

# Product Datasheet

## ENTERPRISE PORTFOLIO MANAGEMENT

### Optimize Investments and Align Technology with Business Objectives

Making strategic decisions about the direction of the business is perhaps one of the greatest challenges organizations face today. Planview® Enterprise Portfolio Management is a powerful management solution that enables you to analyze and manage business risk, strategically align business and technology planning, prioritize strategies, and use scenario planning to better prepare for change and uncertainty.

Planview Enterprise Portfolio Management leverages consistent, repeatable, auditable processes driven by Planview PRISMS™ management best practices. Planview PRISMS helps you improve performance by focusing on key process areas such as strategies, investment analysis, and benefit realization, and delivers guidance through documentation, software automation, and an expert online community. A range of flexible, comprehensive features provides advanced portfolio intelligence, adaptable strategic management, and enhanced financial management.

### Integrate Organizational Budgets and Strategic Planning

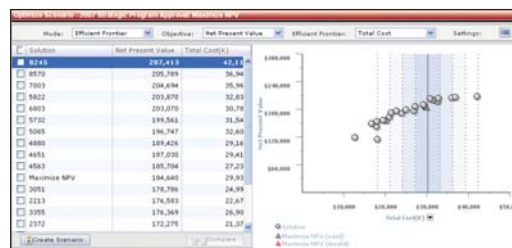
Planview Enterprise Portfolio Management’s investment analysis promotes well-informed decisions by carefully examining the goals, risks, and funding of all investments within a portfolio, associating money and effort with strategic goals. Portfolio dashboards allow you to evaluate investment performance and perform root-cause analysis of investment variances. Strategic lifecycles enhance planning by defining and implementing process stages and decision gates to ensure that the right people are involved at the proper time throughout the planning process. With strategic portfolios, your organization can quickly analyze funding options, eliminate misaligned investments, align top-down and bottom-up planning, integrate multiple planning processes with differing time horizons, and make certain that performance information is accurate and timely.

### Align Resources with Business Demands

Organizational Capacity Planning allows you to balance resources with business demands, ensuring that your resource capacities support your business strategies. You can perform top-down planning on high-level factors such as FTEs (Full Time Equivalents) and organizational units, aligning these efforts with the bottom-up planning performed by project managers. In addition, resource-capacity forecasting can be improved by using a framework based on roles rather than individuals, ensuring that strategic goals aren’t limited by short-term changes in personnel.

### Optimize Investment Decisions

Investment Analysis and Optimization capabilities provide automated ranking, decision modeling, and investment prioritization. With Investment Analysis, you can improve decision making across the enterprise by performing valuable “what-if” scenarios. In addition, a powerful Investment Optimization Engine uses advanced algorithms to evaluate thousands of investment combinations, providing recommendations at different cost points that ensure that you are achieving the greatest possible value from your portfolio mix.



*Planview Enterprise’s Investment Optimization Engine uses advanced algorithms to evaluate and determine the ideal combination of investments for your portfolio.*

### Planview Enterprise

Planview Enterprise® Enterprise Portfolio Management is an integrated component of Planview Enterprise, a market-leading portfolio management solution. Portfolio management helps you optimize your business by balancing strategy against scarce resources – people and money. Other components of Planview Enterprise include Project Portfolio Management (PPM) for managing projects and resources, Product Portfolio Management (PdPM) for maximizing the market impact of products, Service Portfolio Management (SPM) for managing the total cost of business service delivery, Business Process Manager (BPM), and Insight Analytics, for accelerating informed business decisions. Enterprise Portfolio Management enables the alignment of resources and work with business goals and strategy.

### Use Planview Enterprise Portfolio Management to:

- Align IT strategies and business objectives
- Optimize investment opportunities
- Improve stakeholder visibility
- Integrate planning decisions
- Enhance decision making

## Quickly Respond to Changes in Priorities

The Scenarios Management function helps managers evaluate alternative plans and quickly adjust to changes in business priorities. Stakeholders can compare scenarios in terms of financial and business benefits, and allocate resources accordingly.



*Scenarios management enables you to quickly evaluate alternative courses for your organization.*

## Improve Stakeholder Visibility

Enterprise Performance Management measures performance, helps group business strategies into portfolios, and provides enterprise-wide dashboards. These capabilities increase stakeholder visibility and improve communications throughout the organization. Real-time investment Reporting tools allow you to produce consolidated business cases, compare cumulative cost-benefit against baseline, and monitor portfolio and investment performance, variances, and trending. You can also define a portfolio baseline as an accurate way to measure progress on a periodic basis according to financial and resource capacity and schedules.

## Establish and Measure Business Strategy

Benefits Realization leverages best practices and utilizes the business case method to proactively define both the methods and targets for measuring the benefits of investments, initiatives, and programs. Through integrated lifecycles, proposed benefits are captured and revisited multiple times throughout the investment's lifecycle, including during approval, execution, and upon delivery. Lifecycles further ensure post-delivery follow-up for benefits validation.



## Seamlessly Integrate Strategies, Projects, Services, and Assets

Planview Enterprise Portfolio Management seamlessly integrates with Planview Project Portfolio Management to successfully align your business goals with resource assignments. Capabilities such as top-down and bottom-up adjudication coordinate strategic plans throughout your organization and effectively bridge the gap between business and IT. In addition, Planview Enterprise Portfolio Management integrates with Planview Service Portfolio Management to ensure that the delivery of business services supports overall business objectives.

*Dashboard views show trends occurring within an investment portfolio, such as health and baseline performance.*

To sum up, Enterprise Portfolio Management helps decision makers to prioritize their investment decisions based on key criteria such as benefits, timeframe, cost, and risk — and that means a much better alignment of IT and business strategies to provide bottom-line, measurable results.



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, 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](http://www.planview.com).

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## ENTERPRISE PORTFOLIO MANAGEMENT OVERVIEW

FUNCTION	DESCRIPTION	BENEFIT
STRATEGIC PLANNING	<p>Defines strategic lifecycles.</p> <p>Organizes strategies hierarchically.</p> <p>Groups funding in investment portfolios.</p>	<p>Quickly analyze investment options at or above the project level.</p> <p>Eliminate misaligned investments.</p> <p>Organize top-down and bottom-up planning.</p> <p>Review the status of investment strategies.</p>
FEATURE	ADVANTAGE	
PORTFOLIO-BASED	Allows users to create portfolios in a flexible, dynamic manner according to funding sources, specific programs, resources or other criteria.	
WORK, SERVICES, AND ASSETS	Models the many-to-many relationships between various projects and business programs. Supports multiple project environments in a dynamic manner.	
STRATEGIC LIFECYCLES	Guides programs through the organization, collecting required approvals and documents at the right time.	
MULTI-STAGE APPROVALS	Defines and implements a gated approval process that involves progressively more detailed levels of information and rigor as investments are developed.	
FUNCTION	DESCRIPTION	BENEFIT
ORGANIZATIONAL CAPACITY PLANNING	Matches the capacity of the organization to business demands.	Balance resources with business demands.
FEATURE	ADVANTAGE	
ORGANIZATIONAL RESOURCES	Allows users to focus on high-level factors such as FTEs (Full Time Equivalents), roles, and organizational units.	
ORGANIZATIONAL UTILIZATION	Integration with Project Planning and Resource Management to approve and then monitor investments based on actual, evolving resource assignments.	
ORGANIZATIONAL FINANCIAL MANAGEMENT	Breaks dollars down along the organizational structure, from the top down or from the bottom up.	
FUNCTION	DESCRIPTION	BENEFIT
INVESTMENT ANALYSIS AND OPTIMIZATION	Provides decision modeling supported by a combination of automated Investment Optimization and manual ranking and prioritization of investments and audit trails.	<p>Consistently define organizational criteria for improved investment decision making.</p> <p>Build optimal portfolios by considering a wider range of possible solutions</p> <p>Ensure better regulatory compliance.</p> <p>Eliminate low-value or redundant initiatives.</p>
FEATURE	ADVANTAGE	
DECISION MODELING	Provides the ability to create “what-if” scenarios for different requirements or changing priorities.	
INVESTMENT OPTIMIZATION	<p>Provides recommended portfolios by analyzing investments against user-defined criteria.</p> <p>Employs advanced optimization algorithms, including Efficient Frontier logic, to quickly identify wide variety of possibly optimal solutions.</p>	
RANKING AND PRIORITIZATION	Ranks and prioritize investments via user-defined metrics, allowing you to better allocate funding.	
AUDIT TRAILS	Generates extensive audit trails for better regulatory compliance.	

## ENTERPRISE PORTFOLIO MANAGEMENT OVERVIEW

FUNCTION	DESCRIPTION	BENEFIT
SCENARIOS MANAGEMENT	Produces unlimited investment scenarios as a means to evaluate alternative courses for the organization.	Evaluate alternative plans. Quickly adjust to a change in business priorities.
FEATURE	ADVANTAGE	
COMPARISON BASED ON FINANCIALS	Evaluate scenarios based on industry standard metrics such as including Return on Investment, Payback Period, and Internal Rate of Return.	
COMPARISON BASED ON CAPACITY	Compare the impact of different scenarios on organizational capacity.	
COMPARISON BASED ON SCHEDULES	Analyze the strategic and business impact of shifting projects.	
FUNCTION	DESCRIPTION	BENEFIT
PERFORMANCE MEASUREMENT	Measures performance. Groups business strategies into portfolios. Offers enterprise-wide dashboards.	Increase stakeholder visibility. Improve communications throughout the organization.
FEATURE	ADVANTAGE	
EXECUTIVE DASHBOARDS AND ANALYTICS	Summarizes graphical views focused at the portfolio, strategy, and program level; facilitates management tools such as balanced scorecard.	
REAL-TIME INVESTMENT REPORTING	Uses the powerful tools of business intelligence to build complex ways to analyze investments and summarize data.	
PORTFOLIO BASELINES	Defines a portfolio baseline as a way to accurately measure progress on a periodic basis according to financials and schedules.	
OPTIONS		
FEATURE	DESCRIPTION	BENEFIT
INVESTMENT OPTIMIZATION ENGINE	Provides recommended portfolios by analyzing investments against user-defined criteria. Employs advanced optimization algorithms, including Efficient Frontier logic, to quickly identify wide variety of possibly optimal solutions.	Improved decision making. More rigorous alternative to spreadsheet analytics. Consider a wider range of possible portfolios and investment decisions.
PLANVIEW COMMUNITY POWERED BY EROOM	Provides collaboration via EMC Documentum eRoom, allowing teams to work together closely and efficiently.	Capture and expedite strategic planning decisions. Improve performance. Enhance stakeholder visibility.
BUSINESS OBJECTS™	Leverages enhanced reporting via the latest release of Business Objects, the industry's leading suite of business intelligence (BI) software.	Track performance. Better understand business drivers. Improve communication.

### Plan strategies and control investments across the enterprise

Learn more about Planview Enterprise Portfolio Management today by visiting [www.planview.com/epm](http://www.planview.com/epm).