

Checklist to Productively Use Meisterplan

Basic Configuration and Setup

- Configure Meisterplan:
 - Project fields, phases, organizational structure, roles, calendars
- Get own data into the tool:
 - Resources, projects, allocations, optional: milestones, financial data

Processes

- Communicate PPM goals and scope
- Define and map typical project life cycle in Meisterplan
- Define and discuss PPM roles
- Designate substitute
- Set up and detail PPM Meetings
- Determine (sub)portfolios and add them in Meisterplan
- Determine strategy scoring criteria and add them in Meisterplan
- Set up process for idea management
- Design and configure reports in Meisterplan
- Determine access rights
- Define communication of portfolio decisions

Process Participants

- Invite participants in the process to Meisterplan
- Train process participants

Meetings

- Schedule PPM meetings

Establish Responsibilities

- Schedule Lessons Learned meeting
- Create internal documentation

Benefiting from the Knowledge of Others

- Register for the Meisterplan online community quest.meisterplan.com
- Participate in the [Meisterplan Round Table](#)



Personal Support

Our Customer Success Team is happy to support you in the introduction of Meisterplan into your company.
Phone: 1-888-908-5834 | Email: sales@meisterplan.com