Planview Information Technology Group Virtually Reinvents Itself and the Business

About Planview

For more than 20 years, Planview® has been advancing the discipline of portfolio management, helping customers change the way they manage people and money to make better business decisions. With a singular focus on portfolio management, Planview combines customer-driven software, unmatched domain expertise, and proven best practices to solve each customer's unique business problems.

The Challenge

Jerry Sanchez became the IT Director at Planview in January 2008 and was immediately faced with challenges in four areas:

1. **STRATEGIC VISION**
   Prior to January 2008, the IT group at Planview functioned as many IT groups do – its focus was to maintain the functioning of internally used computers, servers, and the network. The business did not look to IT to develop beyond responding quickly and improving abilities on an as-need basis. What was missing was the vision to understand and proactively plan for the various, competing drivers the business would face – be they internal or customer-supporting requirements – or before they became urgent issues: development environments, Software as a Service (SaaS) deployments, and corporate initiatives.

2. **BUSINESS**
   The market was indeed moving towards SaaS options for the portfolio management solutions that Planview develops, and the company wanted to get ahead of the competition by making its products more readily available in this on-demand, hosted format. The company hired new development staff to improve time to market and quality; however, the sharing of environments and tools between staff was problematic. In addition, it was taking six to eight weeks to prepare and equip hosted customer environments. To date, the hosting was being outsourced, and the management team wanted to bring it in-house for better service; Planview IT needed to ensure that its hosting operations were rock solid.

3. **INFRASTRUCTURE**
   IT silos existed across departments and locations, with massive and inefficient server sprawl in datacenters in California, Texas, and Germany. This represented a drain not only on people resources, but on monetary ones.

4. **CULTURE**
   Finally, there were several cultural challenges Sanchez recognized. There was an immature, tactical IT environment, which created concerns that Planview Enterprise®, the company's flagship solution, could not be virtualized for a SaaS deployment, that it rather had to be deployed entirely on physical hardware. And, because IT had been run as a cost center, there was concern about large capital expenses.

In large part because of bringing hosting in-house and the mandate to grow the Planview SaaS business, it became clear that the demands on IT were going to grow exponentially. The IT team had to move fast, build a solid infrastructure, and do so cost-effectively. At the same time, it had to maintain the existing environment and hire and train new staff members to support the business.

Vision: One Infrastructure

In order to quickly build a highly reliable SaaS hosting capability while still supporting the day-to-day operation of internal Planview users, the IT team decided it needed one infrastructure to be the foundation of its strategic vision. This became their set of three over-arching criteria:

1. **HIGHLY FLEXIBLE**
   Planview IT needed to be able to support multiple internal and external customers and meet their requirements for rapid deployment. It also needed the ability to scale locally and globally. Thus, a highly flexible infrastructure was essential.

2. **PRODUCTION READY**
   Each IT constituent had varying production needs. Product Development's needs were dynamic. Sales

Customer: Planview

Industry: Financial Services, Technology, Higher Education, Retail, Energy, Manufacturing, Insurance, Healthcare, Pharmaceutical, and others

Geographies: Worldwide

Uses Virtualized IT Infrastructure to: Create a highly flexible, production-ready, and cost-effective environment to grow the company's SaaS business

Uses Planview Enterprise to: Gain and report on a complete view of virtual machines on the network; understand the real costs of services and assign business value to each virtual machine

"We threw out everything we knew before and all the hardware and started from scratch.

The payoff? A rock-solid new infrastructure that allows us to turn on a new, secure hosted customer environment within 24 hours. Our clients are happy because we are supporting their needs efficiently and cost-effectively.

And my CFO is thrilled that I can tell him that, not only has IT helped grow the SaaS business 1,000%, here's how every single virtual machine on the network is contributing to that growth."

Jerry Sanchez
Director of IT
Planview

needed a demo environment that showed the high performance and stability of the Planview solution. The SaaS business and customers' demand for a hosted Planview environment was accelerating.

3. **COST EFFECTIVE**
   Determined to craft a solution with the lowest possible TCO, Sanchez and his team felt they could realize cost savings through consolidation and the use of readily available staff and skills.

A New Approach

With success criteria in hand, Sanchez and his team took a deliberative approach researching how to bring this vision into reality. Their goal was to build one easy-to-manage platform that would serve all their needs.

They started from scratch. They questioned if there was any existing hardware purchased over the last five years that was capable of doing what they needed and worth incorporating into the new infrastructure design. The answer? No. They needed to build a storage infrastructure from the ground up.

Dashboard views in Service Portfolio Management provide quick visual indicators of the performance of services and assets.

The Pieces

He needed to pick best-of-breed storage products and protocols and determine the physical datacenter location and ideal network topography, and chose Datalink, an information storage architect firm. Together, they aligned requirements and solutions and evaluated vendors in the areas of performance, storage efficiency, redundancy, and backup and recovery.

The fit with Datalink was excellent. The company had an alliance with NetApp®, which provides storage, delivery, and management of network data and content, and is the industry leader in providing solutions leveraging the Network File System (NFS) protocol, which enables users on client computers to access files over a network in a manner similar to how local storage is accessed, using the Open Network Computing Remote Procedure Call (ONC RPC) system.

When NFS was suggested to him, Sanchez was surprised, as he had been considering either the newer Internet Small Computer System Interface (iSCSI)or Fibre Channel protocols as his primary options. However, his prime concern was that the storage networking protocol he selected be enterprise-ready for customer-facing solutions; after more research and in consultation with Datalink, he realized that a NFS and NetApp infrastructure was the ideal choice as this combination mapped to the three criteria of the strategic vision:

1. **IT IS HIGHLY FLEXIBLE**
   Provisioning is easy with this solution. The ability to resize volumes on the go was key and the team is able to simply refresh the datastore after changes. Thin-provisioning makes in-flight disk requirement decisions simple.

2. **IT IS PRODUCTION READY**
   NFS is a highly stable protocol that has been used for 25 years and NetApp is the industry leader in providing NFS solutions. NetApp architected a modular structure with maximum flexibility and scalability. Included was Network-Attached Storage, which uses NFS file-based protocols to offer data storage on a computer that is accessed by heterogeneous clients attached to the network. It compares in performance to a Storage Area Network, a must given that Planview ensures its clients a 99.98% Service Level Agreement availability guarantee. Another benefit of the NetApp offerings is its Snapshot™ technology which enables Planview IT to create copies of file systems, which it can use to revert back to any environment at any point in time and for full recovery.

3. **IT IS COST EFFECTIVE**
   This combination offers a small physical footprint, an Ethernet-only infrastructure, and low administrative overhead, without sacrificing quality or customer requirements.

After spending four months researching and analyzing possible solutions to determine the most flexible, production-ready, and cost-effective one, it took the Planview IT team one month to install and implement this solution.

MAPPING VIRTUAL MACHINES TO STRATEGIC PLANS WITH PLANVIEW ENTERPRISE

Once Planview IT was strategically aligned with the business, the possibilities exploded. In looking at the roadmap for the upcoming year, the biggest challenge is managing rapid growth and virtual machine sprawl. Sanchez's team initially built the environment to support 75 virtual machines; they are currently running 400.

When Sanchez approached the CFO to request new blades to handle the recent quarterly increase of 100 virtual machines, he realized it was challenging to justify virtual machines. There was a disconnect between what the CFO needed to hear to approve purchases and the explanations that IT could provide as to what those virtual machines did. Sanchez's team realized that there was a big opportunity to use one of Planview's own products to map the strategic business goals for each virtual machine.

What Sanchez chose was Planview Enterprise Service Portfolio Management, an integrated component of the Planview Enterprise portfolio management solution. It was designed to accurately links IT services with related assets, labor, and applications to reveal the true cost of delivering services to the business. This information enables IT to determine the value of services, identify and eliminate inefficiencies, accurately invoice business units, gain control of IT spending, and uncover hidden value in the IT department by reducing maintenance costs and delivering business services more efficiently.

Sanchez uses Planview Enterprise Service Portfolio Management to align each virtual machine with a project, which is itself mapped to a strategic goal. Today he can tell his CFO exactly which virtual machines are driving exactly which pieces of the business – Engineering, Corporate, and Production – and thus explain why they are needed and useful. And, critically, the application automatically grabs virtual machine server information from a cluster. This eliminates the need to manually enter each new virtual machine, both saving time and reducing the chances of human error.
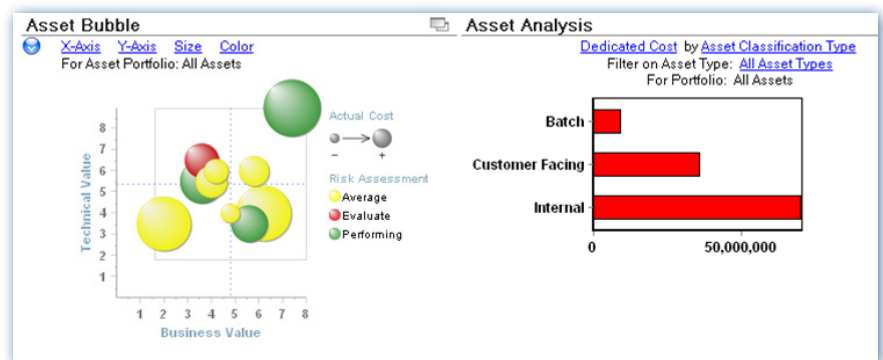
THE PAYOFF

Transforming IT, virtualizing the infrastructure, and leveraging Planview Enterprise Service Portfolio Management has paid off in four key areas:

1. **Revenue and competitive advantage** – Improved sales and the customer buying process with a stable, cost-effective, enterprise-ready SaaS environment that can be provisioned within 24 hours

2. **Corporate productivity** – Guaranteed that the development and quality assurance groups never have to wait on hardware

3. **Cultural and financial benefit** – Changed IT into a true strategic business partner as it turned IT from a cost center into a profit center that can demonstrate the strategic goal and benefit of each and every virtual machine

4. **Easy IT management** – Provided stable and rapid deployment of internal services and increased the job satisfaction of IT staff

Planview IT has evolved from being a financial drain in the eyes of management to being a strategic leader, business partner, and profit center. One of the key benefits for Planview is to meet customer demand for SaaS portfolio management solutions – primarily because IT has found a way to make hosting cost-efficient. It is easy to add new hosted customers because there are no purchase requests for additional hardware to slow things down. Instead, IT simply sets up a new environment for the customer as a virtual machine on existing hardware.

Similarly, IT can create virtual machines and test environments for internal use, such as development requirements, in days instead of months, and move on to more strategic work. And when new virtual machines are added, Planview Enterprise Service Portfolio Management automatically tracks them so that Sanchez has and can report on the complete view of what is happening on his virtualized network, when, and what the strategic import is.

Bottom-Line Benefits

What are the bottom-line benefits for the Planview IT group being strategically aligned and contributing to the business?

1. **Ability to create and turn on a hosted Planview environment for a customer within 24 hours**
   Prior to virtualization, this was a lengthy process that included constructing a detailed plan of needed hardware, getting the plan approved, and purchasing and installing the hardware.

2. **Growth of 1,000% in Planview SaaS business**
   Pre-configured hosting packages, the ability for Planview to bring the hosting in-house, and the capability to turn on the environment within 24 hours made hosting easy for customers to purchase.

3. **Scalability**
   A virtual machine can be installed without adding new hardware. When extra physical capacity is needed, it is easy to add a new blade.

4. **Reduction in needed storage space**
   NetApp compresses the amount of data through deduplication and thus affords storage cost efficiencies and the ability to store more data per unit.

5. **10% of cost of non-virtual solution and faster time to market**
   Despite discarding all existing hardware and starting from scratch, the IT team installed the virtualization-architected solution for only 10% of the cost to purchase a more physical server-intense environment.

6. **Knowledge of true overall cost of services**
   Using Planview Enterprise Service Portfolio Management allows the team to understand the real costs of services and assign business value to each virtual machine. This helps them allocate costs to each group in the business and justify to management the need for additional capacity.

7. **More satisfied IT staff, users, and external customers**
   With faster, flexible, quickly scalable, less physically-intensive deployments, and lower and easy-to-document costs, all constituents experience more satisfaction with this solution.

Features of Planview SaaS Solutions

Secure access to Planview Enterprise
24/7 availability and infrastructure monitoring
Off-site data storage with industry leader Sungard®

Secure Server Environments

- 128-bit encryption SSL certificates
- Load-balanced environment
- Enterprise-grade SAN for data storage
- Web tier and application tier
- Database tier with Microsoft® SQL Server®
- Reporting tier with Business Objects

Optional Services

- Financial repository data exports
- Custom data exports
- Real-time data interface via VPN
- Single sign-on integration

Learn more about Planview SaaS solutions today at
www.planview.com/ondemand

PLANVIEW®

For more than 20 years, Planview has been advancing the discipline of portfolio management, helping our customers change the way they manage people and money to make better business decisions. With a singular focus on portfolio management, Planview is the only company that combines customer-driven software, unmatched domain expertise, and proven best practices to solve each customer's unique business problems. For more information, visit www.planview.com.