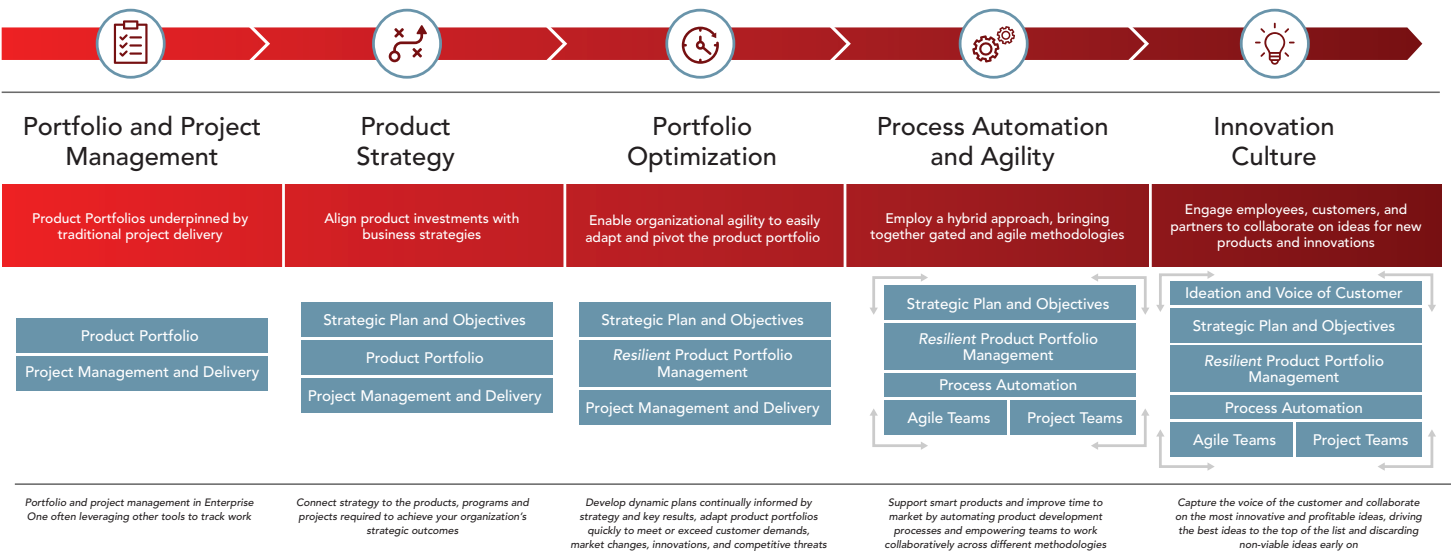# planview®

Professional Services Automation 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.

Portfolio and Project Management	Product Strategy	Portfolio Optimization	Process Automation and Agility	Innovation Culture
Product Portfolios underpinned by traditional project delivery	Align product investments with business strategies	Enable organizational agility to easily adapt and pivot the product portfolio	Employ a hybrid approach, bringing together gated and agile methodologies	Engage employees, customers, and partners to collaborate on ideas for new products and innovations
Product Portfolio	Strategic Plan and Objectives	Strategic Plan and Objectives	Strategic Plan and Objectives	Ideation and Voice of Customer
Project Management and Delivery	Product Portfolio	*Resilient* Product Portfolio Management	*Resilient* Product Portfolio Management	Strategic Plan and Objectives
	Project Management and Delivery	Project Management and Delivery	Process Automation	*Resilient* Product Portfolio Management
			Agile Teams / Project Teams	Process Automation
				Agile Teams / Project Teams
Portfolio and project management in Enterprise One often leveraging other tools to track work	Connect strategy to the products, programs and projects required to achieve your organization's strategic outcomes	Develop dynamic plans continually informed by strategy and key results, adapt product portfolios quickly to meet or exceed customer demands, market changes, innovations, and competitive threats	Support smart products and improve time to market by automating product development processes and empowering teams to work collaboratively across different methodologies	Capture the voice of the customer and collaborate on the most innovative and profitable ideas, driving the best ideas to the top of the list and discarding non-viable ideas early on

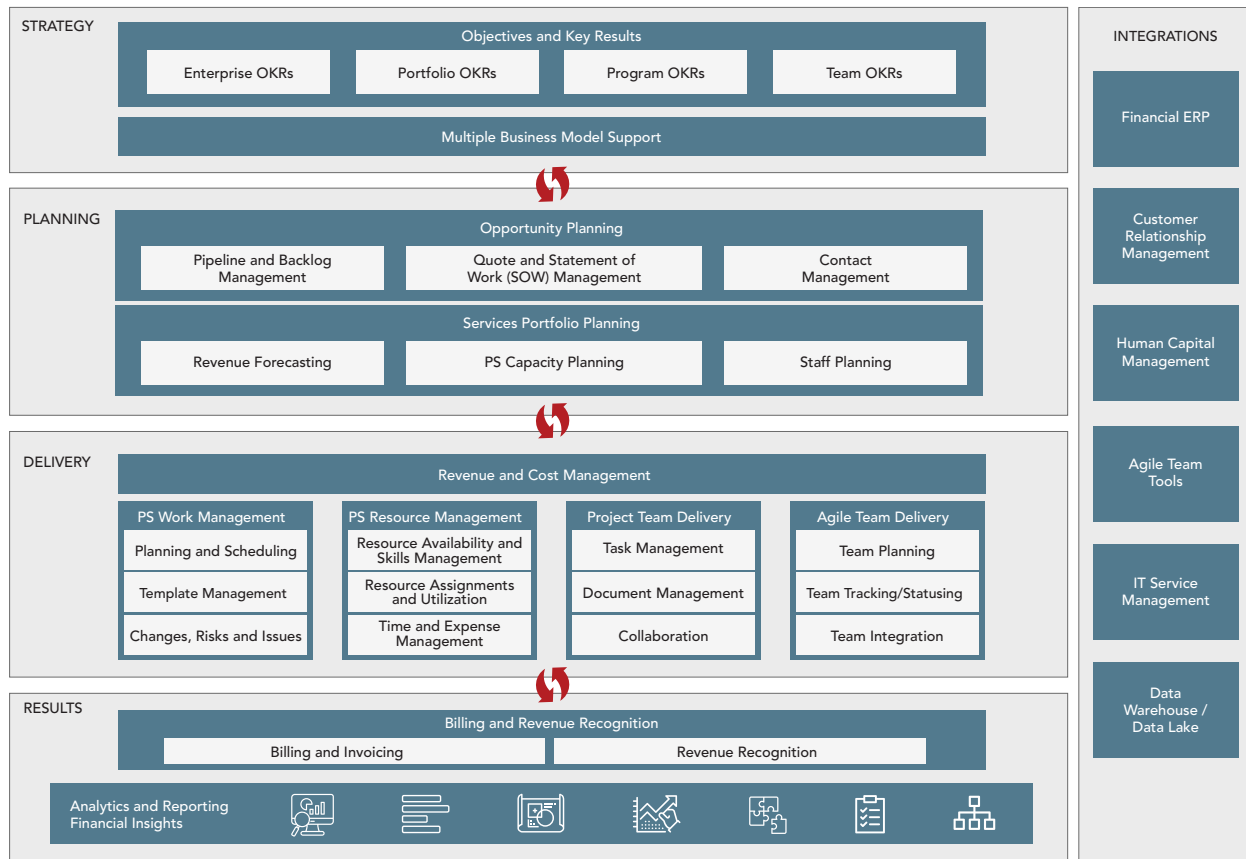*Your Professional Services Automation journey*

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

PROFESSIONAL SERVICES AUTOMATION CAPABILITIES

The Professional Services Automation solution's 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.

Multiple Business Model Support

- Align services processes and structures to multiple business models including T&M, fixed fee, subscriptions, and outcomes.

PLANNING CAPABILITIES

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.

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.

DELIVERY CAPABILITIES

Revenue and Cost Management

- Understand the labor and material costs of your engagements to ensure profitability.

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.

Professional Services Resource Management

- View and manage your entire resource pool to assign the right resources at the right time for more efficient and profitable project delivery across all engagements.

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.

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

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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