

Solution offering brief

The Planview Solution for Services Resource Planning

Professional Services organizations are looking for ways to get ahead of their competitors by managing their resources more effectively and responding with greater agility to new opportunities. Service Performance Insight (SPI) surveyed 416 professional services organizations in the *10th Annual Professional Services Maturity Benchmark* and found that revenue growth and the bid-to-win ratio dipped to new five-year lows, while employee attrition reached a five-year high. While growth may have slowed, the Professional Services market also saw improvements in project backlog, on-time delivery, and revenue per consultant. Nearly 80% of professional service firms have invested in a professional services automation solution. According to the report, these solutions are a key competitive advantage and tend to have 4% higher billable utilization and 17% higher revenue growth.

The SPI benchmark shows that organizations that leverage the right software can expect to see a profitability increase with cross-organizational visibility from pipeline to invoice, managing projects and resources in flight, and integrating with existing applications.

- Get up-to-date information you need to run your business
- Get the right people on the right work at the right time
- See where demand is coming from and manage it efficiently
- Partner with your client and your resources to get the work done
- Control your costs while serving your clients effectively
- Speed client satisfaction with automated processes
- Integrate with enterprise applications and systems

Planview Enterprise for Services Resource Planning



The Planview solution for Services Resource Planning delivers what you need. The solution merges planning and execution to optimally align resources with project requirements and create client satisfaction. It's easy to integrate for the full visibility you require, from bid to bill.

Analytics and Reporting

Stay on top of the myriad projects and resources your organization manages. With out-of-the-box analytics and reporting in easy-to-use formats, you can track those issues critical to your clients, so that you can take informed action when it counts.

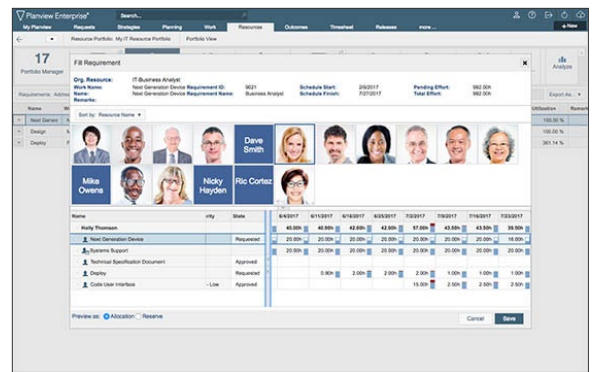
Project Name	Status	Start Date	End Date	Project Manager	Client	Revenue	Profit
Project A	Completed	2017-01-01	2017-03-31	John Doe	Client X	\$100,000	\$20,000
Project B	In Progress	2017-04-01	2017-06-30	Jane Smith	Client Y	\$150,000	\$30,000
Project C	On Hold	2017-07-01	2017-09-30	Mike Johnson	Client Z	\$80,000	\$16,000

With views relevant to each user, you can analyze cost and value, resources and demand, and more, to answer complex questions as you drive toward client satisfaction while maintaining profitable revenue targets.

Financial models and powerful analytics help you easily analyze service revenue and margins and track billable rates and utilization. Preloaded reports keep project managers on top the details; status reports and analytics keep practice managers and clients in the loop.

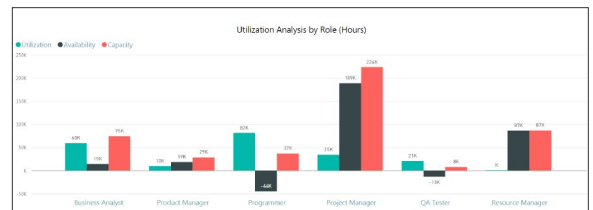
Resource Management

Optimize your resources with a real-time view into demand, projects already in play, and all your resources, no matter location or practice. Easily see who should be allocated where, when, and for how long; analyze resources by role, skill, cost, and rate to ensure that clients are served effectively.



Consultants can track time easily on the road via mobile devices, so practice and resource managers know to the minute and dollar what's been done and what's outstanding.

Boost talent levels while reducing recruitment costs by using the Planview solution to create robust skills profiles and cultivate staff areas of interest; this keeps everyone motivated while building up the entire team's skill set for new clients and projects.



Demand and Capacity Planning

Planview's solution provides a central hub to visualize and manage demand, and is designed to easily integrate with CRM software.

This creates a true overview of the sales pipe, so you can see how the impact of current and upcoming work will affect resource pools, and can confidently develop a capacity plan that will support the organization and your clients in meeting their goals.

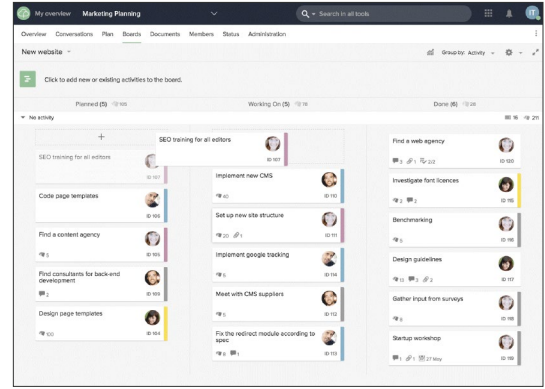
Project	Category	Start	End	May 2018	Jun 2018	Jul 2018	Aug 2018	Sep 2018	Oct 2018	Nov 2018	Dec 2018	Jan 2019	Feb 2019
ABC Resource Plan - Business Analyst	Business Analyst	2018-05-01	2018-06-30	80.0%	81.0%	87.7%	82.4%	83.7%	81.5%	88.0%	86.0%	86.0%	86.0%
XYZ Resource Plan - Engineer	Engineer	2018-06-01	2018-07-31	102.2%	102.8%	101.0%	106.2%	105.6%	105.3%	106.0%	105.0%	106.0%	106.0%

Use what-if scenarios as you build your plan to see how changes in demand and resources will impact the practice and the company. This enables you to prioritize projects by client, by cost, and other goals effectively.

Engagement Management

Capture SOW details like project plans, schedules, and effort to ensure client satisfaction and mitigate risk. Assign and manage your people, internal or outsourced, shared across projects or countries, and dynamically move them where need and impact are greatest.

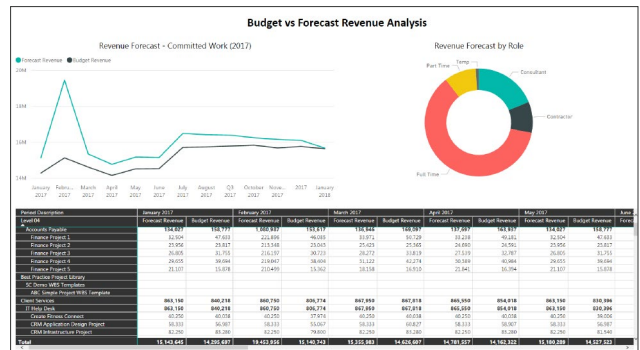
You can also document activities and milestones within the project plan to keep resources on track for execution success. The solution offers out-of-the-box templates with Kanban boards and document management that will get your team on the right track to engaging and partnering with your client on the right tasks and activities and get the work done.



Service Delivery Management

Track progress and automate status reports with out-of-the-box reporting that delivers meaningful views for you and your clients in audience-relevant views. Manage project health, stay on top of resources, fix bottlenecks quickly, and let your clients know exactly what's happening and why.

Streamline replanning and reforecasting by capturing data in real time in one database for the entire organization. Replanning to accommodate a new client demand is easier with visibility into resource allocations and complete organizational demand. Reforecasting is simplified with up-to-date financial data from timecards, projects, and billing information.



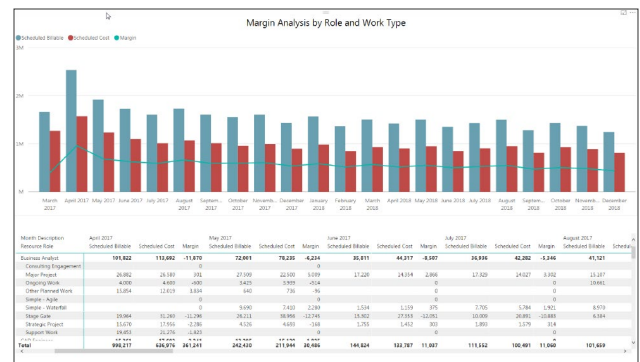
Manage changes, risks, and issues by automating and routing alerts so they can be addressed before they snowball. Dashboards give quick insight into KPIs and are easily rolled up for management insight and mitigation.

Your entire organization can reduce the effort and cost involved in creating client deliverables, while ensuring a more repeatable approach. This creates greater client confidence, increased repeat business, and higher referenceability.

Financial Management

Track the financials you rely on – client, project, region, etc. What used to be labor-intensive reports are now simple; reliable forecasts are developed easily; and account balances are reconciled quickly.

Build out a project's financial plan with milestones tied to invoicing to ensure that execution is tied to revenue, making it easy to justify project costs to clients, and simplify mid-project billing cycles.



With accuracy into what your people are doing, you can track just how much billable revenue is attributable to which resource. You can now de-risk future projects and simplify the calculation of compensation payments.

Process Automation Best Practices

Project delivery is improved through configurable lifecycles and automated approval processes to guide from one milestone to the next. This approach ensures that your clients experience a consistent yet customized professional services experience.

Speed user adoption and enablement with Planview's FastTrack implementation methodology, which delivers proven best practices to enable change, with predefined and prepopulated process and procedural steps for performing any variety of functions, from the strategic to the project-level.

Work	Monday	Sun 4	Mon 5	Tue 6	Wed 7	Thu 8	Fri 9	Sat 10	Total	Complete	Your Revised Entries
Business Applications Maintenance Project - 0000033									0h		
Business Objects Fast Change - 1001									0h		
Financial Account Type Modification - 1005									0h		
Consumer Web Portal Project - 000014									0h		
Implementation									0h		
Standard Time									0h		
PABMS Implementation - 000018									0h		
Solution Assessment Analysis									0h		
User Interface Definition									0h		
Delivery Specification									0h		
Technical Framework Definition									0h		
System Framework Design									0h		
Database Design									0h		
Systems Development Maintenance Project - 0000027									0h		
Data Center Server Consolidation Report - 1004									0h		
ABC Administration									0h		
General Administration Work									0h		
Total	0h	0h	0h	0h	0h	0h	0h	0h	0h		

Designed to Integrate with Enterprise Applications and Systems

Planview's Integration-as-a-Service makes it easy to integrate your core business applications – off-the-shelf or homegrown.

- Integrated with ERP, it ensures that billing data captured in one platform is usable by the other, for one source of the truth, meaningful analytics, and easier replanning when change happens
- Integrated with CRM, you get full insight into the sales pipeline and how this will affect demand, for impact on resource pools and capacity plans
- Integrated with corporate dashboards, client satisfaction data is relevantly displayed in either system to enable management to quickly capitalize on good news and swiftly remediate problematic results

Simple, flexible, reliable: Planview maintains, manages, and implements the integration, and enables seamless connectivity with any cloud or on premises business application.

Optimize your Service-driven Business with Planview

From forecasting revenue to planning resources and executing projects: the Planview solution for Services Resource Planning provides what you need to help you deliver successful services to your clients and profitably grow market share.

The Planview solution for Services Resource Planning includes:

- Planview Enterprise® One for enterprise-wide portfolio and resource management
- Projectplace® for collaborative work management



For more information, email market@planview.com or contact your Planview representative.

