

**SOLUTION BRIEF**

# Elevate PMO Success

## Portfolio and resource management

Organizations are driving toward growth, innovation, and transformation at a faster pace than ever before. Savvy PMOs recognize that their organizations demand more from them now than on-time, on-budget project delivery. PMOs need to enable the business intent and value of projects to help realize the goals of digital transformation and innovation.

Elevating the capabilities of your PMO will enable you to deliver a portfolio with higher strategic value by:

- Optimizing resource utilization through capacity planning.** When change comes, being able to focus the right resources on the highest priorities is key to making strategy real.
- Delivering business value.** Understand the “why” behind project requests; track business KPIs and ensure you are focused to deliver on what’s most important.

### The right solution for today’s PMOs

The **Planview® solution for portfolio and resource management** integrates strategy, planning, and delivery to help you drive innovation and transformation programs in the midst of change and available people and financial resources.



With this comprehensive approach, business stakeholders can visualize and understand portfolio performance against plans, empowering them to make better and faster decisions that ensure resources deliver the highest value projects, all while you:

- ✓ Optimize portfolios
- ✓ Balance capacity against demand
- ✓ Link plans and resources to projects
- ✓ Manage the underlying financials

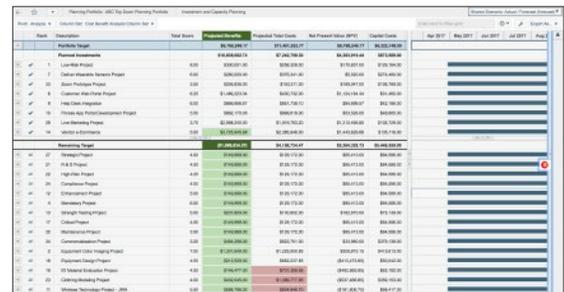
Let's examine how this solution works.

**Analyze portfolio and project performance.** Give stakeholders the information they need to make decisions when and where they need to. Get real-time access so you can communicate on progress, make corrections in-flight, and ensure initiatives are delivering the expected results with:

- Interactive visualizations
- Robust out-of-the-box configurable reports
- Deep analysis with OLAP cubes
- Dashboards for stakeholder visibility

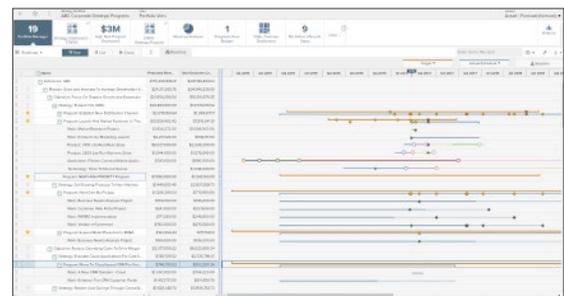


**Prioritize investments to achieve your strategy.** Ensure that strategy becomes reality by creating portfolios prioritized for growth, innovation, transformation, and keep-the-lights-on initiatives. Plan and manage investment portfolios from business case to execution, optimizing spend over shifts, delays, or new opportunities. Drive ranking and prioritization using objective, repeatable methods to quantify investment value; leverage top-down planning to understand and prioritize initiatives.



**Deliver programs that drive innovation and change.** Define programs, establish your business case, and use roadmaps to communicate your plan. Program management and roadmapping capabilities empower you to:

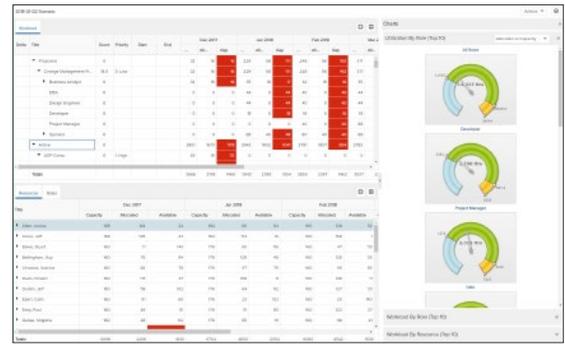
- Define top-down timeframes and financials, then adjust based on bottom-up project forecasts and actuals
- Share timeframes, milestones, and releases across the organization
- Deliver strategic programs with integrated project execution



**Capture all demand.** Centralize demand intake and optimize capacity to deliver on strategy. See and classify new demand, and create a prioritized plan that you can deliver. Scope for evaluation, and use workflows and lifecycles to ensure appropriate submissions and routing approvals are attained. Empower stakeholders to easily request and check work status.

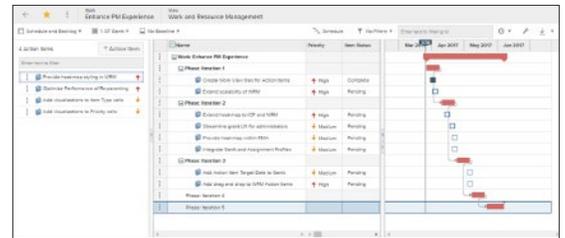


**Optimize resource capacity across portfolios.** Define achievable, role-based plans, and balance capacity and demand over the planning horizon. Ensure the right resources are available to deliver the plan. Proactively identify capacity constraints by role, location, and other factors.



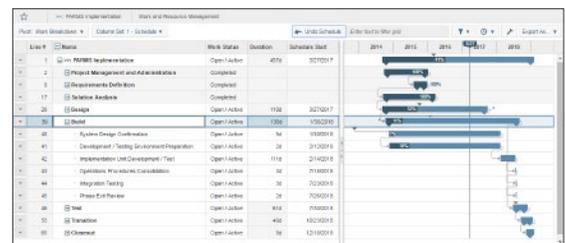
Rebalance capacity using scenarios to evaluate different staffing options. Compare how different scenarios impact different project portfolios. Reallocate capacity by shifting resource pools with priorities.

**Manage project schedules, work, and resources across your entire portfolio.** Plan, manage, and deliver all types of work – traditional, agile, and collaborative. The Planview solution offers a comprehensive approach across project schedules, work collaboration, milestones, and resources so you can manage performance and ensure on-time delivery.



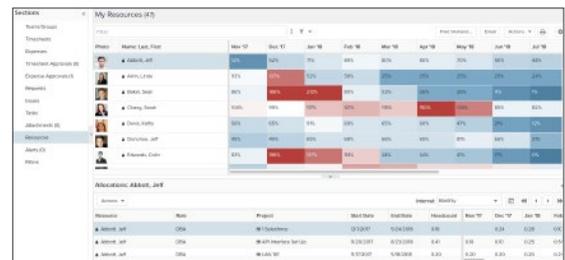
With a real-time view into in-flight work, you can identify projects, issues, and risks that need your attention.

- Accelerate execution and ensure repeatability by configuring workflows and embedding best practices
- Execute work in the best tool – agile, collaborative, or project-based
- Leverage Work Breakdown Structure and templates to standardize and speed delivery



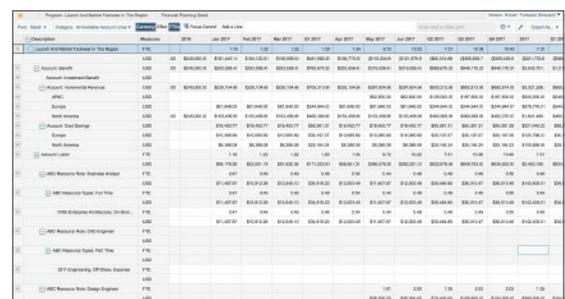
**Improve resource utilization to ensure successful project delivery.**

Focus people on the right work to drive progress toward overall goals. The Planview solution helps you balance named resources across all your projects and work, with visibility into workloads to efficiently allocate people to the right projects at the right time.



- See all your resources across the entire organization
- Improve staffing plans by understanding impact of non-project work
- Monitor current and forecasted utilization to avoid bottlenecks

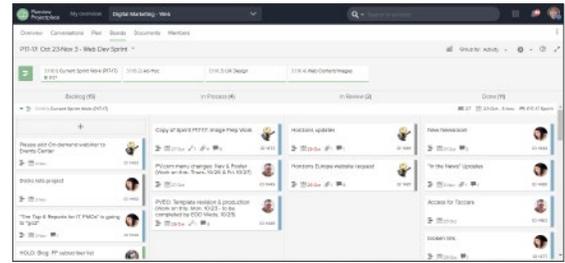
**Manage costs against budget.** Robust financial capabilities enable project budgeting, forecasting, and tracking actuals for capital and expense. Use comprehensive views to understand how costs break down by different priorities – growth, innovation, transformation, keep-the-lights-on, and compliance.



Effectively plan, measure, and communicate your portfolios' financial performance. The solution connects financials from strategy to investments to capital, budget, actuals, and forecasts. Leverage templates that comply with financial reporting policies.

**Enable collaborative workspaces for team members.** Formal project management accounts for only a portion of the work done by team members. Much of the everyday work is unstructured, ad hoc, and cross-functional. The Planview solution integrates a PPM timesheet with a collaborative work management experience that bring teams together to get work done more easily and faster than ever before.

Teams come together in workspaces to plan work, execute tasks, and collaborate on Kanban boards with integrated documents and conversations.



Whether it's your first experience with PPM software or you are advancing strategic and investment planning across your entire organization, Planview offers a portfolio and resource management solution that fits the needs of every PMO.

The Planview solution for portfolio and resource management includes:

Enterprise-wide Strategic Execution



Mid-tier Project Portfolio Management



Team-centric Collaborative Work Management



Learn how Planview can help your PMO build successful project portfolios for business innovation and transformation.

Visit [Planview.com/PRMDemo](https://www.planview.com/PRMDemo) today to learn more.

There is a bold new way of working, where every individual and team can move seamlessly from strategy to successful delivery – every day. Planview makes it possible. As a global leader, we provide the industry's most comprehensive solutions designed for strategic planning, portfolio and resource management, Lean and Agile delivery, product portfolio management, capability and technology management (enterprise architecture), innovation management, and collaborative work management.

†PMI. (2017). Pmi.org. Retrieved 27 April 2017, from <http://www.pmi.org/-/media/pmi/documents/public/pdf/learning/thought-leadership/pulse/pulse-of-the-profession-2017.pdf>