

PMO TRANSFORMATION · DACH REGION

How Helvetia Manufacturing cut portfolio reporting from weeks to one hour

A DACH-region case study in PMO transformation with PPM-Factory

** Helvetia Manufacturing is a placeholder name. The client's identity is kept confidential.*

AT A GLANCE**CLIENT****Helvetia Manufacturing*****INDUSTRY****Precision devices, medtech and industrial****HEADQUARTERS****Switzerland****PORTFOLIO****100+ projects · 250+ users****SOLUTION****PPM-Factory NPD-Ready****GO-LIVE****2022****HEADLINE RESULT · PORTFOLIO REPORTING CYCLE**

Before

3–4 weeks

20+ spreadsheets, e-mails, manual consolidation

After

1 hour

live dashboards on one platform

THE CHALLENGE

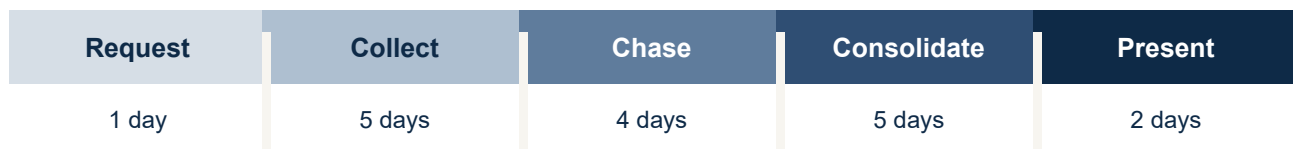
A portfolio report that took weeks to build

Helvetia Manufacturing runs 100+ projects across 3 business units and 2 sites in Switzerland and Germany. Leadership needed a reliable portfolio view, but every report was assembled by hand.

Before the transformation, the PMO compiled the monthly portfolio report from 20+ spreadsheets maintained by 80 project managers. With three portfolios competing for the same engineering and investment budget, the executive board wanted reliable monthly figures on project spend, budget consumption and pipeline value. By the time the consolidated report was ready, the numbers were already three to four weeks old.

The old reporting cycle

Total: 3–4 weeks per month



WHAT STOOD IN THE WAY

Fragmented data Project information lived in 20+ spreadsheets and local files and e-mail threads, with no single version of the truth.	Manual consolidation The PMO spent up to two weeks per cycle merging files and chasing missing updates.
Inconsistent status Each business unit applied its own red, amber and green criteria, so a green project in one portfolio could carry more risk than an amber one in another. Cost figures followed different cut-off dates and definitions.	Hard-to-compare priorities Ideas and projects from different business units could not be compared on the same basis, so prioritizing them across the company was slow, and decisions relied on figures that were a month old.

“

Every month we spent weeks producing a report that was out of date the day we presented it. We were reporting on the past instead of steering the portfolio.

Head of PMO, Helvetia Manufacturing

GOALS SET BY LEADERSHIP

- One consolidated view of all three portfolios for the executive board
- Financial reporting (budget, forecast and actuals) generated from live data, not compiled by hand
- One way to capture, score and prioritize ideas and projects across business units, with a shared stage-gate process

THE SOLUTION

One platform, live in 2022

Helvetia Manufacturing selected PPM-Factory NPD-Ready after a structured comparison of PPM solutions. The deciding factors were agile delivery combined with stage-gate governance, built-in project financials, and a go-live in months rather than years.

WHAT WAS PUT IN PLACE

01 One project inventory All 100+ new product, lifecycle and operational projects in one platform, replacing 20+ spreadsheets.	02 Idea management and stage gates One funnel to capture, score and prioritize ideas, then a stage-gate process that leaves room for agile delivery.
03 Live dashboards and financials Real-time costs, budget, timelines, resources and progress for executives and the PMO.	04 Resource capacity planning Shared capacity views that support collaboration between R&D, Operations and management.

HOW IT WAS ROLLED OUT

Phase 1 · Early 2022 MVP Idea management first, in bi-weekly iterations.	Phase 2 · 2022 Roll-out All three business units on stage-gate projects and 80 project managers trained, for 250+ users in total.	Phase 3 · 2023 onwards Extend Resource capacity planning across R&D, Operations and management.
--	---	---

HOW THE TEAMS WERE KEPT ON BOARD

- **Start with an MVP.** Idea management went live first; the standard setup then grew in bi-weekly iterations.
- **Retire old reports.** The monthly spreadsheet pack was switched off once the first portfolio report came out of the platform.
- **Leaders used it first.** The executive board reviews the portfolio and project financials directly from the dashboards.



Starting with an idea-management MVP and iterating every two weeks was the right call. Teams saw progress quickly, and adoption followed.

PMO Lead, Helvetia Manufacturing

THE RESULTS

From weeks to one hour, and what came with it

The executive board now reviews all three portfolios, including project financials, from live dashboards. The monthly report takes about one hour.

PORTFOLIO REPORTING CYCLE 3–4 weeks → 1 hour	DATA SOURCES FOR THE REPORT 20+ files → 1 platform
PORTFOLIO VIEW 3 reports → 1 view	FINANCIAL DATA AT REVIEW Up to 4 weeks old → Live

WHAT CHANGED

	BEFORE	WITH PPM-FACTORY
Reporting	Monthly, by hand, in 3–4 weeks	Live, generated in about one hour
Ideas	Spreadsheets per business unit	One funnel, scored and prioritized
Data	20+ spreadsheets and e-mails	One platform for 100+ projects
Status	Defined differently per business unit	One shared definition and gate criteria
Financials	Compiled by hand, a month late	Live, per project and portfolio
Executive access	Slides prepared by the PMO	Direct dashboard access

“

For the first time, the board sees the whole innovation portfolio and what it costs in one place, with current figures. Our portfolio meetings are about decisions now, not about checking numbers.

Member of the Executive Board, Helvetia Manufacturing

WHAT'S NEXT FOR HELVETIA MANUFACTURING

The platform keeps evolving in bi-weekly iterations. Next, the company plans to use capacity and financial data together, so that new projects are approved against available engineering capacity as well as budget.