

PLANVIEW ENTERPRISE FOR SERVICES RESOURCE PLANNING

Optimize Your Service-Driven Business

As a service-driven organization, your revenues come from delivering talent and expertise when and where it's needed most. That means your product is your people. How effectively you can maximize their potential, align demand and capacity, heighten responsiveness, and manage your engagement pipeline can determine a good year from a bad one.

THE PROBLEM: A PLANNING AND EXECUTION GAP

Services organizations typically operate in a workflow that extends from quote – the point at which opportunities enter the lifecycle – to cash – when service fees are invoiced. CRM solutions address the front end, with features geared toward opportunity management, sales forecasting, and demand assessment. On the back end, ERP solutions provide tools for invoicing and financial reporting.

But between quote and cash – where resources and projects must be planned and managed – those systems fall short. They don't help you efficiently prioritize resources, assign tasks to appropriately skilled personnel, maintain optimal staff levels, and derive a clear understanding of project costs and value.

What results is a planning and execution gap many try to bridge with complex, inaccurate, or manual processes, for example with weekly conference calls in which field managers share project and resource updates, which end up in a spreadsheet that doesn't provide visibility to optimize performance, revenues, and margins.

Others rely on limited features of traditional Professional Services Automation (PSA) software, which has neither the functional depth for large deployments nor true enterprise-class reporting. Still others juggle an array of disparate tools to track schedules, resources, engagements, and costs, resulting in productivity losses and wasted time. Even services-focused “bolt-ons” for major ERP solutions fall short across the project and resource management spectrum.

And at the end of the day, when a high-value client calls with an unexpected opportunity, most are still forced into the challenging routine of phone calls, spreadsheet cross-referencing, and educated guessing to ascertain which worker with the right skill set can be deployed – and how that will affect current and forecasted projects, and their associated revenue and margin.

The upshot: these approaches, and the gap they leave, promote inefficiencies that directly impact your organization's ability to respond quickly to customer and market demands, optimally align resource levels with project requirements, anticipate future resource requirements, and manage costs associated with engagements.

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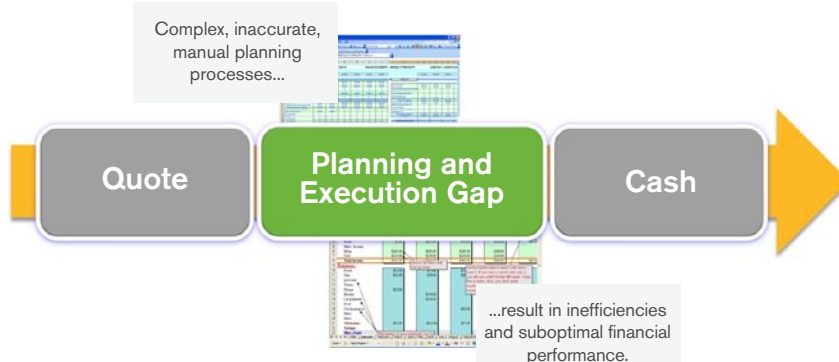
Planview Enterprise® for Services Resource Planning helps service-driven organizations optimize their businesses by closing the planning and execution gap between “quote” and “cash.”

Planview Enterprise delivers market-leading functionality in resource management and project delivery, helping you accurately balance current and forecasted demand with the resources available.

Learn more at planview.com/ServicesPlanning.

Planview Enterprise for Services Resource Planning enables you to:

- Synchronize demand with delivery capacity
- Improve resource management, drive operational excellence, and maximize revenue
- Optimize the *timing vs. availability vs. profitability* equation
- Establish financial transparency into the cost of service and project delivery



Close the gap with Planview Enterprise

What is Services Resource Planning?

It leverages the operational, planning, and analytical strengths of portfolio management to create a best-of-breed approach to resource management and project delivery.

Designed for services-driven organizations responsible for their own P&L and employing large pools of resources, the Planview Enterprise solution for Services Resource Planning bridges the planning and execution gap left by today's enterprise systems and PSA software.

Planview Enterprise streamlines inefficient processes, gives you the insights you need to optimize the resource bench for current and pending engagements, and provides the analytics required to understand resource consumption across roles, skill sets, practices, and geographies.

Advance your resource planning with proven, scalable capabilities in:

- Demand Management
- Resource Management
- Engagement Management
- Utilization Optimization
- Revenue Forecasting
- Project Portfolio Management

The industry forecast indicates that **now is the time to get ready for change:**

- The workforce becomes more remote
- Offshoring will make a comeback
- Worker shortage will continue
- Regulation will increase
- Growing challenges: adding client value, shrinking margins, and commoditization

- The 2020 Future of Staffing Report, *SI Review*, January 2011

THE SOLUTION: A MARKET-LEADING APPROACH TO RESOURCE MANAGEMENT AND PROJECT DELIVERY

Planview Enterprise extends the benefits of portfolio management to service-driven organizations, helping you balance demand against delivery to drive more revenue, and to do so more profitably.

From IT services and telecommunications giants to data processing leaders and government agencies, service organizations around the world already maximize revenues and margins with the capabilities of the Planview Enterprise solution for Services Resource Planning.

It delivers the ability to align capacity with demand, make optimal use of resources, and analyze thousands of resources throughout an organization. With this solution that seamlessly integrates with leading CRM and ERP systems, you can:

- Manage potential and active engagements equally easily
- Assess and manage demand across a broad array of projects
- Deploy cross-functional teams to deliver services to internal and external customers
- Plan resources across globally distributed teams
- Pool resources by role, expertise, and location to deploy the ideal team in every engagement
- Forecast demand and allocation across pools
- Create resource templates for common engagements
- Enable enterprise-class reporting by tying advanced analytics to resource consumption trends
- Easily deliver reliable revenue forecasts every quarter

TAKE CONTROL OF DEMAND

Without an accurate assessment of both committed and forecasted work, you frequently face costly and time-consuming fire drills: either rushing to ramp up resources for unanticipated projects, or leaving resources idle because engagements aren't meeting expectations. Both situations threaten your overall performance, efficiency and margin.

Planview Enterprise gives you the tools to accurately identify project requirements and assess the scope of engagements. It provides a single, centralized location where you can:

- Request work
- Check status
- Delegate requests
- Review lifecycles

Features such as such as automated user alerts, relevant reports and dashboards, and more, deliver powerful tools that work behind the scenes to quickly analyze business services, simplify workflow, and improve overall performance.

MAINTAIN OPTIMAL CAPACITY LEVELS

Only by accurately monitoring your organization's capacity at any given moment can you effectively balance your resources against customer demands. Rely on Planview Enterprise to:

- Understand how capacity and demand align across various resource pools
- Highlight where resources are lacking and where excess capacity exists
- Dynamically plan and deploy resources where the need is greatest or the margins are highest to get the work done most cost-effectively and to the highest standards of client satisfaction

COMMIT RESOURCES WITH CONFIDENCE

Planview Enterprise helps you ensure that the right resources are assigned to specific engagements. Meanwhile, you can optimize resources across a range of financial (costs, revenues, margin) and resource (skills, geography, non-human resources) lenses.

Create resource pools based on various attributes, such as expertise, roles, and location. Then create custom resource templates designed to address common engagement scenarios, arming you with time-saving yet relevant responses when those engagements enter the pipeline. You can also resource projects by drawing from multiple pools. These capabilities are a core part of Planview Enterprise – not an afterthought or add-on.

And with the Resource Assignment Manager built into Planview Enterprise, you get an interactive view of supply and demand so you can commit resources with confidence. This dynamic approach means that when you need to move resources in flight to accommodate higher value clients or more urgent work, you know exactly how other existing projects, offices, and revenue streams are affected, so you can optimize your backfill resource choices.

The Planview Enterprise solution for Services Resource Planning also equips you to:

- Assign work efficiently
- Develop a skills pipeline
- Cultivate staff areas of interest
- Keep staff productive and billing
- Improve forecasting through use of a framework based on roles rather than individuals
- Ensure that short-term changes in personnel don't impact ability to deliver for customers

OPTIMIZE PERFORMANCE FOR EVERY ENGAGEMENT

Planview Enterprise allows you to scope, schedule, and execute work across all of your resource pools to manage projects more effectively. Advanced analytics and reporting give you new capabilities that drive performance throughout the engagement lifecycle, so you can:

- Better understand actual costs and project value of each engagement
- Track and report time worked and expenses against specific projects
- Track and manage risks and issues such as work slippage
- Track and display performance and trend analysis information on work, resources, and KPIs
- Measure and forecast revenues by engagement, practice, office, or across your organization

The Services Resource Planning capabilities of Planview Enterprise also equip you to get quick status updates whenever you need them, so there's no waiting for the next conference call.

INTEGRATE WITH AND GET MORE FROM YOUR EXISTING SYSTEMS

Planview provides seamless integration with the CRM and ERP systems you have in place today. Through the Planview OpenSuite™ product line, Planview provides out-of-the-box interoperability between Planview Enterprise and the enterprise systems you rely on every day. This transparent platform easily delivers connectivity to more than 200 enterprise applications, like ERP and CRM, and makes integration with homegrown systems a snap.



GET THE PLANVIEW ADVANTAGE

Planview Enterprise can help you maximize resources and opportunities with a proven platform that balances demand against delivery, while you improve performance and revenues. Learn more at planview.com/ServicesPlanning.

Are Process Inefficiencies Eroding Your Performance?

If your organization is like many, you spend more time managing your processes than your resources.

The results of inefficient, unreliable processes speak for themselves:

- Demand "surprises" due to poor demand insight
- A reactive, roller-coaster resource utilization mode
- Few capabilities to establish optimal resource pools for common engagements
- Trouble managing virtual, geographically dispersed teams
- An inability to track and assess subcontractor availability
- Inaccurate revenue forecasts
- Poor integration with existing financial, CRM, and ERP systems
- Failure to consistently meet customer expectations

It all adds up to missed opportunities, chronic understaffing or overstaffing, and eroding revenues and margins.

It's time to close the gap and take charge.



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.

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