

Planview for Professional Services

Services solution that connects profitability and customer experience

Overcoming the Blind Spots

Professional Services Organizations need to deliver successful outcomes to their customers while maintaining profitability. To accomplish this, leaders need to overcome these blind spots:

Inconsistent Delivery

Deliver quality engagements consistently for higher customer satisfaction

Resourcing Pressures

Proactively manage capacity, availability, utilization, skills and extended (virtual) bench

Forecast Volatility

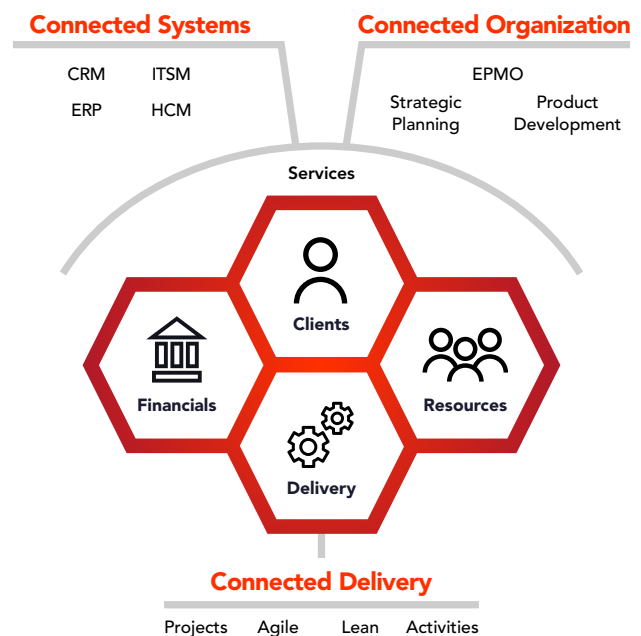
Analyze and forecast staffing needs for new opportunities and current engagements to decrease revenue leakage and increase profitability

Speed of Business

Gain a competitive edge with visibility, accuracy, and adaptability to drive speed across the entire engagement cycle

Outdated Business Model

Flexibility to move from T&M to more profitable remote, hybrid, subscription, and outcome-based offerings across the entire engagement cycle



For services and finance leaders wanting to delight customers and improve profitability, the Planview PSA solution connects professional services into the broader business context, supports multiple ways of working, automates the entire lifecycle from opportunity-to-revenue, and scales and adapts to changing business models without the weak links.



The Future of Connected Services

Key advantages

Work in New Ways

Consistent delivery using the method that fits the client engagement

The Planview PSA solution lets you deliver quality work consistently with quicker time to value, no matter where or how your teams work by connecting new ways of working to your services lifecycle.

Operate with Speed

Match services with the speed of business

The Planview PSA solution optimizes delivery, resources, and financials connected to the broader organization so you can make educated decisions to operate at the speed of the business.

Adapt for Growth

Adapt to new business models and revenue tracking complexity

The Planview PSA solution simplifies growth complexities, adapting to your business model and process – T&M, fixed fee, subscription, and more – needs today and tomorrow by connecting the right systems and processes to your services lifecycle.

Drive Strategy Enterprise-Wide



Enterprise Portfolio Management
Strategic and Financial Planning
Objective and Key Results (OKRs)

Innovation Management



Crowdsource from Employees, Partners, & Customers
Fuel Employee Engagement
Deliver Results from Idea to Impact

Work Management for Teams



Empower Teams, No Matter How or Where They Work
Collaborate and Manage Tasks, Documents, & Deliverables
Embedded into Teams and Slack

Agile Transformation



Lean Portfolio Management
Enterprise Agile Planning and Scaling Agile
Enterprise and Team Kanban

Professional Services Automation



Services Project Delivery
Revenue Visibility and Forecasting
Financial Governance across the Quote-to-Cash Lifecycle

Product Development



Product Pipeline Prioritization & Gated/Agile Project Delivery
Manage Products from Concept to End-of-Life
Speed Time-to-Market and Ensure On-Time Product Delivery

We're building the future of connected work

Planview has one mission: to build the future of connected work. The comprehensive Planview platform and enterprise success model enables customers to deliver innovative, competitive products, services, and customer experiences. Planview Professional Services Automation (PSA) is a comprehensive solution for services organizations that offers the future of connected services today – connecting the services organization to the broader business strategies, automating the entire lifecycle from opportunity-to-revenue, supporting multiple ways of working, and scaling and adapting to changing business models. For more information, visit www.planview.com.