

## DATA SHEET

# Planview Clarizen

## Enterprise Work Management

Today's organizations are in a state of transition, facing a shifting business environment with a lack of visibility across work and resources to deliver on commitments, forecast consistently, and meet customer expectations.

Planview Clarizen™ provides on-time delivery that drives efficiency and profitability. It brings visibility into all projects and engagements, agility to navigate change, and improved confidence across the services lifecycle, empowering teams to do their best work, no matter how they work. Keep teams focused on the things that matter, delivers results faster, and exceed company goals and customer expectations.



## Enterprise Work Management to Achieve Project and Work Success

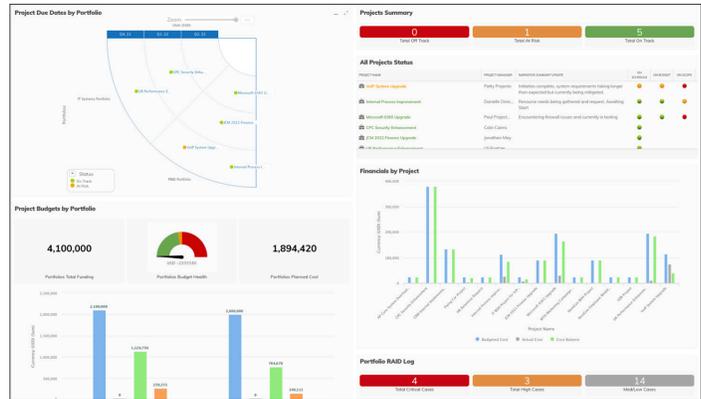
Stop chasing delivery and execution across disparate tools - get the visibility needed for informed decision making by streamlining projects and work into a single source of truth. Planview Clarizen gives you the ability to manage work portfolios through reporting and dashboards, top-down planning, execution and delivery, work collaboration, and adaptability as you scale.

- Reporting and Dashboards:** Get the visibility needed to manage, track, report, and measure status on all work for better decision making
- Planning:** Take a top-down approach to ensure work is focused on the right things, at the right time
- Execution and Delivery:** Have confidence in delivering projects and work on-time, on-budget
- Work Collaboration:** Empower every team member to deliver by working the way they work best, whether traditional projects, agile, or hybrid
- Adaptability:** Configure, automate, and scale as you grow and pivot quickly when business needs change

## Increased Visibility with Reporting and Dashboards

Visibility is power. Centralize relevant data and information for all projects and work in a single place to make decisions and accelerate time-to-value, quickly and effectively. Ensure the status of projects and engagements are on track.

- **Highly configurable dashboards and out-of-the-box reports:** Quickly understand all aspects of individual projects and streamline stakeholder communications with best-practice reporting
- **Interactive, auto-updated widgets:** Embedded or linked with more contextual information for executives and stakeholders without needing to log into Planview Clarizen
- **Slide Publisher:** Save valuable time by automatically creating up-to-the-minute status reports in your own company branded PowerPoint template

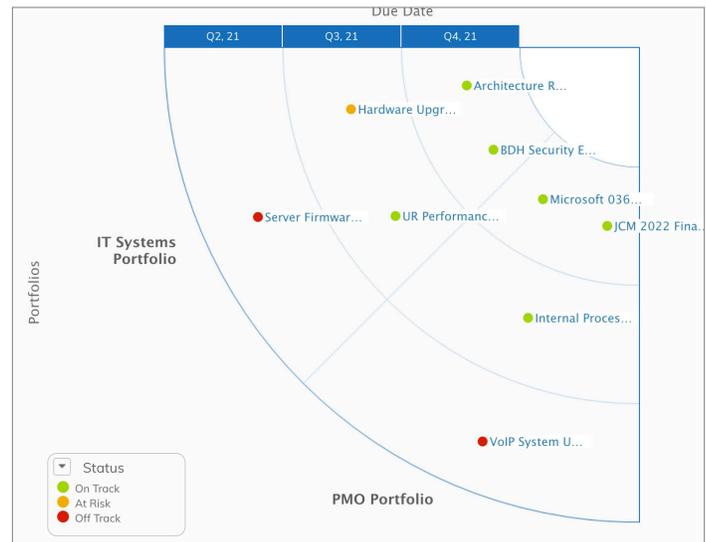


Executive management dashboards give one-click access into requests, projects and work, resources, portfolios, and how all pieces come together

## Prioritize Work with Top-Down Portfolio Management and Planning

Take a top-down approach to ensure the organization is focused on the right things, at the right time. Strategically align projects to achieve business goals and streamline resource planning to meet internal and client work requirements.

- **Portfolio Management:** Visualize aggregate work across teams, projects, initiatives, and time to identify risks and deliver greater impact
- **Financial Management:** Easily track relevant actuals for quicker, more accurate billing (whether labor or non-labor, CAPEX vs. OPEX, billable vs. non-billable), progress, utilization, cost management, and financial performance
- **Roadmaps and Opportunity Planning:** Visualize dependencies, sequencing, and a timeline for plans. Forecast pipeline opportunities and demand to appropriately plan work
- **Goal Management:** Deliver outcomes more effectively by tracking KPIs aligned to goals, objectives, and targets



Understand the relationship between all work and projects within portfolios, and how they fit into the overall strategy.

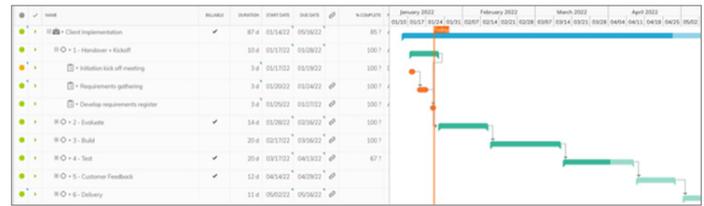
| Project | Priority | All Projects | Name                                   | Department | Contract Value | Opportunity | Start Date | End Date | Status   | Approved Budget | Approved Budget |
|---------|----------|--------------|--|------------|----------------|-------------|------------|----------|----------|-----------------|-----------------|
| 1       | High     | Open         | Architecture System for Implementation | Arma LLC   | 80,000         | Critical    | 10/18/20   | 10/18/20 | On Track | 100.0           | 100.0           |
| 2       | High     | Open         | Customer Site Implementation           | Arma LLC   | 17,000         | Normal      | 08/01/21   | 07/01/21 | At Risk  | 100.0           | 100.0           |
| 3       | High     | Open         | HRM Migration and Upgrade              | Arma LLC   | 100,000        | Normal      | 08/01/21   | 01/01/22 | At Risk  | 100.0           | 100.0           |
| 4       | High     | Pending      | System One Upgrade                     | Arma LLC   | 50,000         | High        | 02/01/21   | 1/26/21  | At Risk  | 100.0           | 100.0           |
| 5       | High     | Pending      | Project Management System Transition   | Arma LLC   | 40,000         | Normal      | 08/01/20   | 07/01/21 | At Risk  | 100.0           | 100.0           |
| 6       | High     | Pending      | Arma Customer Project                  | Arma LLC   | 40,000         | Normal      | 10/01/20   | 08/18/21 | At Risk  | 100.0           | 100.0           |
| 7       | High     | Pending      | Integration Project                    | H&M Partn. | 40,000         | Normal      | 12/01/20   | 07/01/22 | At Risk  | 0.0             | 400.0           |
| 8       | High     | Pending      | Arma Service Delivery                  | Arma LLC   | 300,000        | High        | 08/13/21   | 07/01/21 | At Risk  | 100.0           | 100.0           |
| 9       | High     | Pending      | Project for Estimation Example         | H&M Partn. | 75,000         | Normal      | 08/01/21   | 07/01/21 | At Risk  | 100.0           | 100.0           |
| 10      | High     | Pending      | System Project                         | Arma LLC   | 40,000         | Normal      | 08/01/21   | 08/01/21 | At Risk  | 100.0           | 100.0           |
| 11      | High     | Pending      | Technology SPOT System Project         | Arma LLC   | 40,000         | Normal      | 08/01/21   | 08/01/21 | At Risk  | 100.0           | 100.0           |

Track projects and work in one place. See all opportunities, roll-up pipeline forecasts, prioritize, and plan all work.

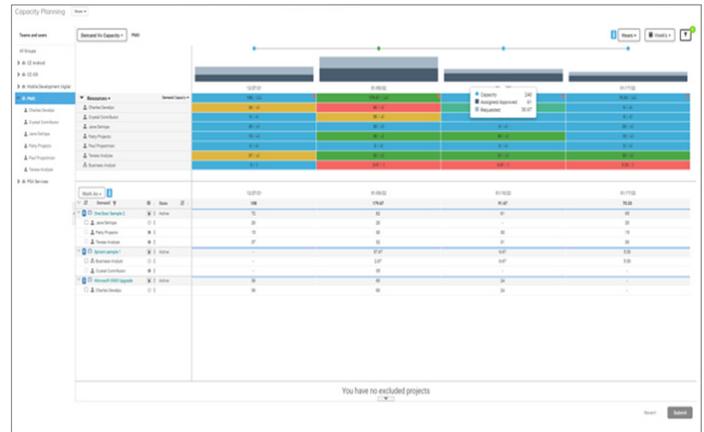
## Confidently Deliver Project and Work On-Time, On-Budget

Clarizen offers a complete picture across demand, resources, projects, and work to deliver on-time and on-budget.

- **Project Management:** Quickly establish a timeline with milestones, due dates, deliverables, and interdependencies with prebuilt templates
- **Demand Management:** Objectively qualify every work request, factoring resource constraints and schedules into the process
- **Resource Management and Capacity Planning:** Make informed decisions on projects and work based on resource capacity and utilization to meet current and future demands
- **Resource Optimization:** Meet demand and increase billable utilization by proactively optimizing current and future resource availability and skills across the organization
- **Time and Expense Management:** Improve overall forecasting with accurate progress, time spent, utilization, and expense metrics; submit time without ever leaving Microsoft Teams or Slack



Identify milestones, build a multi-level work breakdown structure, and manage dependencies, with a project dashboard.

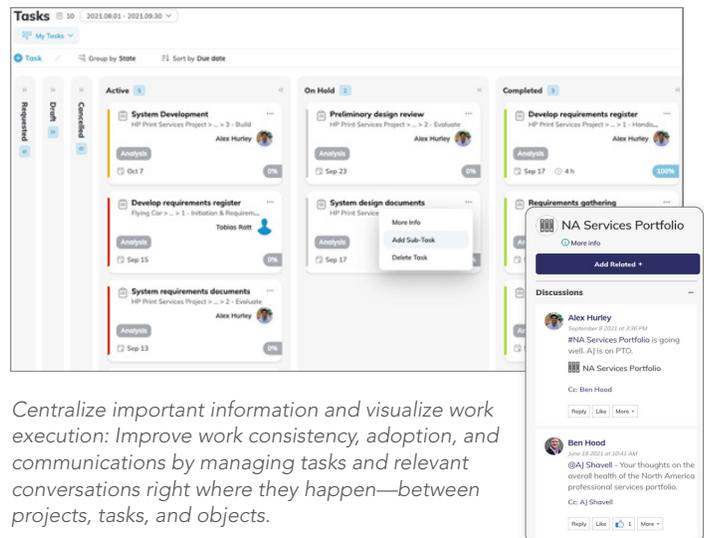


Get a clear picture of current and future work demands. Visualize resource constraints, adjust overallocations, and reassign work.

## Empower Teams to Accelerate Delivery, No Matter How They Work

Embrace multiple and different ways of working with collaborative capabilities that provide the right support for the right type of work. Empower teams to deliver however they work best and ensure visibility up to the portfolio.

- **Flexible Team and User Experience:** Support your teams and how they want to work, from traditional projects, services delivery, lean-work development, hybrid mix of approaches, or anywhere in between
- **Personalized Workflows and Task Management:** Keep teams organized with workspace boards and create custom stages to reflect team workflows, ensuring workloads are handled quickly and efficiently
- **Real-Time Collaboration:** Easy-to-use social-style discussions at any level of work help connect team members and stakeholders to accelerate the delivery of work



Centralize important information and visualize work execution: Improve work consistency, adoption, and communications by managing tasks and relevant conversations right where they happen—between projects, tasks, and objects.

## Adapt, Integrate, and Automate for Growth and Change

Scale and pivot when business needs or processes change. Seamlessly integrate and configure core applications your business relies on every day and reconfigure at any time.

- **Extendable Configurability:** Support daily processes and unique organizational needs with easy to configure automated workflows, validation rules, custom fields, and more. Customize your user experience and gain more control over how your organization views and manages work with a clean, intuitive interface
  - **Connect Your Existing Systems:** Centralize your organization's most important applications and data with out-of-the-box integrations with critical CRM and financial systems like Salesforce, Tasktop, SAP, Oracle, API/laaS into NetSuite, QuickBooks, and other HR tools
  - **Planview Clarizen and Tasktop Connector:** Drive cross-team alignment, visibility, and coordination into agile and hybrid work delivery with a bi-directional synchronization between Clarizen and Jira or other agile third-party tools
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## Accelerate Time to Value and Results with the Planview Customer Partnership

Planview offers a variety of services and programs to enable your success from day one throughout your customer journey.



UNIQUE PROGRAMS ESTABLISH LONG-TERM RELATIONSHIPS,  
ENSURE MUTUAL SUCCESS, AND LOWER RISK.

- **Planview Clarizen QuickStart:** Outcome-focused, adoption driven implementation package offers a low risk and fixed-price approach to fast, successful rollouts with the right capability profile for your needs
- **Planview Customer Success Center:** One place for all Planview training, enablement programs, best practices, and more — everything you need to get the most from Planview Clarizen and speed time to value

## Projects and Work Management with Planview Clarizen

Clarizen is Planview's Enterprise Work Management offering that drives efficiency and profitability across PMOs, services delivery teams, and product companies.

### Building the Future of Connected Work



**Focus on what matters most**

&

**Empower teams to do their best work**

Provides PMOs with capabilities for efficiency and visibility into all work and demand, aligning resources to the highest priority work, and flexibility to support changing business processes, to deliver projects at speed.

Provides professional services organizations with the capabilities to execute projects and work with confidence and efficiency, driving growth and profitability by automating the entire opportunity-to-revenue lifecycle.

Provides product companies with project and work capabilities to drive innovation, reduce the total cost of development, and accelerate time-to-market to optimize the value of the product portfolio.

### Getting Started with Planview Clarizen

Planview Clarizen is the ideal solution to help your organization get to the next level of success for project and work delivery. Achieve fast time-to-value benefits, no matter where you are on your journey.



To learn more about Planview Clarizen, visit [Planview.info/Clarizen](https://planview.info/Clarizen).  
For a deeper dive into the product, [watch a demo](#).