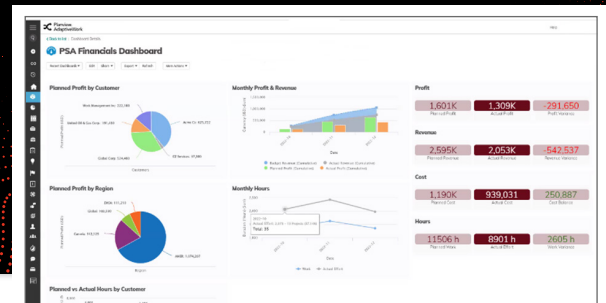


PROFESSIONAL SERVICES AUTOMATION

Modernize Your Business and Service Delivery



How well can you adapt your business models, resource mix, and delivery methods to meet market demands? Whether you need to grow revenue, increase profitability, or improve retention, ad-hoc manual processes using spreadsheets and disparate systems will always constrain you. Planview's Professional Services Automation software is the only solution built for connecting work to dynamically plan engagements, confidently deliver customer work using any method, streamline financial management, and flexibly fit within your existing technology ecosystem.



Maximize Operational Efficiency and Customer Success



Sell More Services Throughout the Customer Lifecycle



Safeguard the Business With Better Customer Retention

"Without Planview® PSA, it took one person a week to prepare a monthly management operations report. Now it's literally available at the press of a button...one of our services project managers calls Planview PSA his 'cockpit'."

– Sharon Burton, Executive Project Manager, IBM

Key Benefits

✓ Make Better Decisions

Gain insights from accurate and readily available information for services and finance leaders down to the individual contributors.

✓ Deliver More Profitably

Standardize and scale processes, automate administrative work, and proactively address issues to deliver projects on time.

✓ Drive Customer Success

Improve customer satisfaction with projects delivered on-time, on-budget, with better quality, and more visibility and collaboration between teams and the customers.

✓ Keep Employees Engaged

Proactively maximize utilization and make sure work is aligned to skills and career growth plans.

✓ Boost Your Competitiveness

Seize more opportunities because your organization can offer multiple business models from T&M to as-a-service subscriptions.

✓ Close the Books Quicker

Streamline financial reporting with accurate and compliant financial information sent to your system of record.

Why Choose Planview?

Adapt with more agility, gain a competitive edge, and drive customer success by modernizing your business and service delivery with Planview Professional Services Automation. See how our customers are impacted in decision making, profitability, and quality of engagements:



How We Do It

✓ Accurate Forecasting, Top-down and Bottom-up

Increase accuracy, frequency, and time horizon of forecasts by aggregating live data across customer engagements from disparate systems.

✓ Advanced Automation & Workflows

Streamline repeatable processes, alerts, and tasks, like opportunity triggers, project creation, and time and expense approvals, so you, your teams, and business deliver faster.

✓ Flexible Delivery Methods

Empower your teams, natively or by integration, to work the best way for them and your customers - waterfall, agile, or hybrid.

✓ Configurable Business Models

Support multiple business models with built-in and configurable billing and project structures aligned to T&M, fixed-fee, milestone, mixed, and more.

✓ Compliant Financial Processes

Deliver accurate pro forma billing, time and expense reporting, and revenue and profit data to your financial system of record to invoice, recognize revenue, and report on earnings faster.

✓ Instant Resource Insights

Quickly identify under- and over-utilized resources and balance workload across customer projects to ensure the right people are working on the right projects, at the right time, to drive profitability.

For professional services organizations looking to adapt to market and business changes, be more competitive, and drive adoption and retention, modernize your business and service delivery with Planview's Professional Services Automation solution. Eliminate inefficiencies, inconsistencies, and delays by connecting all components in the quote-to-cash lifecycle – opportunities, projects, resources, financials – to create a best-in-class technology ecosystem. The result? Adapt with more agility, gain a competitive edge, and safeguard your business with better customer retention.

To learn more, watch Planview's Professional Services Automation software in action in this on-demand demo:

https://info.planview.com/psa_demo-on-demand_psa_en_reg.html or visit us at <https://www.planview.com/products-solutions/solutions/professional-services-automation/>

