

Solution brief

Investment and Capacity Planning

Create portfolio plans based on potential changes, and the impact they will have on your entire portfolio, so you can execute on your organization's highest priorities.

Most organizations make decisions about their portfolios in silos, and lack insight to take informed actions about new investments – their impact on the rest of the portfolio, on human resources, on cost. Given that in the average IT organization, for example, 71% of resources are overcommitted¹, what's needed is a better approach to planning.

If your organization is like many today, it is in a state of continuous planning – although it's often not officially recognized. New challenges arise as work is on-going – emerging customer needs, new opportunities, supply chain breaks – and you must make a quick assessment. Do we invest time/work/effort into this opportunity? Do we have capacity? And the work of your organization continues. Few are able to factor in the impacts of these changes.

This is where Planview Enterprise® comes in.

This enterprise-wide resource and portfolio management solution makes it easy to manage and reshape your portfolio plan in the face of change. It shows you in-flight investments against new demand and delivers what-if scenarios to measure the effect of changes on capacity before making final decisions.

Quickly understand the full impact of new investments across portfolios and communicate it across the enterprise effectively.

Grow, Innovate, and Transform with your Plan

To keep your plans relevant in the face of change, you must be able to analyze current and new investments. As new demands hit, you must continually assess portfolio



priorities against capacity to determine which combination best advances the organization, to meet its growth, innovation, or transformational goals.

Constantly prioritize and plan the portfolio with Planview Enterprise using its integrated, single-click view into your investments and capacity:

- Rank investments based on business drivers and priorities
- Analyze investments to create scenarios and model different trade-off decisions based on the latest

information of investments in execution and new demand

- Balance investments against your capacity financial and human – over time by modeling the impacts of changes in capacity or delaying investments based on availability to drive successful delivery of the portfolio
- Compare scenarios to consider alternative solutions to fulfilling portfolio objectives

This approach injects objectivity and makes it easy for you and your stakeholders to make fast, strategic investment decisions.

Rank

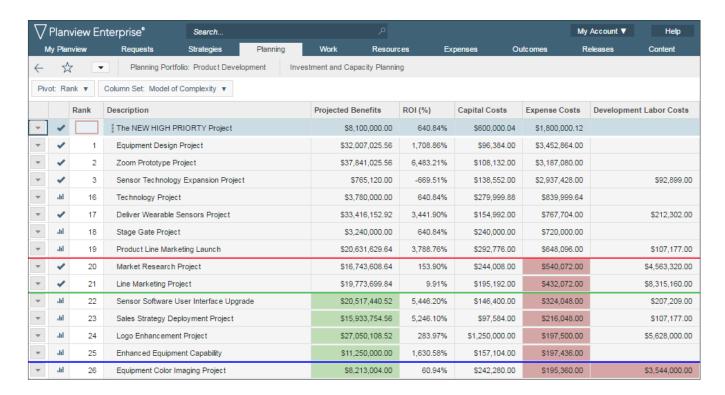
Rank and prioritize potential investments. Use the criteria to help drive portfolio measurement in your organization – ROI, labor costs, suppliers – to auto-rank proposed investments into portfolios. Set threshold lines for revenue, expense, capital targets, and other issues, to see how the different portfolios fare.

Are you concerned about ROI, strategic alignment, technology risk, or vendor costs? Easily add that to your

view to understand the impact of different project options.

Drag and drop to perfect the picture, until you have achieved a strategically sound list of investments – all ranked within a scenario.

What emerges is an objectively prioritized rankings of your organization's investments.



Analyze

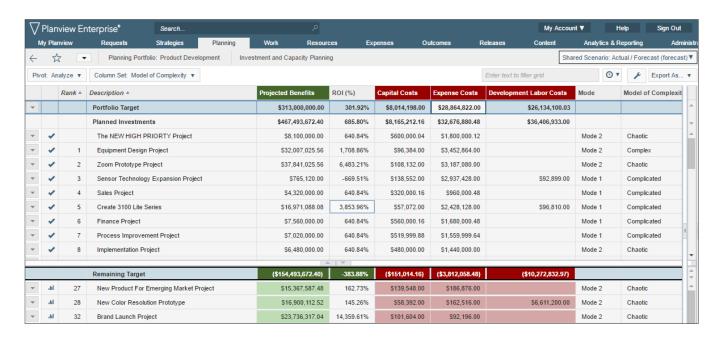
Analyze priorities by creating scenarios for those factors that constrain your portfolio: capital funding, expense targets, rate of return goals, revenue targets, labor, and so forth.

Set alerts to let you know when you have reached a point of significance: if a portfolio exceeds targeted labor costs, for example.

As you approve investments within a portfolio, dynamic alerts will signal that you may be creating an unrealistic

plan that your organization will not be able to deliver on. The scenario will warn you when you fall short of revenue targets, exceed capacity constraints from a resource perspective even though you may still be in budget, or when you have approved an investment that is dependent on others not accepted.

With the Analyze view, it's easy to model decisions and understand and communicate the trade-off decisions you need to make to ensure that you are investing appropriately.



Model ranked investments by configurable scenarios in the Analyze view

Balance

Balance and adjust the plan to solve problems that may arise during execution or planning activities.

Balance your investment portfolios for demand against capacity – both financial and human. The Balance view provides a summary, while letting you drill into the investments and adjust them.

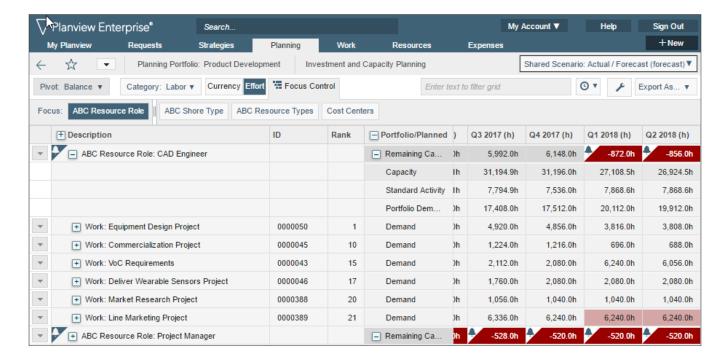
Understand when you run out of capacity by team or role, which investments are driving you over budget, and easily take informed action using the rank to guide you. Shift lower priorities to times when capacity is available, or modify capacity while understanding the impacts of the

individual change to the entire portfolio.

Balancing capacity or demand recalculates cost and effort based on your actions resolving problems while highlighting new issues resulting from your adjustments.

The focus control gives you the ability to pivot the data in order to analyze gaps in your capacity plan and create solutions, for a realistic updated plan that you can deliver.

With balanced scenarios, you can be confident that your prioritized portfolio plan is achievable with the people and financial resources at your command.



Make sure your portfolio of proposed investments is achievable with your resource capacity in the Balance view

Compare

Compare views to help you quickly tell a meaningful story. See how your portfolios measure up against each other and decide how to move forward. In one glance, you and other decision makers can see the differences between two planning scenarios at a summary level, which investment trade-off decisions were made, and their rankings, with calculated and visual variances.



Whether it's ROI, labor cost, vendor cost, utilization, or other details important to your organization, the tradeoffs are clear.

Description	Actual / Forecast (forecast) Status	Take on New Demand Status	Actual / Forecast (forecast) Rank
+ Above the Line in All Scenarios			
☐ Trade-off between Scenarios			
Improved Materials Project	Analyze	Accept	33
Strength Testing Project	Accept	Analyze	14
Deliver Wearable Sensors Project	Analyze	Accept	17
Clothing Modeling Project	Analyze	Accept	30
Equipment Design Project	Accept	Analyze	1
Men's Running Market Analysis Project	Analyze	Accept	34
Wireless Technology Project	Analyze	Accept	29
f/2 Material Evaluation Project	Analyze	Accept	31
The NEW HIGH PRIORTY Project	Accept	Analyze	
Below the Line in All Scenarios			

You can also pull all scenarios into one comparison view to see the top differentiators between them.

The Power of Portfolio Planning

91% of companies agree that improving plan accuracy is vital. But **only 40%** say their plans are accurate.²

What does inaccurate planning cost you?

Accurate portfolio plans enable organizations to deliver on their highest priorities.

Companies that do it well:

- Prioritize and decide faster
- Improve project delivery

- Resolve conflicting priorities
- Have capacity for innovation and growth
- Create an adaptive organization

Inaccurate plans lead to missed opportunities. It's a cost your organization cannot afford.

Continuous planning improves accuracy because it gives you the ability to adapt plans to new information and change more quickly. You need a solution that gives you insight into how changes impact your plans.

Planview Enterprise: Plan with Change

With Planview Enterprise, you can create portfolio plans help you stay ahead of change. Adapt quickly as you focus on what matters to make the best investment and capacity decisions for your organization.

Learn more today at Planview.com/Planning

² Improve Agility through Continuous Planning | Planview eBook. (2016). Go.planview.com. Retrieved 1 November 2016, from http://go.planview.com/ventana-improve-agility-continuous-planning/?tactic=blog



 $^{1\} Capacity\ Planning\ for\ IT\ Leaders\ |\ Planview.\ (2016).\ Planview.\ Retrieved\ 1\ November\ 2016,\ from\ http://www.planview.com/resource-management-capacity-planning/it/planview.\ Planview.\ (2016).\ Planview.\ (2016$