

## APMG EVALUATION SERVICE FOR PROJECT MANAGEMENT PRODUCTS

### GOLD REPORT

*Company:* **Planview UK**

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*Product:* **Planview Enterprise Version 6**

This report covers the Gold Stage assessment of Planview Enterprise Version 6, an application from Planview UK, that I conducted between Monday 14 March and Tuesday 3 April 2007.

The Planview Enterprise software suite comprises four main elements. The Enterprise Portfolio Management module provides investment and benefit management functionality and allows for the alignment of strategies and resource capacities. The Project Portfolio Management module enables the user to plan work, optimising the use of resources. The third element is the Planview Prisms module, which contains in excess of two hundred best practices, which are documented in guides and contain the templates and automated processes to drive them. The Service Portfolio Management module allows managers to control spending on the day-to-day operations that are essential in a business environment.

This is a fully Web-based system. Each user is allocated a 'role' and their interface with the software, what they can do and see, is governed by the rights of that role. However, within the constraints of their role, users can configure their screen displays to their own requirements. As a general rule, the more senior the user, the greater the element of overview delivered by the system reporting capabilities. However, all users can drill down into the information displayed to inspect the detailed data should this be necessary.

At the strategic level, you can define your organisation's strategic breakdown structure and assign lifecycles and budgets. The programmes and projects required to achieve these objectives can be planned and analysed to determine which make the greatest contribution to specific strategic objectives. The entire organisation's work plan can be controlled at this level and, according to their success in delivering the required benefits, projects and programmes can be prioritised, put on hold or cancelled.

The system's programme and project planning and management functionality allows for 'suggestions' for projects to be entered. These may be converted into projects and planned, resourced and monitored at programme, project and resource manager level. The whole system being driven by 'notifications', automatically produced messages that are exchanged with the intention of keeping everyone abreast of the situation. What-if scenarios can be created and accepted or rejected at will. Team members are able to enter details of work done and feed information and suggestions back to higher levels. Peer-to-peer collaboration is also catered for.

To facilitate the Gold Assessment process, Planview was invited to supply details of two

clients who had been using the application during the course of their business for a sufficient period to become well versed in the way they work. This they did and I interviewed the people who use the software in order to discover if they were of the opinion that it works as it should and as they were led to believe it would.

The first client interviewed was a Royal Navy Staff Officer within the MOD Central Staff, working as head of the Programme Management Office within a fully-developed matrix EPM/PPM business model. He has been using PlanView for about two years.

The decision to purchase Planview was taken following the preparation of a Business Case that laid out the key user and availability requirements along with financial and timing specifications and the comparison of at least six products for suitability. The principal requirement was for efficiency savings, which were more than achieved, and additional efficiency savings in other areas are now expected.

Planview handled the installation of the product and there were no problems. All of the statements made during the sales process were fulfilled. The system worked first time and all of the requirements, bar one, were achieved. The product does everything that was expected of it. The missing requirement was for a particular report that was not included in the system. PlanView produced it and embedded it into the system and their service was described to me as 'first class'.

Because the system replaced people's entrenched personal systems there was initial resistance to adopting it. The officer enlisted the support of his Admiral to 'persuade' people to use the PMO and conducted a staged implementation that compelled people to use the centralised system to achieve data fidelity and avoid an unnecessary training burden. No issues connected with training or usability were encountered. The system is shortly due to be rolled out to a potential user-base of more than three thousand people.

The client has purchased a contract for the provision of support and upgrades and describes Planview's responsiveness as 'superb'. I asked if there were any improvements to the system required. I was told that an improvement to one system area had been suggested to Planview who had taken the comments (which were the result of a common issue that had also been raised by other customers) on board. A revision of the product's user interface had been completed and was shortly due for release.

I asked whether the purchase of Planview had provided value for money and was told that its use in one area had led to an immediate 400% increase in productivity. Improved visibility across the organisation and better resourcing led to additional savings - in the last six months, 750 incidents of priority conflicts have been identified through visibility of allocated resources alone.

To conclude the interview, the officer told me that, in his opinion, everyone at PlanView understands where their company is going and he finds the company ethos impressive. Their communication is good and they are customer-focussed. The company is growing and gaining market share and it clearly has some business challenges. However, all of the promises made to him have been kept and company integrity has been maintained despite the growth of the business.

The second interview that I conducted was with the Business Change and IT QA Managers of

a large commercial insurance organisation. They needed an organisation-wide process and metrics tool to help them achieve level three of the Capability and Maturity Model software development accreditation and the system they used previously 'didn't deliver'.

They wrote off the idea of developing a system in-house. Initially employing desk-based research they built up a list of 56 software providers, which was then whittled down to thirteen. In conversation with analysts and other first-hand users they arrived at a short list of three. They spent two days with each of these vendors getting hands on experience of the functionality and checking it against a pre-prepared list of functional requirements. Once they had made a provisional decision to purchase, they visited two reference sites before finalising on Planview. On the IT side there are 280 users, 90 of whom are in India. On the Business side, there are about 200 users, all in the UK. Further users are due to be added in the near future.

Cost savings and efficiencies were achieved as a result of switching to Planview. The Business Side of the organisation now has a consistent standard and their decisions are now based on a measurable decision-making process rather than 'gut feeling'. The IT Department reports an overall process improvement, an integral part of which is attributable to Planview.

The technical implementation, which was carried out 'quite quickly', was fairly trouble-free although their technical people wanted additional 'how to' documentation that Planview wasn't able to provide. Planview overcame this by sending in their own technical people to handle problems.

They purchased the new Enterprise version of the product and were the first people in the UK to use it. Planview's implementation team 'weren't as familiar with the product as they should have been – they were also learning', however, the full implementation process was completed within the initially purchased number of consultancy days and no extra days were needed.

In the opinion of these users, the product is not 'easy' to use. It's a complex tool that requires training and support. It has a lot of functionality and doesn't always work in the 'standard Microsoft' way. One can forget how to perform operations in the period between accessing the less frequently-used functions. However, they don't think that it's any more difficult to use than any other product of this nature would be.

The interviewees gave me details of a few product improvements that they would like to see. These are primarily enhancement requests which have all been previously submitted to Planview's product development group. In some cases workarounds have already been provided.

Although the product does everything expected of it, the tool provided to enable migration of user-driven Planview configurations between environments was not as good as it should have been when first used. Between then and now, however, I understand that Planview has undertaken work to address its shortcomings.

Planview has a help line that can be used to answer questions and the company can also contact their assigned Planview consultants for help. General users contact the company's own IT department (which was responsible for rolling out the system across the enterprise) to use their internal support system.

The interviewees were in no doubt that Planview provides excellent value for money and is 'very cheap for the functionality we get'.

Both sets of clients interviewed are completely satisfied that the product does all they were led to expect and represents an excellent investment on their part. Consequently, I am satisfied that this product meets the required standards and recommend that Planview Enterprise Version 6 be given the Gold Award.

S. Cotterell  
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