



**CASE STUDY**  
**Zentralbahn AG**

Unified project and portfolio management  
creates transparency across all projects

Zentralbahn AG, a subsidiary of SBB (Swiss Federal Railways), operates an important railway connection between Lucerne, Engelberg and Interlaken in Central Switzerland. In addition to daily operations, the company manages numerous construction, IT and investment projects with a high degree of technical and organizational complexity.

To efficiently manage the multitude of projects and simplify reporting commitments required by the Federal Office of Transport (Bundesamt für Verkehr, BAV), Zentralbahn AG required a central solution for project and portfolio management. Their aim was to create transparency across ongoing initiatives, reduce manual effort, and establish a single source of data to enable efficient management of their portfolio.

After a multi-platform evaluation they opted for TPG ProjectPowerPack, built on Microsoft Power Platform. The decisive factors were its flexibility, options to integrate with SAP and manage multiple project types from a single app.

The result is an integrated, future-proof PPM system that consolidates construction, IT, and investment projects and forms the basis for modern and transparent project portfolio management.

**Branche:** Traffic & Infrastructure

**Bereich:** Infrastructure and CEO Office

**Lösung:** TPG ProjectPowerPack

## BACKGROUND AND CHALLENGES

The variety of projects and requirements at Zentralbahn led to a diverse landscape of tools and inconsistent processes. Project managers worked using their own Excel spreadsheets, templates, and filing structures.

A central platform where all project information could be maintained and evaluated consistently did not exist. In particular, the semi-annual reporting to the Federal Office of Transport (BAV) was time-consuming and prone to errors.

“Our processes had grown historically and were very inconsistent. We had no complete overview of which projects were running and how they were connected,” says portfolio manager Lou Lischer.

As the number and complexity of projects increased, it became increasingly difficult to set priorities and make decisions based on current and therefore reliable data. The need for a unified, integrated solution was clear.

## EVALUATION AND DECISION-MAKING PROCESS

The aim was to introduce a central project and portfolio management system that would cover all project types, ranging from construction to IT to investments, while meeting regulatory requirements.

As part of a market analysis, Zentralbahn evaluated several toolsets. It became clear that few if any tools could meet their complex, and partly contradictory, requirements. Either the level of integration was insufficient, or the system was too inflexible.

TPG ProjectPowerPack, built on Microsoft Power Platform, was the only solution that met their functional, technical, and process-related requirements. Among the factors that helped make the decision included:

- » its high level of configurability
- » integration of SAP data via Azure Data Lake
- » the ability to design project-specific workflows

After a successful proof of concept, Zentralbahn chose TPG as its implementation partner.

“The TPG team understood our requirements very quickly. The depth of integration and the flexibility of the system were decisive for our decision,” says Lischer.

## SOLUTION IMPLEMENTATION

Implementation of the new project and portfolio management system took place across several phases in close coordination with the various departments at Zentralbahn. The initial goal was to create a solution that would meet the diverse needs of construction, IT, and investment projects while laying a solid foundation for future enhancements.



*“We wanted to finally create a unified view of all projects — from simple IT initiatives to million-franc construction projects. With the new tool, we have achieved exactly that.”*

Lou Lischer, Head of Portfolio Management, Zentralbahn AG

In the first phase, a universal project process was developed. This standardised procedure was intended to ensure that all projects, large or small, technical or organisational were planned, documented, and evaluated according to the same principles.

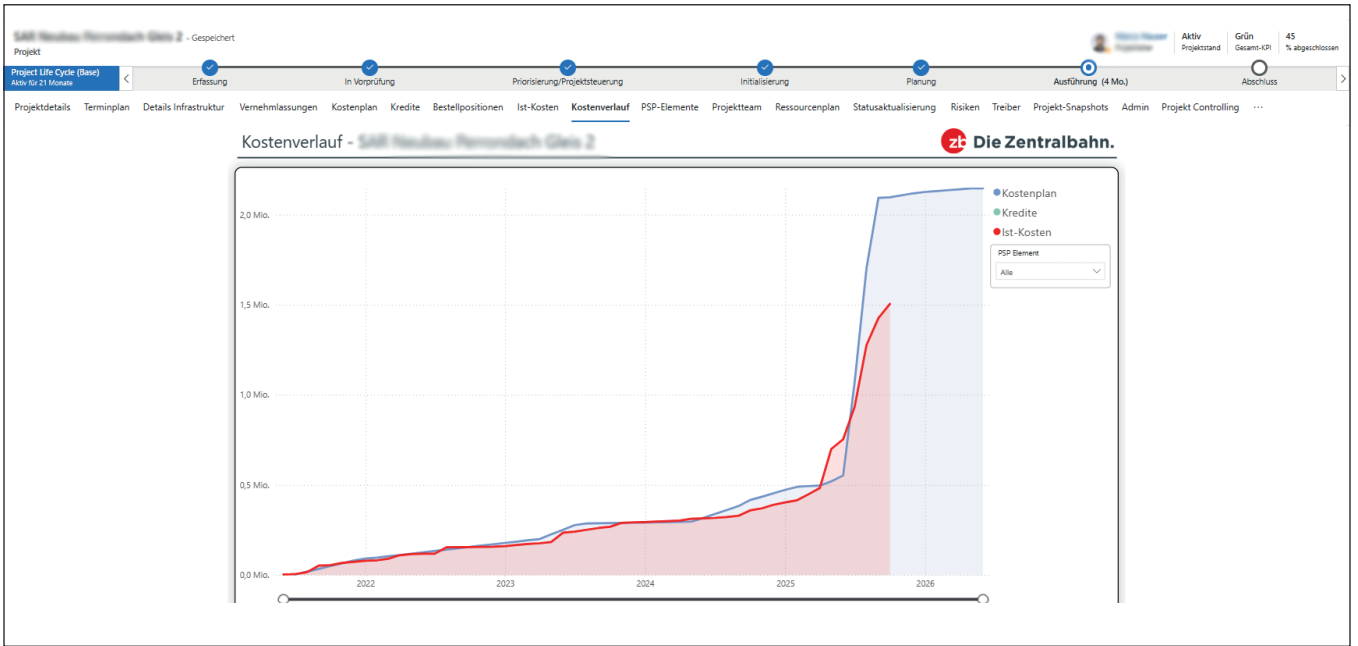
Head of Projects Karin Müller explains: “Our goal was to make the process as generic as possible so that it works for all types of projects.”

The pilot phase started with the Infrastructure Department. Workflows, forms, and reporting structures were tested and refined in an iterative approach. After successful evaluation, the solution was rolled out to additional departments. This enabled each department to incorporate the experience gained from the initial roll-out directly into the configuration of subsequent phases.

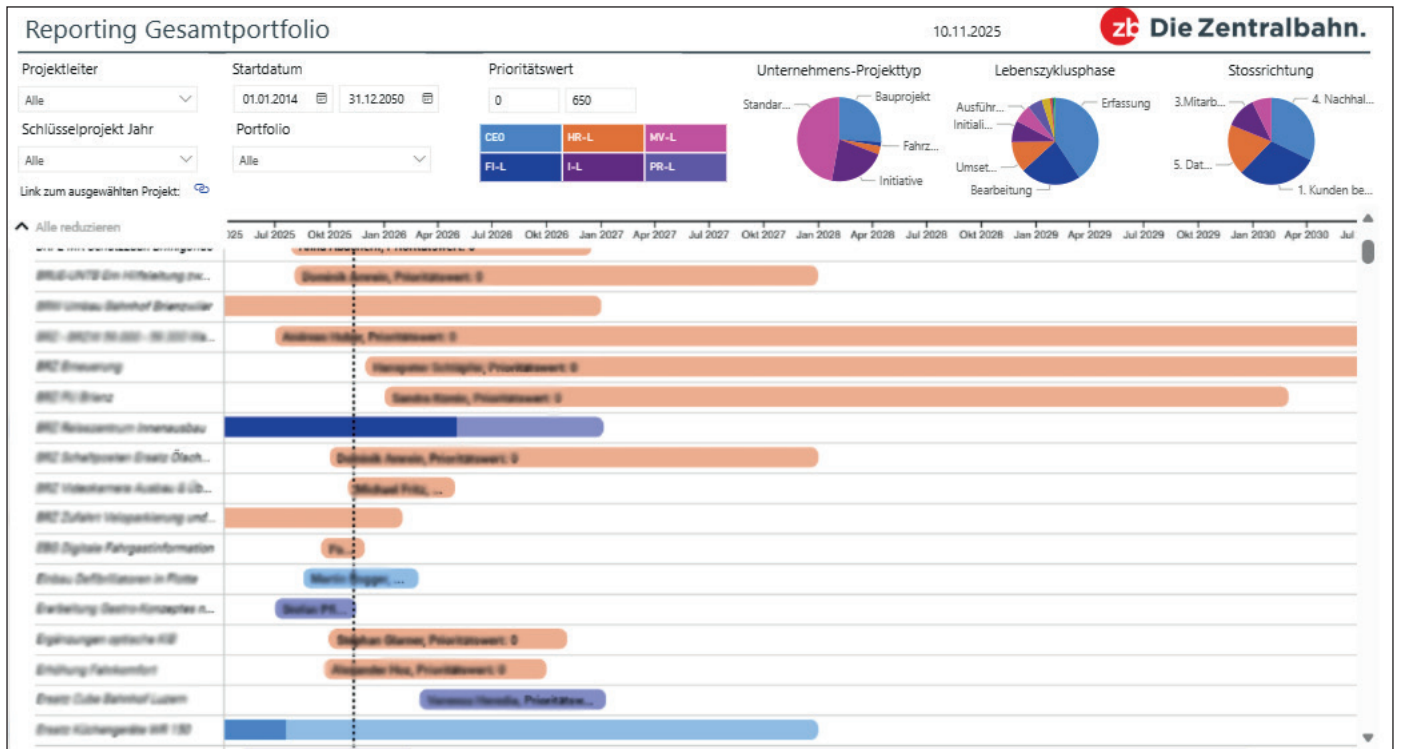
A central component of the solution is the provision of up-to-date financial and project data. To achieve this, Zentralbahn uses automated data copying via PowerShell, this transfers data from SAP into a Microsoft Azure Data Lake. The data is then consolidated and transferred into the new PPM solution, without middleware or manual maintenance.

Meanwhile, workflows were set up for approvals, status reports and BAV reporting (reporting to the Federal Office of Transport, BAV) were introduced. A carefully designed role and authorisation concept ensures clear responsibilities and data security while Power BI dashboards provide visibility across all projects.

## EXAMPLE OF THE COST DEVELOPMENT OF A PROJECT



## EXAMPLE REPORTING TOTAL PORTFOLIO



“The project with Zentralbahn is a prime example of how TPG ProjectPowerPack can be used to standardize a complex organization with very different project types. The close cooperation and clear focus on a lean but consistent solution were decisive factors,” says TPG consultant Martin Imwinkelried.

### LEARNING THROUGH AN ITERATIVE APPROACH

“We deliberately started with a single department to gain experience. This allowed us to make adjustments before bringing other departments on board and that greatly increased acceptance,” says Head of Projects Karin Müller.

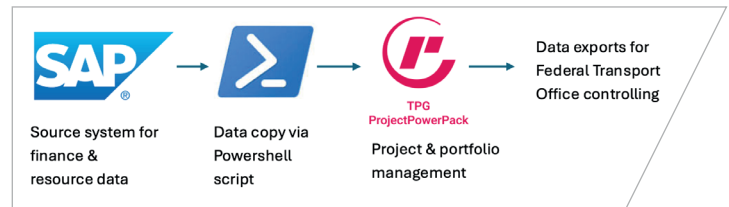
The introduction was deliberately iterative, with learning feedback loops between each phase. This approach ensured a stable go-live date, high user acceptance, and a system that reliably connected all ZB’s departments.

Based on the success outlined above, workflows were implemented for project planning, approval, status reports, and final reports. For BAV reporting, mandatory fields are maintained in the app and can be exported at the touch of a button. The role and authorisation concept ensure that each user group - from project manager to management - receives the information they need, when they need it to make informed decisions.



*“The biggest challenge was to combine our complex and very different processes into a common structure. With TPG ProjectPowerPack, we have succeeded in doing so for the first time.”*

Karin Müller, Head of Projects,  
Zentralbahn AG



Power BI dashboards are used to visualize key performance indicators (KPIs) and project progress. They show current budgets, milestones, and resource levels, enabling informed decision-making at all levels.

“The go-live went smoothly. The system was immediately ready for use, and users quickly mastered it,” says Karin Müller.

### BENEFITS AND MEASURABLE RESULTS

With the introduction of TPG ProjectPowerPack, Zentralbahn has fundamentally modernized its approach to project and portfolio management. The effects are evident both in day-to-day project work and in strategic management. Workflows that were manual, time-consuming, and prone to errors are now automated and transparent. This improves operational efficiency, the quality of information and is now the basis for decision-making at management level.

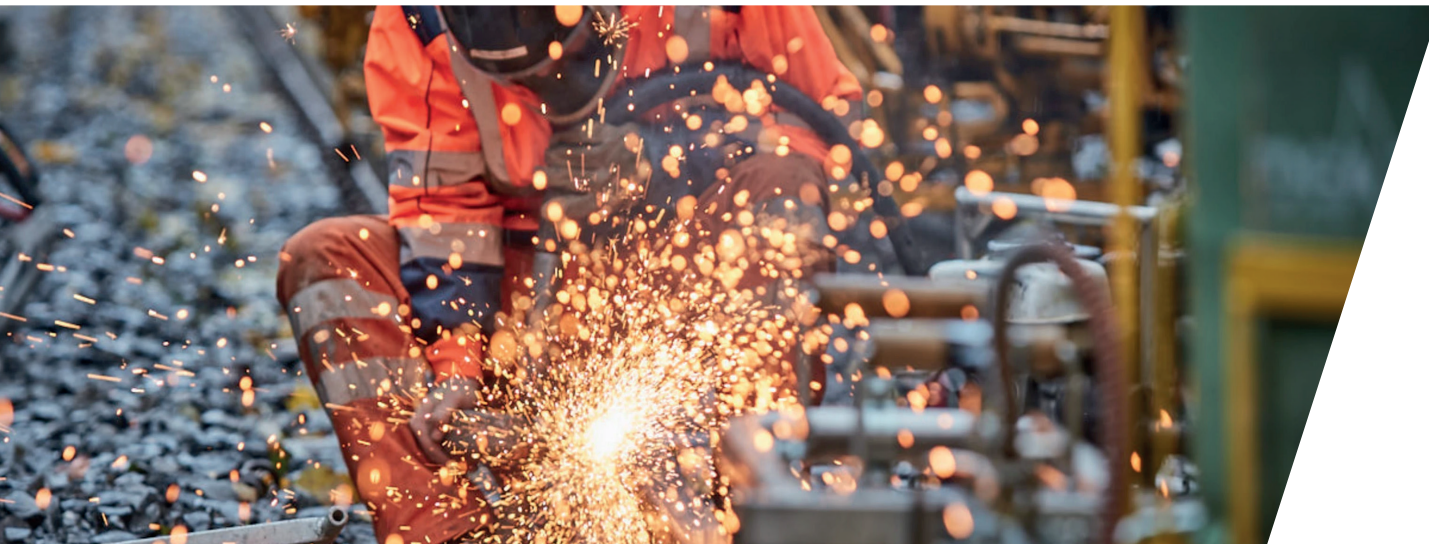
#### Benefits Overview:

- » Significant time savings in reporting: The semi-annual BAV reporting, used to take several days, is now completed in hours – automated, consistent, and reliable.
- » Error reduction through data integration: Manual entries and duplicate entries have been eliminated. Data from SAP flows directly into the system via Azure Data Lake.
- » Greater transparency and improved decisions: Power BI dashboards provide management with up to date data when needed. Decisions can be made faster and on an informed basis.
- » High acceptance and future viability: The familiar Microsoft 365 environment made the transition easier while Power Platform offers scalability for future expansions.

“We used to have ten different reporting systems – now everyone works with a standard process. That saves time and creates transparency,” says Lou Lischer. .

### NEXT STEPS

Karin Müller and Lou Lischer are primarily concerned with consolidating the existing solution. While in the future they look to expand resource management and extend Power BI. Other departments may also be integrated into the solution.



## PROJECT PROFILE

### THE COMPANY:

Zentralbahn AG (ZB) is a subsidiary of SBB (Swiss Federal Railways). It connects towns such as Lucerne, Engelberg and Interlaken on the traditional metre gauge railway line. As a major regional and tourist railway, it operates its own route network and continuously implements construction, IT, and investment projects. With over 400 employees, it manages daily operations and the long-term modernisation of its infrastructure – from large-scale construction projects and vehicle procurement to digital initiatives as part of their strategic development.

### THE CHALLENGE:

The biggest challenge was mapping a highly complex project landscape. ZB combines construction, IT and investment projects with different processes, approval paths and reporting obligations – including to the Federal Office of Transport. Different tools, Excel lists, and the absence of standards led to discontinuity and a high level of manual effort. The goal: to map all project types in a standardised, integrated system that meets regulatory requirements and provides operational flexibility for the various departments. This flexibility made it possible for the first time to combine all construction, IT, and investment projects in a single system.

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### THE SOLUTION:

In close cooperation with TPG The Project Group, Zentralbahn implemented TPG ProjectPowerPack, built on the Microsoft Power Platform. The solution integrates all project data centrally, links to SAP, and maps the different project types through standardised workflows. Special attention was paid to modularity and future expandability, to scale the solution as its needs evolve. Automated reports, uniform data structures, and a modern user experience support transparency and efficiency across the entire project portfolio.

### THE BENEFITS:

With the introduction of the TPG ProjectPowerPack, ZB has a comprehensive, scalable project and portfolio management solution. Disconnected tools and Excel redundancies have been eliminated, processes standardised, and data flows automated. Visibility across projects has increased significantly, and reporting – especially to the Federal Office of Transport (Bundesamt für Verkehr, BAV) – is now consistent, error-free, and available at the touch of a button. The PPM system maps the complex processes of the organisation and creates a solid basis for efficient ways of working.

### TPG The Project Group GmbH

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