

Ride the change, lead the future

STRATEGIC PORTFOLIO MANAGEMENT FOR INSURANCE

Inflation, AI and digital disruption, climate change, evolving customer expectations, and shifting regulations are reshaping how insurance organizations operate and compete in today's rapidly changing market.

In response, insurance leaders are accelerating strategic initiatives that protect revenue, boost growth, and improve productivity – all while carefully balancing risk management, compliance requirements, and resource constraints.

Despite these efforts, insurance organizations face several critical challenges that hinder meaningful strategic change:

**LACK OF VISIBILITY & ALIGNMENT**

due to disconnected teams, tools, and data.

**POOR PRIORITIZATION**

driven by outdated or incomplete information, making it hard to adapt to shifting priorities.

**UNPREDICTABLE DELIVERY**

with limited cross-team visibility, leading to delays and dissatisfied customers.

**DEMAND EXCEEDS CAPACITY**

leaving no space for innovation, improvements, or meeting compliance needs.

The good news? These challenges can be overcome, and with the right solution in place, insurers can not only accelerate change but also clearly demonstrate the value of their transformation efforts.

Planview Strategic Portfolio Management for Insurance: Turn Disruption into Advantage

Insurance companies are leveraging **Planview's Strategic Portfolio Management** solution to stay ahead of change – accelerating strategy execution, cutting costs, and delivering real, measurable impact across initiatives.



Improve Speed-to-Value and Market Responsiveness



Unlock Capacity for Priority Initiatives



De-risk Strategic Bets



The automation enabled by Planview has empowered our technology teams to provide visibility of our investments, run more work, with more resources and with greater efficiency."

– **Bhavna Longani**,
Vice President & Head
of Strategy, Portfolio &
Compliance (SP&C) at
Max Life Insurance



Leading Insurers Choose Planview: The Benefits of Smarter Portfolio Management

Connected strategy, teams and outcomes	Dynamic planning and prioritization	Powerful enterprise work connectivity	Optimized resource capacity and utilization	Trusted and proven partner
All teams, tools, and data across the enterprise are centralized in one platform - providing real-time visibility into initiatives and aligning execution with strategic goals.	Quickly replan and prioritize initiatives with real-time data, scenario modeling, and full visibility into strategic investments, risks, and capacity.	Enable and view all types and combinations of work, methodologies, and practices in a single place. Track delivery progress in real time, reducing delays and ensuring on-time outcomes.	Real-time visibility into resource availability and demand across teams allows you to allocate capacity effectively, prioritize high-value work, and reduce overload.	Leverage market and thought leadership, along with proven success methodologies, training, best practice playbooks, and strategic partnerships, to guide you.



Why Planview?

Planview's Strategic Portfolio Management solution prioritizes capital and resources across objectives, operating models, and initiatives to build plans with purpose. Connect the dots from strategy to team, idea to outcome, and project to product with a holistic approach to scenario planning, portfolio management, and hybrid work delivery. With Planview you can bring your strategies to life no matter how you plan, fund, or deliver work.

To learn more, watch the [Planview's Strategic Portfolio Management solution](#) demo, or visit us at: [Planview.com/strategic-portfolio-management](https://planview.com/strategic-portfolio-management).

