FINANCIAL SERVICES & BANKING

planview®

Deliver Innovation at Speed

Are you truly equipped to compete against the technology companies disrupting your market?

With 78%[1] of consumers now favoring digital banking over in-person experiences, financial services companies face an urgent challenge: adapt or risk falling behind. Legacy business models are being outpaced by agile competitors, and customer expectations are evolving faster than ever. Time is running out, but within this rapid change lies a critical opportunity. For over 35 years, Planview has empowered financial services organizations to innovate and thrive by delivering the cutting-edge software essential for survival in today's market.

Deliver seamless digital experiences to market faster	**Boost team productivity and efficiency**	**Navigate risk and tradeoffs amidst regulatory complexity**

"The teams are committed, excited and engaged and we're seeing culture improvements because every engineer can now see how their work impacts business delivery and helps support an effective DevOps culture."

– Paul Littlefair, Bank of New Zealand

Key Benefits

Top Line Growth
Find hidden capacity for innovation and constantly delight customers with new features and products.

New Market Opportunities
Gain insight into the impact of changes, allowing for quick pivots when market conditions or business strategies shift.

Data-Led Decisions
Use end-to-end data from the entire software delivery lifecycle to drive priorities and tradeoffs.

Faster Time-To-Value
Accelerate software delivery by uncovering hidden obstacles, automating information flow, and making handoffs smoother at every stage.

Enhanced Productivity
Balance demand with team capacity by eliminating rework and enabling developers to stay focused on strategic work.

Proactive Risk Management
Ensure your customers stay protected by maintaining a consistent, dedicated focus on essential regulatory compliance and critical tasks.

Why Choose Planview?

Planview enables financial services organizations to deliver the right software faster through end-to-end data-driven insights, complete visibility into the software delivery lifecycle, and alignment between business and technology leaders.

How We Do It

✅ **Single Pane of Glass Visibility**
A transparent view across every stage of the software delivery lifecycle from ideate to operate.

✅ **Smarter Tradeoffs**
Balance demand with actual team capacity to reduce rework, improve quality, and prioritize revenue-generating initiatives.

✅ **Data-Driven Approach**
Connect strategy to software delivery with consolidated outcome-focused metrics that reveal problem areas and guide decisions.

✅ **Pivot on a Dime**
Real-time insights and actionable recommendations enable flexibility and adaptability in response to changing market forces and customer expectations.
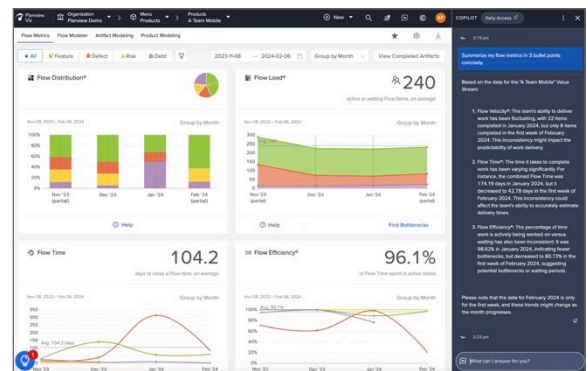
✅ **Powerful Connectivity**
Integration with 60+ enterprise applications and tools, facilitating seamless communication, automation, and collaboration across departments and systems.

✅ **Shift from Project to Product**
Leverage end-to-end data and leading indicators to adopt the product-operating model that is the foundation for technology companies' success.

Planview can help financial services and banking organizations improve operational efficiency, reduce costs, mitigate risks, and drive growth and innovation in today's dynamic and highly regulated environment.

To learn more, visit **https://www.planview.com/lp/pc/deliver/finserv/**

Planview Viz uses Copilot's generative AI to provide insights into the health of your software delivery lifecycle.

1. Forbes Advisor: 2022 Digital Banking Survey

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