PLANISWARE
ENTERPRISE

Strategic Portfolio Management & Delivery

FOR IT AND DIGITAL PRODUCTS

Planisware

Introduction

Planisware Enteprise stands out as **the only software in the market** that brings together strategies, portfolio delivery, and enterprise architecture within a single platform.

- Streamline IT portfolio management with a true one single source of truth.
- Accelerate digital transformation thanks to powerful what-if scenario capabilities
- Deliver on average 20% more with the same resources.
- Simplify IT architecture to mitigate risks and save cost.
- Make data-driven portfolio decisions with real-time visibility over the book of work.

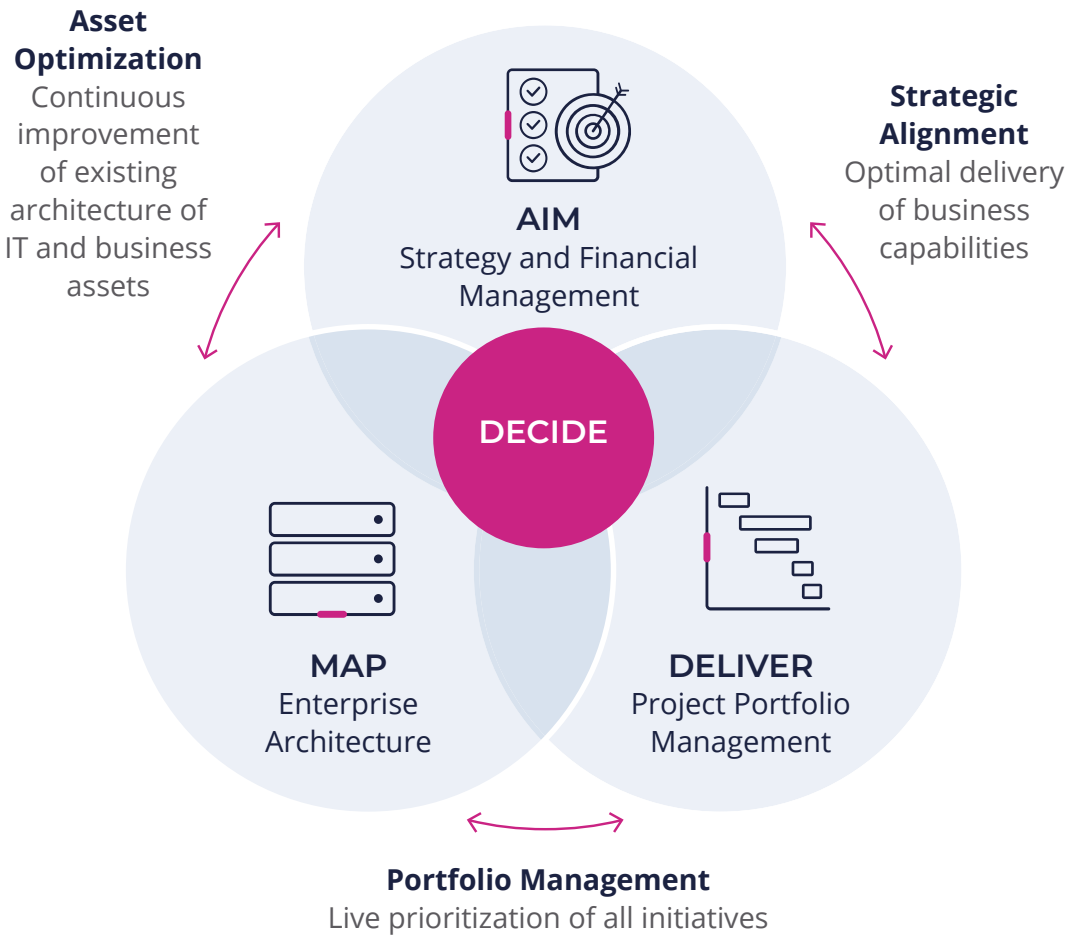


Table of content

Introduction 2

Part 1: Strategic Planning 5

Portfolio Management 6

Enterprise & Business Architecture 7

4-Step Process for Effective Demand Management 8

Part 2: Portfolio Delivery 11

Agile Portfolio Management 12

Project Portfolio Management (PPM) 13

Capacity Planning and Resource Management 14

Financial Planning and Cost Management 15

Part 3: Collaboration 17

Artificial Intelligence for Portfolio Management 18

Integrations, Reporting & Access 19

Why Planisware? 20

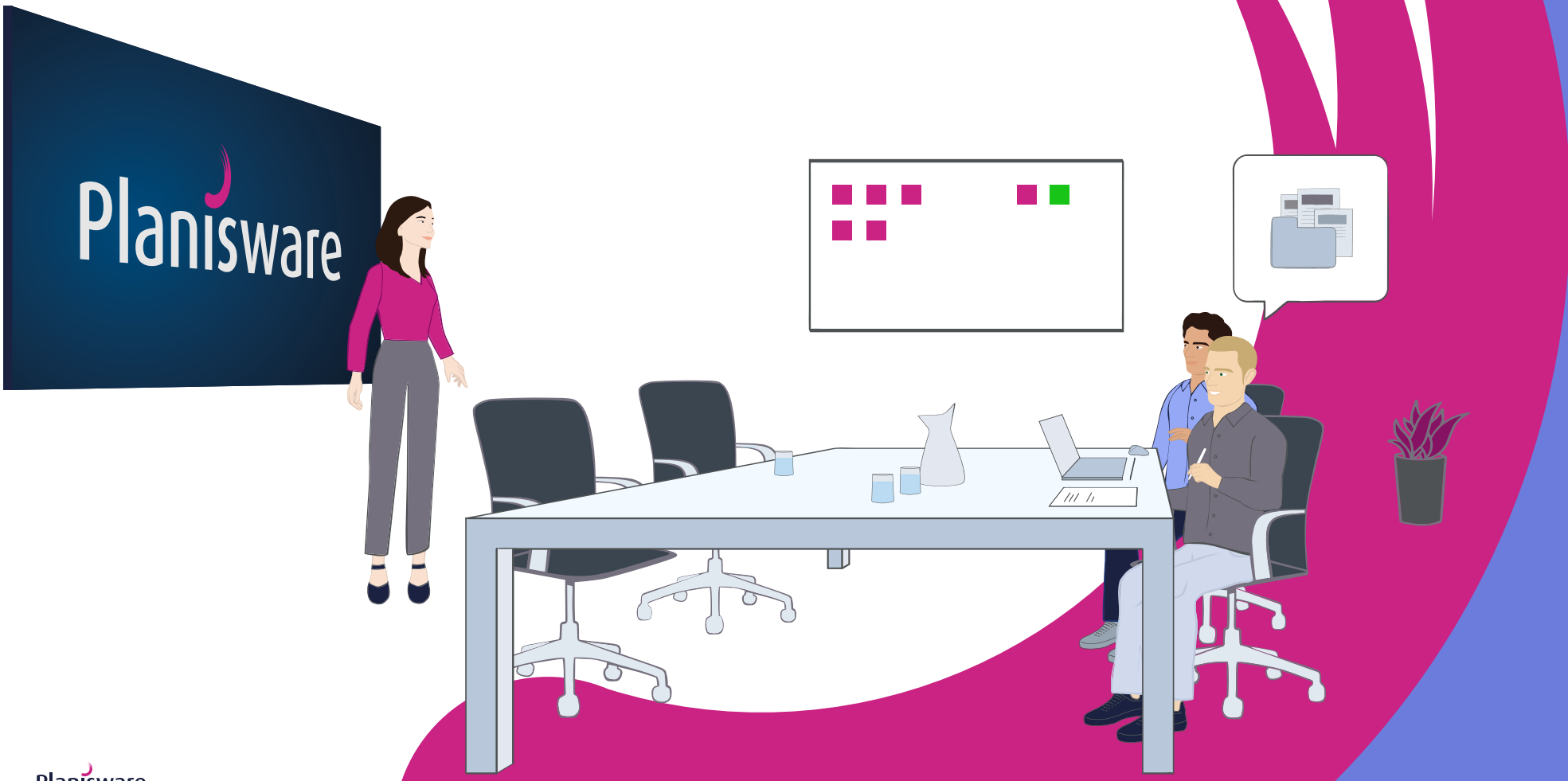
About Us 21

By 2025, **70% of digital investments will fail** to deliver the expected business outcomes due to the absence of a strategic portfolio management (SPM) approach.

Gartner® Magic Quadrant™
for Strategic Portfolio Management - April 2023

Part 1:
Strategic Planning

Make vision reality with effective planning, seamless strategic alignment, and continuous value tracking



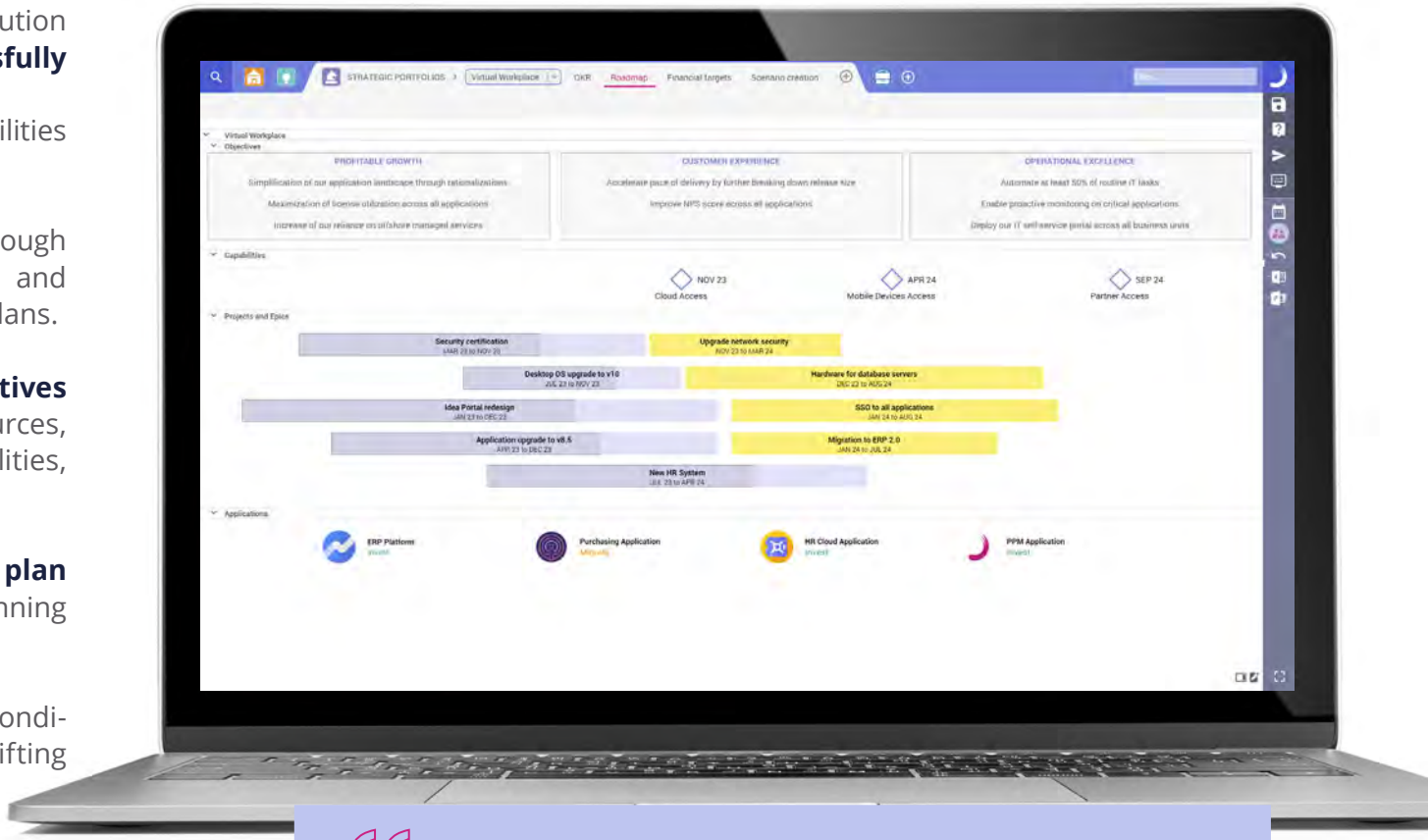
Portfolio Management

Efficiently closing the strategy-to-execution gap is the **number 1 driver to successfully overcome any business disruption**.
Planisware's strategic planning capabilities help our customers:

- **Lay out your company's strategy** through multi-layered roadmaps, Objectives and Key Results (OKRs), and investment plans.
- **Define, map, and track digital initiatives** in real time, including financials, resources, timelines, benefits, business capabilities, dependencies and more.
- **Identify the optimal investment plan** with state-of-the-art scenario planning capabilities.
- **Instantly react** to changing market conditions, emerging opportunities, and shifting strategic priorities.

Our best of breed solutions helps portfolio leaders plan for the unknown, quickly pivot when necessary, dynamically track portfolio delivery, and monitor business value over time.

Product Demo:
Strategic Planning



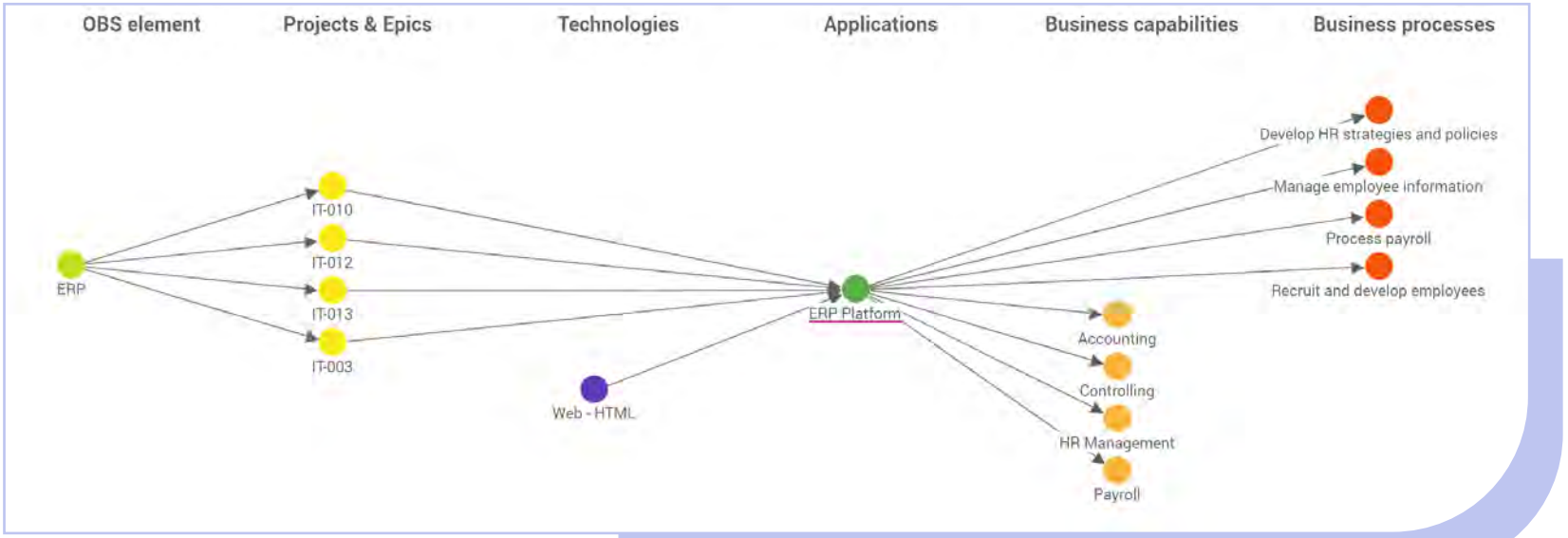
> We are more predictable, we are able to deliver the benefits at the timing we committed to deliver these benefits; so, when we show up at our earning calls, we hear that we exceeded the expectations from the analysts.
>
> **Vice President IT PMO**

Enterprise and Business Architecture

Effectively managing dependencies between IT portfolios and Enterprise Architecture (EA) is vital for maximizing desired outcomes across the enterprise. With Planisware Enterprise, architects and portfolio managers:

- **Define and track diverse IT assets** (e.g., business capabilities, applications, technologies) supporting the portfolio strategy, along with current and to-be states of these assets.
- **Manage dependencies** across all IT assets and projects, programs, value streams.
- **Define the contribution of each initiative** to achieving desired states of IT assets.
- **Continuously track value delivery** for expected benefits, such as level of maturity, OKRs, financials, etc.

Beyond visibility into investment outcomes, this connectivity between EA and portfolios empowers organizations to proactively mitigate risks, reduce costs by rationalizing applications, and fuel rapid digital transformation.



4-Step Process for Effective Demand Management

1. **Collection:** Run campaigns across the organization to collect a diverse range of ideas aimed at enhancing customer value, reducing risks, optimizing processes, and more.

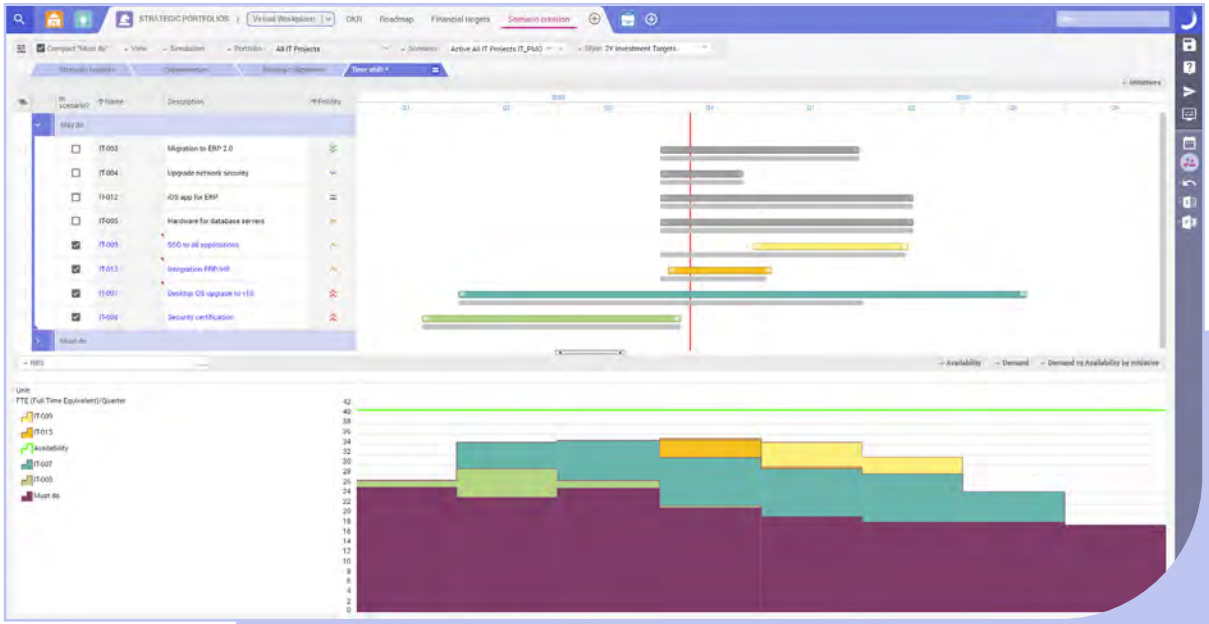
2. **Evaluation:** While contributors participate through social collaboration features, stakeholders leverage scoring mechanisms to best categorize, prioritize, and select the most promising ideas.

3. **Promotion:** Once top ideas are identified, seamlessly convert them into actionable initiatives, change requests, or backlog items with a simple click. Historical data is leveraged to automate the planning process efficiently.

4. **Optimization:** Continuously assess, refine, and update your investment portfolio by striking a balance between ongoing initiatives and newly added items in the portfolio backlog.

This turnkey approach to demand management ensures a smooth and efficient process from idea generation to project execution, fostering innovation and strategic growth within the organization.

IT Horizon Series
Episode 1:
Demand Management



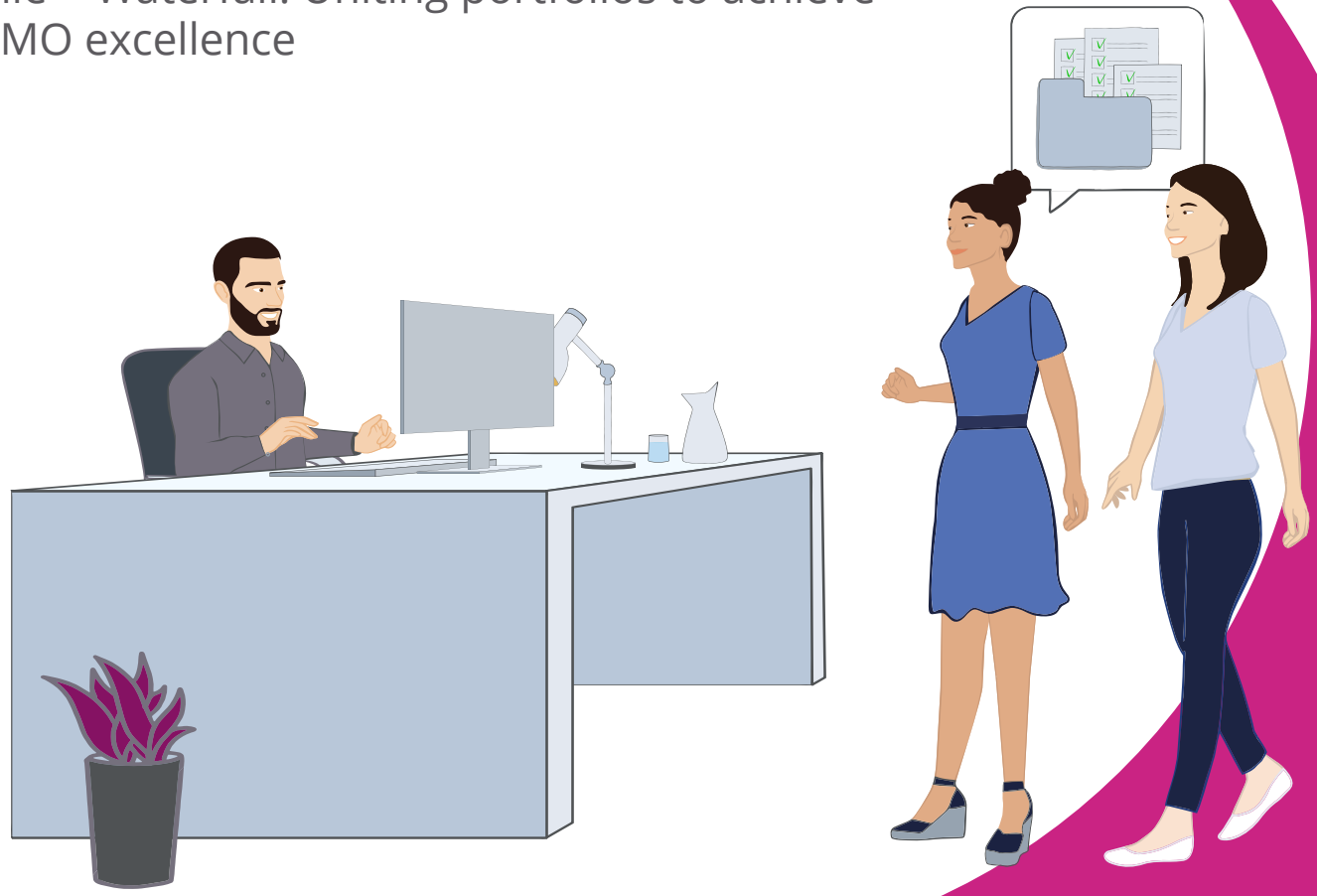
> Planisware is the best PPM tool in the business especially as it relates to Resource and Cost Forecasting. No other PPM tool even comes close to it.
>
> **Executive director in Healthcare and Biotech**

> Agile and traditional project management aren't at war with each other. In a change-driven world, companies can't apply just one methodology to all their projects.
>
> **The Project Economy Has Arrived, Antonio Nieto-Rodriguez**

Part 2:

Portfolio Delivery

Agile + Waterfall: Uniting portfolios to achieve EPMO excellence



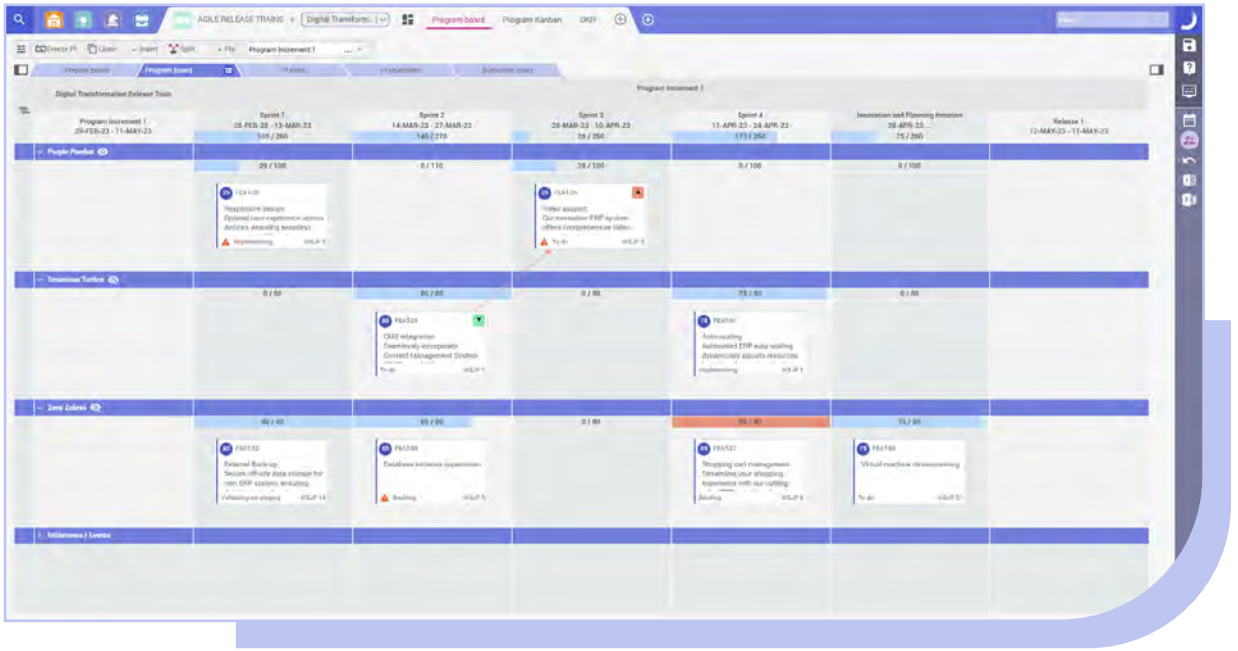
Planisware

Agile Portfolio Management

From single-team Scrum to full SAFe, Planisware Enterprise supports mainstream Agile frameworks while flexibly adapting to your unique culture and processes.

Experience the Power of Planisware Enterprise:

- From Value Stream to Epic, ART PI to team Sprint.
- Configurable Scrum & Kanban boards for peak productivity gains.
- Native integration with popular DevOps solutions through native APIs.
- Efficient value stream funding and management.
- Scenario planning for informed trade off analysis.
- PI-based capacity planning to model team allocations over time.
- Robust financial and capacity planning capabilities.
- Built-in reports and metrics to best track deliver.



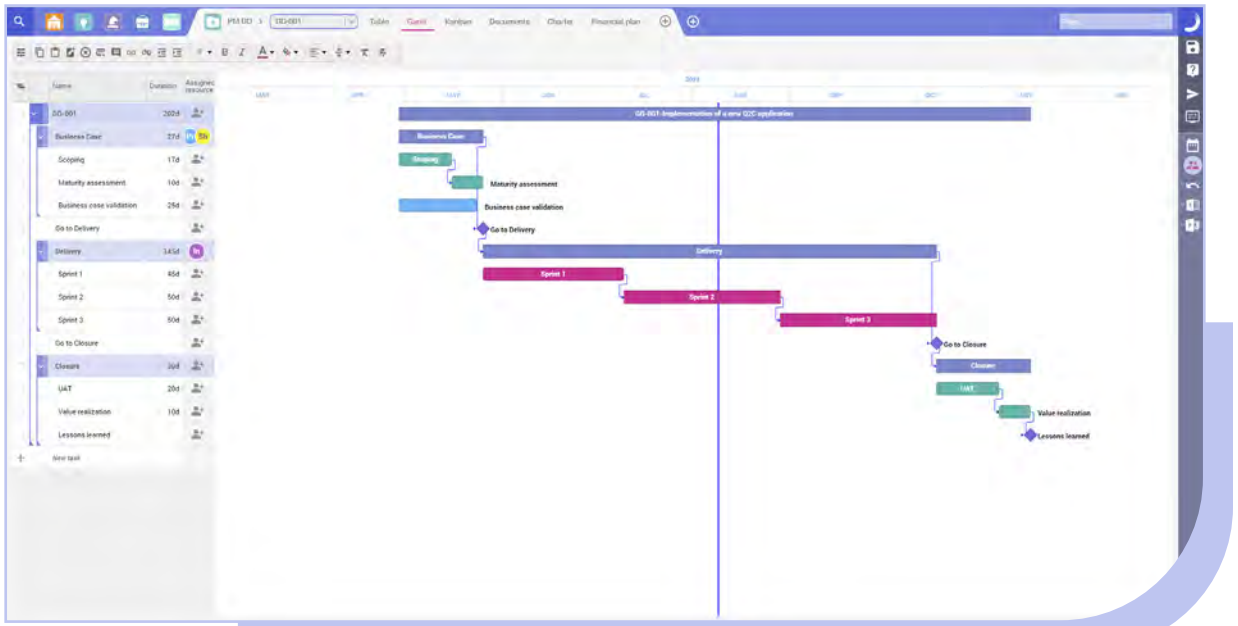
Empower your Agile transformation with Planisware Enterprise – Your Key to Agile Success!

Project Portfolio Management (PPM)

Did you know that **51% of IT projects still rely on this the waterfall delivery**, as revealed by Gartner in 2021! Infrastructure and hardware deployment, regulatory compliance, data migration, and external client initiatives are usually run this way. Planisware offers comprehensive support for these projects with the following features:

- **Comprehensive Program & Project Management:** Support for both top-down scheduling with program roadmap assumptions transformed into actionable projects, and bottom-up planning with project data that seamlessly rolls up to the program level.
- **Flexible Planning Engine:** Support for a wide range of planning methodologies, spanning from simple task management to stage-gate processes and even meticulous schedules.
- **Full feature Project Management:** Change of scope, risks, issues, dependencies, governance and integration with cost and resource data are all built-in capabilities that complement the solution.

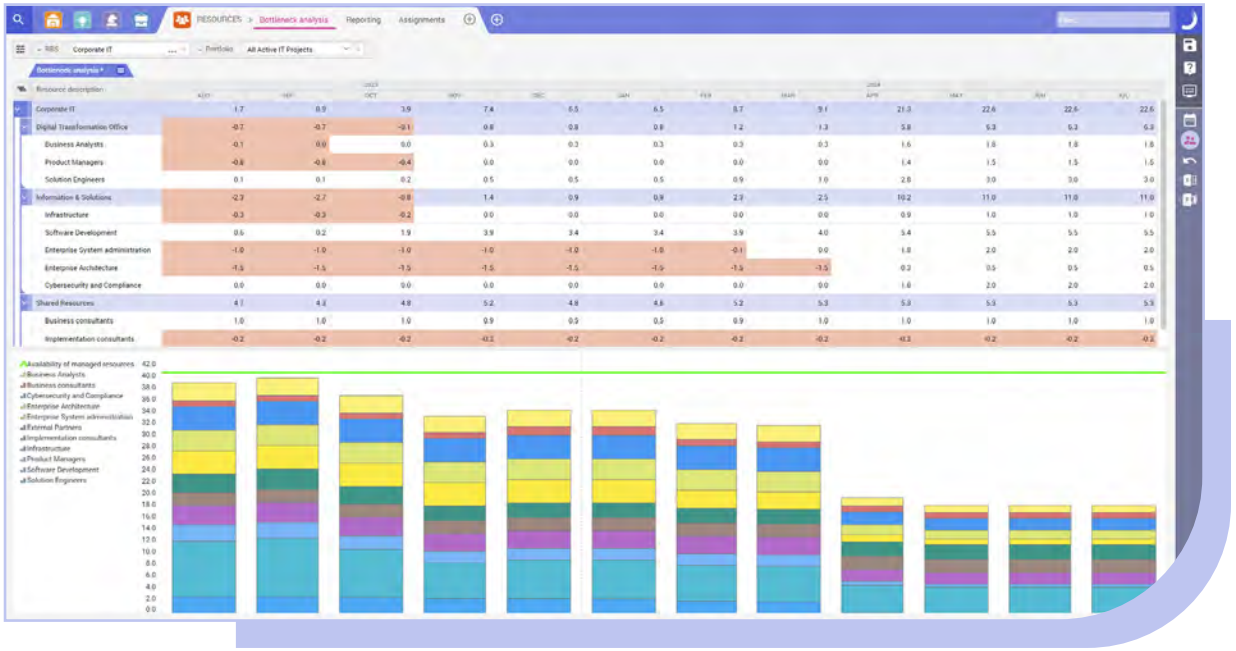
Planisware ensures that organizations can efficiently manage and execute their projects, regardless of the chosen methodology, enabling successful project deliveries and improved project outcomes.



Capacity Planning and Resource Management

Resource forecasting, allocation, and tracking pose challenges to all organizations. For IT teams, managing time-boxed projects, indefinite Agile initiatives, and ongoing operational tasks adds an extra layer of complexity. Planisware Enterprise offers unmatched flexibility in its resource management offering to support any of your use cases:

- Unique dynamic models for efficient long-range planning.
- Portfolio-wide capacity planning and real-time bottleneck resolution.
- Integrated social networking for seamless communication of decisions.
- Advanced models, algorithms, and AI to predict future demand.
- Native reports for individuals, teams, roles, and departments.
- Built-in time tracking capabilities.



Achieve transparency, agility, and foresight for resource management, leveraging Planisware Enteprise!

Financial Planning and Cost Management

Main cost management capabilities:

- Flexible cost breakdown structures and cost types (committed, pending, reserve).
- Actuals vs Forecast vs Budget vs Baseline comparisons, with unlimited baselines.
- Cost escalation tables for time-based variations, multi-currency support, custom fiscal calendars, and rate card management.
- Standard connectors with ERPs for data exchange (invoice, accruals, forecast).
- Epic costing with points to dollars conversion based on the type of work and the teams assigneds.

Main financial planning capabilities:

- Full-fledged and dynamic P&L engine with all financial KPIs (ROI, IRR, NPV, eNPV, etc.).
- Cell level bi-directional integration with Excel.
- Parametric estimations to automate project cost forecasting.

> We forecast our projects with FTEs and dollars including CapEx. We collet actual hours from our associates working on projects and integrate with the General Ledger [...]. We utilize the tool to manage our projects and milestones that are communicated all the way to Wall Street.
>
> **Sr. Director portfolio support & tech op**

> Only 35% of the projects undertaken worldwide are successful.
>
> **Chaos Report, The Standish Group**

Part 3:
Collaboration

With the future of work being increasingly digital, facilitating collaboration becomes vital for project success

Artificial Intelligence for Portfolio Management

Unleashing the Power of AI in PPM

As organizations seek to increase efficiency, make better-informed decisions, and deliver projects more effectively, they are turning to AI to provide insights and support at every stage of the portfolio management process.

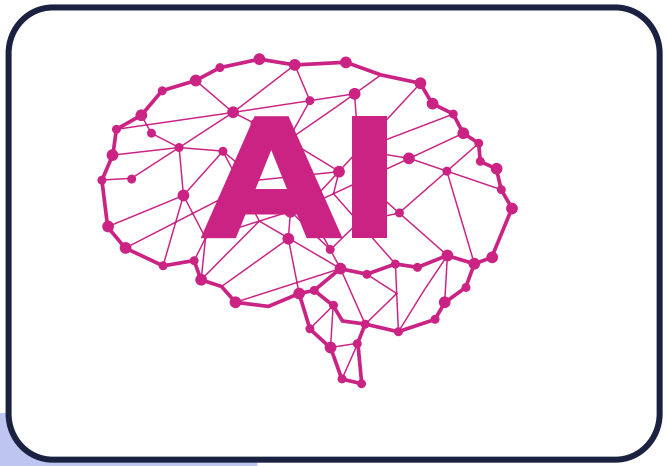
Here is how Planisware AI solutions help leading organizations:

1. **Data Entry Automation:** Planisware's AI solutions utilize generative AI to streamline data entry processes. By providing a simple scope of work description, the AI system can automatically transform it into a comprehensive project schedule. This automation helps save time and reduces the risk of human error in data input. Other use cases include risk identification in a given book of work.

2. **Resource Estimation, and Data Anomalies Identification:** Leveraging the power of machine learning and predictive analytics, Planisware's AI solutions enable organizations to perform resource estimation with greater accuracy and efficiency. By analyzing historical data and patterns, the AI system can both automate predictions, suggest key drivers, and identify outliers on any dataset.

3. **Communications and Search Automation:** Planisware's AI-driven chatbot, named Oscar, plays a pivotal role in automating communications and search processes. Oscar can efficiently handle routine inquiries, answer frequently asked questions, and provide information to users, saving valuable time for team members.

These AI-powered capabilities empower organizations to make more informed decisions, enhance efficiency, and optimize project outcomes.



> By 2027, organizations investing in artificial intelligence (AI) will process 60% of IT and digital initiatives to the approval stage without human intervention.
>
> **Gartner® Hype Cycle for Strategic Portfolio Management, 2023**

Integrations, Reporting & Access

Enhancing collaboration involves automating communication and data exchange among teams and systems while generating valuable insights from collected data. Planisware empowers customers in the following ways:

Integrations: Planisware offers a wide range of built-in APIs with popular tools like Microsoft Teams, Microsoft Office365, Google Suite, and Microsoft Project. Integration with mainstream DevOps solutions like Jira and Azure DevOps is easily customizable through a no-code configuration studio. The platform supports webservices like OData and REST, flat file exchanges, and direct database connections ensuring seamless data flow in and out of the software.

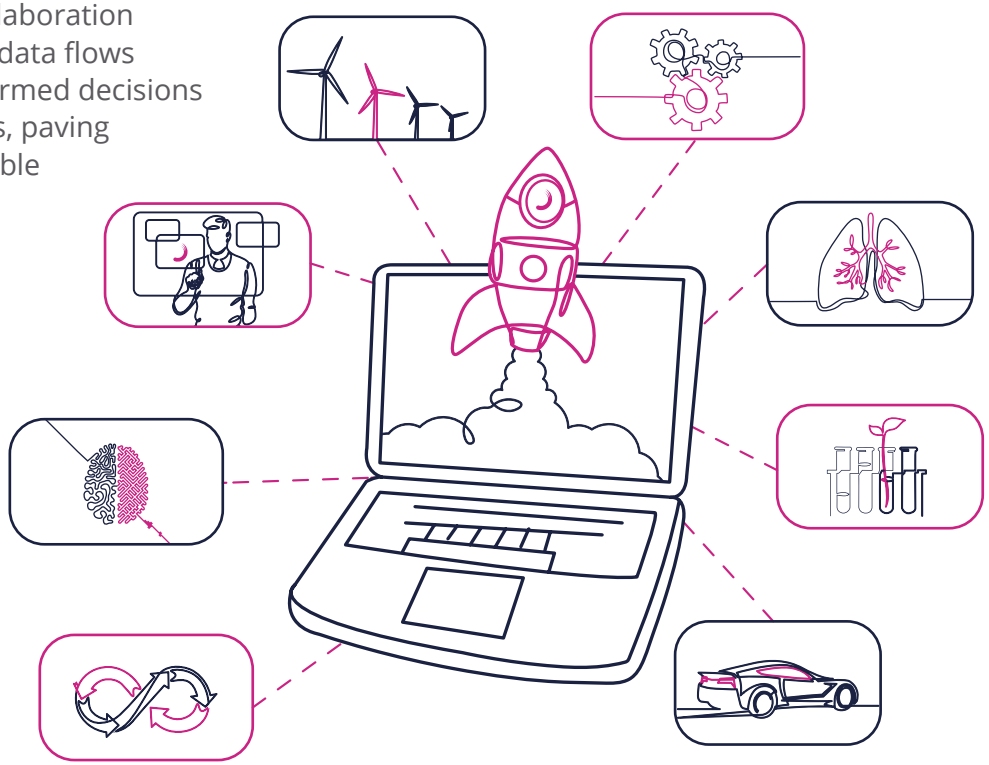
Seamless integration with your critical enterprise applications

Reporting: Planisware boasts an industry-leading reporting module, Planisware Explorer, offering comprehensive built-in reporting capabilities. For external reporting that combines Planisware data with third-party information, the platform leverages BI Box, a plugged-in reporting cube.

Access: Perform on-the-go updates leveraging our mobile applications (available on iOS and Android), act on simple tasks via Microsoft Teams, collaborate seamlessly with 3rd party with Extended Enteprise.

Product Demo: Planisware Enterprise: Mobile App

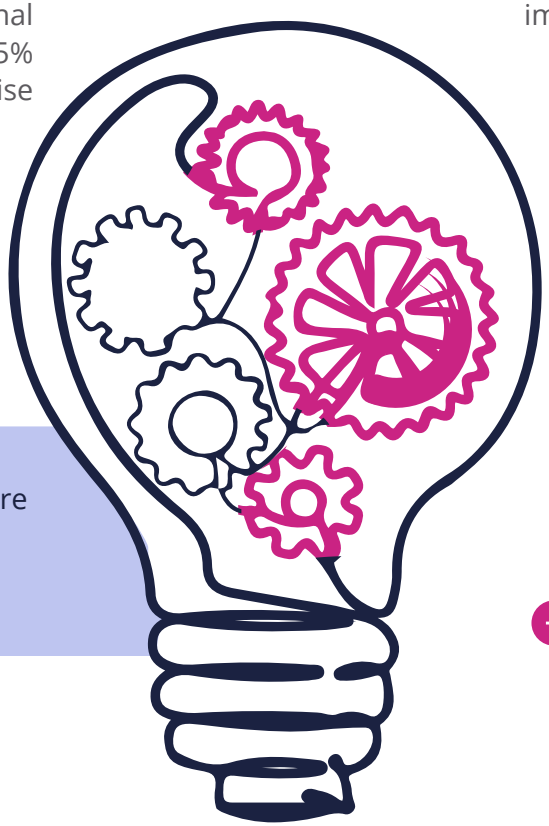
With Planisware, collaboration becomes effortless, data flows seamlessly, and informed decisions drive project success, paving the way for remarkable outcomes.



Why Planisware?

Trusted Partner: Join 500+ satisfied customers who have experienced our exceptional services, reflected in a remarkable 99.5% net retention rate. We are the #1 Enterprise solution in willingness to recommend.

Cutting-Edge Technology: Embrace the flexibility and scalability of our state-of-the-art solutions, ensuring ease of use, seamless implementation, and widespread adoption.



> Our interaction with the Planisware team has been nothing but exceptional.
>
> **Director of Product**

IT Best Practices: Benefit from our solutions effortlessly and quickly by leveraging Planisware's IT best practices and functional expertise, streamlining your implementation journey.

Beyond IT: Our platform extends its capabilities beyond IT to support product development, capital planning, manufacturing, commercialization, and more, making it a versatile solution for your company.

Looking to streamline the management of your IT portfolio?
Let Planisware make your vision a reality!
www.planisware.com

About Us

Planisware is an independent software vendor with two product offerings: Planisware Enterprise and Planisware Orchestra.

Privately owned, Planisware has achieved double-digit year-over-year growth since 1996. Planisware offices are located in Paris, Nice, Toulouse, Lyon, Bordeaux, San Francisco, Denver, Philadelphia, Manchester, Munich, Tokyo, Singapore, Dubai and Tunis.

You'll have a solid partner in Planisware. We've been around for decades, and we'll be around for decades more.

Our customer page
What our customers have to say

600+
employees
dedicated to your success

800.000+
users
in 40 countries worldwide

$140M+
annual revenue
with strong finances

14
offices
for local and expert services

Available in 8 languages and multiple currencies

Make vision a reality

In a world that is constantly evolving, our customers need to master change at an unprecedented scale. With Planisware cloud solutions, garner your resources and drive all your project activities with improved certainty and visibility.

Make vision a reality with Planisware

Our event page
Upcoming events

Planisware

Make Vision Reality

Your vision brought to life in the cloud. Software solutions to set projects, products and programs in motion.

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