

DATA SHEET

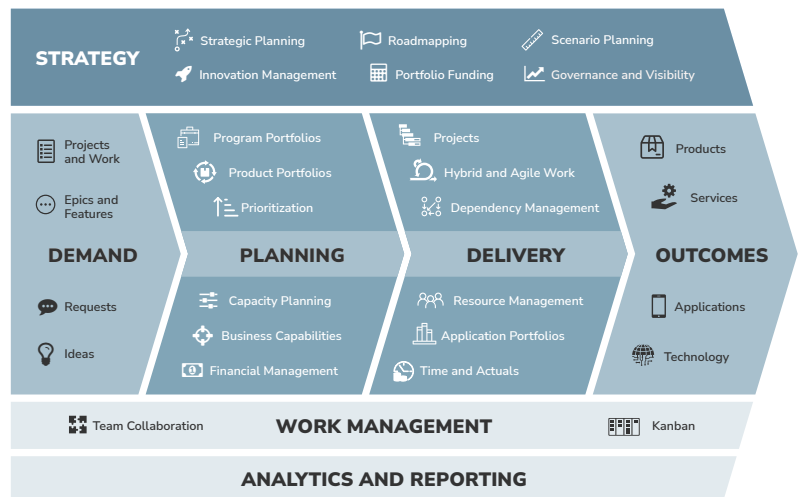
Planview Portfolios

Enterprise Portfolio Management and Work Delivery Spanning Traditional, Agile, and Hybrid Approaches

Business leaders aspire to confidently drive change that advances their strategic objectives, but resource constraints and bottom-line pressures often cause mismatched plans and operations. The result: people are not focused on the right work, money is misspent, time is wasted, and opportunities are lost.

Creating the interconnected products and services that move your business forward requires continually assessing and evolving your business capabilities while directing cross-organizational coordination between strategy, work, people, technology, and outcomes.

Planview® Portfolios is a top-rated enterprise-wide portfolio planning and delivery solution that enables strategy execution, project portfolio management, hybrid portfolio management, product portfolio management, and enterprise architecture. With Planview Portfolios, you can create organizational focus on the strategic outcomes that matter.



Integrate Strategy, Planning, Delivery, and Outcomes with Planview Portfolios

To bring your strategy to life, fuel innovation, and drive digital transformation, Planview Portfolios orchestrates all work and resources dynamically through integrated portfolios across projects, programs, people, products, technology, and capabilities, within a common user experience. Your organization can quickly iterate and adapt, achieving higher levels of business performance. Portfolios facilitates:

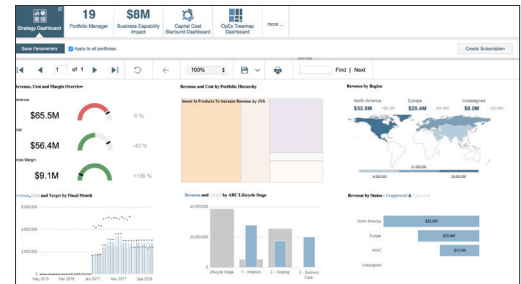
- **Strategy:** Translate strategy on an organization-wide, cross-functional scale with roadmaps and financials
- **Demand:** Collect and evaluate demand across the enterprise from unstructured ideas to formal requests, all in one place
- **Planning:** Plan portfolios, optimize resources – people, money, technology – and advance business capabilities to operationalize the strategic roadmap
- **Delivery:** Manage and execute all types of work by efficiently and effectively leveraging resources and technology
- **Outcomes:** Coordinate delivery and benefits realized from the products, services, and other outcomes that achieve strategic objectives
- **Work Management with Planview:** Provide Agile, hybrid, and collaborative tools so teams can deliver their best work, no matter how they work
- **Analytics and Reporting:** Make informed decisions every step of the way and provide C-level performance visibility and governance

1. Drive Your Strategic Plan

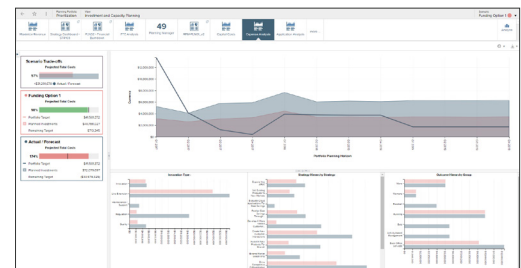
Translating strategy into delivery requires a dynamic plan that you can manage across the organization.

With Planview Portfolios, determine what business capabilities your goals require, assess their current state, determine gaps, and define investments. Build scenarios that optimize funding and resource allocation across potential investments and initiatives and compare trade-offs to drive better decisions.

Set direction with integrated roadmaps to implement strategic, operational, and technology changes. Use programs to develop cross-functional plans, track status, and measure progress.



Gain a complete view of portfolio performance with enterprise-wide dashboards



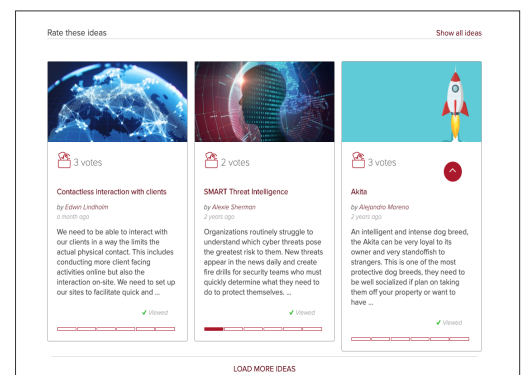
Analyze scenarios to compare trade-offs

2. Centralize Demand Intake

With Portfolios, capture all types of demand – product ideas, project and work requests, emerging technology, and new epics and features – and evaluate it against your strategic goals.

Engage a broader audience to identify creative ideas for new products and innovations with ideation.

Planview makes it easy to collect, evaluate, and prioritize suggestions and quickly test new product concepts before investing.

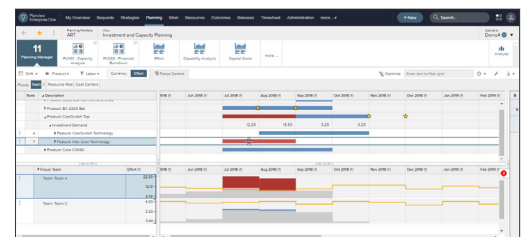


Collect, evaluate, and prioritize ideas to drive innovation

3. Plan Your Business, Project, Product, and Technology Portfolios

Operationalize the strategic roadmap by optimizing portfolios and allocating resources to set the direction for execution. Identify the best approach given capacity constraints with impact analysis and scenario planning. Analyze impacts based on dependencies between business capabilities, applications, and technology. Model scenarios to visualize and reallocate resources and funding.

Refine the plan based on change, be it top-down reprioritization or bottom-up work and resource actuals.



Pivot and balance capacity to focus the right resources on the right work

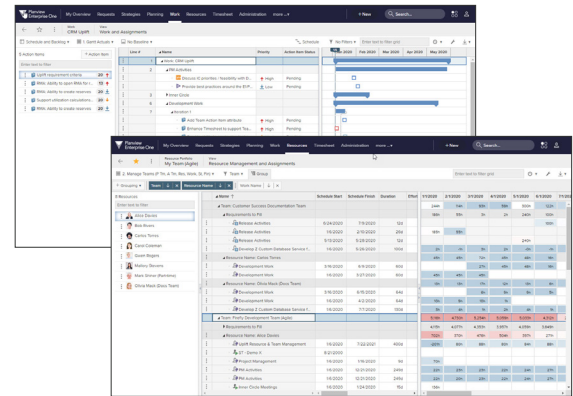


Visualize how your portfolios are connected integrating strategy, capability, applications, programs, and projects

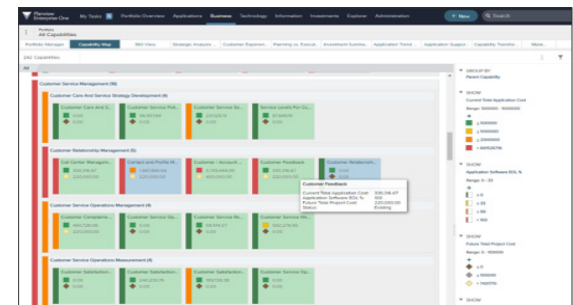
4. Empower Teams to Execute

With plans in place, you need to drive progress for delivery, focusing people, money, and technology on the right priorities. Planview Portfolios enables you to:

- Balance, prioritize, and schedule resource capacity with a real-time view into both future demand and in-flight work.
- Plan, manage, and deliver across all types of work, such as traditional, agile, iterative, and collaborative. Ensure on-time delivery with a comprehensive approach across scheduling, staffing, and tracking status.
- Implement change across your application and technology portfolios. Rationalize your technology landscape to mature the business capabilities necessary to achieve your strategic objectives.
- Improve governance by enforcing technology standards for more accurate project estimates and shortened project delivery times, while proactively avoiding technology debt caused by growing investment demands.



Manage and execute on iteration-driven and hybrid project plans

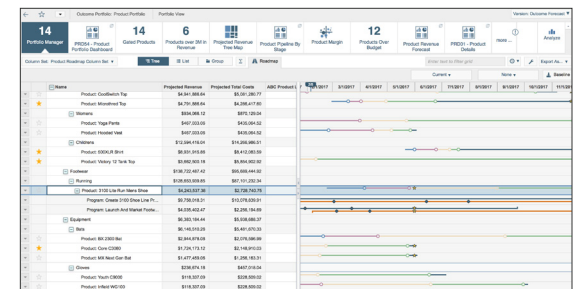


Analyze the complex relationships between your technology and business capabilities

5. Deliver Outcomes, Innovative Products, and Services

Portfolios helps you coordinate delivery of all the outcomes – from products and services to internal applications and technologies to other entities such as stores and locations – required to achieve your strategic goals.

Manage the entire outcome lifecycle – launch, rollout, development, enhancement, or sunset. Analyze each outcome by technical viability, financial impact, resource capacity, complexity, risk, and commercialization success.

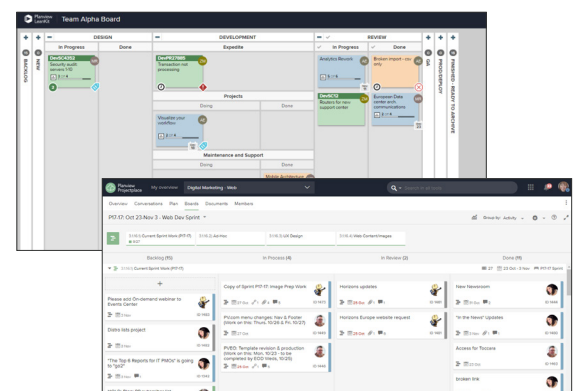


Outcome-driven roadmaps connect strategy with delivery of investments, products, technology, and applications

6. Work Management with Planview

A one-size-fits all approach to work delivery is no longer viable for teams looking to improve responsiveness and speed delivery. Today's enterprise is embracing a combination of work approaches to increase the success rate of strategic delivery.

Teams can leverage different delivery experiences while ensuring overall strategic alignment – whether teams are adopting agile approaches, needing collaborative workspaces, or using traditional PPM methods.



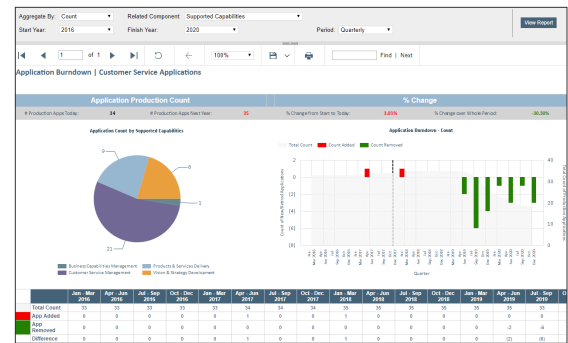
Teams can deliver how they choose – whether they are project or process-driven

7. Improve Decision Making with Analytics and Reporting

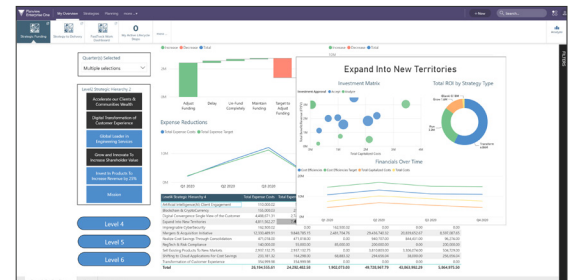
Make better decisions faster and achieve your goals with highly visual reports and powerful analytics to gain insights into demand, plans, work, resources, technology, and capabilities. Easily access, use, and share these via the intuitive user experience, which features executive dashboards and an innovative ribbon design with workflow-driven tiles.

Embedded directly into the user experience is interaction with Microsoft Power BI® for another level of data visualization, analysis, and transformation.

Planview's out-of-the box FastTrack reports enable immediate access to highly configurable, best practice reports and analytics that you need to run your business effectively starting on day one.



See application production and retirement date trends over time



Build and easily distribute compelling, strategic dashboard visualizations

Integrate Your Core Applications with Planview Portfolios

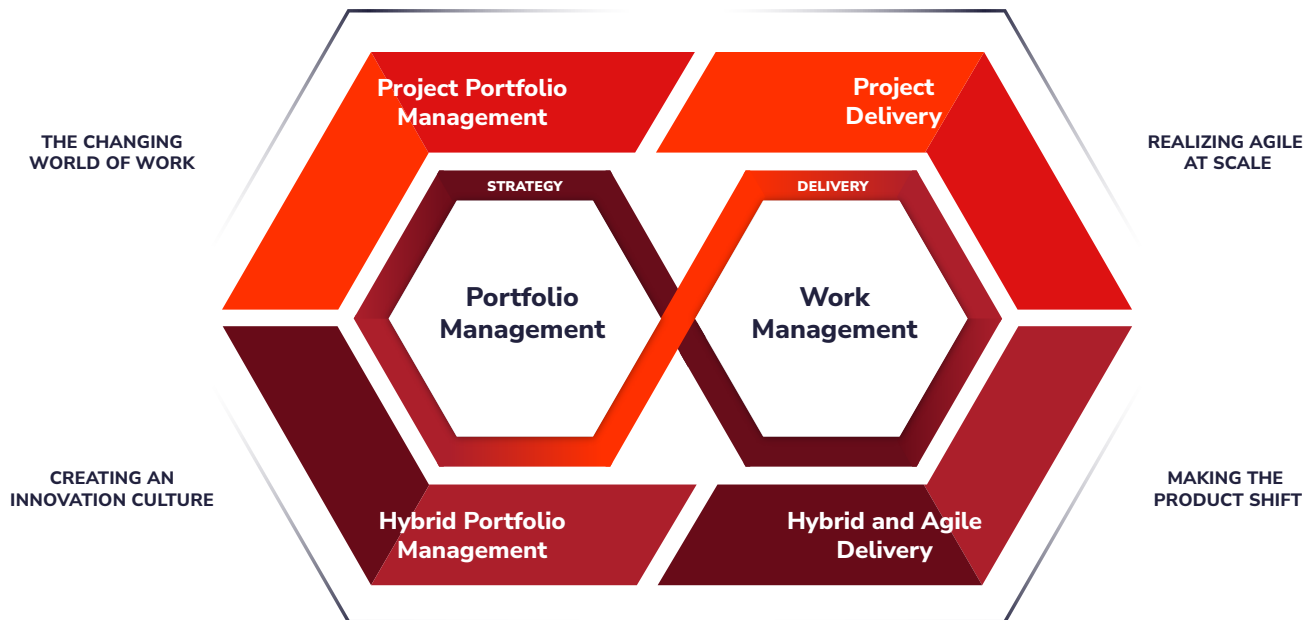
Seamlessly integrate applications your business relies on every day with Planview Portfolios.

Planview Integration-as-a-Service (IaaS) is a proven approach to speed delivery, cut costs, and de-risk implementation. Automate information flow between Planview solutions and any other application, be it cloud or on-premises, off-the-shelf, or homegrown.

Planview's Agile Integration Capabilities powered by Tasktop enable bi-directional synchronization across Jira and other agile lifecycle management tools for centralized visibility into the work delivered across teams and alignment to strategic initiatives.

Portfolio and Work Management with Planview Portfolios

Planview Portfolios powers Planview's portfolio and work management solutions for strategic planning, project portfolio management, Agile and hybrid portfolio management, product portfolio management, and enterprise architecture.



- Bring strategy to life from formulation to execution across the organization with integrated roadmaps, financials, and business capability management
- Optimize project portfolios, balance capacity against demand, and effectively leverage resources to execute your plan
- Align your product portfolios to your innovation strategy, and focus your resources on winning products
- Scale Agile and hybrid, visualize value streams, optimize the flow of work, and promote continuous improvement
- Advance capabilities by connecting technology with business outcomes; engage stakeholders to jointly create enterprise architecture plans and roadmaps that achieve strategic objectives

Enable your transformation journey with Planview Portfolios:

- ✓ Increase revenue by reducing time-to-market
- ✓ Grow portfolio value by prioritizing winning initiatives and killing non-strategic projects and technologies
- ✓ Mitigate risk with improved visibility into technology and work portfolios
- ✓ Optimize resource utilization to create capacity for innovation and transformation
- ✓ Decrease costs with improved efficiencies from repeatable processes and streamlined reporting

Accelerate Time to Value and Results

Customer success: This is what drives us every single day. We define your success in results that have meaningful business value for you. Gain quick wins and plan your transformation journey with Planview® by your side.

Success is achieved by more than just software, and we live that commitment in many ways, including:

- **Planview FastTrack:** These outcome-focused implementation packages offer a low-risk, fixed-price approach to fast, successful rollouts
- **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 Portfolios while speeding time-to-value
- **Inner Circle Program:** Collaborate and influence the product direction by working directly with our product managers to discuss direction, prioritize enhancement requests, and provide feedback on proposed designs
- **The Planview Customer Community:** Connect with other users and share best practices to advance portfolio and work management in your organization

Translate Strategy Into Results

Planview® Portfolios enables enterprises to accelerate strategic execution by integrating business and technology planning, optimizing all resources, and leveraging embedded AI to deliver breakthrough products, services, and customer experiences that maximize business performance.



To learn more, visit [Planview Portfolios](#).

For a deeper dive into the product, [watch this on-demand demo](#).