

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™ IT 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 IT 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.

Improve Financial Decisions

Investment Analysis capabilities provide ranking, decision modeling, and prioritization of investments. This functionality also improves governance by generating extensive audit trails. You can create valuable "what-if" scenarios for different requirements or changing priorities. It is also possible to model the approval of a project that is shared across multiple programs and allow each unit to see their investment in the project. With Investment Analysis, you can define consistent comparison criteria for improved decision making within and across business units, and enhanced regulatory compliance.



Planview Enterprise Portfolio Management efficiently ranks business investments based on user-defined metrics.

Planview Enterprise

Planview Enterprise Portfolio Management (EPM) is an integrated component of the Planview portfolio management solution known as Planview Enterprise. This solution optimally balances the supply of IT resources with business demands and automates PRISMS adaptive best practices to deliver proven methods for cost savings and value creation. Other components of Planview Enterprise include Planview Service Portfolio Management (SPM) for business service delivery and Planview Project Portfolio Management (PPM) for project and resource management.

Why Use Planview Enterprise Portfolio Management?

Planview Enterprise Portfolio Management enables you to:

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

IT management is frustrated with its inability to see fact-based views of IT activities. This includes demands on resources and plans for new initiatives, the cost and effort expended to maintain existing applications, and the performance and consumption of infrastructure resources on which the applications operate.

- Forrester Research



Benefit from Planview PRISMS Adaptive IT Best Practices:

Planview PRISMS is designed to help technology organizations deliver value through a comprehensive, systematic approach to:

- comparing actual results with clearly defined business requirements
- efficient execution of change initiatives
- improve stakeholder visibility
- integrate planning decisions

Quickly Respond to Changes in Priorities



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 capacity and schedules.



Dashboard views show trends occurring within an investment portfolio, such as health and

Establish and Measure Business Strategy

Benefits Realization leverages IT 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 with 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.

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.

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 funding options.</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 IT 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 higher 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 IT 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 FINANCIAL MANAGEMENT | Breaks dollars down along the organizational structure, from the top down or from the bottom up. | |
| FUNCTION | DESCRIPTION | BENEFIT |
| INVESTMENT ANALYSIS | Provides decision modeling, ranking and prioritization of investments and audit trails. | <p>Consistently define organizational criteria for improved financial decision-making.</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. | |
| RANKING | Ranks investments via user-defined metrics such as a balanced scorecard. | |
| PRIORITIZATION | Makes prioritization decisions on investments, allowing you to better allocate funding. | |
| SHARED STRATEGIC APPROVAL | <p>Models the approval of an investment that is shared across multiple programs.</p> <p>Allows each unit to see their investment in the services and assets.</p> | |
| AUDIT TRAILS | Generates extensive audit trails for better regulatory compliance. | |
| FUNCTION | DESCRIPTION | BENEFIT |
| SCENARIOS MANAGEMENT | Produces unlimited investment scenarios as a means to evaluate alternative courses for the organization. | <p>Evaluate alternative plans.</p> <p>Quickly adjust to a change in business priorities.</p> |
| 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. | |

ENTERPRISE PORTFOLIO MANAGEMENT OVERVIEW

| FEATURE | ADVANTAGE | |
|--|---|---|
| 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 |
| 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 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.



Since 1989, Planview has been a market leader and trusted partner in software for comprehensive IT management. Our flagship product line, Planview Enterprise, brings the most comprehensive IT management solution to the market, combining adaptive IT management best practices, best of breed resource management and portfolio management software. Planview enables business leaders to integrate the decision-making process to improve alignment of IT resources with business strategies. We serve an active and growing global customer community of over 400 organizations in financial, insurance, healthcare, government and other industries. Planview is privately held and has been profitable for over a decade.

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