

Sparkasse Mainfranken: Sales Controlling with MindMeister and MeisterTask

SUCCESS STORY



Marijana Schaffer
Project Leader, Sales Controlling



Cornelius Rihm
Process Management

REGION

DACH

EMPLOYEES

1.000+

INDUSTRY

Banking & Finance

WEBSITE

www.sparkasse-mainfranken.de/en

- Efficient collaboration in the office and remotely.
- "Bite-sized meetings" — time savings through focused communication.
- Top security standards thanks to German-based servers.

Even before 2020, web-based productivity tools were becoming increasingly commonplace in banks around the world. However, with the coronavirus-enforced trend towards remote work, these digital aids have transitioned from "nice-to-haves" to absolute essentials. We spoke to Marijana Schaffer, Project Leader for Sales Controlling at the German bank **Sparkasse Mainfranken**, about how MindMeister and MeisterTask have become indispensable requirements for team productivity.

The timing could hardly have been worse for Marijana Schaffer. Having spent considerable time planning a workshop on agile project management, the big date of March 23, 2020 coincided exactly with the rollout of coronavirus restrictions in Germany. With the possibility of holding the workshop at her bank's offices out of the question, it seemed that cancellation would be the only option. However, Schaffer held one key advantage: together with Cornelius Rihm, a colleague from the Process Organization department, she had already thought in advance about which digital tools would be required for a successful remote-based workshop. The show could go on.

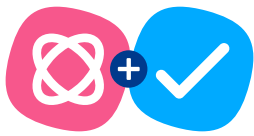
For Rihm, agile working methods were nothing new, having worked

extensively with mobile task management solutions in his private life. Despite this, the question of how such a tool could be used for digital task management in the highly sensitive banking sector (especially in sales management) remained an open topic. This was until Rihm found MeisterTask: the ideal test candidate for Schaffer's project.



MeisterTask has an intuitive user interface, facilitates mobile access via smartphone or tablet, and is a security-conscious choice due to its server location in Germany and other high-level privacy standards.





MeisterTask makes agile work not just possible, but simple too. The tool allows employees to organize their activities via visual Kanban boards that also support Scrum workflows. Following a thorough security check, the path was clear to test the tool in the Sales department.

Road-Testing MeisterTask

Even remotely, the event was a hit.



Thanks to MeisterTask, the workshop on agile working was a huge success,



concludes Schaffer. In fact, results were so positive that the experience convinced the department to roll out the tool to the rest of the team. Once a decision had been made, the ease of switching to MeisterTask meant that the team quickly accepted the tool and integrated it into their processes. In terms of features, Schaffer is fond of using tags to categorize her tasks

in MeisterTask, as well as exploring the various automation options that enable efficient work.

However, the use of MeisterTask in the Sparkasse Mainfranken is not limited to the Sales Controlling department: enthusiastic employees quickly spread word of the solution to other areas of the bank. For Cornelius Rihm, the key selling point of the system is its flexibility, which adapts to the differing needs of departments and users across the organization.



Even our less tech-savvy employees like using MeisterTask. Its intuitiveness makes handling the tool simple and means onboarding is self-explanatory.



The bank's senior management in particular values the MeisterTask apps for smartphone and tablet, which en-

able managers to access projects and receive status updates from wherever they are.

Shorter Meetings with MindMeister

Although Schaffer was initially interested in MeisterTask to improve project work with her team, she soon realized the value of the whole Meister Suite. Aided by MindMeister, Meister's collaborative mind mapping tool, the bank now uses online mind mapping for meeting preparation and management. MindMeister allows team members to collect and evaluate ideas — before, during and after meetings — while the mind map format also helps the team, according to Schaffer, “gain an overview of subject areas and let them sink in”.

Thanks to MindMeister, meetings in the Sales Controlling department have become significantly shorter. She often releases a mind map of the topic in advance, a tactic that allows employees to add ideas on their own instead of large meetings. “I call them bite-sized meetings,” she says.