easy-to-use** tool with a good **visualization** is key.

Different PM methods, from waterfall to agile, to be supported by the tool in an easy way.

OKRs (Objective and Key Results) within the tool, linked to projects and activities is requested for future usage

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Solution

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System Landscape: Strategic Projects

Planview AgilePlace

SPB

Seamless Integration

Planview ProjectPlace

Project Manager

Team Member

- Project Portfolio Management
  - Enterprise Kanban Board
    - OKR Management
      - Roadmapping

Planview Portfolios

EPMO

- Dashboarding
- OnePager Reports

- Project Planning and Execution
- Task Management: Kanban Boards
  - Risks & Issues
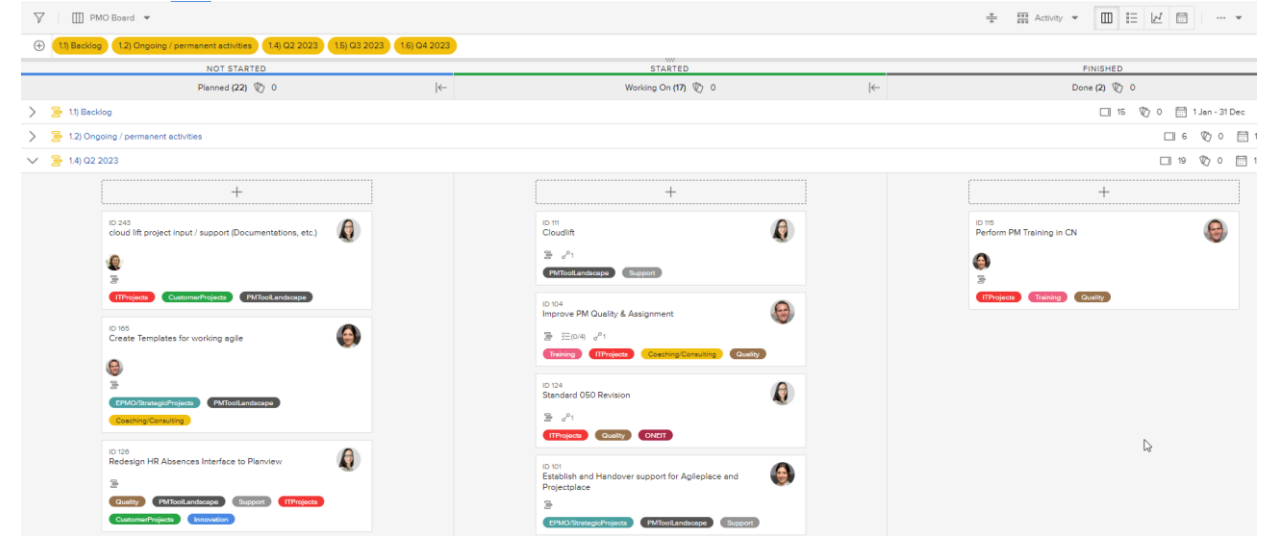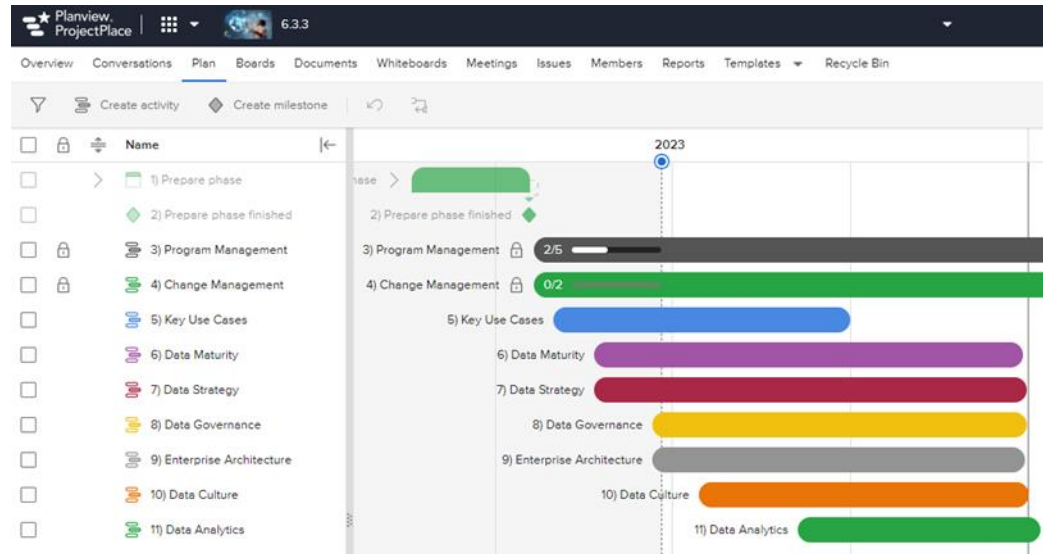 - Status Reporting
  - Project Communication
    - Whiteboards

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Planview AgilePlace
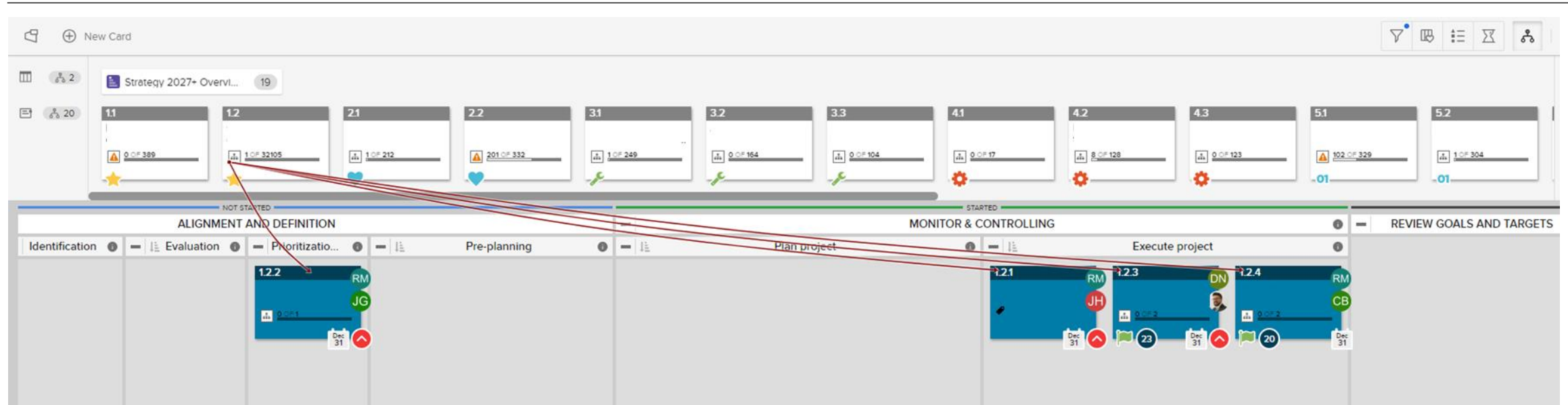
- Strategy 2027+ board including SDIs and SSFs available.
- Columns in Project Portfolio Board represents steps in portfolio process
- Strategic Projects can be linked to corresponding SDIs and SSFs in strategy board
- On the project card, all necessary information, incl. content, progress and responsible is visible
- Strategic projects can be linked to IT Projects to show dependencies between them
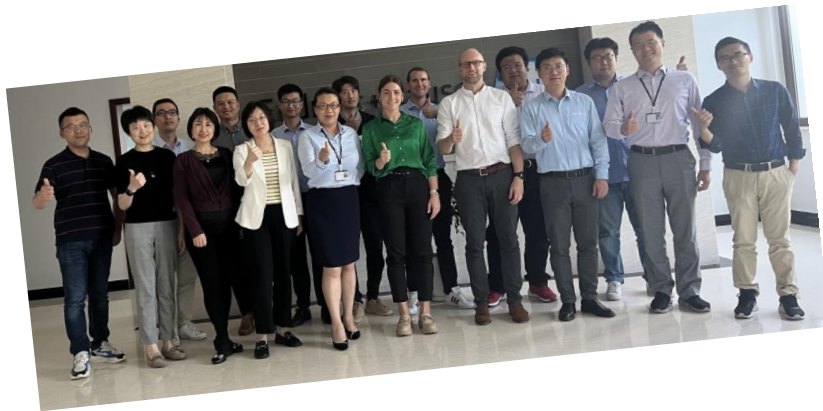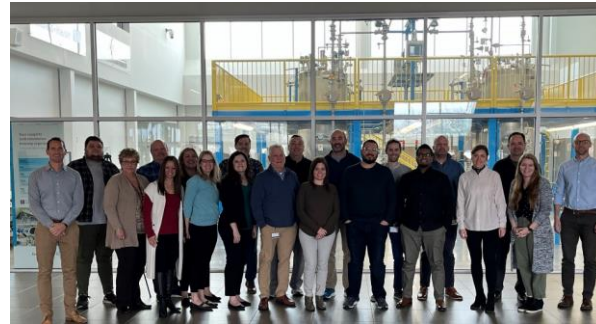
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Planview ProjectPlace

- Projects are executed in Planview ProjectPlace.
- All PM methodologies, from waterfall via hybrid to agile are supported.
- Status reporting is performed in ProjectPlace and synchronized automatically to AgilePlace.
- Tool is easy-to-use and appreciated by all trained PMs so far.
- The Boards in ProjectPlace supports the collaboration in the strategic projects.

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Implementation

- **Onsite** Implementations, incl. **Project Management** and **Agility skill** training and the **tool introduction** (AgilePlace, ProjectPlace)

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Time for questions

Thank you very much for your attention

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