



**PLANVIEW DAY 2022 ROADSHOW**

**WASHINGTON DC** | June 30th

Working Together to  
Deliver What Matters

Planview and UPS

Sandy Pittman, Vice President, ePMO





# We are UPS



534,000

Employees



220+

Countries & territories served



25.2M

Packages delivered daily



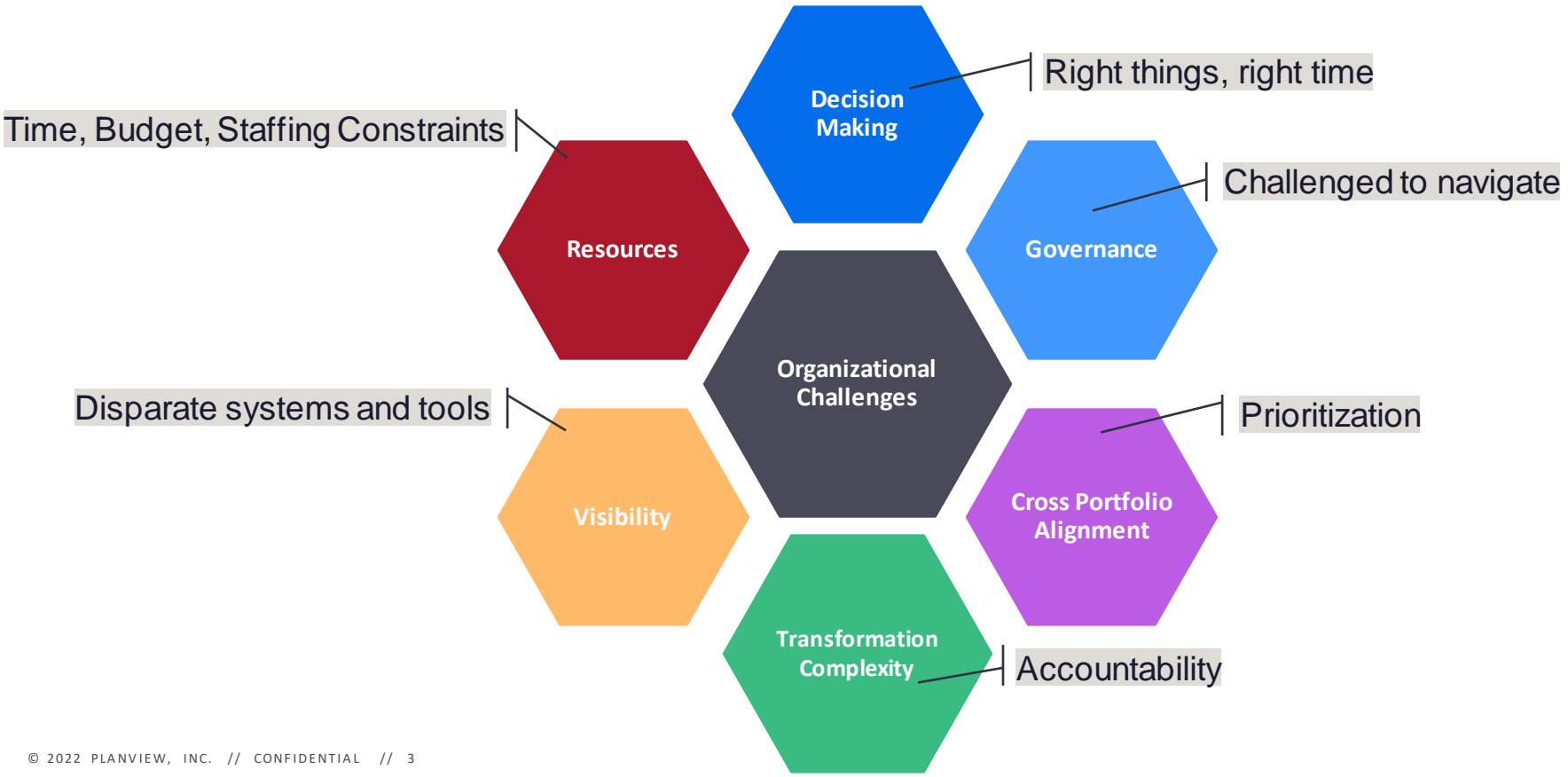
\$97.3B

Total revenue for 2021





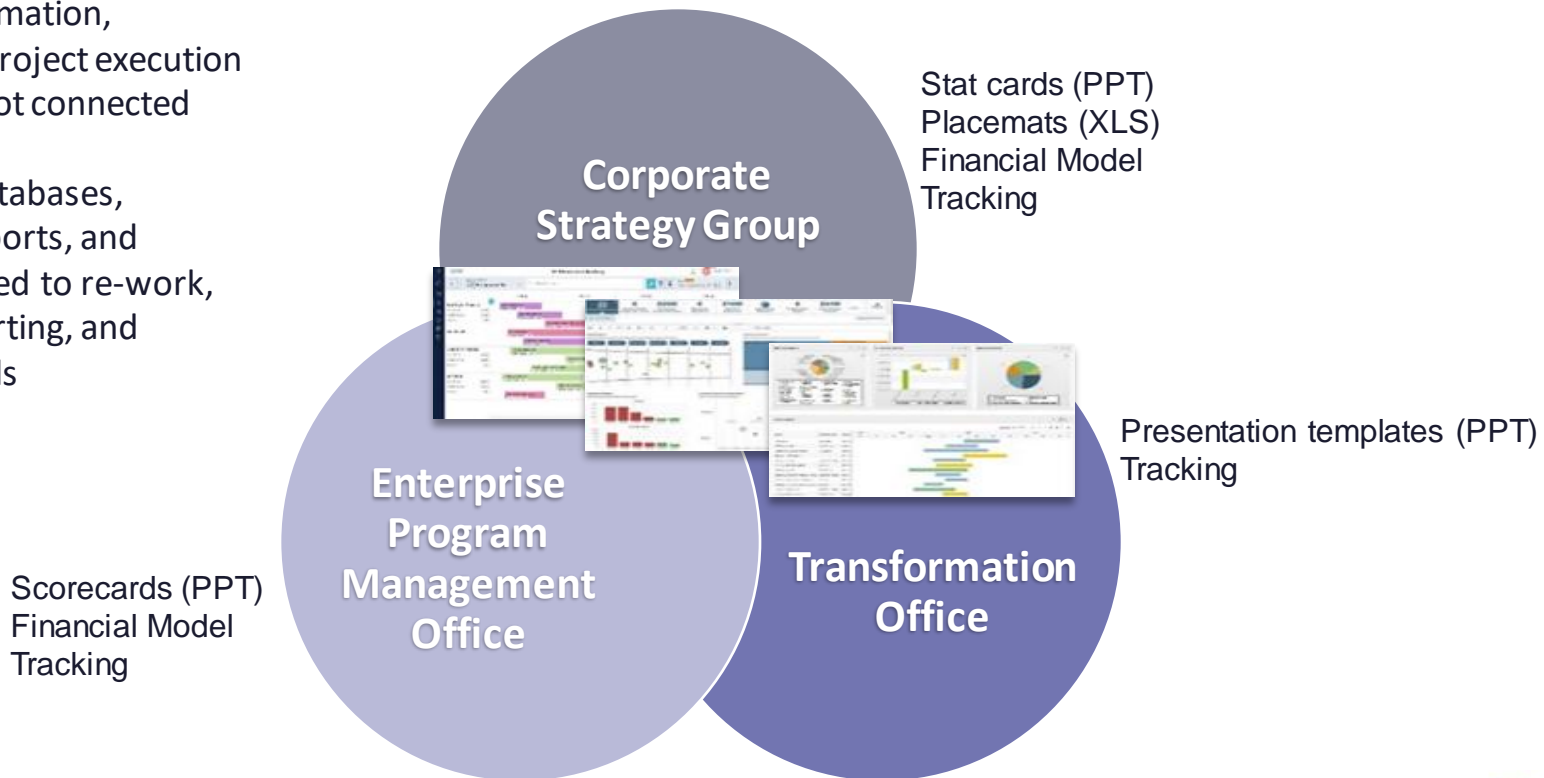
# Strategic Rationale – Challenges and Opportunities





# Strategic Rationale – Who’s Doing What?

- Strategy, transformation, governance and project execution processes were not connected
- Multiple tools, databases, spreadsheets, reports, and financial models led to re-work, inconsistent reporting, and outdated materials

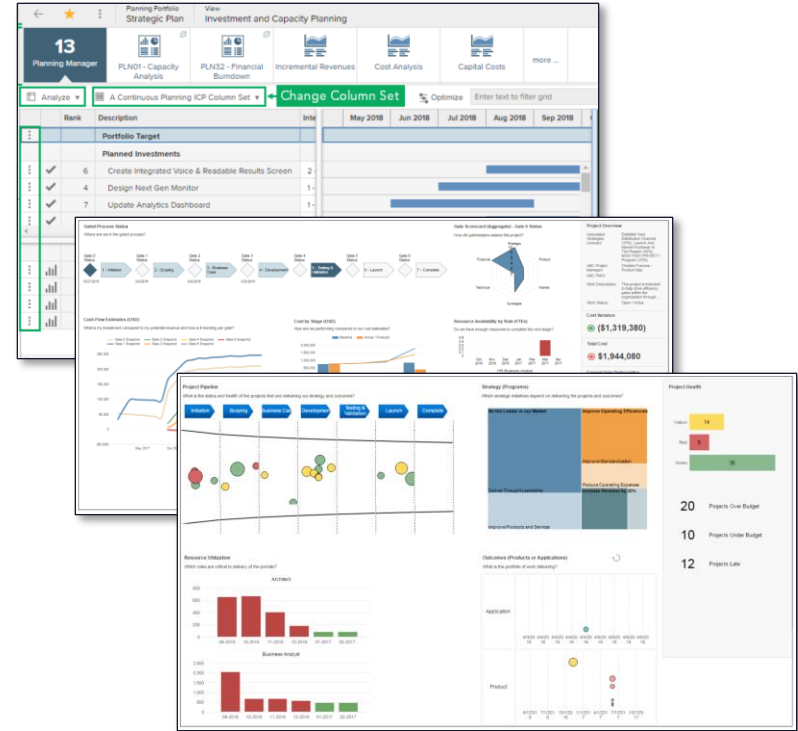




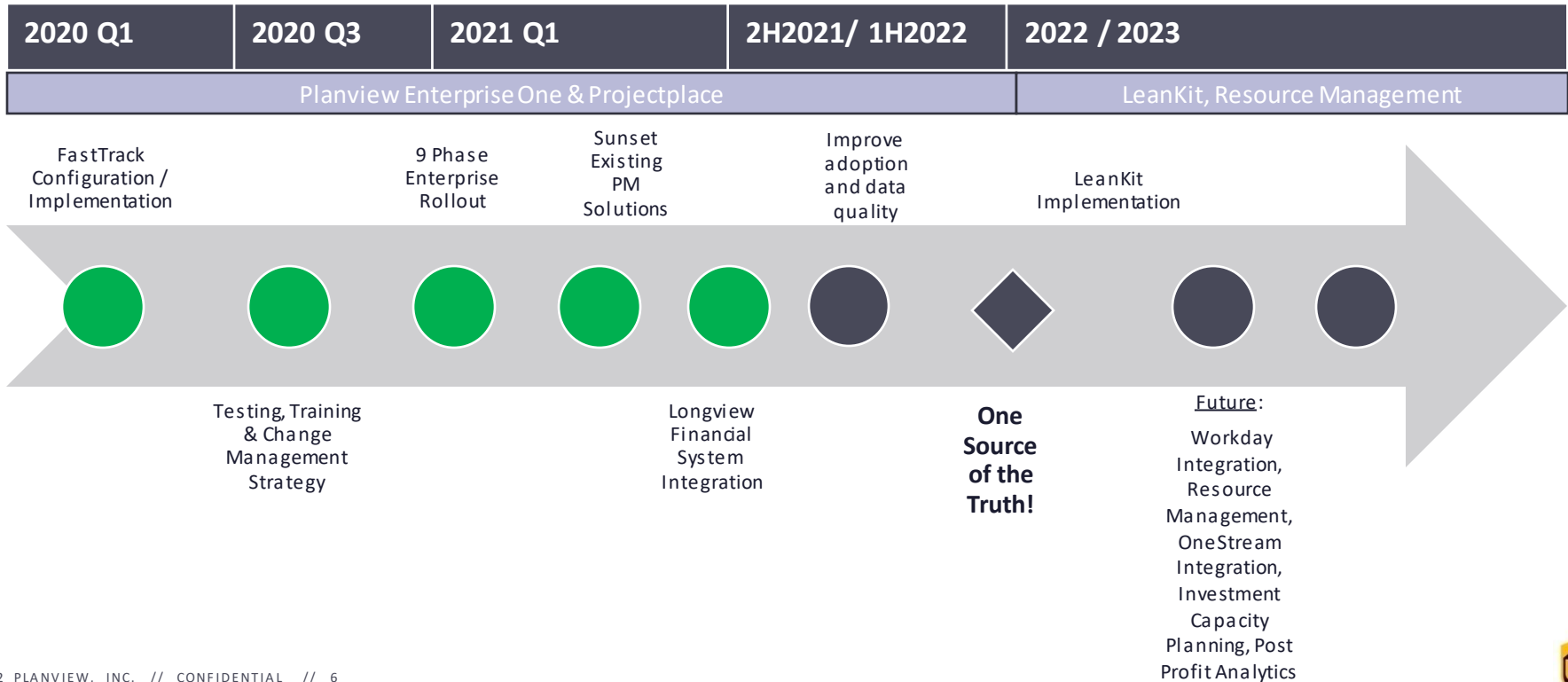
# Strategic Rationale <> Planview!

Planview Enterprise One provides significant benefits to our organization by enabling...

- Strategy and Investment planning
- Execution process support (Transparency)
- Financial management of Investments
- Enterprise governance support
- Program and Project Management suite of tools
- Robust, streamlined reporting and dashboards
- Resource management (future)
- Time tracking (future)
- ...accomplished through *'one source of the truth'*



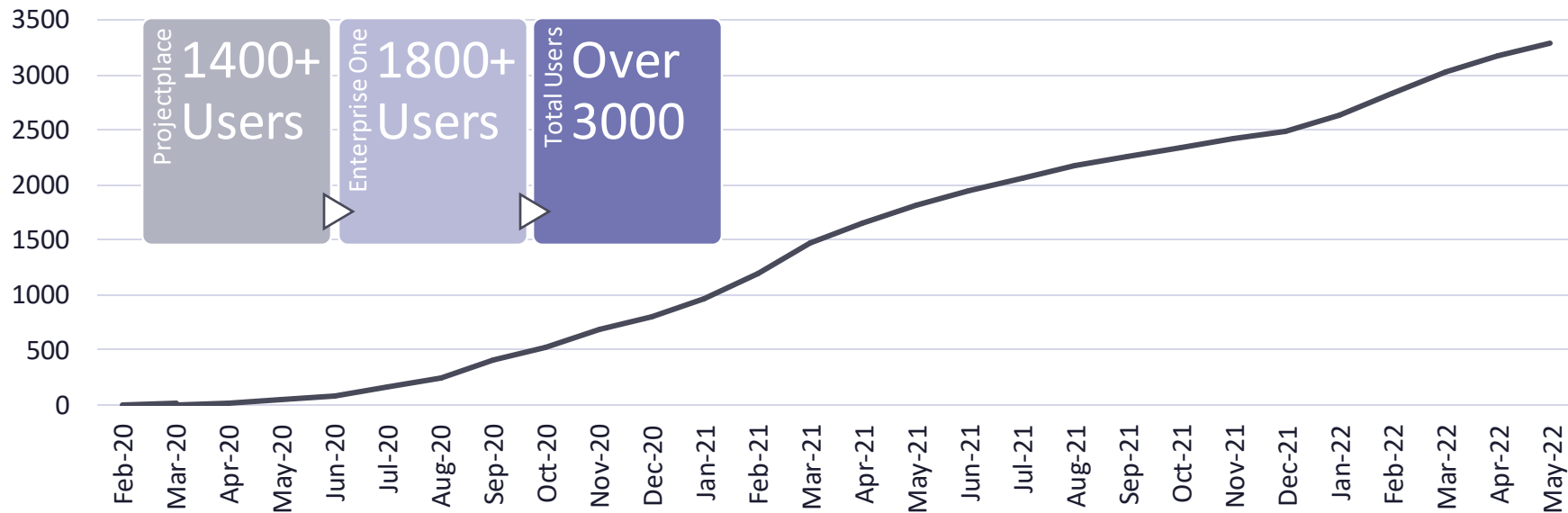
# Key Milestones for UPS Implementation





# Deployment and Implementation – Users

## User Growth



— User Count

Growing at a rate of  
~80 users per month





# Initial Areas of Focus

Corporate Strategy  
& Financial  
Processes

Governance &  
Visibility

Project Management  
& Collaboration

P&L View	\$M					
Benefits	2021	2022	2023	2024	2025	Total
Net Revenue	\$110.0	\$115.0	\$120.0	\$125.0	\$130.0	\$500.0
Cost of Revenue	\$10.0	\$10.0	\$10.0	\$10.0	\$10.0	\$50.0
Constr. Margin	\$100.0	\$105.0	\$110.0	\$115.0	\$120.0	\$450.0

One-time Expense	In Plan	Not in Plan
IT Expense (Capex)		
Non-IT Staffing Expense		
Professional Services		
All Other Expense		
Total one-time Expense		
In Plan		
Not in Plan		

Recurring Expense	In Plan	Not in Plan
Staffing Expense		
Net Depreciation / Amortization		
All Other Expense		
Total Recurring Expense		
In Plan		
Not in Plan		

Balance Sheet	In Plan	Not in Plan
Capex (non-IT)		
IT Capex		
Inorganic		
Less CAPEX Savings		
Total Capex		
Total Capex (in Plan)		

### Global SMB

#### Context:

#### Objective / Value Proposition:

#### Approach:

#### Key Assumptions:

#### Risk of foregoing this initiative:

CONFIDENTIAL

2021-2025 IMPACT IN MILLIONS	
Revenue	\$110.0
Cost of Revenue	\$10.0
One-Time Expense	\$10.0
Savings	\$10.0
NPV (60 months)	\$100.0
Payback Period	3.5

2022 BENEFIT REQUIREMENTS	
Total Benefit	\$100.0
Total Capex	\$10.0
Total Profit	\$90.0

Intangible Benefits	
Planning Impacts	
Is this in the Business Plan?	No
Is this in the Profit Plan?	No
Is this in the IT Budget?	No
Business Resources (FTE)	
IT Resources (FTE)	
Other Resources (FTE)	

### Highlight Report Sales Performance Management

Project Manager: Theresa Ioele  
Project Owner: Michael Sloan

Report Run Date: 5/30/2022  
Work Status: Active  
Project with IT: EPMA/Other  
Alignment: Sales & Solutions  
Confidentiality: No  
Growth / Revenue Benefit: Incremental Revenue Growth  
Yield / Profit Benefit: No

Overall Status History						
11/30/2021	12/31/2021	1/31/2022	2/28/2022	3/31/2022	4/30/2022	Now
Red	Red	Red	Red	Red	Red	Yellow

Status Assessment Indicators

Overall Status Assessment	Resourcing Status Assessment	Benefit Status Assessment	Scope Status Assessment
Red	Green	Green	Green

Project Description: Sales Performance Management (SPM) is a suite of operational and analytical functions that automate and unite back-office operational sales processes. SPM is designed to improve operational efficiency and effectiveness. Capabilities include sales incentive compensation management, objectives management, quota management, territory management and advanced analytics.

Business Impact: Sales Performance (SP) function manages volume and revenue planning and sales compensation for 8,000 sales resources across 6 BUs in North America. The current system to execute is 2X higher than companies who have deployed vendor SPM systems. Current system limitations result in increased complexity and compliance and regulatory requirements (e.g. Sarbanes-Oxley, internal audit, country-specific regulations, Europe GDPR).

Strategic Objectives: The project will ensure compliance with evolving regulatory, security, and governance obligations while enabling UPS to gain greater productivity in sales processes. It will improve speed to market for compensation design changes, increase accuracy, reduce costs, and improve visibility into sales compensation plans to create transparency, mobile accessibility, and what-if scenario modeling for sales resources. A cloud-based solution will ensure compliance with evolving regulatory, security, and governance obligations while enabling UPS to gain greater productivity in sales processes.

Next Gen Profit/Revenue Architecture of Tomorrow

Scrum of Scrum Board

OT STARTED

ID	Task Name	Status	Assignee
ID 158	EBCM - Enterprise Billing Common Modules - Gerry Nappo	GN	PN#2
ID 157	FCB - Flexible Core Billing - Rose Deguzman	RD	PN#2
ID 161	CDC - Consolidated Data Capture - Ajoy Sen	MD	PN#2
ID 168	MDC - Adjustments/Misc Data Capture - Sandhya Desai	SD	PN#2







# Executive Visibility

Strategy Dashboard									
Strategic Alignment	Strategy Description		StrategyLink	Program Owner(s)	Program Phase	Benefit (2021)	Status Flag	Trajectory	
International	International Compliance 2020				Complete				
International	International Compliance 2021				Complete	0.00M			
International	International Revenue Management 2021				Complete	0.00M			
Digital Factory	Connect the Dots				Concept				
Digital Factory	Best Digital Experience			C. Byrne, N. Basford	Execution	262.47M			
Customer Mix (new)	Name	Project Description	Strategic Imperative & Core Ena	IT Status	Final IT Estimate	Revenue - 5 yrs	Executive Summary - IT	Current IT Activity Status	IT Project Manager
International	Next Generation Brokerage	Simplify global trad							
Healthcare	IVR Modernization for Euro	The Nuance solutio							
Healthcare	Void Portal Internal Login	Requiring the CCRs	Digital Commerce & Exper	Green	\$80k		Deployed 5/24/22 This is n	Deployed	Pamela Tyler
Modernized People Agen	2944 - Claims Reimagined	This initiative will su	Small Medium Business	Green	MVP 2022: \$5.2M	1,079,050,020	Accelerated Scope - Execu	In Development	James Rice
Customer Network (new)	Theft of Service – Shipping Fraud	The goal of this initi	Digital Commerce & Exper	Green	<\$1M Initial Est.		Target Deployment TBD – )	In Development	Pamela Tyler
International	Lab Logistics Enhancements 2.0	The UPS Pickup Po	Healthcare			109,974,054	2022 - UPP CA Expansion -	In Development	Geetha Sanakkay
Product & Network Mana	UPS Premier 2.0	UPS Premier 2.0 Pr		Green		31,650,000	•An acceleration request w	Evaluation	Geetha Sanakkay
Customer Mix (new)	UPS Premier 1.0	UPS® Premier lever	Healthcare	Green	\$14.9 M	1,624,965,472	Premier Phase II: •2Q22 PI	In Development	Danielle Ayan
Healthcare	UPS Mobile Native Xamarin	Ongoing developm		Green	\$3.5M		**Current Status** On 5/19-E	In Development	Paul Weimer
	WorldShip	WorldShip is a desk		Green			May 23: WorldShip July 20;	In Development	Ran Green
	Next Generation Brokerage Program 2022	Automating and gui	International	Green	\$3.2M		Next Deployments: •Itemize	In Development	Julie Reavis
	Global Customer Experience (CX) Program 2022	Focused on custom	International	Green	\$3.5M		Resource identified for beg	In Development	Julie Reavis
	Global B2C Program 2022	Projects include ED	International	Green	\$4.0M		Safe Place Photo: Architect	In Development	Julie Reavis
	Global Small Customer Program 2022	Projects include ES	International	Green			Next Deployment: Update E	In Development	Julie Reavis





# Lessons Learned

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Simple is a strategy...

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Start at the top – Get the execs onboard

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Have all the right stakeholders at the table from the beginning

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Quality of data will always be a challenge

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Change management is as important as they say it is

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Consider your audience





# Success Stories



Strategic Planning  
and Execution

- All business cases in Enterprise One
- Output used at C level strategy meetings
- Single Source of Truth (work in progress!)



Innovation  
Alignment Process

- Using Projectplace for all initiatives
- Collaboration between multiple development groups
- Intake/Pipeline Tracking

*Enabled by the partnership between Planview and UPS...*





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# Thank you!

Sandy Pittman

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