

## PLANVIEW ENTERPRISE – ENTERPRISE PORTFOLIO MANAGEMENT

### Optimize Performance by Integrating Operational Planning and Execution Across the Enterprise

The core of Planview Enterprise is Enterprise Portfolio Management (EPM), a comprehensive operational planning and execution system. This platform empowers you to collaborate on and codify your operational plan, driving strategic priorities through project execution, enabling you to efficiently allocate and dynamically manage money and resources. You are able to make better investment decisions to effectively drive revenue, cut costs, and mitigate risk, by synchronizing top-down planning with bottom-up execution.



*Enterprise Portfolio Management helps you optimize performance through eight key capabilities*

### 1. Strategic Planning

Use Enterprise Portfolio Management to create strategic portfolios during your planning process. These enable you to quickly analyze funding options, eliminate misaligned investments, align top-down and bottom-up planning, integrate multiple planning processes with differing time horizons, and ensure that performance information is accurate and timely.

EPM's collaborative structure gives you a place to record business objectives, define strategies and tactics, and assess trade-offs through scenario planning before selecting a specific course. Built-in lifecycles enhance planning by defining and implementing process stages and decision gates to ensure that the right people are involved at the right time throughout the planning process. The proposed benefits of the investments, initiatives, and programs are measured continually, and adjustments can be made as needed.

### 2. Investment Analysis

EPM promotes well-informed investment decisions by carefully examining the goals, risks, and funding of all investments within a portfolio and aligning money and work with strategic goals. Investment analysis and optimization capabilities provide automated ranking, decision modeling, and investment prioritization based on key criteria such as benefits, timeframes, costs, and risks.

A powerful Investment Optimization Engine uses advanced algorithms to evaluate thousands of investment combinations, providing recommendations at different cost points to ensure that you are achieving the greatest possible value from your portfolio mix. Real-time investment reporting tools allow you to produce consolidated business cases, compare cumulative cost-benefit against a baseline, and monitor portfolio and investment performance, variances, and trending.

### 3. Capacity Planning

Enterprise Portfolio Management enables you to optimize your two most valued resources – people and money – against your strategic and operational priorities. Through multi-dimensional analysis, you can understand how capacity and demand align by key factors such as role, resource type, and department. Highlighting where you lack resources and where excess capacity exists, you can dynamically plan and allocate both full-time equivalents (FTEs) and money to focus on the most important work of the organization. Capacity planning is linked to execution but not tied to it, allowing you to perform high-level planning at an executive level without impacting ongoing efforts. Once the capacity plan is finalized, decisions are published to guide future execution.

### Planview Enterprise – Enterprise Portfolio Management

Planview Enterprise® – Enterprise Portfolio Management is an integrated component of Planview Enterprise, the market-leading portfolio management solution.

Portfolio management helps you optimize your business by balancing strategy against scarce resources – people and money. Other components of Planview Enterprise include Product Portfolio Management for maximizing the market impact of products, Ideation Management for amplifying the voice of the customer throughout products and services, Service Portfolio Management for managing the total cost of business service delivery, and Insight Analytics for accelerating informed business decisions.

Planview Enterprise – Enterprise Portfolio Management helps you optimize performance by integrating operational planning and execution across the enterprise.

Learn more at [www.planview.com/EPM](http://www.planview.com/EPM).

### Use Planview Enterprise – Enterprise Portfolio Management to:

- Analyze and manage risks, prioritize programs and projects, and employ scenario planning to prepare for business demands
- Develop long-term investment strategies that meet business objectives
- Balance resources with demands for strategically-aligned capacity planning
- Manage demand from a central location
- Scope, schedule, and execute work and manage projects effectively
- Forecast, baseline, and manage project budgets throughout the project lifecycle
- Balance demand from multiple sources for proper resource prioritization

"We have seen a cost reduction for managing and maintaining redundant IT management systems of 90% using Planview Enterprise...and it helps us increase our internal productivity in that each of our project managers can now handle more projects without external help."

– *Portfolio Manager, Cuscal*

"We knew what we needed – and Planview delivered. This has dramatically improved our productivity while eliminating wasteful spending, proving that the IT dollars spent are necessary and help contribute to the company's goals."

– *Process Manager, Hallmark Cards*

## **PLAN YOUR WAY WITH PLANVIEW ENTERPRISE ADD-IN FOR MICROSOFT PROJECT**

### **Extend the business rules of portfolio planning in Planview Enterprise to Microsoft® Project®**

This bidirectional add-in provides a user-friendly approach that gives access to Planview Enterprise projects and resources directly from Microsoft Project.

Providing an add-in toolbar interface to Project, it allows users to interact with Planview Enterprise without leaving the Microsoft application; any changes made in Project are instantly reflected in Planview Enterprise, so that portfolio planners and project managers know the true state of all their programs and projects, no matter what system their resources are using.

## **4. Demand Management**

EPM provides a single, centralized location where you can request work, check status, delegate requests, and review lifecycles. Managers can properly delegate work requests based on their size and characteristics, from simple Help Desk tickets and minor enhancements to major projects, while users can track the outcome of their requests. Demand Management can also be fed by Planview Enterprise Ideation Management to drive the most innovative work into the pipeline most efficiently.

## **5. Resource Management**

EPM helps you prioritize resources to align with business goals and to balance demand from multiple sources. It provides dashboards and reporting tools for staff management, staff assignments, and long-range staff planning. The portfolio management framework allows you to assign work based on roles rather than individuals, ensuring that short-term changes in personnel do not impact strategic goals. Managers can perform a skills inventory and assign the right person to the right job, thereby lowering labor costs, increasing productivity, and improving utilization percentages. This flexible tool allows managers to allocate resources according to priority, helping to resolve conflicts in work assignments among several projects.

## **6. Project Management**

Within the portfolio management framework of EPM, users can scope, schedule, and execute work, and speed time to delivery, and thus value to the organization, by ensuring that projects are completed on time and on budget. Flexible dashboards and analytic tools are easy to access, use, and share for insight into the health and status of portfolios, projects, and resources. Plus, EPM was designed to be used flexibly across development methodologies, giving users the ability to see Agile and traditional Waterfall projects in the same context.

To assist with timely decision-making, users can access trend analysis, baseline, critical path, and resource usage information. Automated time records and billing, backed by regular reports, help managers control time and expenses. By replacing traditional stand-alone time-entry systems, managers can increase efficiency, improve regulatory compliance, and reduce under-capitalization by facilitating proper financial reporting.

## **7. Financial Management**

With EPM, financial and operating groups work together to create better financial plans, track the costs of projects, products, and assets, and ultimately understand the total cost of delivering value. The comprehensive, integrated system provides financial planning to budget and forecast planned costs and benefits, cost management to understand the planned and actual costs across both labor and capital, and a financial interoperability platform to integrate with your organization's financial systems. EPM links organizational financials, strategic objectives, and the operational delivery of products, programs and services to drive strategic alignment, measure performance in meaningful business terms, and promote overall accountability.

## **8. Change Management**

With EPM, you gain visibility into the health of your project and can understand and mitigate risk. You are able to effectively track and manage issues and changes to schedules and costs. To avoid unauthorized changes, approval cycles are built into the system to authenticate change requests. Each issue is assigned an owner, who is responsible for its documentation and resolution.

## **9. Analytics and Reporting Portal**

The Analytics and Reporting Portal is a unified environment that brings together all of Planview Enterprise's powerful reporting including Insight Analytics, Charts and Dashboards, and Business Objects in one place. The portal's innovative approach encourages people across the organization to access information relevant to them, share it with those who need it, and promote better business decisions. The portal features integration with Microsoft® Outlook, Office, Office Communicator, SharePoint and Yammer for instant communication and collaboration with project stakeholders.

## ENTERPRISE PORTFOLIO MANAGEMENT OVERVIEW

FUNCTION	DESCRIPTION	BENEFIT
STRATEGIC PLANNING	Provides a collaborative platform to define missions, objectives, strategies, and tactics; facilitates the analysis of risks and trade-offs through scenario planning; automates and manages the strategic process with built-in lifecycles	Align top-down and bottom-up planning; prepare for economic and business uncertainty and eliminate misaligned investments; ensure the right use of people and money throughout the planning process
FEATURE	ADVANTAGE	
HIERARCHICAL STRATEGIC PORTFOLIOS	Flexibly and dynamically creates investment portfolios according to funding sources, programs, resources, or other criteria	
STRATEGIC LIFECYCLES	Guides programs through the organization, collecting timely, required approvals and documents	
MULTI-STAGE APPROVALS	Defines and implements a gated approval process that involves progressively more detailed levels of information and rigor as investments are developed	

FUNCTION	DESCRIPTION	BENEFIT
INVESTMENT ANALYSIS	Examines the goals, risks, and funding of all investments in a portfolio; aligns business objectives and priorities with investment decisions; performs predictive decision modeling and scenario planning	Consistently define organizational criteria for improved investment decision making; balance innovation with sustaining work and eliminate low-value initiatives; analyze portfolios and investments and maximize financial return and business impact
FEATURE	ADVANTAGE	
SCENARIOS MANAGEMENT	Produces unlimited investment scenarios based on financial metrics, organizational capacity, and shifting schedules to assist in evaluating alternative investment portfolios	
INVESTMENT OPTIMIZATION	Analyzes investments against user-defined criteria; employs advanced optimization algorithms, including Efficient Frontier logic, to quickly identify a wide variety of possible solutions	
RANKING AND PRIORITIZATION	Ranks and prioritizes investments via user-defined metrics for better funding allocation	
REAL-TIME INVESTMENT	Uses powerful tools to analyze investments and summarize data	

FUNCTION	DESCRIPTION	BENEFIT
CAPACITY PLANNING	Matches available resources with business demands; forecasts resource (work, services, assets) capacity	Ensure people and money are focused on strategic and operational priorities
FEATURE	ADVANTAGE	
MULTI-DIMENSIONAL CAPACITY ANALYSIS	Analyze how capacity and demand align by role, resource type, department, etc. in an interactive, OLAP-like environment to identify over- and under-utilization	
INTEGRATED, DYNAMIC PLANNING	Model resource allocations dynamically to understand how investment and resource allocation decisions impact delivery schedules and cost	
INDEPENDENT PLANNING	Build an independent capacity plan that integrates with execution and models future resource allocation without impacting current state execution	

FUNCTION	DESCRIPTION	BENEFIT
DEMAND MANAGEMENT	Provides a central location where stakeholders can request work, check status, delegate requests, and review lifecycles	Easily prioritize and manage project requests; expedite response and resolution
FEATURE	ADVANTAGE	
REQUEST WORK AND DELEGATION	Captures work requests in a central location and allows the dispatcher to properly delegate work requests based on size and characteristics	
WORK REQUEST STATUS	Keeps an eye on the outcome of requests and provides up-to-date summary views of group requests	
LIFECYCLES	Monitors lifecycle status across all requests in the portfolio, provides business case templates, and supports efficient, accurate estimations for financial planning and scheduling	

# ENTERPRISE PORTFOLIO MANAGEMENT OVERVIEW

FUNCTION	DESCRIPTION	BENEFIT
RESOURCE MANAGEMENT	Provides dashboards and reporting on staff management, staff assignments, and long-range staff planning; assigns work based on roles, or individuals	Lower labor costs, improve productivity and utilization; stop short-term personnel changes from impacting strategic goals
FEATURE	ADVANTAGE	
SCOPING AND ESTIMATING	Utilizes historical data to gauge resources and time required for future projects and employs a power estimating tool with adjustable templates, which include requirements and milestones	
RESOURCE ASSIGNMENT	Determines the correct resource for a project, based on skill set and abilities, for specific periods of time	
STAFF MANAGEMENT	Enables development of a skills pipeline, cultivation of staff interests, and management of resource profiles	
FUNCTION	DESCRIPTION	BENEFIT
PROJECT MANAGEMENT	Provides a structured portfolio management framework to manage projects and resources; supplies dashboards and analytics for tracking, analyzing, and measuring performance; automates time and billing and delivers time and expense reporting	Track and report money spent and time worked against specific projects; easily identify issues, reducing the impact on delivery and reducing overruns; reduce under-capitalization. Generates extensive audit trails for better regulatory compliance
FEATURE	ADVANTAGE	
COLLABORATION	Provides discussion groups, message boards, and access points to related content in the portfolio	
SUPPORT FOR AGILE METHODOLOGY	Offers integration points for Agile including story points and status, team, sprints and sprint dates, metrics, and more	
PROJECT MANAGER DASHBOARDS AND ANALYTICS	Delivers key health and status information related to the project manager's portfolios; can be configured to individual users to give quick, high-level summaries at the portfolio, strategy, and program levels	
WORK PERFORMANCE MEASUREMENT	Evaluates work completed and progress through various metrics on projects throughout the lifecycle	
TIME AND EXPENSE REPORTING AND APPROVAL	Provides the ability to submit expenses and time reports against projects and efforts, ensures that they are reported correctly, and helps managers track and control expenditures and time spent on projects	
FUNCTION	DESCRIPTION	BENEFIT
FINANCIAL MANAGEMENT	Provides framework for performing financial planning and reporting; supplies a platform for linking execution, costs, and organizations	Create better forecasts to enable better decision making; understand true execution costs, the value provided, and the benefit received
FEATURE	ADVANTAGE	
DYNAMIC FINANCIAL PLANNING	Builds financial plans on projects, products, services, and assets/applications with the right level of financial information for the right audience for accurate budgeting, forecasting, and accountability	
COST MANAGEMENT	Integrate labor and non-labor cost planning and tracking with project management to understand the relationship between schedules, delivery, and total cost	
FUNCTION	DESCRIPTION	BENEFIT
CHANGE MANAGEMENT	Tracks and handles changes to mitigate risks	Discover and make timely adjustments to handle possible change impacts on schedules and costs
FEATURE	ADVANTAGE	
APPROVAL CYCLES	Generates an approval cycle for any necessary changes to authenticate its necessity	
FUNCTION	DESCRIPTION	BENEFIT
ANALYTICS AND REPORTING PORTAL	A unified environment that brings together all of Planview Enterprise's powerful reporting in one place	Encourages people across the organization to share information and make better business decisions
FEATURE	ADVANTAGE	
INTEGRATION WITH MICROSOFT APPLICATIONS	Ease collaboration and share information in the tools you already use including Microsoft Outlook, Office, Office Communicator and SharePoint.	
MOBILE ANALYTICS	Get mobile analytics on the Go via the Apple iPad	