



Translate Strategy into Results with Planview® Portfolios

Challenges

Overcoming Key Business Challenges:
Prioritization, Agility, and Execution

Adapting quickly to change is essential for businesses to remain competitive in today's fast-paced environment. Organizations face challenges in delivering outcomes, responding to disruption, and de-risking strategic investments:

- To ensure delivery of business results, organizations must embrace new ways of working, gain visibility, manage new demand, and re-prioritize and realign resources when change happens.
- Prioritizing high-value products and development processes are impacted by economic headwinds, supply chain constraints and high failure rates
- Agility in making strategic trade-offs, allocating funding and resources cross-functionally, and feedback loops are crucial for successful transformations and strategic initiatives.

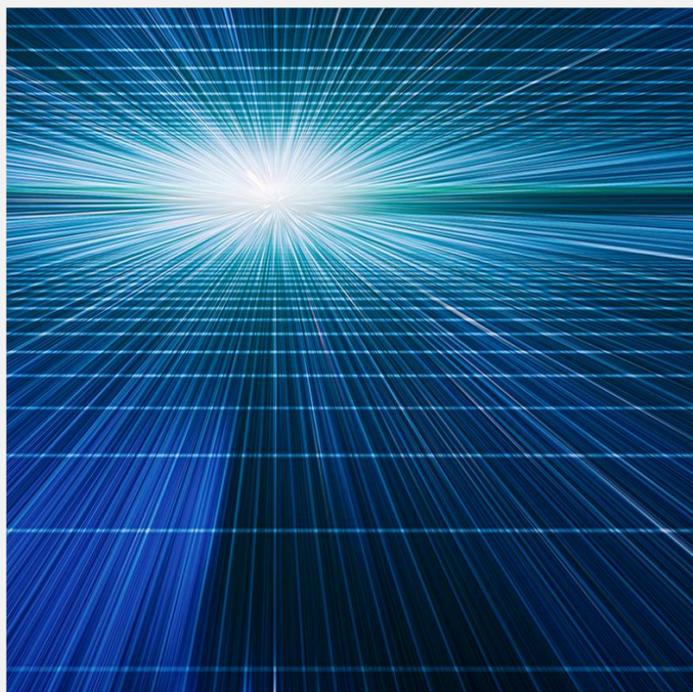
Planview Portfolios Solutions

Optimize resource capacity, deliver results, realize strategy at speed.

Planview® Portfolios combines business and technology planning to optimize funding and resource capacity, provide end-to-end visibility, track actuals to plan, and accelerate strategic execution.

- Project Portfolio Management (PPM) - empowers executives, leaders, and PMOs to drive outcomes
- Product Portfolio Management – enables R&D and product organizations to prioritize the pipeline and optimize resources for target revenue and profitability.
- Strategic Portfolio Management (SPM) – Empowers leaders and EPMOs to drive cross-functional initiatives, create dynamic plans, and accelerate on-strategy delivery.

Planview Portfolios is the foundational product in these Planview solutions for enterprises spanning various industries.



Benefits

Planview® Portfolios empowers leaders and teams to optimize resource allocation, prioritize work, adapt to change, and drive business outcomes for strategic success.

»» Improve time-to-value and predictability

Consistently meet customer and market commitments with early warnings into constraints. Planview enables more accurate planning – leveraging leading indicators and better capacity assumptions – and shortens the time from ideas to business outcomes.

»» Increase efficiency to unlock capacity

Keep your teams focused on strategic objectives by using embedded goal tracking throughout the flow of work. Planview provides deep visibility into capacity utilization, helping business leaders reduce operational costs and redeploy resources by proactively identifying and addressing waste and constraints.

»» De-risk your strategic bets

Confidently tackle uncertainty when internal or external conditions change. Planview delivers complete, actionable data that empowers business leaders to compare and prioritize strategic initiatives – based on risk and tradeoff scenarios – to maximize business outcomes.

Planview® Portfolios on AWS

By joining forces, AWS and Planview are better together in accelerating the delivery of cutting-edge capabilities and features to our customers. Our partnership ensures a consistent and reliable platform for Planview, enabling joint customers to unlock new levels of innovation and efficiency. Together, we are empowering organizations to achieve their goals with greater speed and agility, and we look forward to continuing our collaborative efforts in delivering unparalleled value to our customers.



Case Study: Santander UK

»» Challenges

Against the backdrop of revolutionary macro and microeconomic changes in the UK banking environment, Santander UK needed to create an ecosystem that enabled enterprise agility by connecting business with IT and strategy into delivery – with a single line of sight into key initiatives at every stage of the journey.

»» Solution

Built on the world-class AWS Platform, Planview® Portfolios is a SaaS product that enabled Santander UK to translate strategy into delivery. Across the cross-functional organization, Portfolios Roadmaps seamlessly connected the investments, outcomes, capabilities, milestones, technology and financials required to empower business decisions and speed delivery of new products and services into the market.

»» Results

By utilizing Planview® Portfolios, 4,000 users across five companies recorded 6.5 million hours of time yearly, planned and tracked 500 business initiatives, and managed 2,500 work pieces. Santander UK increased resource utilization to 80%, more informed budget reallocations, and 25% faster decision-making.



Features

Dynamic Planning

Make informed decisions with scenario planning to explore options and understand the impact of decisions based on incomplete information or uncertainties:

- Plan and replan faster, top-down and bottom-up, by aggregating live data from disparate systems
- Leverage real-time scenario planning that incorporates goals, demand and capacity, uncertainty, dependencies, and constraints to make better decisions
- Visually model your plans' effect on people, time, and financials simultaneously to allocate funding and resources more effectively

Connect and Align Strategy to Delivery

Translate strategy into business results for your most important initiatives and keep your organization and processes aligned.

- Provide a single pane of glass with actionable insights into all initiatives and their status from ideas, plans, delivery, and outcomes
- Cascade and roll up objectives and key results (OKRs) in the systems where work gets done to ensure strategy informs execution and vice versa
- Accommodate multiple methodologies (Agile, waterfall, hybrid), work types, and workflows, all in one place.

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