

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 via user groups
- 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

- Check out our [blog](#) for suggestions and solution approaches
- 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.

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