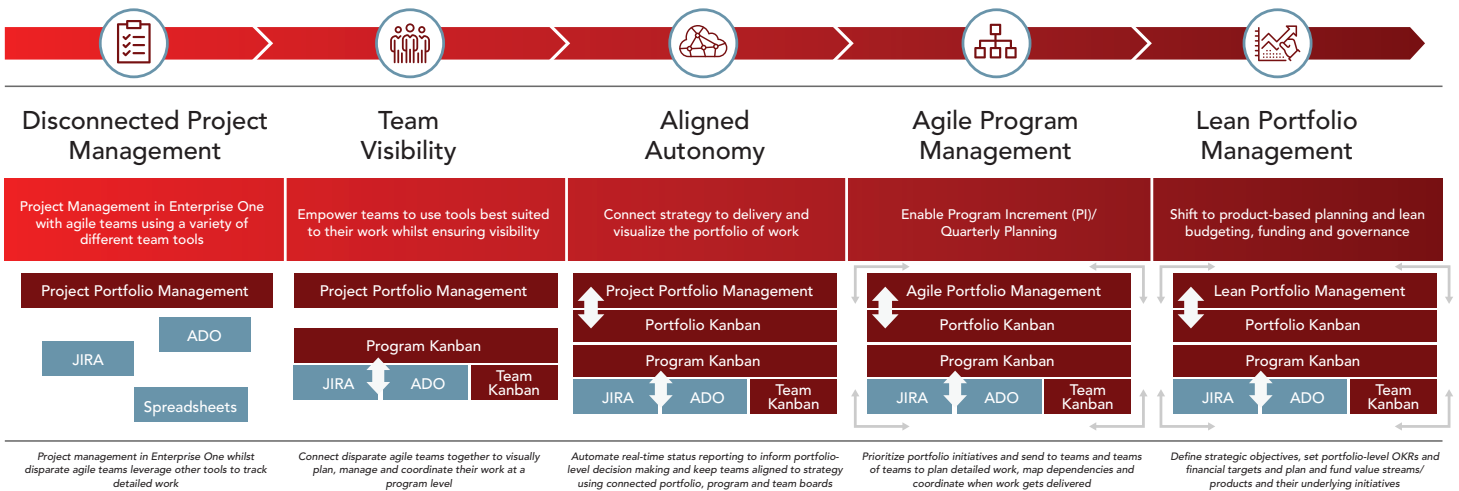# planview®

CAPABILITIES GUIDE

Planview Platform Capabilities Guide

WHAT IS A CAPABILITY?

Capabilities are the foundational building blocks of the Planview Adoption Framework, a focused series of customer journeys and associated guidance designed to lead our customers through adopting Planview's solutions.

Disconnected Project Management	Team Visibility	Aligned Autonomy	Agile Program Management	Lean Portfolio Management
Project Management in Enterprise One with agile teams using a variety of different team tools	Empower teams to use tools best suited to their work whilst ensuring visibility	Connect strategy to delivery and visualize the portfolio of work	Enable Program Increment (PI)/ Quarterly Planning	Shift to product-based planning and lean budgeting, funding and governance

Project Portfolio Management	Project Portfolio Management	Project Portfolio Management	Agile Portfolio Management	Lean Portfolio Management
ADO	Program Kanban	Portfolio Kanban	Portfolio Kanban	Portfolio Kanban
JIRA	JIRA ADO Team Kanban	Program Kanban	Program Kanban	Program Kanban
Spreadsheets		JIRA ADO Team Kanban	JIRA ADO Team Kanban	JIRA ADO Team Kanban

Project management in Enterprise One whilst disparate agile teams leverage other tools to track detailed work	Connect disparate agile teams together to visually plan, manage and coordinate their work at a program level	Automate real-time status reporting to inform portfolio-level decision making and keep teams aligned to strategy using connected portfolio, program and team boards	Prioritize portfolio initiatives and send to teams and teams of teams to plan detailed work, map dependencies and coordinate when work gets delivered	Define strategic objectives, set portfolio-level OKRs and financial targets and plan and fund value streams/ products and their underlying initiatives

*A customer journey designed for our Enterprise Agile Planning solution*

As you begin to explore the capabilities within your solution, remember that you don't have to use all of them right away – our framework is deliberately modular, so that you can continuously build and improve upon your solution. Each capability contains a selection of business processes, best practices, analytics, and other resources to guide you towards achieving value in the form of specific business outcomes.

| Features & Functions | + | Business Process & Best Practice | + | Outputs, Reports and Analytics | = | Business Value |

| EXPECTATIONS | OUTCOMES |

How our capabilities are used to achieve business value

PLATFORM CAPABILITIES

Planview's platform capabilities extend across four critical areas for success within your organization- strategy, planning, delivery, and results.
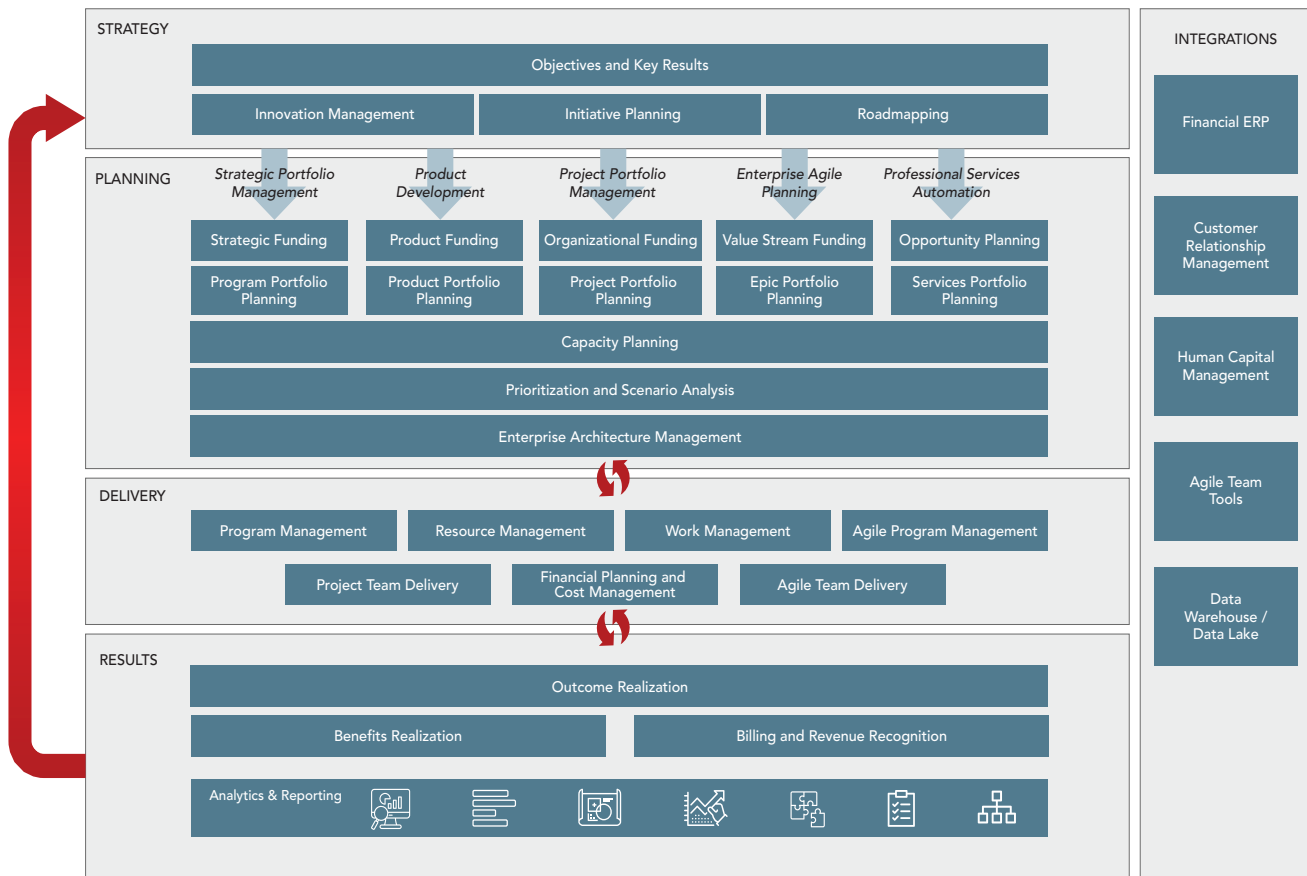
STRATEGY CAPABILITIES

Objectives and Key Results

OKRs are a framework for defining, aligning around, executing, and measuring progress toward key organizational goals. OKRs answer the questions:

- Where do we want to go?
- How will we measure our efforts to get there?

Defining and aligning around OKRs helps to link organizational and team goals in a hierarchical way to measurable outcomes. This is around defining the hierarchical structure.

The Objectives and Key Results capability's enablers include:

- Enterprise OKRs – define the company-level objectives. These are informed by your long-term strategy for the organization.
- Portfolio OKRs – crystallize your strategic themes and investment objectives. OKRs owned by the Portfolio should demonstrate the contribution of epics towards desired outcomes and help you with investment decision-making.
- Program OKRs – assist with vision setting and provide context as epics are unpacked, looking for features that will contribute to the defined objectives.
- Team OKRs – align with features and provide discipline when articulating outcomes rather than solutions.

Innovation Management

- Supports an organizational culture of innovation. It allows for the submission of ideas from across an organization's entire ecosystem and centralizes them for evaluation and development.
- Helps drive solutions to crowd-generated challenges and opportunities, providing a structure for team collaboration.

Initiative Planning

- Supports the definition and management of the organization's strategic missions and initiatives
- Supports the identification, categorization, and assignment of ownership and/or responsibility to those strategic initiatives that will support the achievement of the strategic missions
- Allows estimation of the cost and/or budget for each initiative and an estimation of the value (benefit or revenue) that each initiative will deliver

Roadmapping

- Allows business leaders, product and program managers, and others to translate strategy into a timeline of business outcomes and deliverables.
- Roadmaps can be used to set direction and expectations, as well as maintain clear communication throughout delivery.

PLANNING CAPABILITIES

Strategic Funding

The Strategic Funding capability's enablers include:

- Budgeting – provides the mechanism to set time-phased financial budgets that planned and current investments can be analyzed against.
- Financial Targets – supports the setting of time-phased financial targets against which planned and in-flight investments can be analyzed.

Product Funding

The Product Funding capability's enablers include:

- Product Planning – supports the creation, planning and approval of the organization's products.
- Budgeting – supports the setting of time-phased financial budgets for each product, against which planned and current investments can be analyzed and approved.
- Financial Targets – supports the setting of time-phased financial targets (benefits / revenue) for products against which planned and in-flight investments can be analyzed.

Organizational Funding

The Organizational Funding capability's enablers include:

- Budgeting – provides the mechanism to define or manage the organization's budgets and set time-phased financial budgets that planned and current projects can be analyzed against.
- Financial Targets – supports the setting of time-phased financial targets against which planned and in-flight projects can be analyzed.

Value Stream Funding

The Value Stream Funding capability's enablers include:

- Value Stream Planning – supports organizations that have made the product shift. It allows them to organize their funding model around value streams that develop and operate their products, systems, and services.
- Lean Budgeting – set time-phased financial budgets for each value stream, against which planned and current investments can be analyzed and approved.
- Financial Targets – set time-phased financial targets for value streams in the form of benefits and revenue, against which planned and current investments can be analyzed.

Opportunity Planning

- Supports creating new engagements out of opportunities by creating visibility into the pipeline, streamlining quotes and statements of work, and accurately capturing billing agreements.

Program Portfolio Planning

The Program Portfolio Planning capability's enablers include:

- Business Requests – supports a clearly defined process to initiate business requests, including collecting relevant categorization/scoring information and initial financial data.
- Demand Management – supports the creation, planning, business case development, and approval of programs that will deliver the organizational strategic initiatives and business outcomes. It supports a clearly defined process to initiate a potential new program and collect relevant categorization/scoring information and initial financial data.
- Governance – provides a process and governance structure for progressing programs through an approval lifecycle into execution/delivery, ensuring that decisions are made by the right people based on structured data for each program entity.

Product Portfolio and Pipeline Planning

The Product Portfolio and Pipeline Planning capability's enablers include:

- Business Requests – supports a clearly defined process to initiate business requests, including collecting relevant categorization/scoring information and initial financial data.
- Intake – supports the creation, planning, business case development, and approval of the projects and programs that will deliver the organization's products. It supports a clearly defined process to initiate a potential new project or program and collect relevant categorization and scoring information and initial financial data.
- Gated Process Automation (stage-gate) – supports automation of a repeatable gated process and governance framework within which products and their associated programs and projects are delivered. It ensures that stage-gate decisions are made by the right people, based on structured and complete data.

Project Portfolio Planning

The Project Portfolio Planning capability's enablers include:

- Business Requests – supports a clearly defined process to initiate business requests, including collecting relevant categorization/scoring information, and initial financial data.
- Demand Management – supports the creation of new work/projects and the entry of descriptive and categorization information. All work is centralized and can be tracked and reported on through various statuses.
- Project Governance – provides a process and governance structure for progressing projects through an approval lifecycle into execution/delivery, ensuring that decisions are made by the right people and are based on structured data for each project entity.

Epic Portfolio Planning

The Epic Portfolio Planning capability's enablers include:

- Intake and Lean Business Case Development – supports the creation, initial planning, and Lean business case development of epics that will deliver and operate our products, services, and systems and their corresponding business outcomes.
- Epic Financial Planning – supports planning and management for all financial information associated with an epic, including:
    - High-level estimates
    - Approved or baseline budgets
    - Actual costs to date
    - Forecasts to complete costs
    - Variance reporting
- Portfolio Backlog Management – supports portfolio backlog management, visualizing all work on a portfolio Kanban board aligned to a preferred work methodology and process.

Services Portfolio Planning

- Allows effective planning for service organizations through projecting revenue and enables flexible staffing so that the right resources are assigned to the right projects and delivery occurs on customer timelines.

Capacity Planning

- Provides the mechanism to set time-phased resource capacity targets.
- These targets can be used to analyze demand and make assessments on the ability to continue with or adopt new investments (e.g., programs, projects).

Prioritization and Scenario Analysis

- Provides a mechanism to collect all potential and existing investments for prioritization and assessment before the overall portfolio plan is approved.
- As part of this, planners can create and compare various what-if scenarios.

Enterprise Architecture Management

The Enterprise Architecture Management capability's enablers include:

- Application Portfolio Management – provides insight into the impact of application changes, business demand, and strategic priorities on your application portfolio while increasing business value through portfolio optimization and reduced cost and complexity.
- Technology Portfolio Management – allows you to proactively understand and address the business impact and risk of aging technologies and improve compliance to meet your preferred standards.
- Capability Portfolio Management – this planning and analysis function aligns investment and technology portfolios with enterprise strategic priorities to drive optimal performance and advance business capability maturity.

DELIVERY CAPABILITIES

Program Management

- Monitors program roadmap realization, tracking the status and health of a given program executed through associated projects.

Resource Management

The Resource Management capability's enablers include:

- Resource Availability

  - Provides a single repository of resource availability information to the organization.

  - Resources are associated with a calendar that defines overall working time.

  - Resource Capacity can be reduced by using defined activities such as holiday, illness, administration.

  - Resource availability can be managed by resource managers or resources themselves, reflecting the true capacity of the organization to deliver work and projects.

- Resource Assignments and Utilization

  - Provides the ability to track and manage the assignments of named resources to work on projects or discrete activities within projects. Identify over and under allocations and understand future demand on their teams.

- Time Reporting

  - Monitor the progress of work, together with actual hours and costs. This time reporting information is collected through the submission of timesheets; recording the hours spent each day by each resource on project activities and other work.

  - This enables project actual hours and costs to be efficiently collected and used to update project progress and re-forecast future work

- Agile Costing

  - Allows work being done by agile teams within LeanKit to be used to automatically create timesheet entries, including categorizing the work into capitalization or operational expenses, all without requiring team members to manually fill out timesheets

Work Management

The Work Management capability's enablers include:

- Planning and Scheduling

  - Provides work managers with the ability to view and manage all work details.

  - They can develop the schedule or plan by defining the timeline, milestones, activities, and resources required to deliver the work.

- Changes, Risks, and Issues

  - Supports the definition and classification of change requests, risks, and issues and the tracking of any subsequent actions, approvals, or escalations.

- Execution and Tracking

  - Supports the Project Manager to manage the project through the Execution / delivery stages and to report on the overall status and health of the project.

  - Support the management of all work types, whether project-based or lights-on work.

Agile Program Management

The Agile Program Management capability's enablers include:

- Program Backlog Management – supports program backlog management, visualizing all work on program Kanban boards aligned to a preferred work methodology and process.
- Team of Teams Planning and Management – provides a structure to carry out quarterly planning. It provides teams and teams of teams with a way to visualize, plan, and coordinate organizational initiatives quickly, effectively, and with clarity into the value delivered.
- Program Execution – supports Agile team of teams' ability to execute and track the program plan.

Project Team Delivery

The Project Team Delivery capability's enablers include:

- Task Management – provides team members a productivity-focused workspace to manage group projects and complete daily tasks using integrated Kanban boards.
- Document Management – provides a centralized document management solution, allowing for integrated document templates, version tracking, sharing, review and approval of documents.
- Collaboration – provides the ability to have team visibility into the project plan and track progress using integrated Kanban boards and Gantt charts. This also provides an integrated communication tools for all team members.

Financial Planning and Cost Management

- Supports the planning and management of all financial information connected to programs and projects.
- Different sets of financial data can be managed when taken at key approval and governance points, providing a standard for measuring program and project performance.
- This supports:
- Creation of high-level estimates
- Approved / baseline budgets
- Actual costs to date
- Forecasts to complete costs
- Variance reporting

Agile Team Delivery

The Agile Team Delivery capability's enablers include:

- Team Backlog Management – provides Agile teams with the structure within which to manage their team backlog, allowing them to visualize, prioritize and plan work activities that align to strategic priorities.
- Team Execution – supports Agile teams to deliver on their team plans; using Kanban boards that match their preferred work methodology and processes.
- Team Integration – supports the connection of one or more Agile team tools, as well as multiple federated instances of a given team tool, into LeanKit. This enables Agile teams to visualize, plan, coordinate, and deliver their work together, no matter where their work is tracked or how it's managed.

RESULTS CAPABILITIES

Outcome Realization

- Allows the organization to manage the outcomes that will realize their strategic objectives.

- Outcomes are defined as any deliverable the organization's programs and work creates, enhances, and supports. Deliverables include products, services, technologies, applications, et al.

Benefits Realization

- Supports the monitoring of the achievement (benefit / efficiencies / revenue) of an organization's products

Billing and Revenue Recognition

The Billing and Revenue Recognition capability's enablers include:

- Billing and Invoicing – deliver billing items such as time and milestones to ERP for invoicing or deliver customer invoices directly from the Planview PSA solution.

- Revenue Recognition – get real-time visibility into revenue and deliver the results to your ERP system. Have Planview PSA perform the revenue recognition process or simply deliver the inputs to your ERP system for processing.

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