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BUYER'S GUIDE FOR ADAPTIVE PPM SOLUTIONS



THE EVOLUTION OF WORK MANAGEMENT

The pace of change is rapidly accelerating and impacting every aspect of work. Enterprises are facing unprecedented pressure to rapidly pivot and meet ever changing customer demands — because if they fail to consistently enable customer success, then sooner or later a competitor will.

As a result, enterprises need to re-imagine and re-invent work management in order to address these new mission critical objectives:

- **Deliver results faster:** Today's market demands require more immediate results, putting pressure on teams to work more efficiently and effectively. Introducing innovative ways to maximize productivity across the entire team, including external stakeholders, and automating mundane processes can help make every minute of work count towards meeting your strategic goals.
- **Make more informed decisions:** Keeping up with rapid changes means you're always asking whether or not the work is paying off. A single source of truth increases your visibility in real-time to help ensure that all work is aligned against key initiatives, decisions can be made promptly based on near-perfect, real-time information, and risks can be proactively managed as they arise.
- **Retain control and pivot quickly:** In this new world of work – where uncertainty and volatility are the norm rather than the exception – enterprises need to be more adaptive to remain relevant. They also need to have confidence that their systems will be flexible enough to support new business models in order for them to continuously deliver value in response to ever-changing customer demands.

Having the right adaptive PPM solution can make a pivotal difference between simply focusing on task management and being able to optimize the business impact of all investments and efforts.

GETTING TO THE ROOTS OF AN ADAPTIVE PPM SOLUTION

At its core, a comprehensive and effective adaptive PPM solution enables enterprises to achieve the three critical strategic objectives:



Maximize Productivity



Increase Visibility

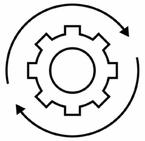


Gain Adaptability

Embedding all of these capabilities throughout the organization and across external stakeholders (e.g. vendors, clients and suppliers) is transformative and ensures that you'll be prepared to quickly address the ever-changing demands on your business.

What follows is an in-depth view for each of these critical business capabilities, along with the key features required to achieve them. As you review this list, think about how you plan to weight these factors during the selection process and let this guide help you as you evaluate different solutions that are available on the market today.

MAXIMIZE PRODUCTIVITY



Engage teams and foster focused, efficient, and effective employees — both co-located and remote — as well as external stakeholders by:

- Connecting formerly disconnected teams, aligning communications and driving collaboration.
- Supporting agile methods and multiple work preferences and styles — because not everyone works best in the same way.
- Developing unique processes for each diverse team to maximize their efficiency, while also supporting governance and standardization.
- Automating tedious and repetitive tasks so that employees can focus on high-value activities and priorities.
- Keeping the entire ecosystem of external stakeholders — such as customers, partners, suppliers and vendors — informed and aligned throughout an engagement.
- Removing redundant systems that are no longer needed.

Key Features to Look for in an Adaptive PPM Solution:

- Collaboration tools that extend across multiple systems, like email, to reach users even when they're not logged into the system, while retaining the context of each discussion associated with the project.
- Configurable workflows, approval processes, customizable rules and fields, dynamic templates, and automatic notifications via email.
- Centralized file management that creates a system of record for all related project information (files, videos, discussions, meeting minutes, notifications, etc.).
- Mobile apps that are functional and feature-rich, as well as intuitive and easy to use.

INCREASE VISIBILITY



Establish effortless transparency to enable fast, accurate decision making and proactively reduce risks by:

- Enabling PMOs and other decision-makers to see the big picture, so they can ensure resources are optimized and aligned to goals and understand the impact of any adjustments in advance of making changes.
- Making all relevant and updated work-related data available in real-time, so project managers can act on information vs. spending valuable time aggregating data.
- Ensuring that objectives and performance metrics are connected to project execution, which retains alignment and informs everyone of new priorities and how their work creates an impact.
- Supporting effective contingency planning to understand the effect of potential adjustments (e.g., What is the impact if we need to cut the budget by 10%? Where do we need to invest in more people to meet upcoming demand? What's the best approach for getting more resources to help us get this critical project done faster?).
- Centralizing access to real-time data across all workstreams and for all types of work — structured and unstructured, planned and ad hoc, waterfall and agile — that can be integrated with other mission critical systems (e.g. financials) to provide richer context.
- Ensuring that visibility spans across all work-related data and includes permissioned access for all critical stakeholders, including external contractors and suppliers.

Key Features to Look for in an Adaptive PPM Solution:

- Customizable reporting and dashboards, along with shareable links and automatically scheduled status report generation, that provide insights about work progress, potential risks, expected results and goals.
- A suite of planning tools such as portfolio roadmaps, capacity planning, program and project views.
- Portfolio planning and optimization to ensure all top priority projects are being supported and understanding the impact when priorities shift.
- The option to add custom fields to capture critical data across all projects consistently and make better, faster decisions.

GAIN ADAPTABILITY



Pivot to adapt to continuous change, optimize customer success and maximize revenue opportunities by:

- Continuously evaluating your strategies to keep delivering value to meet new market needs.
- Linking goals to execution to maintain alignment and keep teams focused on business outcomes and how their work contributes to the organization's success.
- Aligning and re-aligning work based on changing business objectives and priorities — without unleashing chaos as the organization shifts.
- Defining and tracking against critical business metrics and key performance indicators.
- Implementing new processes and workflows for each team as business models change without incurring vendor costs or facing delays.
- Centralizing work management processes in one solution to minimize redundancies and increase data quality and access in real time.

Key Features to Look for in an Adaptive PPM Solution:

- A workflow engine that provides the control needed to configure (and reconfigure when needed) unique processes for diverse teams, all in the same system.
- Highly configurable user interfaces at every level, which increases engagement and enables transparency throughout the enterprise.
- Seamless and secure integration with other task management systems in the environment, which ensures alignment and that the right work is being done.
- Integrations that can connect to any source or destination system using APIs or pre-built connections.

ADDITIONAL CONSIDERATIONS

Enterprises also need to ensure that the adaptive PPM solution they choose delivers additional business benefits that go beyond the day-to-day user requirements. This includes having a strong, long-term partnership with the vendor which is vital to ensure you receive ongoing value from the investment.

Rapid Time to Value

An adaptive PPM solution must accelerate time to value, so that teams across the enterprise can quickly start to improve performance, processes, and results. Key aspects to focus on include:

- Out-of-the-box reports, dashboards, views and templates for common use cases, which can all be easily updated as required.
- Intuitive interfaces and layouts.
- Customizable homepages that allow team members to quickly access the information that matters most to them.
- Localization options (e.g., language and multi-currency reporting).

Robust Information Security

An adaptive PPM solution needs to provide a level of security that protects critical company data while minimizing business risk. The solution must adhere to rigorous industry recognized security standards and practices that are backed by a multi-tiered approach that includes:

- State of the art technology, combined with strict procedures, to protect privacy and secure all documents and data at rest and in motion.
- Software architecture designed to safeguard against security breaches – no matter the source.
- Adherence to relevant and industry-leading regulatory compliance, including local guidelines (e.g. GDPR, UK-G Cloud) and certification standards (e.g. ISO/IEC 27001:2013, SOC 2, SSAE16).
- Guaranteed service availability and reliability so there is no interruption of service or loss of data.

Comprehensive Support

Enterprises need multiple layers of support from an adaptive PPM solution vendor in order to accelerate time to value and address ongoing changes and needs. This should include:

- 24/7 access to a trained, knowledgeable and responsive customer support team who understand the solution inside and out.
- An extensive library of on-demand learning tools, such as webinars, tutorials, and knowledge base articles that cover workflows, customizations, features, best practices, and so on.
- A knowledge portal that enables customers to ask questions and make suggestions, with responses available to the entire community.
- Ongoing educational webinars and interactions to remain current with product features.

GETTING PREPARED

The following checklist will help your teams prepare for and ultimately choose the right adaptive PPM solution for your enterprise:

- ☐ Identify all of the teams that may use the system, including which ones will be among the first wave of users.
- ☐ Determine if teams have similar use cases, or will need different functionality (if the latter, then make sure to cover all use cases during vendor demos).
- ☐ Identify the decision-making committee members, their goals, and success criteria.
- ☐ Determine the order in which the teams will be onboarded (i.e., identify the most critical functionality that will be needed right away).
- ☐ Establish clear decision-making criteria to ensure consistency across all solutions being evaluated.
- ☐ Review the various guidelines industry analysts have published on essential features/capabilities to ensure you haven't overlooked something.
- ☐ Determine how to weigh all of the factors under consideration and make sure that this is done before vendor demos start.
- ☐ Prepare a list of questions to ask during vendor demos. Inquire about current issues and future needs
- ☐ Get references for shortlisted vendors to tap into their experience with both the solution and the vendor.
- ☐ Explore customer reviews and ensure they are unbiased and verified. A few good sources for adaptive PPM reviews include **G2**, **Gartner Peer Insights**, and **Capterra**.
- ☐ Evaluate the "fit" with shortlisted vendors to determine if they will help enable an immediate path to value and can also offer a solution that will grow with your enterprise to continue to deliver value in the future.
- ☐ Prepare to justify the cost of acquiring a new solution by thinking about the cost of doing nothing vs. the expected advantages and benefits

GETTING STARTED

Planview's adaptive PPM solution enables modern PMOs to maximize productivity, increase visibility, and drive engagement for their organizations so that they can quickly adapt to changing market demands with maximum impact.

Discover why Planview is trusted and recommended by leading enterprises around the world for driving agility and ensuring work stays aligned with your company's strategy and business priorities. Watch the on-demand role based demo to learn more.

GET STARTED TODAY

ABOUT PLANVIEW

Planview connects work across the enterprise, turning ideas into strategies, plans, and action. With Planview, organizations can work the way they want to work and have real time visibility into all their workstreams. This keeps teams focused on the things that matter, delivers results faster, and helps them exceed their company goals and customers' expectations. Thousands of global customers, such as Jones Lang LaSalle (JLL), Siemens Energy, De Beers, Ricoh, Box, and Shaw Industries, across a wide variety of industries in 124 countries, rely on Planview to help them achieve their business goals.

To learn more, visit www.Planview.com

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