

## INFOSHEET

# Stop managing work in spreadsheets. Start leading with strategic precision.

Planview gives organizations a clear, supported path from Smartsheet to a purpose-built platform that connects strategy to delivery across every team, every project, every decision.

If you're using Smartsheet, you already know the limits. Grids and dashboards were never designed for portfolio leadership. When the business needs real-time visibility, resource intelligence, and strategy alignment, spreadsheet logic breaks down.

## Why Organizations Switch

### Where Smartsheet Falls Short at Scale

- ✘ **No portfolio-level visibility**  
 Smartsheet tracks tasks and projects, but can't connect work to strategic goals, financial performance, or resource capacity in real time.
- ✘ **Manual resource management**  
 Resource planning requires manual effort and workarounds, with no demand forecasting, no capacity modeling, and no automated conflict detection.
- ✘ **No strategy-to-execution link**  
 There's no native way to map initiatives to OKRs or strategic objectives, leaving executives without line-of-sight from vision to delivery.
- ✘ **Siloed, disconnected data**  
 Teams maintain separate grids and dashboards, creating version conflicts and preventing a single source of truth across the organization.

## Head-To-Head Comparison

### Smartsheet vs. Planview

Capability	Smartsheet	Planview
Strategic portfolio management	Limited, workaround-based	Built-in, enterprise-grade
Real-time resource capacity planning	Manual, grid-based only	Dynamic demand & capacity modeling
Financial portfolio management	Not available	Budget, actuals & forecast tracking
Strategy-to-delivery alignment	Not available	OKR & roadmap integration
Hybrid / Agile / Waterfall delivery	Primarily Waterfall	All delivery models supported
Executive portfolio dashboards	Manual, limited customization	Real-time, role-based insights
Enterprise risk management	Project-level only	Strategic & portfolio-level risk

## What You Gain With Planview

### Purpose-Built for Portfolio Excellence

- ✓ **Strategy-to-execution visibility**  
Connect every project and initiative directly to the strategic goals that matter most.
- ✓ **Real-time portfolio intelligence**  
Give leaders a live view of portfolio health, capacity, risks, and financial performance.
- ✓ **Faster, better decisions**  
Prioritize the right work and allocate resources with confidence using scenario modeling.
- ✓ **One connected platform**  
Eliminate silos with a single source of truth spanning PPM, SPM, Agile, and financials.
- ✓ **Any delivery model**  
Whether teams run Waterfall, Agile, or hybrid, Planview meets them where they work.
- ✓ **Enterprise-grade security**  
SOC 2 Type II certified with role-based access, audit trails, and enterprise SSO.

## The Smartswitch Migration Journey

### Purpose-Built for Portfolio Excellence

- 1 Discovery** – Planview experts assess your current Smartsheet environment, usage, and integration landscape.
- 2 Migration Plan** – A tailored roadmap is built to migrate your data and workflows with minimal business disruption.
- 3 Data Transfer** – Projects, resources, and portfolio data are migrated with guided tooling and dedicated support.
- 4 Enablement** – Role-based training and onboarding ensures your team is productive from day one.
- 5 Go Live** – Launch with dedicated customer success support and ongoing optimization guidance.



*“Planview helps us turn strategy into project deliverables.”*

**– Sebastian Büchle, PMO Lead & PPM Platform Owner, Endress+Hauser**



### Ready to make the switch?

Schedule a personalized demo with our migration team today.

[planview.com/contact-us](https://planview.com/contact-us)