

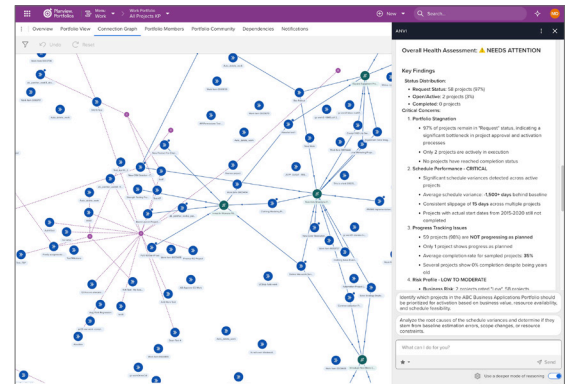
Planview Anvi™ for Portfolio Management: AI that Accelerates Strategic Outcomes

Anvi helps portfolio teams prioritize work, optimize resources, and deliver outcomes with confidence.

Transform Planning and Delivery with Planview Anvi

Portfolio leaders face constant pressure to deliver results amid shifting priorities, constrained resources, and increasing complexity. Planview Anvi is your AI for Connected Work, applying embedded portfolio expertise and predictive intelligence across strategy, projects, programs, and resources to surface risks and opportunities while guiding more confident prioritization decisions.

Whether it's optimizing portfolio health, managing resources, identifying risks and dependencies, or driving alignment, Anvi strengthens and supports the core portfolio decisions that matter most.



HOW ANVI SUPPORTS CORE PORTFOLIO MANAGEMENT USE CASES

Portfolio Health

Anvi delivers smarter portfolio health visibility by bringing together performance, KPIs, dependencies, and team sentiment to highlight where delivery is drifting and why.

Anvi helps support:

- Health Assessment
- Alignment Checks
- Risk & Gap Identification

Resource & Financial Optimization

Anvi provides actionable insights into resource allocation, dependencies, and financials so portfolio leaders can spot bottlenecks, protect critical work, and ensure investments stay aligned to strategy.

Anvi helps support:

- Resource Planning
- Financial Optimization
- Trend Analysis

Risk & Dependency Management

Anvi analyzes relationships across initiatives, teams, and milestones to reveal cross-project risks and dependencies so leaders can act early to protect timelines and outcomes.

Anvi helps support:

- Risk Identification
- Dependency Assessment
- Mitigation Planning

Visibility & Communications

Anvi quickly turns complex portfolio data into clear, tailored updates so leaders and teams stay aligned on priorities, risks, and outcomes without hours of manual reporting.

Anvi helps support:

- Priority & Risk Focus
- Stakeholder Communication
- Insight Summarization

Prioritization

Anvi accelerates portfolio prioritization by analyzing initiatives, highlighting critical dependencies, and surfacing trade-offs in minutes, giving portfolio leaders fast, data-informed visibility into what to prioritize next.

Anvi helps support:

- Demand Prioritization
- Trade-Off Analysis
- Scenario Planning

Governance & Compliance

Anvi makes it easier to apply consistent policies and standards across your portfolio by using your guidance documents and project data to highlight gaps, flag issues, and suggest improvements.

Anvi helps support:

- Policy Guidance
- Compliance Checks
- Data Quality

HOW ANVI SUPPORTS CORE PORTFOLIO MANAGEMENT USE CASES

See how Anvi supports each core portfolio management use case, including how it works behind the scenes and example questions you can ask to get immediate, portfolio aware insights.



PORTFOLIO HEALTH

Anvi analyzes initiative status, KPIs, dependencies, and team updates to detect patterns that signal drift, misalignment, or emerging risk across the portfolio.

Questions you can ask Anvi

Health Assessment

- Give me a heat map showing which projects are red, yellow, and green.
- What is the overall health status of my portfolio?
- What are the key risks and mitigation plans for the red and yellow projects?

Alignment Checks

- Are there any projects that are misaligned with my strategic goals and intent? If there are any misalignments, rank misalignments by highest concern and articulate clearly how and why it is misaligned with my objectives. Then provide recommendations on next steps.
- What trends do you see in my portfolio that I should be aware of?
- Which projects are contributing most to our strategic objectives this quarter?

Risk & Gap Identification

- Give me a heat map showing which projects are red, yellow, and green.
- What is the overall health status of my portfolio?
- What are the key risks and mitigation plans for the red and yellow projects?



RESOURCE & FINANCIAL OPTIMIZATION

Anvi analyzes resource assignments, workload distribution, dependencies, and financial signals across the portfolio to highlight overloaded teams, capacity gaps, budget risks, and optimization opportunities.

Questions you can ask Anvi

Resource Planning

- Who is working on <specific project> and what are they assigned to?
- Which team members are overloaded and need workload adjustment?
- Do we have adequate coverage for <specific task> starting next week?

Financial Optimization

- Analyze my project's budget variance and forecast completion costs.
- Identify opportunities to optimize resource allocation across my program.
- If we need to accelerate [project name], which resources could we reallocate?

Trend Analysis

- Show me the trend of schedule variance across all projects over the past 4 weeks.
- Based on our project pipeline, what resource gaps do we need to address next quarter?
- Identify opportunities to optimize resource allocation across my program.



RISK & DEPENDENCY MANAGEMENT

Anvi scans project data, dependencies, and signals across the portfolio to detect emerging risks, map critical dependencies, and connect issues to potential mitigation options so leaders can act before problems escalate.

Questions you can ask Anvi

Risk Identification

- What are the emerging risks across my portfolio initiatives?
- Which risks could impact delivery timelines or budget forecasts?
- What corrective actions could mitigate the highest-priority risks?
- Summarize the risks and recommended actions for leadership reporting.

Dependency Assessment

- What trends do you see in my portfolio that I should be aware of?
- Which projects are contributing most to our strategic objectives this quarter?
- Analyze my portfolio mix by project type, risk level, and resource allocation.
- Which dependencies across projects are most at risk of causing delays?

Mitigation Planning

- What is the overall health status of my portfolio?
- For those projects at risk, what are the specific risks causing the issues?
- Which resources are involved in these conflicts and what are my options to resolve them?
- Provide action items for me and my team, and write an executive summary explaining these issues and recommended actions for my leadership team.



VISIBILITY & COMMUNICATIONS

Anvi synthesizes complex portfolio signals into role-based views and narratives, surfacing what matters most and generating ready-to-use updates so portfolio leaders can keep stakeholders aligned.

Questions you can ask Anvi

Priority & Risk Focus

- What are the top 5 tasks I should focus on today based on criticality?
- Show me all inter-project dependencies that need attention today.
- Which milestones are due this week across all my projects?
- Have any new risks emerged that I need to address immediately?

Stakeholder Communication

- Which projects should I be most concerned about today?
- For each of these concerning projects, what trends led to the current state?
- What are the downstream impacts if these trends continue for another 2 weeks?
- Create stakeholder talking points that explain the situation, impacts, and what actions we're taking.
- Now summarize those talking points into a 2-minute elevator pitch to the CEO.

Summarization & Insights

- What should I report to stakeholders about my portfolio's current status?
- Create talking points for my leadership meeting about top achievements and challenges.
- Draft a portfolio status update highlighting progress, risks, and upcoming milestones.
- Generate a daily standup agenda highlighting blockers and dependencies.
- Prepare a concise update for my stakeholder meeting this afternoon.



PRIORITIZATION

Anvi pulls live portfolio data on initiatives, dependencies, and constraints, then compares options and surfaces the factors driving different prioritization choices.

Questions you can ask Anvi

Demand Prioritization

- Which projects would contribute most to our strategic objectives next quarter?
- Analyze my portfolio mix by project type, risk level, and resource allocation
- Provide me recommendations that maximize ROI to cost.

Trade-Off Analysis

- What is the overall health status of my portfolio?
- For those projects at risk, what are the specific risks causing the issues?
- Which resources are involved in these conflicts and what are my options to resolve them?

Scenario Planning

- For this portfolio create three scenarios for what should be continued or discontinued or adjusted: aggressive growth, balanced, and conservative. Show resource allocation and expected outcomes for each.
- Generate a what-if scenario showing portfolio impact if <<key strategic initiative>> gets delayed by <<X time>>
- Create a scenario that optimizes our portfolio for maximum strategic value delivery within current resource constraints



GOVERNANCE & COMPLIANCE

Anvi uses your uploaded policies, standards, and guidance documents together with portfolio data to answer governance questions, check work against internal rules, and flag missing or low-quality data that could weaken decisions or business cases.

Questions you can ask Anvi

Policy Guidance

- What is our correct approval process for new initiatives?*
- Which of our internal policies apply to this project type?*

Compliance Checks

- Does this project plan meet our internal review standards?*
- Based on our policies, are there any gaps in compliance for this initiative?*

Data Quality

- Analyze my portfolio for projects that have missing or low-quality data.*
- Based on our policies, provide guidance and specific recommendations on what I need to fix.*
- Analyze my processes and data across my portfolio and projects. Provide suggestions on how I could improve my processes and/or what specific data enhancements would help me improve my insights.

*Note: The indicated prompts assume your organization's governance and policy documents have been uploaded to Anvi.

Learn more about Planview Anvi for Portfolios at the [Planview Customer Success Center](#)