Solving Top Challenges For Service Organizations

Services Automation = Efficient Services Delivery and Improved Business Profitability

Core Service Capabilities Powering the Quote-to-Cash Cycle

Opportunity Management
Monitor demand and forecast opportunities to better understand your pipeline. Planview tracks current and potential opportunities’ costs, timelines, and profits so you can improve sales effectiveness and service delivery.

Contract Management
Create and automate standard processes for contract management to improve profitability. Planview helps you precisely manage contract elements, such as expenses and mixed billing methods, across all engagements.

Resource Management
View and manage your entire resource pool to assign the right resources at the right time for more efficient project delivery across all engagements. Planview helps improve resource utilization and realization, customer satisfaction, and profitability.

Project Management
Gain efficiencies and more accurate project metrics across all your service offerings—ensuring projects get completed on time and on budget. Planview has built-in quality control when assigning resources to various tasks, creating product status reports, and sharing project information.

Time and Expense Management
Use real-time documentation for timely approvals and invoicing—resulting in immediate revenue recognition. Planview and its mobile app provide anytime, anywhere access to time and expense tracking via any device for greater financial accuracy.

Financial Management and Revenue Recognition
Keep your client engagement and cash flow thriving with real-time financial health management across engagements. Planview removes cash-flow challenges with dependable insights, sophisticated budgeting, and intuitive cost allocation capabilities.

Watch demo