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DRIVING SUCCESS: HOW METALSA ACHIEVED DIGITAL TRANSFORMATION WITH PLANISWARE

Metalsa is an automotive company that manufactures metal frames for heavy and light trucks with an extensive portfolio of auto manufacturers. Like any Tier I, II, or III automotive supplier, Metalsa had to react to the impact that customer change requests created and made decisions based on the data created by manual reports within an old and outdated internally built system. To create the real-time information necessary to react with more speed and precision, they decided to upgrade their project management system.

Where they once spent a lot of time trying to make decisions based on outdated, incomplete and unvalidated data, their real-time alerting system now allows them to avoid problems before they escalate. With Planisware, their escalation process alerts them to any risks that could develop into a problem while better serving customers and protecting margins.

Customer Changes Drive Digital Transformation

When it comes to making the metal chassis and other automotive components based on a customer's order, Metalsa goes through the process of setting up the manufacturing plant. New equipment may need to be purchased and the manufacturing site needs to be configured. There are several detailed aspects related to time, capacity, and resources that are all managed as projects.

To make sure those projects launch in the right direction, Metalsa leadership supported a new digital transformation process. "Our customers frequently ask for modifications. In order to protect our margins, we need to be better at identifying and managing all impacts of change requests." said Iliana Martinez-Flores, Project System Coordinator and a thirteen-year veteran for Metalsa.

Their homegrown project management system was limited, slow, and struggled to handle real-time data and alerts. Delays and budget overruns raised questions about how to effectively address project issues. The absence of a streamlined escalation process hindered timely decision-making in critical situations. So, in 2016, Metalsa decided to upgrade their system.

Real-Time Alerts Drive Value

Planisware Enterprise was selected based on its navigation, visualization capabilities and positive user feedback. Metalsa now has the ability to evaluate their pipeline of projects to focus the right level of management on the right set of project issues that need to be addressed. Capturing lessons learned in Planisware provides them with the ability to refine and update their process and standards for continuous improvement. "We have a robust governance and escalation process. With the real-time information provided by Planisware, we can detect if there is any risk with any timely indicators, like financial topics, and keep making incremental improvements" said Martinez-Flores.

With Planisware, Metalsa now has an automated change-management process that involves all levels, with communication cascading from management to end users. Martinez-Flores highlights the focus on identifying financial indicators for successful KPIs, such as customer milestone achievements and budget adherence. This strategic direction helps them respond to customer changes with greater accuracy, reinforces their project management system, and aligns with their digital transformation efforts.

This faster escalation process provides alerts and notifications when there is a risk. "This is particularly important because we can make decisions on time before the risk gets critical. As soon as we get something at risk, we can escalate the problem with top management."

"Here's how it works. If there is a delay by 5%, - that alert goes to one level of people where it says, 'Hey! We're 5% over. We should start paying attention!' If it's over 50%, that goes to a whole other level of people and probably should have been solved before it got that far. If it goes over that up to 100%, then it gets escalated all the way up to the top, immediately. This visibility means if you're potentially going to have a problem because you're 5% over whatever the due date was or whatever the budget was, you still have plenty of time to correct it. Our goal is to identify and solve issues before they get to above 50%."

> "Our leadership gets notified by us that we have a solution to a problem before they even know that one exists. We're avoiding problems before they happen and that's a great thing."
>
> — Iliana Martinez-Flores,
> Project System Coordinator, Metalsa

Improved Governance Supports Good Communication, Customer-Centricity, and Protects Margins

Since adopting Planisware, Metalsa have increased their efficiency of task completion, and overall project completion while reducing their overall project administrative work by 30% by spending less time searching for and solving problems.

Instead, they can proactively avoid issues and promptly address any that arises. With Planisware, they can configure any alerts and notifications based on their specific business rules and parameters per their customer's requirements.

The automated governance and escalation process has been particularly beneficial because it provides real-time alerts to specific individuals based on risk criticality. As a result, Metalsa has improved its overall project management performance and collaboration, impressing stakeholders with their proactive approach to problem-solving. This approach helps Metalsa protect margins in a competitive industry and adapt to changes in customer scope much faster.

The previous PPM system at Metalsa was slow and difficult to deal with real time data and alerts. Things were often late as they often can be with projects. If things were late or went over budget, the questions were always 'why are they late? Why are they over budget? How do we solve this?'

"We were spending a tremendous amount of time trying to find answers to those problems or trying to find the problem that was causing the symptoms" Martinez-Flores explains. "Now we are avoiding problems before they happen with data that is much more trustworthy. With the escalation process, we get alerts as soon as something happens. We're not looking for problems to solve any more so much as avoiding them and solving them as soon as they happen. I think that's what's really caught the eye of our leaders, including our CEO."

Martinez-Flores concludes "I like to have a robust governance and escalation process. User adoption and adherence to the process has increased significantly. Of course, it's been great to have this process automated because we have that escalation that sends alerts and notifications to specific people depending on if the risk is classified as high critical, medium critical, or not critical. It depends on the criticality of the risk, whether that's time or financial. This is one of the best things that we have from Planisware."

"Now things are going a lot smoother. We can go to our leaders and tell them when we find something happened, we already have a solution for it. I think it's highly significant when you can get to it before it even notifies them that there was a problem."

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> — *Iliana Martinez-Flores, Project System Coordinator, Metalsa*

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