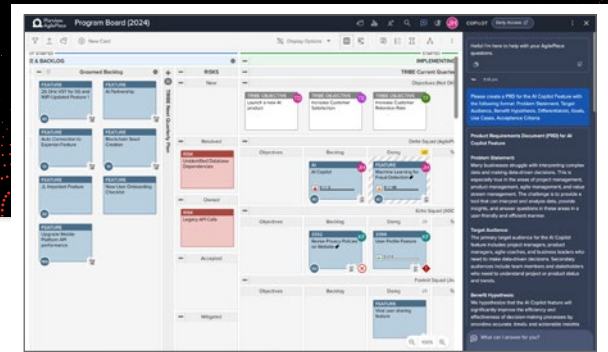


FINANCIAL SERVICES & BANKING

Accelerate On-Strategy Delivery



Can you act fast enough when new opportunities arise?

Financial Services companies are grappling with change across multiple vectors: from evolving market dynamics, fierce competition, and changing customer expectations, to new business models, shifting company strategies, and entirely new ways of working. Where there's change, there's also opportunity. Planview is uniquely positioned to help organizations streamline delivery of transformative strategic initiatives and enable teams to do their very best work.



Move faster to market to deliver world-class customer experiences



Optimize efficiency while building digital-first teams



De-risk strategic bets within a complex regulatory environment

"We had to get faster and more efficient in delivering new capabilities to allow us to be more competitive in the marketplace. Planview gave us that capability."

– VP, Huntington National Bank

Key Benefits

✓ Time-to-value

Bring digitized products and services to market faster.

✓ Top line growth

Achieve new sources of revenue by meeting customer expectations.

✓ Seize market Opportunities

Pivot and replan with agility.

✓ Employee Engagement

Work environment supports collaboration and high productivity.

✓ Data-led decisions

Improve strategic initiative investments backed by real-time data.

✓ Decreased risk exposure

Quickly understand and address external and internal risks.

Why Choose Planview?

Planview enables financial services organizations to connect strategy with execution through agile planning, data-driven insights and trusted support.



How We Do It

✔ Single Pane of Glass Visibility:

A centralized view of all strategic initiatives, from conception to outcomes, providing transparency and alignment across the organization.

✔ Alignment of Strategy and Execution:

Cascade and roll up objectives and key results (OKRs) to ensure that strategy informs execution and vice versa, fostering adaptability and alignment throughout the organization.

✔ Data-Driven Approach:

Utilize metrics focused on customer value to guide decision-making, reveal problem areas, and optimize investment for speed, velocity, and quality.

✔ Planning Agility:

Utilize dynamic planning and prioritization tools, enabling flexibility and adaptability in response to changing market forces and customer expectations. Real-time scenario planning allows for better decision-making amidst uncertainty.

✔ Powerful Connectivity:

Integration with various enterprise applications and tools, facilitating seamless communication and collaboration across departments and systems.

✔ Shift from Project to Product:

Leverage leading indicators and outcome-focused metrics to link business strategy and OKRs to the work of software delivery. Optimize software development processes with end-to-end data and aggregate metrics across team of teams.

The Planview Platform 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 business environment.

To learn more, visit <https://www.planview.com/lp/finserv-na/>

