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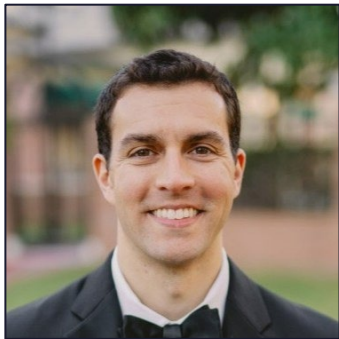
September 13-14, 2022

Connected Services Journey in Action

AJ Shavell | Director, Solutions Consulting

Nolen Ramminger | Senior Solutions Consultant

Your Speakers



AJ Shavell

Director, Solutions Consulting

AJ is a Director of Solution Consulting at Planview, where he collaborates with customers to help them optimize their current strategy, solutions, and processes to drive successful business outcomes. AJ is an experienced technology consultant with 10+ years of expertise in Leadership, Strategy Planning, and Work Management.



Nolen Ramminger

Senior Solutions Consultant

Based in Denver, CO, Nolen is a Senior Solution Consultant at Planview, bringing his professional services experience as a Management Consultant with a specialization in software development and emerging technology, as well as PMO transformation and change management. He works to contextualize Planview's solutions within the landscape of our customer's evolving challenges and pain points.

Agenda



PSA Journey
Context – Planning
Capabilities



Demo

PSA Customer Journey Assessment



		TRADITIONAL	OPTIMIZED		CONNECTED
Planning	How do you plan capacity?	Based on what we are currently executing	We plan ahead		We plan based on pipeline and work in flight
	How do you improve margins?	Rate card	Standardization	Consolidation	Value add
	How much visibility do you have into demand?	On opportunity close	Committed Pipeline		Any stage in pipeline
	Do you participate in strategy planning?	PS is a stand-alone profit center	PS helps deliver strategy ad-hoc		PS is a full strategic partner in the business
Delivery	Who owns delivery?	Project Manager	Regional PMO		Global PMO
	How do you manage resources assignments?	Manual/Ad-hoc	Coordinated		Resource Management Office
	How you manage utilization?	Reactive – actuals only	Limited future visibility – (planned + actual)		Real-time Dashboards
	How do you deliver work?	Waterfall	Hybrid		Continuous
	How do you partner?	We Don't	Some Key Partners		Formal program
	How do you work across geographies?	Single	Multiple		Global
	What are you able to templatzize?	Project Plans	Solutions		Outcomes
	How do you manage portfolios?	Projects only	Programs		Agile Portfolio Management
Customer Engagement	Where do you manage customers?	CRM only	Integrated with PSA		Enterprise - wide
	How do you report to customers?	Manual status updates	Interactive		Real-time/Dashboard
	How do you collaborate with customers?	Email	Project based, online		Collaboratively
Financials	How do you bill?	T&M	Fixed	Subscription	Outcomes
	When do you bill?	After delivery	During - milestones, monthly hours		Scheduled (monthly subscription)
	How do you forecast revenue?	Post-period close	Mid-period revenue forecasts		Real-time revenue forecasting
	How do you manage costs?	Manual/Ad-hoc	Near shore/ Offshore		Variable staffing

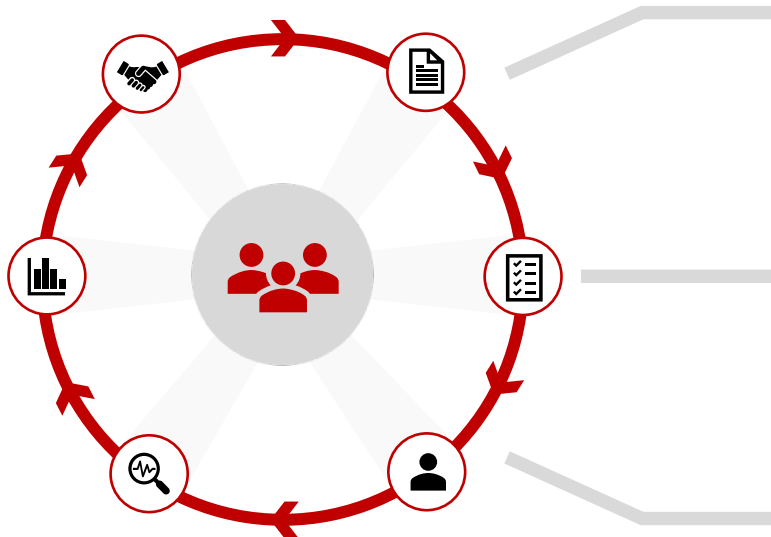
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DEMO

Key Takeaways



Prepare your organization before diving into technology (Process & People)

Discuss when your team should bring Capacity Planning into the planning process

Continuously monitor opportunity status, current projects, and resource utilization

Next Steps



Contact your CSM for
a Connected Services
Journey assessment



Agree in principle
on journey plan



Plan & run
discovery sessions



Phase 1 Preparation,
Kick-off, & Execution

Resources and Events



- EBOOK: [Connected Services eBook](#)
- WEB: [Customer Success Center](#)
- BLOG: [Planview PSA Blog](#)
- BLOG: [Maximize Value and Outcomes in Your Implementation](#)
- REPORT: [SPI Benchmark Report](#)
- EVENT: Join us at TSIA World: Envision Oct 17-19th!
- SURVEY: Please participate in the SPI Professional Services Maturity Benchmark study for 2023! More info to come.

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Thank you!