PLANVIEW

PORTFOLIO MANAGEMENT

IT GOVERNANCE TO POWER BUSINESS STRATEGIES & MANAGE RISKS

How Does IT Power Your Business Strategies?
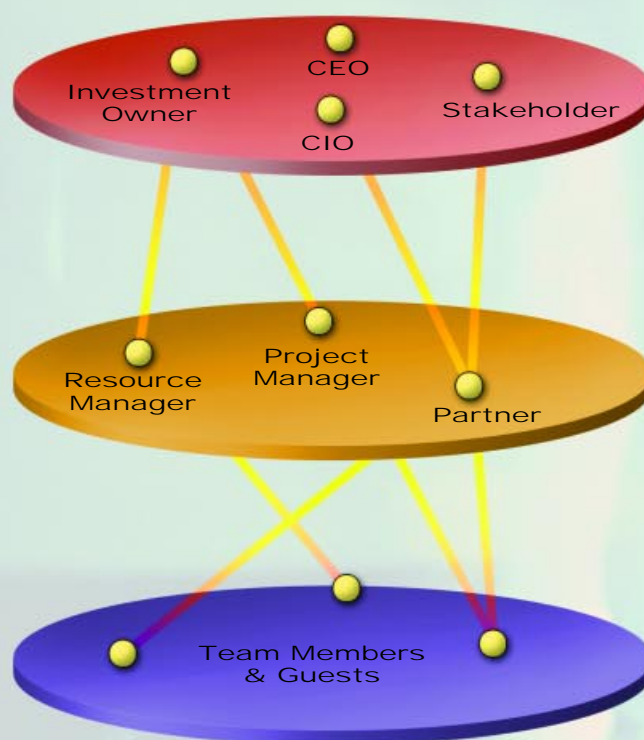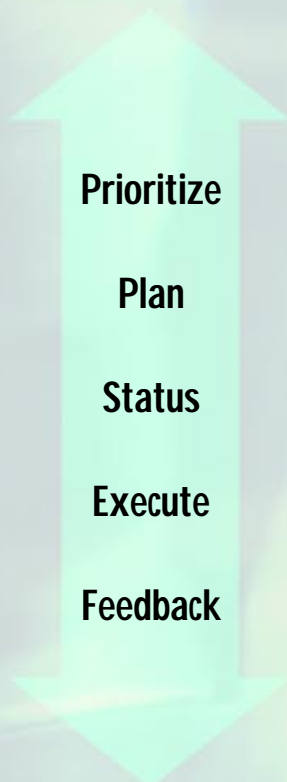
With Portfolio Management

- Costs are controlled
- Redundant work is identified and eliminated
- Dependencies are clarified and managed
- Risks are recognized and mitigated
- Staff is focused on the right work

Many business executives consider IT wasteful and out of control at the same time that they have never been more dependent on it. Managing business strategies & risks and improving IT governance are on converging paths. As CEOs & CFOs recognize their personal liability for business performance, they want assurances that the information they use to make decisions is accurate & auditable. IT is the engine that powers corporate processes, supplying speed, repeatability, discipline and auditing. IT Governance is getting control of your IT expenditures and using them to accelerate business strategies. You go beyond mere compliance with regulations like Sarbanes-Oxley to elevate your business processes to a competitive advantage.

Empower the agile, Real-Time Enterprise.

Analysts estimate that a 20% process improvement can reap productivity improvements of up to 80%. PlanView offers software, services and mature, real-time business processes that improve IT Governance. The results? Your business processes are consistent, repeatable, disciplined and auditable. You reduce executive liability. You recognize and mitigate risks. You identify redundant work and eliminate it. You clarify work dependencies to manage at an enterprise level. You focus resources on the right work for the best return. And you assure stockholders, employees, partners, customers and regulators of high organizational performance.

Prioritize

Plan

Status

Execute

Feedback

CEO
Investment Owner
CIO
Stakeholder

Resource Manager
Project Manager
Partner

Team Members & Guests

Corporate Performance
Enterprise Planning & Scorecarding

- Balanced Scorecard
- Strategic Issues
- Scenarios
- Dashboard

Portfolio Performance
Enterprise Portfolio Management

- Risk Analysis
- Investment Analysis
- Portfolio Methods
- Lifecycle

Work & Resource Performance
Enterprise Project Execution

- Project Management
- Resource Allocation
- Time & Expenses
- Workflow

Why PlanView
Portfolio Management?

Implement Portfolios
to Transform Your Organization

The only constant is change. Your organization is continuously reinventing itself while still operating at peak efficiency. Transforming to meet challenges such as breaking into new markets, cutting costs, leveraging new technologies, and meeting new regulations stress the organization and the executive team that guides it.

Transform while performing.

PlanView Portfolio Management includes software and PRISMS™ for IT real-time processes that help your organization to align your business strategies with your work & resource management. With PlanView, you can:

- Apply a work initiation process to focus resources on the right work
- Clarify investment decisions with risk and dependency analysis before funding
- Measure the performance portfolios to eliminate non-productive work and redeploy resources on the work that matters
- Maximize productivity by aligning skills and work pipelines with availability and by keeping your people "off the bench"
- Execute high-quality work and eliminate surprises & risks
- Deliver the promised benefits by auditing the results

Agility in your marketplace? One PlanView customer cut the time to deliver global portfolio status to their strategic governance board from 10 days to 5 minutes. The impact was more timely decision-making on where to cut costs and deploy resources, saving millions of dollars in just one year.

Productivity increases? PlanView customers in an Aberdeen Group survey reported a 17.7% average increase in resource productivity. Think how adding almost one extra day per week per person could increase your organizational throughput.

Better cost control? One PlanView customer trimmed their outsourcing costs by US$9M by deploying internal resources more productively and by engaging their customers in cutting redundant work. These cost savings flowed directly to the company profits.

PlanView Portfolio Management

Roles · Portals · Business Functions
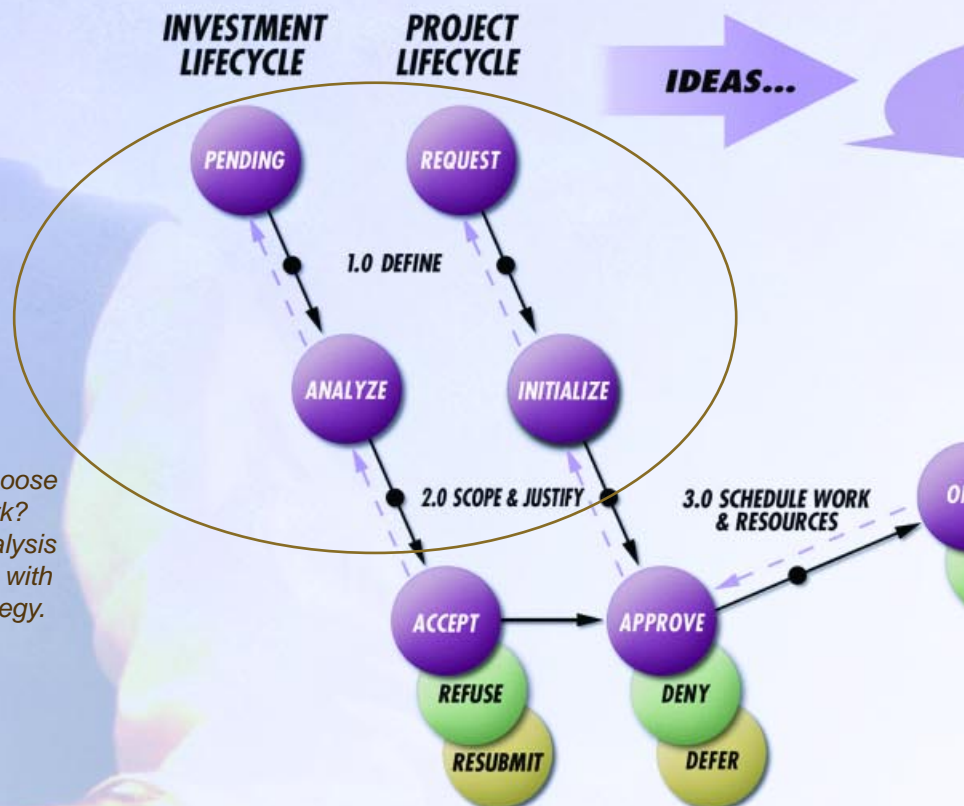
Apply Portfolios to Put Strategies Into Action

The lifecycle of a new idea or request starts with a formal work initiation process to define the business benefits, list any redundant efforts, clarify work dependencies and identify the various risks. PlanView Portfolio Management offers processes and tools to capture all requests, and route them using governance processes based on their strategic importance. A stage/gating process gets the right information to the right person to make informed decisions and communicate them appropriately. The decision cycle is tightened up, with fewer politics and more objectivity.

Integrate your investment analysis with how you deploy resources & deliver work.
You create investment models and portfolio targets that you then meet with PlanView. PlanView investment analysis facilitates investment classification, scoring, cost/benefit analysis, calculating ROI, measuring results, and more to dynamically choose the best new work. You balance risk and reward in portfolio scenarios, which can be as sophisticated as you need them to be— such as three scenarios for a down economy, a flat economy and a growing economy. Evaluating requests and opportunities against a common investment model also helps guarantee a consistent, quantitative method for ranking, scoring and prioritizing work. Your decisions are easier to communicate, prove and audit—resulting in no surprises for executives, managers, and customers as well as in more-accurate disclosures for regulators.

How do you choose the right work? Investment analysis aligns projects with business strategy.

INVESTMENT LIFECYCLE **PROJECT LIFECYCLE**

IDEAS...

PENDING   REQUEST

1.0 DEFINE

ANALYZE   INITIALIZE

2.0 SCOPE & JUSTIFY   3.0 SCHEDULE WORK & RESOURCES

ACCEPT → APPROVE

REFUSE   DENY

RESUBMIT   DEFER

Assure You Get the Promised Benefits to Build Business Value

Evaluate and audit the quality, cost and timeliness of work deliverables in PlanView once the project or product is deployed. Using this knowledge to then mature how decisions are made during investment analysis in the early lifecycle can yield significant productivity improvement. With PlanView, you can track benefits from the original request, through the work delivery, to deployment. Executives and managers know to make more-realistic promises when requesting new work because their claims will be tracked. Your organization has real metrics to update best practices, evaluate resource performance and maintain a knowledge base.

PlanView provides workflows, content documents, collaboration and best practices in integrated processes to support the lifecycle from idea generation all the way to benefit tracking. You can, for example, build on early cost/benefit estimations with more formal payback calculations during the scoping & justifying stage, then track actuals during the deploying & auditing stage. The impact is you know what real value is being generated by your investments. You reduce business risk by generating an audit trail. You improve organizational best practices and prove value to your customers.

...TO ASSETS

6.0 EVALUATE BENEFITS

MAINTAIN

5.0 DEPLOY & AUDIT

COMPLETE

4.0 EXECUTE & DELIVER

PEN

CANCEL

ON HOLD
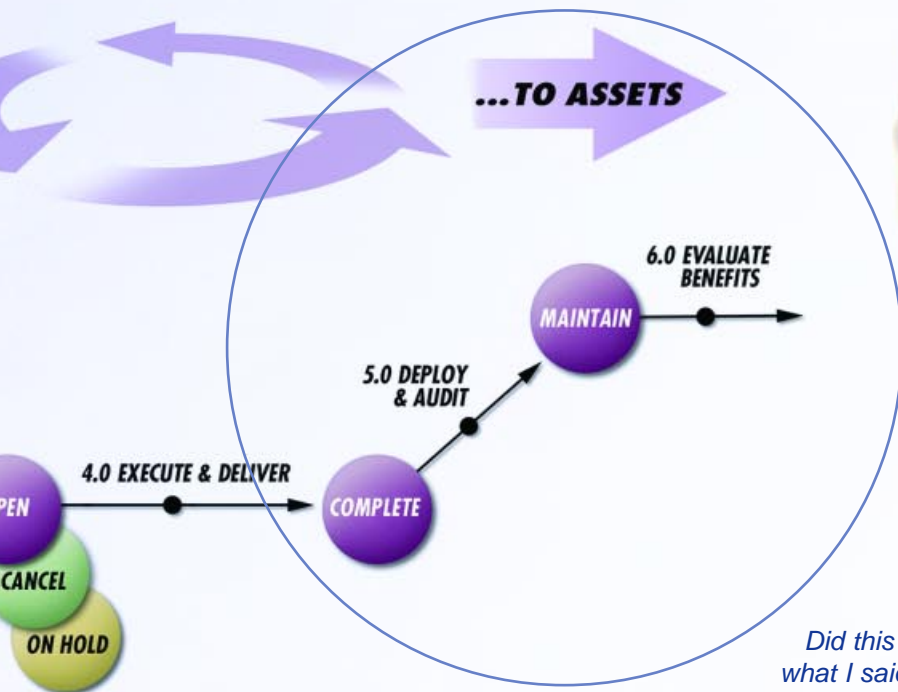
Did this initiative do what I said it would do? Real value comes from fulfilling the promises that were made when the idea was approved.

5

Investment Portfolio Portal

Investment Portfolio Portal ⊕   HomeView | Edit | Help | Log Off

Merger Portfolio   Friday, July 18, 2003
Scenario::1
Last Promoted Scenario: Portal Administrator: Jim Harris
Suppy Chain Related to the Merger

Portfolio Measurements

Measurement	Target	Accepted(4)	Difference	Analysis(7)	Refused(1)	Total(12)
Total Benefits ($K)	21750	19250	2500	9050	8500	36800
Direct Costs ($K)	8250	6950	1300	3715	4500	15165
Total Labor (Hrs)	11600	10600	1000	5500	8000	24100

Project Priority Matrix

Direct Costs ($K)

(Chart: Customer Benefit vs Strategic Fit)

- ACME Accounting System Migration
- Strategic Systems Review
- Customer Order Tracking System
- Update Corporate App and Web Servers - Win2000
- Vendor e-commerce II
- Customer Support Center PC Workstation Upgrade
- Financial Systems Maintenance

PLANVIEW

Scenarios   Edit
3.Weak Economy
2.Robust Economy
1.Active Plan
More...   Scenario

Rank Projects

Members
Total: 2
Member Info   Member

How well do you align your projects with your business strategies and assure execution performance?

Investment Portfolio

Score, rank and prioritize work requests, then manage changes and risks during execution. You compare scenarios and alternatives. You improve your decision-making and how you communicate strategic vision across the organization. Investment analy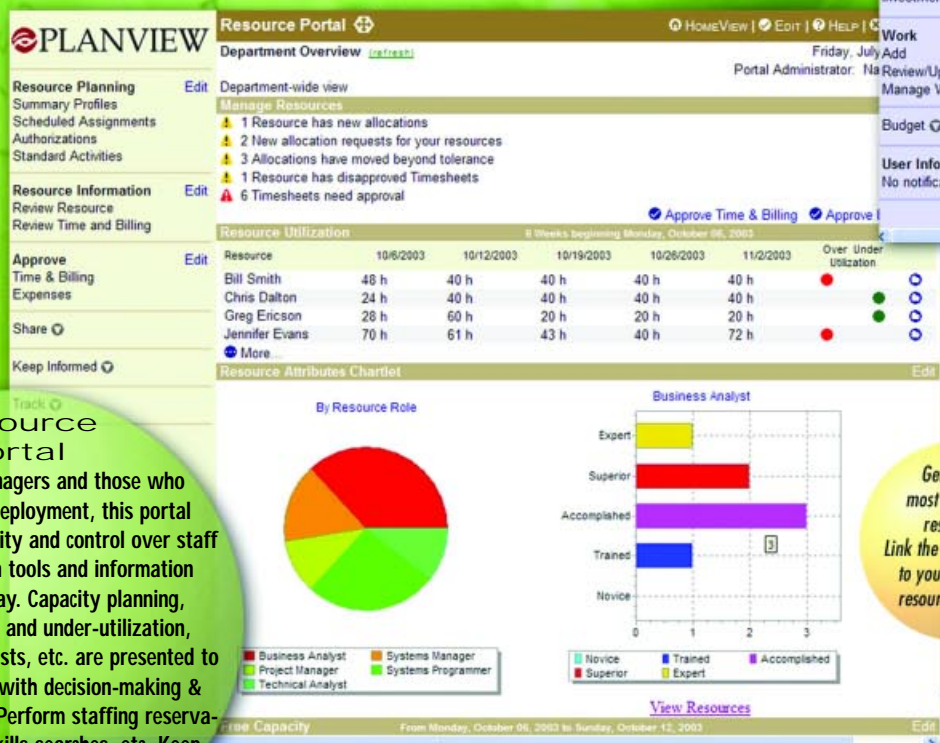sis is the link between business strategy and executing work. PlanView investment models help create an objective decision-making environment to reduce politics and improve communications.

HomeView

PLANVIEW

HomeView ⊕

Welcome, John Rogers

Edit **Project Lifecycle**
⚠ 2 items require your input / a

Project Health

Project Description

CRM Website
PARMS Implementation
Strategic Systems Review
More...

My Performance Portfolios
Description
Department Performance
Merger Portfolio
[0 New / 2 Total]

Share   Edit
Content
Project Portals
Resource Portals
Performance Portfolios
Investment Portfolios

Changes, Risks, and Issues
⚠ 1 Change has been escalate
⚠ 1 Risk has been escalated
⚠ 1 New Change
⚠ 1 Risk is Past Due

Work   Edit
Add
Review/Update
Manage Work

Budget

User Info   Edit
No notifications at this time

Resource Portal

Resource Portal ⊕   HomeView | Edit | Help |

Department Overview (refresh)
Department-wide view   Friday, July
Portal Administrator: Na

Manage Resources
⚠ 1 Resource has new allocations
⚠ 2 New allocation requests for your resources
⚠ 3 Allocations have moved beyond tolerance
⚠ 1 Resource has disapproved Timesheets
⚠ 6 Timesheets need approval

Approve Time & Billing   Approve

Resource Utilization
6 Weeks beginning Monday, October 06, 2003

Resource	10/6/2003	10/12/2003	10/19/2003	10/26/2003	11/2/2003	Over/Under Utilization
Bill Smith	48 h	40 h	40 h	40 h	40 h	●
Chris Dalton	24 h	40 h	40 h	40 h	40 h	●
Greg Ericson	28 h	60 h	20 h	20 h	20 h	●
Jennifer Evans	70 h	61 h	43 h	40 h	72 h	●

More...

Resource Attributes Chartlet

By Resource Role

- Business Analyst
- Project Manager
- Technical Analyst
- Systems Manager
- Systems Programmer

Business Analyst

Expert
Superior
Accomplished
Trained
Novice

- Novice
- Superior
- Trained
- Expert
- Accomplished

View Resources

Free Capacity   From Monday, October 06, 2003 to Sunday, October 12, 2003   Edit

PLANVIEW

Resource Planning   Edit
Summary Profiles
Scheduled Assignments
Authorizations
Standard Activities

Resource Information   Edit
Review Resource
Review Time and Billing

Approve   Edit
Time & Billing
Expenses

Share

Keep Informed

Track

Resource Portal

For functional managers and those who oversee resource deployment, this portal provides better visibility and control over staff & contractors, with tools and information organized your way. Capacity planning, resource overloads and under-utilization, unfulfilled work requests, etc. are presented to the manager, along with decision-making & communication tools. Perform staffing reservations, allocations, skills searches, etc. Keep people off the bench and put the right people on the right work.

Getting the most from your resources? Link the work pipeline to your maximum resource capacity.
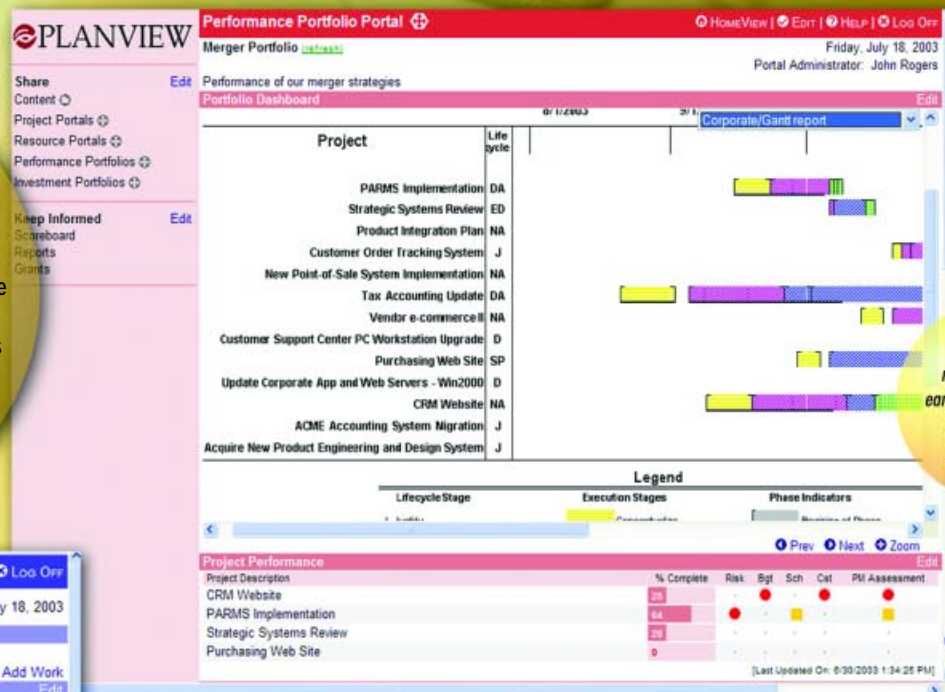
dyna
offer
tools
qualit
critica
collab
buil
H
eng

Performance Portfolio

Everyone with oversight or management responsibility has real-time indices and measurements on their work responsibilities organized their way in this portal. You see portfolio trends on budget, risk, cost, schedule and more in real-time. You can drill down to more details when you want it. The result is that you eliminate non-performing work and focus resources on what is important. Your organization is agile and responsive to market changes.
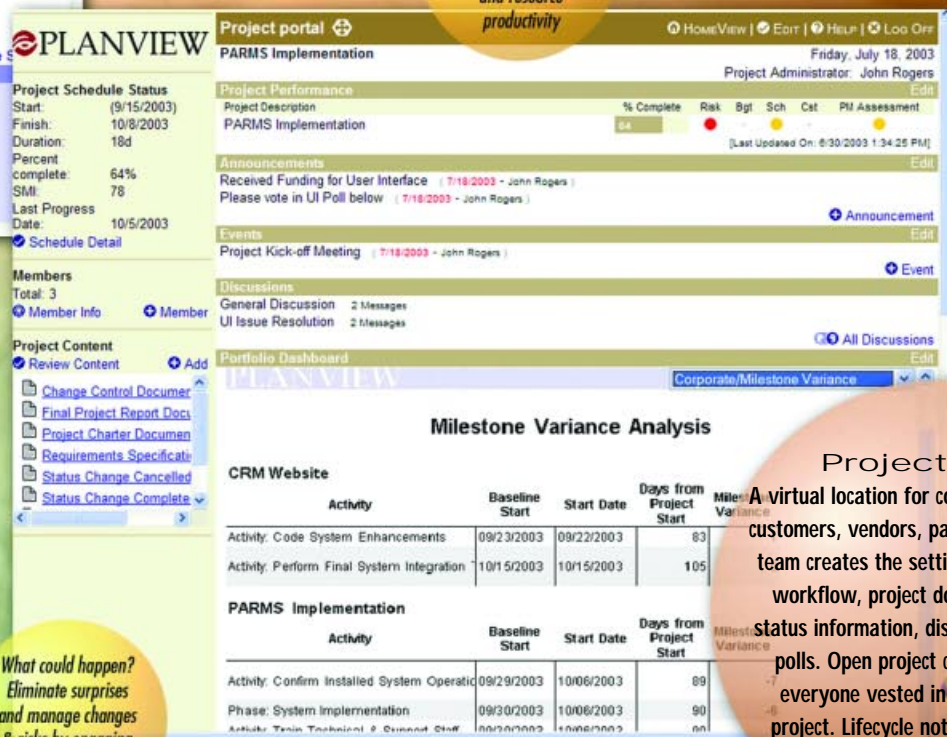
Do you use metrics to make early decisions about your portfolio performance?

Need focus? Highlight the actions that make a difference in work performance and resource productivity

HomeView

Your personalized workspace is ...amically built each time you launch it, ...ring easy access to the reminders and ...you need to keep your output at high ...ty and your decisions current. You get ...al information to make judgments, and ...poration & knowledge management to ...d intellectual property. Personalized ...HomeView portals keep everyone ...gaged in the process and committed to successful results.

What could happen? Eliminate surprises and manage changes & risks by engaging everyone on the team.

Project Portal

A virtual location for collaboration with your customers, vendors, partners and the project team creates the setting for success. Share workflow, project documents, real-time status information, discussions and member polls. Open project communications get everyone vested in the success of the project. Lifecycle notifications speed the decision cycle and decrease project slippage.

PLANVIEW — Performance Portfolio Portal

Merger Portfolio [refresh]
HomeView | Edit | Help | Log Off
Friday, July 18, 2003
Portal Administrator: John Rogers

Performance of our merger strategies

Share — Edit
Content
Project Portals
Resource Portals
Performance Portfolios
Investment Portfolios

Keep Informed — Edit
Scoreboard
Reports
Grants

Portfolio Dashboard — Corporate/Gantt report

Project	Life cycle
PARMS Implementation	DA
Strategic Systems Review	ED
Product Integration Plan	NA
Customer Order Tracking System	J
New Point-of-Sale System Implementation	NA
Tax Accounting Update	DA
Vendor e-commerce II	NA
Customer Support Center PC Workstation Upgrade	D
Purchasing Web Site	SP
Update Corporate App and Web Servers - Win2000	D
CRM Website	NA
ACME Accounting System Migration	J
Acquire New Product Engineering and Design System	J

Legend

Lifecycle Stage	Execution Stages	Phase Indicators

Prev | Next | Zoom

Project Performance — Edit

Project Description	% Complete	Risk	Bgt	Sch	Cst	PM Assessment
CRM Website	25					
PARMS Implementation	64	●	●	■	■	
Strategic Systems Review	28					
Purchasing Web Site	0					

[Last Updated On: 6/30/2003 1:34:25 PM]

Edit | Help | Log Off
Friday, July 18, 2003

...ttention

Add Work — Edit

% Complete	Risk	Budget	Sched	Cost	PM Assessment	
25		●		●		
64	●	●	■	●	■	
28						

[Last Updated On: 6/30/2003 1:34:25 PM] — Edit

Total Projects
8
21

Portfolio — Edit

Change Summary | Risk Summary | Issue S...

...ght 2003, PlanView, Inc., Version 7.3.1 rc1

PLANVIEW — Project portal

PARMS Implementation
HomeView | Edit | Help | Log Off
Friday, July 18, 2003
Project Administrator: John Rogers

Project Schedule Status
Start: (9/15/2003)
Finish: 10/8/2003
Duration: 18d
Percent complete: 64%
SMI: 78
Last Progress Date: 10/5/2003
Schedule Detail

Members
Total: 3
Member Info | Member

Project Content — Add
Review Content
- Change Control Documer...
- Final Project Report Docu...
- Project Charter Documen...
- Requirements Specificati...
- Status Change Cancelled
- Status Change Complete

Project Performance — Edit

Project Description	% Complete	Risk	Bgt	Sch	Cst	PM Assessment
PARMS Implementation	64	●	●	●	●	

[Last Updated On: 6/30/2003 1:34:25 PM]

Announcements
Received Funding for User Interface (7/18/2003 - John Rogers)
Please vote in UI Poll below (7/18/2003 - John Rogers)

Announcement — Edit

Events
Project Kick-off Meeting (7/18/2003 - John Rogers)

Event — Edit

Discussions
General Discussion — 2 Messages
UI Issue Resolution — 2 Messages

All Discussions — Edit

Portfolio Dashboard — Corporate/Milestone Variance

PLANVIEW

Milestone Variance Analysis

CRM Website

Activity	Baseline Start	Start Date	Days from Project Start	Milestone Variance
Activity: Code System Enhancements	09/23/2003	09/22/2003	83	
Activity: Perform Final System Integration	10/15/2003	10/15/2003	105	

PARMS Implementation

Activity	Baseline Start	Start Date	Days from Project Start	Milestone Variance
Activity: Confirm Installed System Operatic	09/29/2003	10/06/2003	89	
Phase: System Implementation	09/30/2003	10/06/2003	90	
Activity: Train Technical & Support Staff	09/30/2003	10/06/2003	90	

Optimize the Use
of Your Resource Capacity—

Organizations have learned the value of optimizing the use of critical resources. Functional centers of excellence, skills and contractor management, and identifying and tracking areas of interest are all functional management tools and processes to ensure resources are assigned to the right project & service work to generate real benefits for the organization. PlanView provides tools & processes to improve how matrixed organizations share responsibilities & common resource pools and keep resources deployed to the maximum benefit of the organization.

Put the right people on the right work.

PlanView was the first to use the Total Workforce Model for resource capacity planning and continues to innovate today. Projects, service and standard work (vacation, training, etc.) all affect the ability of resources to take on new work. By modeling true resource availability, project schedules become more realistic, promised service work can be delivered, and standard work is tracked and accounted for. Functional managers have tools to keep people off the bench, identify bottlenecks and over bookings. You can ensure that you have the right people available when the work arrives. Your resources deliver the value that you expect every time.

Got your arms around your true workforce capacity? PlanView helps you model all your work.

INVESTMENT ANALYSIS

WORKFORCE CAPACITY

STANDARD WORK

—To Do More With Less

What could you do with an extra day per week? What if everyone in your organization had an extra day each week? That's just the average productivity increase reported by PlanView customers in third-party survey (Aberdeen Group, PSA User Study, 2001). Our customers have also reported savings in the millions of dollars by eliminating redundant work and finding work for under-utilized resources.

Make the resource assignment process visible.

Empowering managers to use resources wisely can dramatically improve utilization. Resource managers work with project and service managers to easily deploy & track resources and share performance information across portfolios of projects, service agreements, resource pools and more. Real-time metrics are displayed for individuals, skill or role pools, work assignment, charge back or billing rates, etc. By linking resource plans to work portfolios, business strategies are improved.

Automate project tracking and financial reporting.

Team members drive both project status and financial reporting information directly from their time reporting. These real metrics can be mapped to payroll codes, human resource rules and project activities to create consistent cost/benefit status information across the whole organization. This summary information can then be passed to an ERP, payroll, HR or other system by project, individual or other groupings through data integration. The information is accurate, secure and auditable.

Need help making real-time decisions and communicating them? Easy to comprehend graphics show you over- and under-booking and more.
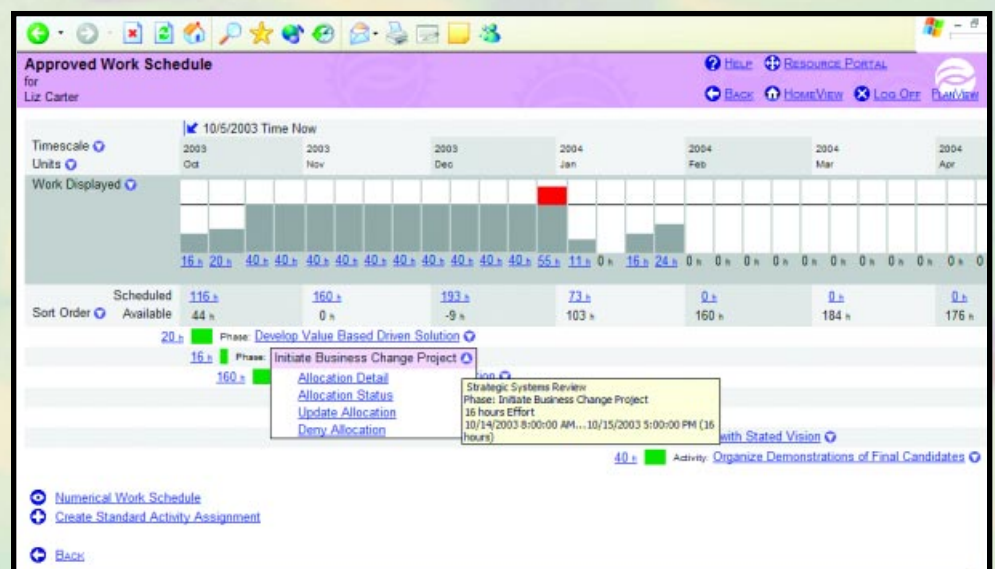
Execute Successful Projects
& Do It Right the First Time

Project & service managers need to do their work right the first time.
PlanView offers best practices, workflow notifications, content documents, collaboration,
changes, risks and issues tools— as well as cost, schedule and quality control tools—
for just-in-time mentoring. Real-time processes support consistent, disciplined and
repeatable performance by everyone in the organization, not just the stars. These processes
can also integrate with quality initiatives like CMM, 6 Sigma, Prince2 and others. The result:
you quickly build organizational maturity.

Quick, easy, smart and repeatable.

Automated, adaptive workspaces prompt mangers, associates, guests and team members to
focus on the important things, and give them real-time tools to get the job done. They create
consistent documentation and metrics to build the knowledge base and support auditing. The
organization enjoys better performance and fewer risks.

Enterprise-class Scheduling Engine.

Intra-project dependencies, resource capacity planning and multiple project what-if analysis are mod-
eled in PlanView Portfolio Management. PlanView's Enterprise Scheduling Engine is elevated beyond
basic scheduling to become an integral component of the enterprise-class processes
that drive good organization-wide decision-making.

Microsoft Project supported—but not required.

PlanView performs CPM (critical path method) scheduling natively,
so doesn't require an outside
scheduling tool. Some organizations
are accustomed to Microsoft
Project. PlanView offers them
a flexible bi-directional
interface with Microsoft Project,
allowing you to leverage your
MSP with web-based collaboration
and process improvement.

Interactive Gantt on the web? With PlanView you get that and an integrated resource histogram showing capacity.
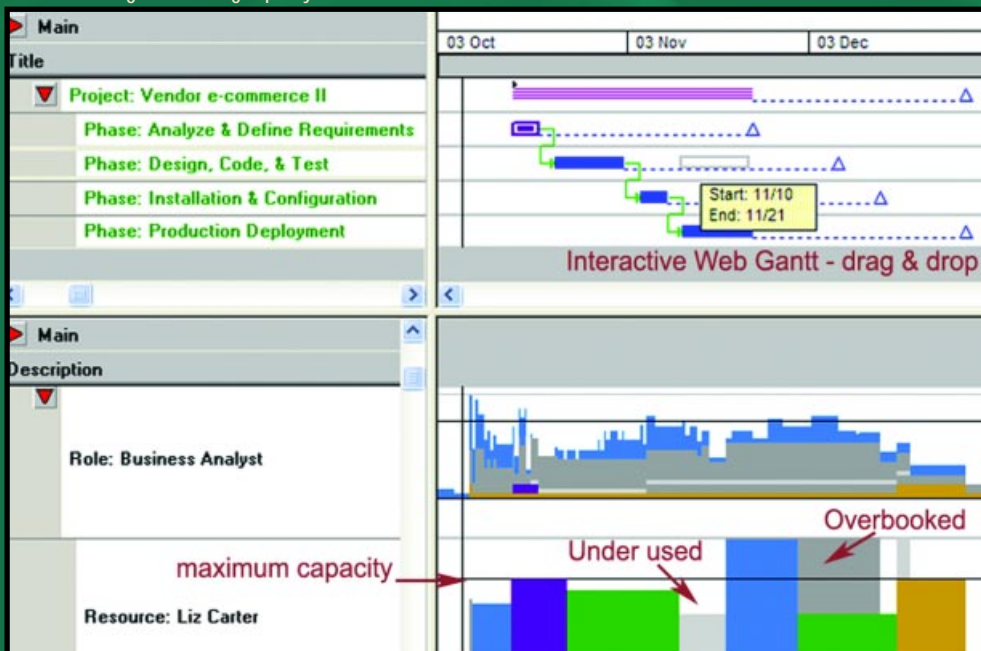
PlanView's Innovation Helps You Realize Real Value

Your investment in a PlanView solution is safe, secure and stable. For more than a decade, PlanView has been offering world-class innovation for strategic, work and resource management. We've also been consistently profitable and growing in revenue since 1993. Headquartered in Texas, privately owned and financed, our direction is motivated by long-term performance not quarterly market results. We partner with our customers on new feature/functions and strategic direction.

Our own professional services group implements PlanView's enterprise-class solution, which allows us to keep the highest standards. They offer deep experience with identifying business needs, tailoring software to support your culture and organization, training, mentoring and more. PlanView also offers world-class customer service, including a yearly user group conference, an on-line HelpDesk, and PlanViewDirect, our on-line user community site for secure file transfers, mentoring, e-Learning, and more. Premium support service options are also available.

PlanView is a role-based web-software solution tailored for your organization. PlanView's application infrastructure supports enterprise-class scalability and security, as well as integration with other systems. The multi-tiered architecture provides flexibility for global deployment with high performance. Open standards allow disparate computer systems and networks to utilize the software. The system provides multilevel security to adapt to strict standards used in the finance and public sector. PlanView also offers multi-language interfaces with dynamic localization for international deployments.

Valued PlanView Partners
- Business Objects
- Crystal Intelligence
- Microsoft
- Oracle
- SAP and other ERP
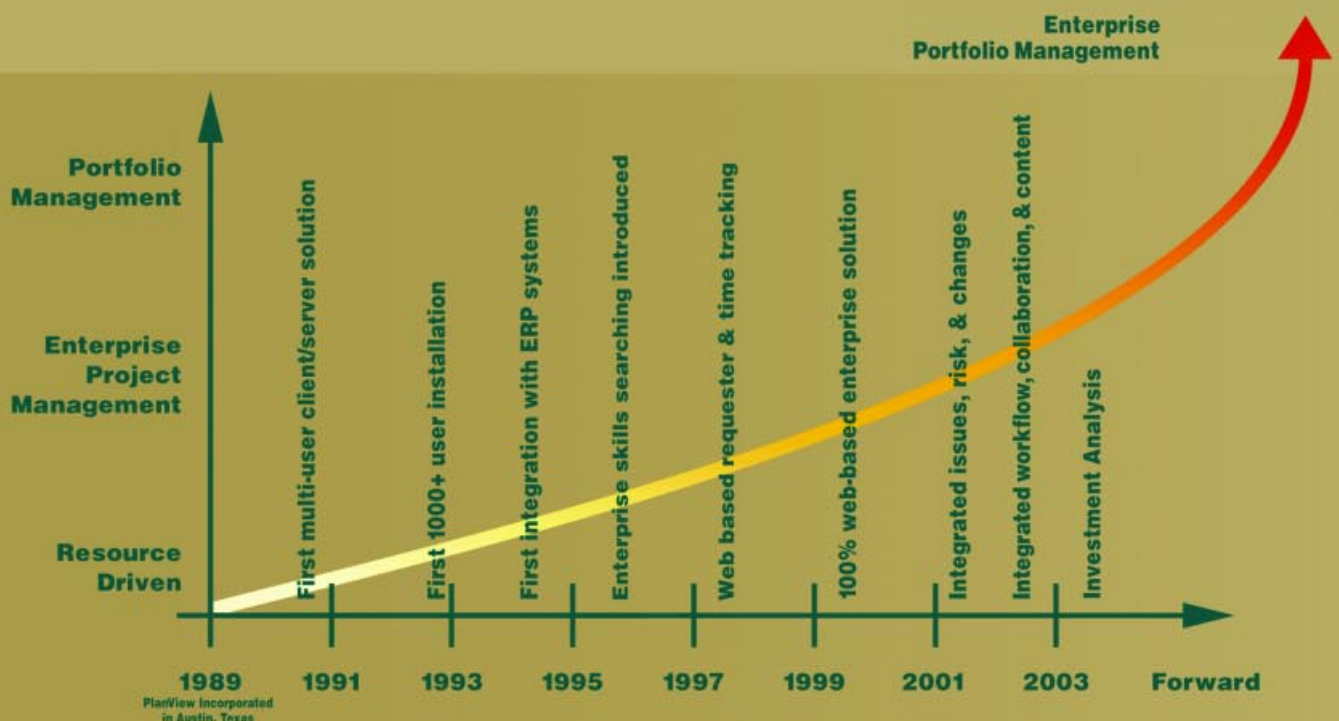- gantthead.com
- Borland (Starbase)
- PRTM
- neoIT
- *— and many more!*

PlanView Best Fit For
- IT Governance
- Enterprise-Wide Deployment
- R&D
- Product Development
- Professional Services

Industry Focus
- Financial/Insurance
- Government/Public Sector
- Consulting/PSOs
- Telecom
- Life Sciences/Pharma

Enterprise Portfolio Management

Portfolio Management

Enterprise Project Management

Resource Driven

- First multi-user client/server solution
- First 1000+ user installation
- First integration with ERP systems
- Enterprise skills searching introduced
- Web based requester & time tracking
- 100% web-based enterprise solution
- Integrated issues, risk, & changes
- Integrated workflow, collaboration, & content
- Investment Analysis

1989 — PlanView Incorporated in Austin, Texas
1991
1993
1995
1997
1999
2001
2003
Forward

www.planview.com

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