

# Planview for Professional Services

Accelerate your services success from delivery confidence to financial growth

## Systematic Struggles

Professional Services Organizations need to deliver successful outcomes to their customers while maintaining profitability. To accomplish this services leaders and managers need to:

- Manage the quote to cash lifecycle of billable customer projects
- Successfully deliver projects to their clients
- View projects across multiple portfolios such as practice, product, or customer
- Manage to target utilization rates
- Adjust staffing levels to meet active and incoming demand
- Collaborate with all customer and internal project stakeholders

Planview's Professional Services Automation solution powers the entire services lifecycle from opportunity to billing, advancing operational effectiveness and visibility needed to maximize utilization, improve customer satisfaction, and increase profitability.



Services orgs can optimize staffing levels using the solution's capacity forecasting and planning capabilities. The solution enables today's spectrum of work delivery from traditional projects to agile methods, leading to more successful engagements with customers.

Gain delivery confidence while generating profits from happy customers with the Planview® PSA solution.

## Built to drive PSO success

### Key advantages

#### Centralize Key Processes

*Optimize the services lifecycle profitably*

Planview PSA spans the full lifecycle of services engagements from quote to cash. Instead of juggling various ad hoc systems and disparate tools, PSOs can centralize everything that matters: pipeline management, financial management, project and resource management, change requests, operational reporting, and business processes, that provides unified customer engagement.

#### Delivery Confidence

*Successfully deliver business outcomes for customers*

Planview PSA brings together project and resource management, configurable workflow automation, and collaboration to enable customers to deliver projects using multiple work methodologies. Additionally, customers can proactively resolve capacity and staffing issues that affect the ability to deliver. It all adds up to successful engagements that help clients achieve their objectives.

#### Full Visibility

*Comprehensive visibility that drives decision making*

Improve decision-making and business outcomes with real-time transparency into engagements and the full quote-to-cash cycle. Planview PSA provides an authoritative system of record that centralizes and automates data and activities. Best-in-class analytics leverage this single source of truth to provide configurable dashboards and reports, giving executives and teams visibility into engagement health



#### 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

Unlike other PSA providers, Planview has a range of solutions for every Services Organization. Whether an embedded services organization focused on implementations or a professional services company focused on revenue and margins, we help customers attain business outcomes. Configurable workflow capabilities enable services processes, while resource management capabilities can solve the thorniest capacity and staffing issues. Purpose-built dashboards and analytics provide the insights needed to make critical decisions around financials, billable utilization, and other key areas.

Planview solutions enable the full services lifecycle from quote to cash either natively or through integrations to CRM and ERP systems. Look to Planview's PSA solutions to increase productivity, provide end-to-end operational visibility from executives to engagement teams, and drive higher profitability through improved efficiencies and transparency.