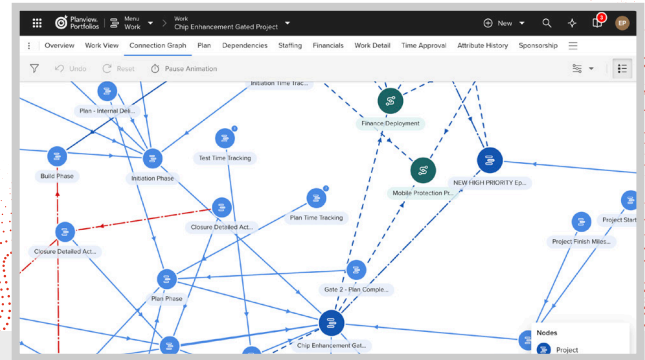


PLANVIEW® PORTFOLIOS

Realize Strategic Outcomes with Planview Portfolios



Organizations need to adapt fast, but most struggle to respond to disruption and de-risk investments. Economic headwinds make prioritization harder and slow the funding decisions on which transformation relies, while AI investment outpaces most teams' ability to prove a return. Meanwhile, leadership wants answers yesterday.

With Planview® Portfolios, executives have the confidence and the answers they need to act fast. The platform combines business and technology planning to optimize funding, capacity, and execution, so work and teams stay connected to the business outcomes. And thanks to Anvi, its embedded AI, you can generate scenarios, surface risk, and read portfolio patterns, compressing weeks of analysis into hours.



Plan Faster And Deliver On Time

Connect planning to delivery so constraints and risk surface early, and commit to dates you can keep, backed by outcomes you can prove.



Focus Capacity Where It Matters Most

Have complete visibility into all committed resources, budget, and time, so you can shift capacity to what matters before it's locked into low-value work.



Commit with Confidence Knowing All Trade-Offs

Compare initiatives side by side against risk, cost, and dependencies in minutes, not days, so you understand every trade-off before you decide.

"Planview helps us turn strategy into project deliverables. Because every single project is captured, maintained and updated, we have a fantastic overview of where we stand."

– Sebastian Büchle, PMO Lead & PPM Platform Owner at [Endress+Hauser](#)

Key Benefits



Anchor on Outcomes

Focus on the impact of your investments with OKRs that cascade goals across funding, prioritization, planning, and execution, all connected in a single source of truth.



✓ Balance Capacity Against Demand

Capacity planning weighs people and demand against strategic priorities, so managers see overcommitment and overspend before it becomes a delivery problem.



🔴 Replan Quickly with the Full Picture

Generate new scenarios in hours, not weeks, backed by an AI-driven map of strategy, work, resources, and dependencies that surfaces risks before they hit your status reports.



 Track Cost and Value from Investment to Delivery

Track cost and value from the business case to approved budget, through forecast and actuals, so the numbers stay connected from first estimate to final result.



 One Platform for all your Operating Models

Run project, product, and Agile delivery side by side, in one system, so different teams can operate without losing a single view of strategy.



✓ Drive Better Decisions with Purposeful AI

Anvi is built on 30+ years of portfolio management expertise, not a generic model, so it deeply understands data in the right context and enables better planning decisions.

Why Choose Planview Portfolios?

Planview® Portfolios empowers Technology, Transformation, Finance and Strategy leaders, and EPMOs to drive business outcomes, adapt plans as conditions change, and accelerate on-strategy delivery.

Planview is a Leader in the 2026 Gartner® Magic Quadrant™ for Strategic Portfolio Management and The Forrester Wave™: Strategic Portfolio Management Tools, Q2 2026.



Endress+Hauser 

How We Do It

✓ Strategic Alignment & OKRs

Translate high-level missions into specific investments, and cascade OKRs across portfolio, program, and team so teams focus on outcomes, not just deliverables.

✓ Scenario Planning

Build roadmaps connecting strategy to delivery, then rank investments using manual or AI-generated what-if scenarios for staffing, timing, and capacity, and see how each plays out across the portfolio before you commit.

✓ AI-powered Dependency Management

Map dependencies across your entire organization in real-time with the Connected Work Graph, surfacing critical risks and bottlenecks before they derail your delivery.

✓ Financial Planning & Forecasting

Set budgets and financial targets for every portfolio, then forecast and track actuals against them to catch cost or benefit shortfalls early.

✓ Capacity & Demand Planning

Collect and evaluate demand across the enterprise, from unstructured ideas to formal requests, to make the right trade-offs between people and money.

✓ Program & Resource Management

Plan cross-functional programs with what-if analysis, timelines, milestones, costs, and dependencies, while keeping everyone focused on the right priorities.

✓ Hybrid Work Delivery & Workflow Automation

Support Agile, Stage-Gate, collaborative, or waterfall delivery, and automate the processes for proposing, planning, and delivering work to cut manual data entry.

✓ Analytics & Reporting

More than 200 out-of-the-box reports and dashboards, plus embedded Power BI, turn portfolio data into decisions.

The Planview Value

Planview is the platform for driving enterprise execution and outcomes. It brings initiatives, investments, and resources into a continuous, connected model of the business: the actionable understanding leaders need to move decisively, keep teams and AI in lockstep, and know how their initiatives are performing. Trusted by the world's leading organizations and recognized by Gartner, Forrester, and IDC, Planview transforms how enterprises turn strategic investments into decisive action and measurable outcomes.

To learn more, watch the Planview Portfolios product demo, or visit [Planview® Portfolios at planview.com/products-solutions/products/planview-portfolios](https://planview.com/products-solutions/products/planview-portfolios)

