

Case Study Daptiv PPM



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Jon Verson, Senior
Project Manager

Elkay Manufacturing Manages Everything from NPI and NPD Processes to Marketing and Business Improvements Activities with Daptiv PPM

Elkay Manufacturing was founded in 1920 and is the largest manufacturer of stainless steel sinks. They are also known for high quality faucets, water coolers and drinking fountains. Today, Elkay has more than 1,800 employees in the Plumbing Products Division.

Business Need

Elkay Manufacturing is divided into 3 business units – Residential Trades, Commercial Products and Retail Products. MS-Excel was being used for reporting purposes but it became clear that a formal Project Management group needed to be established so things wouldn’t slip through the cracks. Elkay established their PM group and they found a need to implement a true ‘solution’ to manage their workflow and reporting needs. Finding an on-demand solution that would allow plenty of business flexibility was a top priority – they wanted to alleviate the burden and costs associated with depending on internal resources. Elkay also wanted a simple solution that could facilitate consistency in their reporting methods. “Business segments were using multiple reporting formats; we wanted to have a single reporting format across divisions to make things consistent for the Executive Team to review,” says Jon Verson, Senior Project Manager. Lastly, Elkay had a great need to escape from time-consuming spreadsheet management so they could focus on critical work.

Flexible, Customizable Solution

Elkay considered Microsoft Project Server and Daptiv. “We chose Daptiv PPM because we liked the fact that it’s on-demand, facilitates collaboration and allows for a lot of flexibility in reporting and custom field creation,” says Martin Zimmersch, Engineering Manager.

Elkay’s Use of Daptiv PPM: Managing Hundreds of Projects and Hundreds of Tasks

Elkay has created multiple project types for different business segments, but the heaviest Daptiv PPM users are Elkay Engineers. The project types are as follows:

- **Business Process Improvement** - All Daptiv PPM users contribute to this project
- **ECN/ ECR** – Engineer change notices & Engineer change requests
- **Manufacturing Projects** – Specific to Elkay’s manufacturing facilities, these projects help manage their plant activities

Key Facts

- Elkay had been using MS-Excel to manage complex reports and work schedules, but they felt that they were spending too much time managing spreadsheets and not gaining enough insight into critical work.
- Although Elkay considered MS-Project Server as a solution, they chose Daptiv PPM because they felt it offered the most simple, flexible, customizable solution that would allow for collaboration.
- Benefits of Daptiv PPM, according to Elkay: time saved, improved project insight and execution, consistency, and flexibility in doing work when and how they want to.

- **Operational Support** – Details process improvement at plants where engineers can support them
- **MRID** – Market Research Industrial Design: project to manage the legwork needed in order to validate a concept
- **MarComm** – supporting marketing documents, activities to help drive new product to market
- **Supplier Projects** – Workflow between Elkay and external suppliers, good place to share documents
- **Commercial Projects** – projects specific to the Commercial Business Unit for water coolers and faucets

Elkay Project Workflow

With Daptiv PPM, Elkay has been able to fine-tune their project request process. “We now have a system where a requester must answer approximately twenty critical questions before their request can be considered. The qualifying questions focus on strategic advantage, competitive advantage, target GP% and financial gain. We score this to see how it measures at the portfolio level for approval,” says Verson.

Elkay currently has more than 100 projects, with hundreds of associated tasks. Elkay’s Engineers, who function as ‘project managers’, have built templates for their projects. They’ve created many custom fields with scoring questions, such as risk vs. reward and technical and product feasibility, to help create balanced score cards. Financial data, usually high-level details, is also tracked within each project.

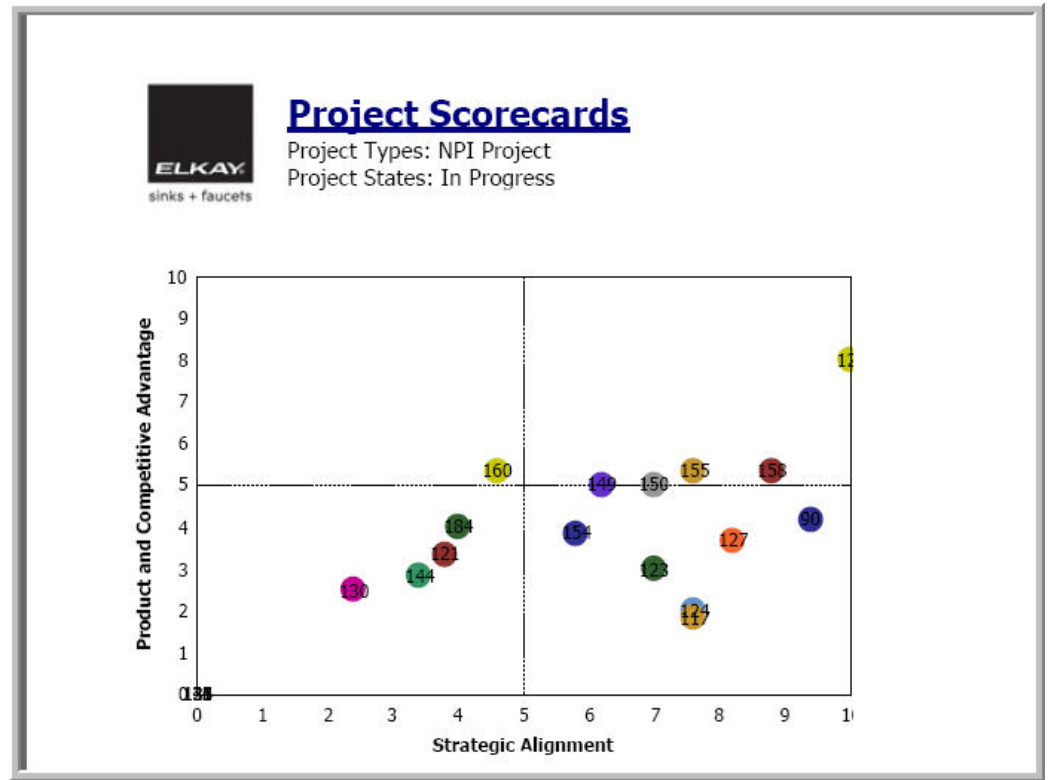
Elkay takes advantage of the project hierarchy relationship with parent & child projects. Each sink project has an associated child project that details the required product accessories. Elkay’s marketing department also uses Daptiv PPM so they are involved with each project or product’s needed marketing communications and deliverables, such as photography, specification sheets, product catalogs, PR/Advertising, merchandising, etc. “It’s incredible the amount of effort that goes into bringing a new product to market - from idea generation, product design and detail engineering to market research and marketing analysis. It’s a long process,” says Verson. “Daptiv PPM helps us tie in all the necessary business segments so we’re all in the loop on what needs to be accomplished so we are able to deliver as expected.” Like the Engineers, Elkay’s Marketing group has also created project templates so they can account for different project scenarios to deliver on end product results.

Daptiv Reporting

“We really like having executive dashboards where we capture the project portfolio summary, timeline, tracking, duration of gates versus plan...all of this data in a snapshot view helps us to make important strategic decisions.”

Martin Zummersch,
Engineering Manager

Daptiv PPM offered several advantages at the portfolio level. Elkay heavily relies on reports, particularly at the portfolio level. They have created bubble chart reports to measure how business segments, according to commodity and other score card items, stack up to the entire company. A report can detail information such as what projects they have by phase (completion, end date), complexity of the project, critical issues, and resource planning. “By using our score card method and generating Daptiv reports, Elkay is able to make critical business decisions,” says Zummersch. “We expect to roll these reports out to all the executives soon.”



Bubble size indicates Target GP %
Business Segments: Residential - Everyday, Residential - Premium,
Residential - Upper Premium
Commodities: Sinks

Time tracking is critical to the project execution and Elkay has implemented stage gates™ to monitor how projects are progressing in accordance to the expected timeline. Within Elkay’s reporting, there are color-coded stage-gate phases so they can immediately see which projects are on target or slipping behind. If a stage-gate is passed, it will be prioritized and assigned a launch date. Elkay is even able to monitor a baseline of estimated project completion dates and how projects are currently pacing.

Daptiv Reporting

Dashboard views of reports, such as Elkay's NPI critical issues report, help to ensure that important issues are identified before they grow into larger problems:

“Daptiv PPM has saved us countless hours in creating reports. “We used to create them using MS-Excel and now, with Daptiv PPM, we’ve saved countless hours. When people update their project information, a report of the latest data can be auto-generated in minutes...this is a HUGE time savings.”

Jon Verson, Senior Project Manager



Critical Issues List - NPI Projects

Active Residential Projects
SINKS ONLY

Fabricator Undermount						
Target Launch Date:	Project Number:	Phase:	Complexity:	CEA Number:		
Jan 1, 2009	0		T1 - Not too complex	0		
Priority	Issue Name	Start Date	Description	Assigned To Name	Deadline	Date Resolved
High	Financial Analysis	11/18/08	Complete Analysis: need to add cost for removing spray, adding 2 pads on either side of the sink bowl, and then respray.	Deborah Rummage	11/25/08	
High	Product Spec	11/18/08	Complete Product Spec. Several Items such as forecast are Incomplete.	Mark Hird	11/19/08	

Residential Accessories						
Target Launch Date:	Project Number:	Phase:	Complexity:	CEA Number:		
Apr 1, 2009	7013	Concept Phase	T2 - Moderately complex			
Priority	Issue Name	Start Date	Description	Assigned To Name	Deadline	Date Resolved
High	PO's for eGranite and Avado	12/4/08	12/4 - ECN's have been released, we need Sourcing to place the PO's.	Michael Placzek	12/8/08	

Residential Low Bridge						
Target Launch Date:	Project Number:	Phase:	Complexity:	CEA Number:		
May 15, 2009	7005	Development Phase	T2 - Moderately complex			
Priority	Issue Name	Start Date	Description	Assigned To Name	Deadline	Date Resolved
High	Finalized \$/timing	11/10/08	Complete the finalized cost & timing once the design review is completed. 10/31: date changed from 11/14 to 11/21 based on incomplete financials. 11/7: date changed from 11/21 to 11/28 due to financials 12/4: obtain a quote for 18 gage. Date changed from 11/28 to 12/12.	Michael Placzek	12/12/08	
High	Production dwgs, CEA, ECN, tooling req	12/4/08	Production dwgs - chg the height of the bridge Also complete the ECN, CEA, tooling req. 12/9: changed from 12/9 to 12/12 based on availability to meet for a design review.	Kristine Forsythe	12/12/08	

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Overall Daptiv Value

Huge Time Savings: “Daptiv PPM has saved us countless hours in creating reports,” says Verson. “We used to create them using MS-Excel and now, with Daptiv PPM, we’ve saved countless hours. When people update their project information, a report of the latest data can be auto-generated in minutes...this is a HUGE time savings.”

Improved Project Planning and Execution: “From a project-by-project and project-by-business segment point of view, Daptiv PPM has helped us to better plan our projects. Timesheets have also helped us to closely monitor how much time we need to allocate to different tasks and overall project work.”

Keeping a Constant Pulse on What’s Going On: “We really like having executive dashboards where we capture the project portfolio summary, timeline, tracking, duration of gates versus plan...all of this data in a snapshot view helps us to make important strategic decisions.”

Consistency: “We really wanted consistency in the way we manage our work and pull reports across different business segments - and Daptiv PPM has helped us streamline those processes.”

Flexibility to Meet Business Needs: “Because you can create custom fields and applications, we are able to configure Daptiv PPM to track the type of information we need to monitor, such as stage gates and score card criteria...that level of flexibility is exactly what we need.”

“We know that there’s a lot of potential in using Daptiv PPM – we hope to take advantage of more functionality in the future and get our Executive team using the Daptiv Work Intelligence capabilities.”