

Solution Brief

THE PLANVIEW SOLUTION FOR OPERATIONAL PLANNING

Close the Gap Between Strategy and Execution

Today's corporate leadership faces enormous pressure brought on by economic challenges and unrelenting competition. Yet as the demand for improved productivity and corporate performance increases, budgets and resources are likely to remain flat – and not just this year, but for years to come. In this challenging “New Normal,” enterprises have little choice but to wring the very most from what they already have.

Never has a comprehensive and flexible operating plan been more crucial for business success. But at a time when enterprises must plan and execute strategically, typical operational planning processes are anything but strategic.

THE PROBLEM: A COSTLY GAP IN THE PLANNING PROCESS

Today's operational planning is a largely manual effort that results in a series of tactics aimed at meeting budget targets or tolerances. The impact of plans on operating groups – those who must execute operating initiatives – is often unclear to the planners.

Most plans are developed in spreadsheets, and this makes it difficult to enable shared, iterative planning across the enterprise. Organizations also have trouble integrating from multiple systems the data they need to establish a truly comprehensive operating plan. Meanwhile, poor communication among departments leads to initiatives that may actually work against a company's goals.

The problems don't end once an operating plan is established, because most plans lack the flexibility companies need to respond to changing market conditions. Even when changes are made, managers often can't accurately forecast how those changes will impact relevant areas of the enterprise.

The result is a costly gap between strategy and execution.

THE SOLUTION: CREATE A DYNAMIC, ALWAYS RELEVANT OPERATING PLAN

The Planview Operational Planning Solution fills this critical gap in enterprise planning by creating a dynamic and consistently relevant operating plan, one that is integrated with established strategic and financial processes.

By fostering a collaborative planning process that builds consensus, the Planview Operational Planning Solution ensures that operating units across the enterprise are executing in support of top-level business goals, such as driving revenue, accelerating time to market, improving productivity and operating efficiencies, and preserving and enhancing brand value.

This new approach solution gives life to a company's strategy by defining:

- What the organization seeks to accomplish
- When those accomplishments will be met
- How labor and financial resources can best support those investments
- What benefits will be realized as a result



The problem: A costly gap in the operational planning process.

The Planview Solution for Operational Planning

The Planview® Solution for Operational Planning optimizes the translation of strategy into execution with a dynamic, consistently relevant business plan that aligns strategic planning, financial, and operating groups.

The solution leverages Planview portfolio management strengths in demand management, strategic planning, capacity planning, financial management, roadmapping, brand impact analysis, and ideation management, to provide a comprehensive approach to operational planning. This ensures that operating units across the enterprise are executing in support of top-level business goals, such as driving revenue, accelerating time to market, improving productivity and operating efficiencies, and preserving and enhancing brand value.

Learn more at planview.com/Planning.

Use the Planview Operational Planning Solution to:

- Optimize the translation of strategy into execution
- Align strategic planning, financial, and operating groups
- Quickly adapt to changes in the business environment
- Reduce cost and improve accuracy of planning
- Improve time to market and manage resources for product delivery
- Baseline expected benefits to drive measureable business results
- Improve communication throughout the enterprise

DO YOU NEED AN OPERATIONAL PLANNING SOLUTION?

Consider these questions, and ask yourself if your organization's current planning process could benefit from the Planview Operational Planning Solution.

- Is our planning process done on spreadsheets?
- How could we benefit if departments and LOBs were more involved in Operational Planning?
- Do we merely set financial and budgetary targets and leave it up to departments to meet them?
- How accurate are the budgets and forecasts in our Operating Plan? How accurate will they be in three to six months?
- Once a plan is set, how easy is it to update it to respond to – or get ahead of – the market?
- When we make changes, can we reliably predict their impact on financials, releases, products, timelines and resources?
- Do our roadmaps reflect all pertinent functions that contribute to meeting our business goals?
- Does our operating plan incorporate the Voice of the Customer? Does it reflect the competitive landscape?

The Planview Operational Planning Solution combines the proven strengths of this portfolio management leader with new capabilities available in Planview Enterprise to create a business-driven – rather than project-driven – operating plan.

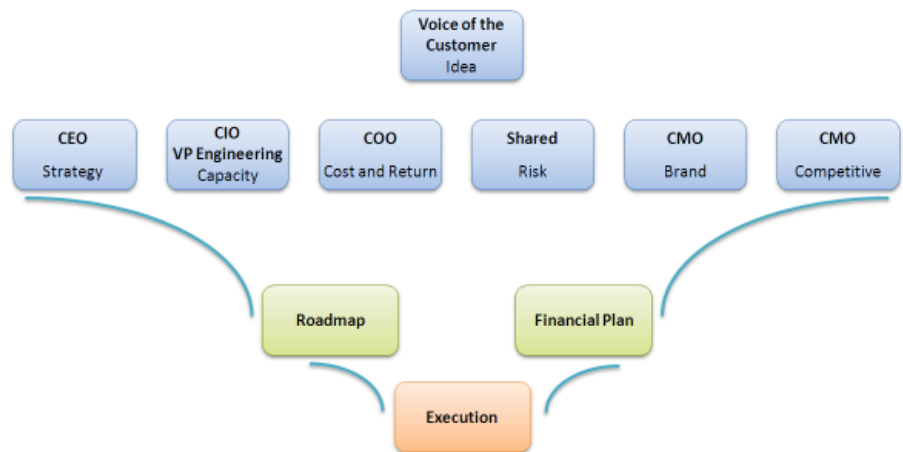
It enables managers to optimally translate strategy into execution with a range of powerful capabilities, including:

- **Demand management.** Capture and structure demand from all stakeholders to feed the planning process and align it with strategy.
- **Brand impact analysis.** Enable the Voice of the Customer to influence operational planning decisions.
- **Strategic planning.** Guide the entire operational planning process to ensure it adheres to top-line strategy.
- **Next generation capacity planning.** Create a shared, iterative process that balances capacity and demand across multiple dimensions.
- **Expanded financial management.** Gain deeper insights into financial implications of plan changes with seamless integration into financial systems.
- **Roadmapping.** Dynamically define how strategies, products, programs, projects, services, and releases all combine to achieve operating goals – and communicate business-driven metrics for all lines of business (LOBs) via a published roadmap.

Engage the Enterprise in Planning

A single, collaborative platform for operational planning helps you achieve a productive dialogue across departments and LOBs. This allows stakeholders, often for the first time, to analyze the plan based on their individual needs, challenges and expected benefits.

- Feed the operating plan with demand captured from business units, departments and LOBs
- Make optimal choices by sharing what-ifs to explore the viability of given plans and the inherent trade-offs of each scenario
- Provide appropriate data views so all stakeholders can understand the true implications of scenarios on the enterprise, its LOBs and its departments
- Manage the planning process above the execution layer, to ensure that the plan impacts operating groups appropriately, at the end of the operational planning cycle



A collaborative planning process that integrates all functions mitigates risk by sharing information and insights across departments, LOBs and functions.

Integrate Operational Planning with Finance

Arm your organization with a robust planning process that's informed – but not dominated – by budget drivers.

- Manage your operations with plans based on accurate costs
- Let departments and workgroups feed Finance exactly what it needs – anticipated expenditure amounts and targets, expected revenues, capital vs. expense – without having Finance drive the planning process
- Integrate data (cost, margin, revenue, and so forth) with processes to connect the dots between the strategic plan, financial and budgetary constraints, and the operating plan
- Leverage existing financial systems by sharing data across platforms
- Enable more specific and accurate forecasting, with concrete deliverables
- Lay the groundwork for measuring success by establishing a baseline to measure future performance of the operating plan

Create a Plan that Responds to Customers and the Market

Successful operating plans are informed by the Voice of the Customer and by insights from marketing and brand managers – and then can be easily modified to remain relevant. Using proven Brand Image Analysis capabilities, you can ensure these vital influences are incorporated in a dynamic plan that helps you keep ahead of the market.



- Analyze customer-originated ideas through the filters of strategic planning and demand management, and financials and capacity planning.
- Ensure operating initiatives support and enhance the brand attributes that most resonate with customers
- Integrate competitive landscape analysis into Operational Planning
- Leverage patented methodology from Strategic Harmony®.
- Integrate with Planview Enterprise Ideation Management to ensure operating plan elements support innovation initiatives.

Analyzing and including brand impact in operational plans makes your plans responsive to the market.

Optimize Resources by Balancing Capacity and Demand

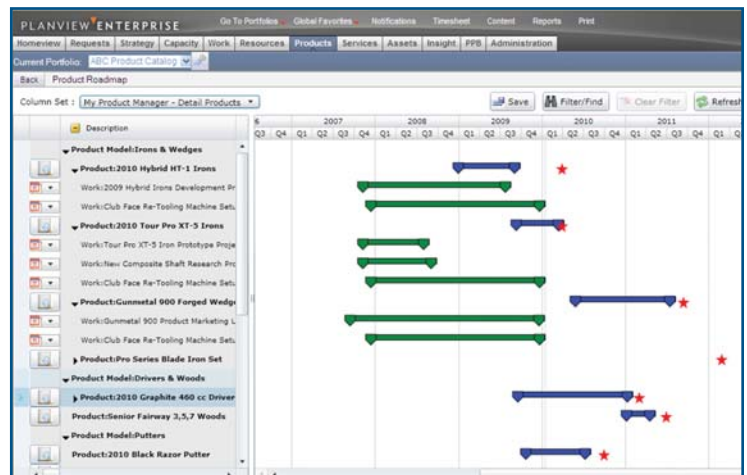
By integrating products into capacity planning, you can achieve a more revenue- and business-driven approach to operational planning.

- Understand resources (FTEs), labor costs, and non-labor costs, and how they relate to the many ways your company delivers value (via products, programs, projects, features, releases, etc.)
- Analyze demand across the organization with a robust user interface that scales powerfully as you add departments and operating functions
- Allocate resources to the prioritized investments that result from strategic planning and demand management to meet business goals – on time, on budget, and with the resources at hand
- Assess and balance the demand for both people and money over time
- Determine what investments to pursue and their relative priority
- Establish a timeframe and allocate resources for each investment

Communicate a Unified Operating Plan with an Interactive Roadmap

To improve communication and attain company-wide commitment to a single operating plan, publish a roadmap that reflects what the organization can confidently deliver and when.

- Assign roadmaps to products, applications, services, technologies, campaigns and more
- Quickly assess resource investment, delivery status, and the like, with fully interactive and customizable treemap views
- Immediately update delivery dates and spot schedule problems with intuitive, sliding timelines
- Understand the indirect implications of Roadmap changes with drill-down capabilities



Interactive roadmaps solidify buy-in by reflecting what the organization can deliver.

Streamline Your Operational Planning Process Today

The Planview Operational Planning Solution offers a comprehensive platform for automating your manual planning process in a way that reduces costs, improves accuracy, ensures buy-in, and enables you to compete more effectively than ever before.

Retool your operational planning methodology so all relevant – and critical – enterprise functions are accurately represented, closing the gap between strategy and execution. This powerful, scalable solution combines the proven strengths of Planview Enterprise with new capabilities so you can ensure revenue-impacting LOBs and departments are always executing in support of top-level business goals, and that the Voice of the Customer is incorporated throughout. As a result, you can:

- Increase revenues**
- Optimize time to market**
- Boost productivity and operating efficiencies**
- Preserve and enhance brand value**

Learn more about how Planview can transform your Operational Planning process at planview.com/Planning.



For 20 years, Planview has been advancing the discipline of portfolio management, helping our customers change the way they manage people and money to make better business decisions. With a singular focus on portfolio management, Planview is the only company that combines customer-driven software, unmatched domain expertise, and proven best practices to solve each customer's unique business problems.

Planview Enterprise®, a market-leading portfolio management application suite, with Planview PRISMS®, the knowledge base for accelerating organizational change, and Planview Process Builder™, for process modeling and management, delivers measurable business results for IT management, product development organizations and throughout the enterprise. As an independent, trusted partner, Planview is committed to interoperability with key management systems through the Planview OpenSuite™ integration product line. Industry leaders such as Citi, BP, and EDF, rely on Planview to drive revenue, mitigate risk, cut costs, create efficiencies, and ultimately give their businesses a competitive advantage.

Privately held and consistently profitable, Planview is headquartered in Austin, Texas. With offices across North America, Europe, and Asia-Pacific, the company supports customers in virtually every industry around the world. For more information, visit www.planview.com.

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