

**SOLUTION BRIEF**

# Make Your Strategy Real

## Create transformative change

Half of all strategic initiatives fail.<sup>†</sup> Organizations are unable to connect execution to strategy, to transform the vision of innovation, growth, and enhanced customer experience into reality.

What’s the problem? For decades, what has passed as “strategic planning” has been the documentation of strategic statements, which departments use to justify work they believe is necessary – but not necessarily strategic.

Most organizations lack strategic planning tools that integrate strategy with execution, ones which create roadmaps for plans that can be managed, tracked, and executed enterprise-wide.

Help your organization deliver on its vision with the Planview solution for strategic planning:

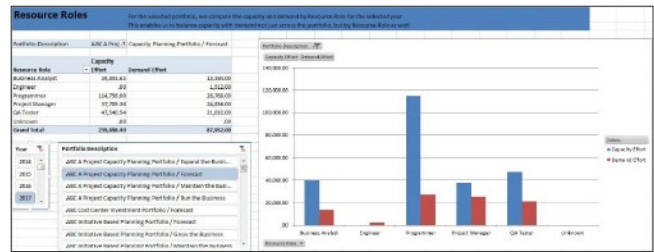
- ✓ Use roadmaps to translate vision into plans
- ✓ Prioritize initiatives to optimize resources
- ✓ Manage large cross-functional initiatives
- ✓ Ensure initiatives deliver on ROI
- ✓ Engage your people and fuel their passion
- ✓ Provide leadership visibility into progress

The Planview solution for strategic planning is a comprehensive approach that accelerates the delivery of strategy.

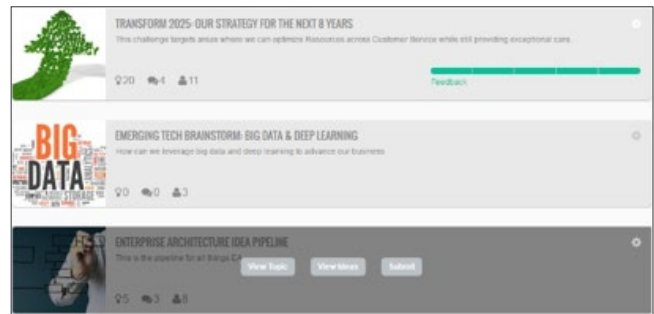
<b>Strategic Analytics and Dashboards</b> <ul style="list-style-type: none"> <li>• Measure performance and share progress</li> <li>• Executive dashboards and data visualizations</li> <li>• Real-time ad-hoc analysis through rich, graphical views</li> </ul>		
<b>Ideation</b> Engage with your organization and share responsibility in creating executable strategic plans		
<b>Strategic Planning</b> Manage the strategic portfolio from formulation to execution enterprise-wide, on a cross-functional scale		
<b>ROADMAPPING</b> Connect strategy to the investments and outcomes that drive transformation and execution	<b>SCENARIO PLANNING</b> Model trade-offs in constantly changing environment	<b>PROGRAM MANAGEMENT</b> Deliver the programs that drive innovation and transformational change
<b>OUTCOME-DRIVEN PORTFOLIOS</b> Drive strategy from the products, applications, and services you deliver	<b>CAPABILITIES</b> Define plan based on the current and future state business context	<b>FINANCIAL AND CAPITAL PLANNING</b> Manage strategic funding and performance from strategy to initiatives
<b>Work and Team Collaboration</b> <ul style="list-style-type: none"> <li>• Collaborative workplace for creating and managing strategic plans</li> <li>• Drive the process with Kanban boards and cards</li> <li>• Doc management with sharing, security, and version control</li> </ul>		

Let's examine how this solution works.

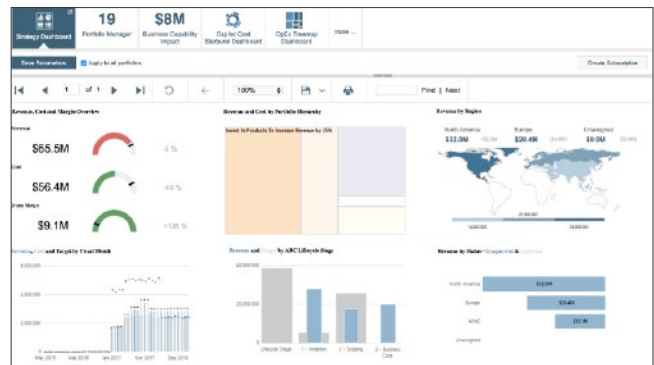
**Strategic Analytics and Dashboards.** Give stakeholders the information they need when they need it. Powerful reporting and analytics provide real-time access so you can communicate on progress, make corrections in-flight, and ensure initiatives are delivering the expected results.



**Ideation.** Engage the organization to take ownership of strategy and leverage ideas to make your strategy come to life. The ideation capability in the Planview solution for strategic planning empowers you to source ideas from across the enterprise and capture different ways to execute the vision. This encourages engagement and increases urgency across the enterprise for making the vision real.

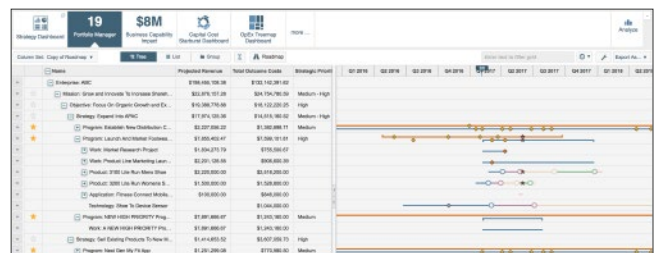


**Strategic Planning.** Simplify the creation and execution of the strategy plan with the Strategy Dashboard, which imparts unique visibility for understanding, managing, and tracking the strategy portfolio, and connecting the dots between your plan and what it will take to deliver strategy across the enterprise.



**Strategic Roadmapping.** To make your plan actionable and track its execution across the company, translate it into enterprise-wide roadmaps. With a consolidated, visual roadmap, departments can easily define the investments to realize the vision

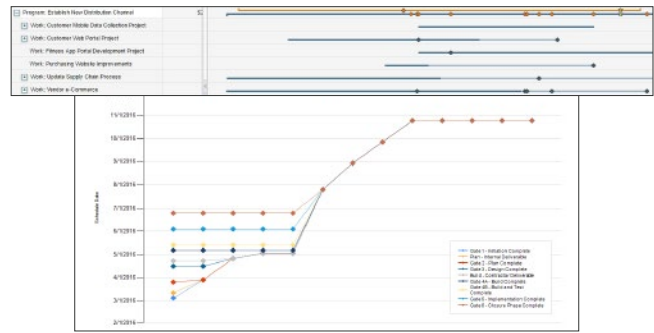
This streamlines the coordination of a broad set of outcomes – products, services, applications, locations, and more – across silos to achieve strategy, shortening time to market and optimizing resources.



**Scenario Planning.** Determine the best combination of investments that will deliver the strategy given financial, resource, and risk constraints. Use scenarios to model the impact of potential changes, balance trade-offs, and visualize the reallocation of resources and funding. Create multiple scenarios for achieving objectives and compare by cost, risk, resources, business capability impact, and benefits and save them for easy recall and review.

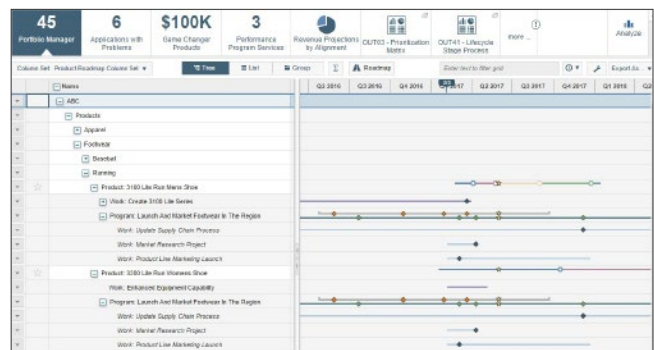
Description	Q1 Review	Continuous Planning	Variance	Change (%)
Projected Revenue	\$15,500,000	\$15,250,000.00	(\$250,000.00)	-1.61%
Projected Total Costs	\$11,327,886	\$9,070,399.67	\$1,357,296.1	11.98%
Dependency State				
RDI (%)	39.70%	55.69%	16.83%	43.43%
Capital Costs	\$2,461,049.1	\$2,461,072.68	\$185,968.99	6.97%
Expense Costs	\$4,213,600.1	\$2,292,268.68	\$1,936,728.1	45.63%
Labor Cost	\$4,447,646.1	\$5,207,038.67	(\$759,392.66)	-17.07%
Total FTEs (f)	13.48	15.75	-2.27	-16.81%

**Program Management.** Plan and manage complex programs that span resources and departments to support strategic outcomes. Program management drives performance measurement from individual initiatives to the overall strategic plan.

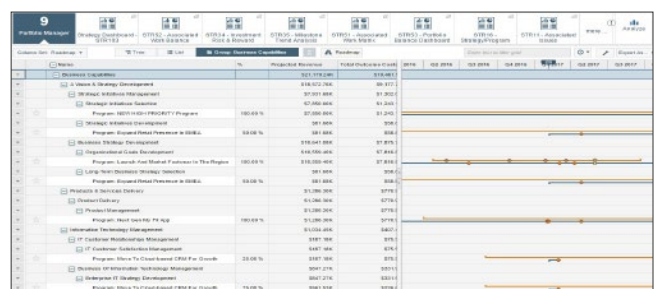


The Planview solution for strategic planning enables cross-functional program teams to determine and illustrate connection points within programs early, increasing the probability of successful execution.

**Outcome-driven Portfolios.** Drive strategy through the products, applications, and services you deliver. Outcome-driven portfolios give you a holistic approach for defining and managing outcomes across silos, harnessing expertise from every area of your business. Connecting outcomes, strategies, and programs gives you a complete picture of financials, strategic drivers, program delivery, and day-to-day execution.



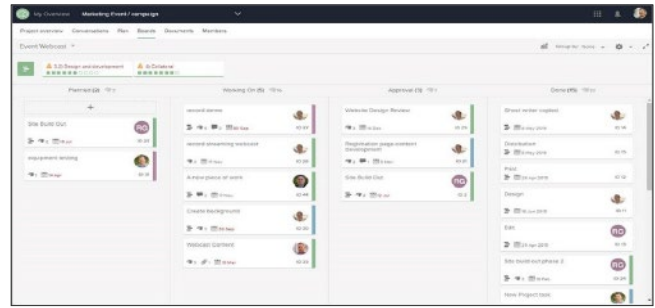
**Capabilities.** Track and measure business capabilities to ensure success of your strategic plan. The Planview solution for strategic planning can help you assess the impact of strategic programs on business capabilities, analyze future capabilities required, and determine investments needed to enhance or create the business capabilities that will enable your plans to achieve objectives.



**Financial and Capital Planning.** Meeting funding targets is critical. Robust financials in the Planview Solution for Strategic Planning enable leaders to set realistic goals, understand how strategic funding is being spent, and reallocate as needed throughout the fiscal period. Whether you are tracking capital or forecasting incremental revenues as part of your strategic plan, financial planning can be used to effectively plan, track, and measure financial performance.

Period	2017	2018	2019	2020	2021	2022	2023	2024	2025	Total
Account: Revenue	USD	\$1,195,034	\$95,642.51	\$198,802.51	\$75,412.51	\$287,687.51	\$294,089.51	\$292,593.51	\$294,969.51	\$1,808,281.51
Account: Investment	USD	\$5,239,000	\$523,963.34	\$523,963.34	\$523,963.34	\$523,963.34	\$523,963.34	\$523,963.34	\$523,963.34	\$5,239,000
Account: Investment-Benefit	USD	\$185,000.00	\$8,789.80	\$8,789.80	\$8,789.80	\$28,259.60	\$28,259.60	\$28,259.60	\$28,259.60	\$196,808.00
Account: Investment-Expense	USD	\$5,054,000.00	\$515,173.54	\$515,173.54	\$515,173.54	\$515,173.54	\$515,173.54	\$515,173.54	\$515,173.54	\$5,054,000.00
Account: Investment-Net	USD	\$185,000.00	\$8,789.80	\$8,789.80	\$8,789.80	\$28,259.60	\$28,259.60	\$28,259.60	\$28,259.60	\$196,808.00
Account: Revenue-Expense	USD	\$1,195,034	\$95,642.51	\$198,802.51	\$75,412.51	\$287,687.51	\$294,089.51	\$292,593.51	\$294,969.51	\$1,808,281.51
Account: Revenue-Net	USD	\$1,195,034	\$95,642.51	\$198,802.51	\$75,412.51	\$287,687.51	\$294,089.51	\$292,593.51	\$294,969.51	\$1,808,281.51
Account: Investment-Net	USD	\$5,054,000.00	\$515,173.54	\$515,173.54	\$515,173.54	\$515,173.54	\$515,173.54	\$515,173.54	\$515,173.54	\$5,054,000.00
Account: Investment-Net-Benefit	USD	\$185,000.00	\$8,789.80	\$8,789.80	\$8,789.80	\$28,259.60	\$28,259.60	\$28,259.60	\$28,259.60	\$196,808.00
Account: Investment-Net-Expense	USD	\$5,054,000.00	\$515,173.54	\$515,173.54	\$515,173.54	\$515,173.54	\$515,173.54	\$515,173.54	\$515,173.54	\$5,054,000.00
Account: Investment-Net-Net	USD	\$185,000.00	\$8,789.80	\$8,789.80	\$8,789.80	\$28,259.60	\$28,259.60	\$28,259.60	\$28,259.60	\$196,808.00
Account: Revenue-Net-Expense	USD	\$1,195,034	\$95,642.51	\$198,802.51	\$75,412.51	\$287,687.51	\$294,089.51	\$292,593.51	\$294,969.51	\$1,808,281.51
Account: Revenue-Net-Net	USD	\$1,195,034	\$95,642.51	\$198,802.51	\$75,412.51	\$287,687.51	\$294,089.51	\$292,593.51	\$294,969.51	\$1,808,281.51
Account: Investment-Net-Net	USD	\$5,054,000.00	\$515,173.54	\$515,173.54	\$515,173.54	\$515,173.54	\$515,173.54	\$515,173.54	\$515,173.54	\$5,054,000.00
Account: Investment-Net-Net-Benefit	USD	\$185,000.00	\$8,789.80	\$8,789.80	\$8,789.80	\$28,259.60	\$28,259.60	\$28,259.60	\$28,259.60	\$196,808.00
Account: Investment-Net-Net-Expense	USD	\$5,054,000.00	\$515,173.54	\$515,173.54	\$515,173.54	\$515,173.54	\$515,173.54	\$515,173.54	\$515,173.54	\$5,054,000.00
Account: Investment-Net-Net-Net	USD	\$185,000.00	\$8,789.80	\$8,789.80	\$8,789.80	\$28,259.60	\$28,259.60	\$28,259.60	\$28,259.60	\$196,808.00
Account: Revenue-Net-Net-Expense	USD	\$1,195,034	\$95,642.51	\$198,802.51	\$75,412.51	\$287,687.51	\$294,089.51	\$292,593.51	\$294,969.51	\$1,808,281.51
Account: Revenue-Net-Net-Net	USD	\$1,195,034	\$95,642.51	\$198,802.51	\$75,412.51	\$287,687.51	\$294,089.51	\$292,593.51	\$294,969.51	\$1,808,281.51
Account: Investment-Net-Net-Net	USD	\$5,054,000.00	\$515,173.54	\$515,173.54	\$515,173.54	\$515,173.54	\$515,173.54	\$515,173.54	\$515,173.54	\$5,054,000.00
Account: Investment-Net-Net-Net-Benefit	USD	\$185,000.00	\$8,789.80	\$8,789.80	\$8,789.80	\$28,259.60	\$28,259.60	\$28,259.60	\$28,259.60	\$196,808.00
Account: Investment-Net-Net-Net-Expense	USD	\$5,054,000.00	\$515,173.54	\$515,173.54	\$515,173.54	\$515,173.54	\$515,173.54	\$515,173.54	\$515,173.54	\$5,054,000.00
Account: Investment-Net-Net-Net-Net	USD	\$185,000.00	\$8,789.80	\$8,789.80	\$8,789.80	\$28,259.60	\$28,259.60	\$28,259.60	\$28,259.60	\$196,808.00
Account: Revenue-Net-Net-Net-Expense	USD	\$1,195,034	\$95,642.51	\$198,802.51	\$75,412.51	\$287,687.51	\$294,089.51	\$292,593.51	\$294,969.51	\$1,808,281.51
Account: Revenue-Net-Net-Net-Net	USD	\$1,195,034	\$95,642.51	\$198,802.51	\$75,412.51	\$287,687.51	\$294,089.51	\$292,593.51	\$294,969.51	\$1,808,281.51
Account: Investment-Net-Net-Net-Net	USD	\$5,054,000.00	\$515,173.54	\$515,173.54	\$515,173.54	\$515,173.54	\$515,173.54	\$515,173.54	\$515,173.54	\$5,054,000.00
Account: Investment-Net-Net-Net-Net-Benefit	USD	\$185,000.00	\$8,789.80	\$8,789.80	\$8,789.80	\$28,259.60	\$28,259.60	\$28,259.60	\$28,259.60	\$196,808.00
Account: Investment-Net-Net-Net-Net-Expense	USD	\$5,054,000.00	\$515,173.54	\$515,173.54	\$515,173.54	\$515,173.54	\$515,173.54	\$515,173.54	\$515,173.54	\$5,054,000.00
Account: Investment-Net-Net-Net-Net-Net	USD	\$185,000.00	\$8,789.80	\$8,789.80	\$8,789.80	\$28,259.60	\$28,259.60	\$28,259.60	\$28,259.60	\$196,808.00

**Work and Team Collaboration.** Creating and executing strategic plans requires collaboration and teamwork. Simplify this with team collaboration that streamlines communication. Regardless of geography or department, individuals can talk in real time about work and easily share important documents.



The Planview solution for strategic planning combines the power of:

Enterprise-wide Strategic Execution



Enterprise-wide Engagement



Team-centric Collaborative Work Management



Learn how Planview can help you make strategic execution real, to drive organizational change and transformation.

Visit [Planview.com/SP-Strategic-Planning](https://planview.com/SP-Strategic-Planning) today to learn more.

The Planview solution for strategic planning is one of our work and resource management solutions. Work and resource management is a new approach for a growing problem. Getting work done today – work that delivers on strategy – is becoming increasingly difficult. Rapidly changing market forces are working against your organization, and the stakes have never been higher.

Complexity in integrating strategy and delivery is inevitable, and your path to innovation is fraught with challenges. The key to reach your goals is realizing your organizational resource potential. And that is what Planview work and resource management solutions empower enterprises to do in the areas of strategic planning, portfolio and resource management, product innovation, capability and technology management, Lean and Agile delivery, and collaborative work management.

† Bascuas, K. (2014). Study: Change Is Good, But Many Organizations Don't Do It Well. Associations Now. Retrieved 8 March 2017, from <http://associationsnow.com/2014/03/study-change-good-many-organizations-dont-well/>