



Oerlikon achieves greater agility and completes portfolio visibility with Smartsheet

To enhance the efficiency of its project and portfolio management, Oerlikon used Smartsheet to implement new workflows. The change resulted in better project prioritization, faster reporting, and smarter planning.

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Mandy Aeschlimann, Head of Global SAP Management & SAP IT Program Manager, Oerlikon IT Solutions



Customer:

OC Oerlikon

Industry:

Manufacturing

Organization Size:

Enterprise (10,000+ employees)

Region:

EMEA

Website:

<https://www.oerlikon.com/>

Headquartered in Switzerland, global technology group Oerlikon provides world-leading coating technology for advanced industries like automotive, medical, tooling, textiles, and aerospace. Its solutions encompass materials, coating equipment, coating methods, coating services, and the engineering of entire integrated polymer plants. The company employs over 10,000 people to deliver its products and services across 37 countries.

The challenge

In 2018, Oerlikon started rapidly expanding its project portfolio. This move created a need for better project prioritisation and management. Previously, decision-making on projects was based on “*who screams the loudest*”. Oerlikon wanted to shift to a transparent and objective process for evaluating projects based on their business value. The company then made incremental improvements to fill these gaps, the first of which was a demand management process introduced in March 2018. By 2019, Oerlikon’s first Project Management Office (PMO) was established.

The project management transition overlapped with another key transformation in the company. “*The global SAP roll-out absorbed all IT and business capacity for projects, creating an internal struggle for resources. Frustration in business appeared, because people couldn’t get the IT support they needed or deserved,*” confesses Mandy Aeschlimann, Head of Global SAP Management & SAP IT Program Manager at Oerlikon IT Solutions. This solidified the need for a more structured and transparent way of prioritizing and managing projects.

The solution

After establishing the PMO, Oerlikon realized that more needs to be done. “*The next step for the company was the implementation of a global time tracking system for IT services and projects which analyzed real-time data to assess time spent on projects and tasks. With this, all the projects could be prioritized based on KPIs, an important aspect of Oerlikon’s overall strategy,*” says Mandy Aeschlimann. The team chose to collaborate with Agile Management Experts (AMX), a Smartsheet Platinum Partner based in Europe.

In a nutshell:

In 2018, Oerlikon, a leading provider of coating technology and services for various industries, started making process and system changes to improve prioritization and management of IT-based projects.

The new time tracking system was rolled out using Smart Grid, linking all services and projects globally. To accelerate the change, Oerlikon needed a data aggregation platform that they could easily adapt and customize on their own. *“Smartsheet’s flexibility was such a winning point that we decided to use it. We can now make modifications without having to reach for a consultant every time, and that’s important to us,”* says Mandy Aeschlimann.

Better decision making and prioritizing

To ensure better alignment with the company’s strategy, IT and business projects were categorized under three pillars: organic growth, efficiency and people, and inorganic growth (Mergers & Acquisitions). This shed light on the way projects could be prioritized based on data.

“We used Smartsheet to build our new processes for project review, approvals, and prioritisation in a way that’s user-friendly and convenient for the teams,” says Julia Gummert-Loellke, Head of IT Project & Portfolio Management, Oerlikon IT Solutions. The standardized templates are the same for any project manager, so all requests can be unified and reviewed using similar criteria.

Projects go through a demand process that is the same for everyone, no matter where they come from. *“We don’t make any exceptions and prioritization can’t be manipulated. It’s based on KPIs that indicate how efficiently the project supports the Oerlikon strategy,”* says Julia Gummert-Loellke.

Maximum transparency with real-time dashboards

“We manage our reports via real-time dashboards in Smartsheet. That means we don’t need to sit down and prepare reports manually every month for presenting at our IT Steering Committee,” adds Mandy Aeschlimann. This enables teams to focus on more added-value tasks.

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In a nutshell:

Oerlikon’s project portfolio was reorganized under three core pillars. With Smartsheet, projects are now being prioritized based on common KPIs.

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As a result, every business line knows where their projects stand in relation to the overall portfolio, while the leadership team can track progress and spending in real-time to inform their decisions. All the collected data also helps controllers make accurate budget estimations for the upcoming year.

The project's success is something all stakeholders celebrate, including technology partners. *"We are happy to have helped Oerlikon transform the way their projects are managed by increasing transparency, reshaping collaboration for the better, and offering all stakeholders a single source of truth for any type of information"* shares Vlera Hetemi, Senior Solutions Consultant at AMX Germany GmbH. *"The AMX team has worked side-by-side at Oerlikon offices in Pfäffikon, Switzerland, several times to brainstorm, meet with different stakeholders and build the solutions together with the Smartsheet Champions from Oerlikon's side."*

Templates to expand usability

As Smartsheet power users, Mandy Aeschlimann and Julia Gummert-Loellke helped other users get the most value from the platform. *"We use templates for our projects, so we can easily steer a portfolio or pull out reports. When we build new solutions, we get support from consultants. Anybody who's done a project with us before will be very familiar with the process and they can run a project in Smartsheet on their own,"* says Mandy Aeschlimann.

"Data for a new project needs to be populated just once and then projects are rolled out automatically. This process takes roughly 15 minutes and speeds up onboarding of people hired externally tremendously. A fully new templates dashboard reserves about half a day to set up, it's very intuitive. All the elements are available in Smartsheet already, you just need to add and place them," adds Julia Gummert-Loellke.

With Smartsheet, Oerlikon not only simplified project and portfolio management and gained complete visibility across multiple projects, but has also introduced a collaborative and agile approach to project management. *"The methodology needs an adaptable environment that welcomes feedback and participation, and with Smartsheet I think we'll achieve just that,"* concludes Mandy Aeschlimann.

In a nutshell:

To ease the workflow, Mandy Aeschlimann and Julia Gummert-Loellke made sure that templates are used to kickstart projects more effectively.



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Julia Gummert-Loellke,
Head of IT Project &
Portfolio Management,
Oerlikon IT Solutions.