

APMG EVALUATION SERVICE FOR PROJECT MANAGEMENT PRODUCTS

SILVER REPORT

Company:
PlanView UK

Address:
400 Thames Valley Park Drive, Thames Valley Park, Reading, Berkshire RG3 1PT

Tel: 0118-963-7722
Email: info@planview.co.uk

Product:
PlanView Enterprise Version 6

This report covers the Silver Stage assessment of PlanView Enterprise Version 6, an application from PlanView UK, that I conducted between Tuesday 14 November and Wednesday 6 December 2006. This version of the product was released late in the past Summer.

The PlanView Enterprise software suite comprises four main elements. The Enterprise Portfolio Management module provides investment and benefit management functionality and allows for the alignment of strategies and resource capacities. The Project Portfolio Management module enables the user to plan work, optimising the use of resources. The third element is the PlanView Prisms module, which contains in excess of two hundred best practices, which are documented in guides and contain the templates and automated processes to drive them. The Service Portfolio Management module allows managers to control spending on the day-to-day operations that are essential in a business environment.

This is a fully Web-based system and requires Microsoft Internet Explorer 5.5 or later to run. It utilises either a SQL Server or an Oracle database and customers need to acquire their own copy of the database application. Although appearing modular in format, in fact there is just one version of the product's code, the various software components being activated, or not, according to the customer's requirements. Each user is allocated a 'role' and their interface with the software, what they can do and see, is governed by the rights of that role. However, within the constraints of their role, users can configure their screen displays to their own requirements. As a general rule, the more senior the user, the greater the element of overview delivered by the system reporting capabilities. However, all users can drill down into the information displayed to inspect the detailed data should this be necessary.

At the strategic level, you can define your organisation's strategic breakdown structure and assign lifecycles and budgets. The programmes and projects required to achieve these objectives can be planned and analysed to determine which make the greatest contribution to specific strategic objectives. A bubble chart can be used to display and compare details of the project portfolio. Different investment factors can be illustrated 'on the fly' and clicking any bubble on the chart reveals the data behind it. Changes, made at a high level, can be rolled back down the project hierarchy and experimenting can be carried out on what-if scenarios. The entire organisation's work plan can be controlled at this level and, according

to their success in delivering the required benefits, projects and programmes can be prioritised, put on hold or cancelled.

The system's programme and project planning and management functionality allows for 'suggestions' for projects to be entered. These may be converted into projects and planned, resourced and monitored at programme, project and resource manager level. Project managers can request resources generically, or by name. Resource managers are able to view displays detailing how the resources are occupied and giving them the information required for them to make informed decisions. Provisions exist for resource managers to 'borrow' staff from other resource managers.

The whole system is driven by 'notifications', automatically produced messages that are exchanged with the intention of keeping everyone abreast of the situation. What-if scenarios can be created and accepted or rejected at will. Team members are able to enter details of work done and feed information and suggestions back to higher levels. Peer-to-peer collaboration is also catered for and change requests, and details of risks and issues are held in logs that are linked to projects, or project components.

'Lifecycles', PlanView's way of controlling workflow, are pervasive throughout the system. The Prisms module contains a set of lifecycle templates, including some PRINCE2 templates. Users can edit existing lifecycles and create new lifecycles and PlanView can provide lifecycles at their customers' request, supporting their own governance processes. Consequently, in this respect, the system can fully support whatever iterations of PRINCE2 the user requires.

The service portfolio management functionality is contained in the newest part of the product, which also contains application portfolio management features. These enable users to periodically analyse whether the business applications currently in use meet the business's needs and see what they are costing. The quality of service required and provided can be taken into account.

Bubble charts display and compare business value, technical value, size, cost, etc. and a useful screen displays a pictorial diagram of your services and what they depend on and their cost and where those costs come from - done by interlinking assets, projects, services, applications, etc. The ongoing cost of providing a service can be fed back into the strategic planning structure via the appropriate programmes.

PlanView has indicated that, in their opinion, the design and use of this product falls within the field of guidance offered by the OGC Business Change Guidance documents covering Strategic Management, Requirements Management, Benefits Management, Portfolio Management, Programme Management, Project Management and Risk Management. I agree with their opinion. PlanView also states that their Prisms module provides all that is necessary, in the way of features, templates and procedures, for their product to be used in a way that is fully compliant with the PRINCE2 methodology. Whilst PlanView Enterprise has not been specifically designed as a PRINCE2 tool, I confirm that it can be used in this way.

PlanView provided me with a CD copy of their Web site (www.planview.eu/uk). I found just one item worthy of comment. The statement 'PlanView Enterprise delivers

unprecedented levels of visibility and control into resources and capacities across IT'. However, I consider this to be advertising 'puff', unlikely to mislead anyone.

PlanView provided me with electronic copies of their publicity documentation (also available on their Web site), a total of thirty-one documents. I have studied each of these documents and, on most of those published in 2006 I found the statement 'PlanView Enterprise brings the most comprehensive IT management solution to the market'. I think that it's unlikely that this claim can be substantiated, but also feel that it is just more advertising puff.

There were four documents containing claims that do warrant further attention.

The PlanView Community Datasheet states: 'PlanView Enterprise is designed to help organizations like yours better align work efforts with business goals . . . ' As it's impossible to know who's reading the document this sentence is unjustifiable in many circumstances.

The Prisms Datasheet states: 'Time and money are never lost in poor communications . . . '. This sweeping claim can't be justified. It also states: 'The results are a rapid return on your investment, a high level of cultural adoption and the flexibility to implement additional processes'. PlanView can't be certain that these results will be achieved in every case.

Both versions (2005 and 2006) of the Service Portfolio Management datasheet state: 'PlanView Service Portfolio Management is the only solution that accurately accounts for labor expenses by tracking all work to a specific business service.' I doubt that PlanView's is the only accurate solution.

In my opinion these statements could be misleading and should be removed or modified.

I did not find any other claims or statements that could be construed as misleading and consider that otherwise, PlanView's Web site and documentation fairly represent the capabilities of the product.

Consequently, I recommend that, subject to PlanView UK agreeing with the APM Group the way the issues relating to the four documents highlighted above will be addressed, and correcting them within three months, PlanView Enterprise be given the Silver Award. I suggest that this assessment should now proceed to the Gold Stage and that PlanView be invited to supply details of two clients who have been using this application during the course of their business for a sufficient period to become well versed in the way it works. My intention is to interview the people who use this software and discover whether they are of the opinion that it works as it should.

S. Cotterell

6th December 2006