

# APMG EVALUATION SERVICE FOR PROJECT MANAGEMENT PRODUCTS

## BRONZE REPORT

*Company:*

**PlanView UK**

*Address:*

Atlantic House, Imperial Way, Reading, Berkshire RG2 0TD

*Tel:* 0118 903 6166

*Email:* info@planview.co.uk

*Product:*

**PlanView Enterprise**

This report covers the Bronze Stage assessment of PlanView Enterprise, an application from PlanView UK, that I conducted on Thursday, 9 February 2006.

The PlanView Enterprise software suite comprises three 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. I understand that PlanView will be releasing a fourth element, their Service Portfolio Management module, fairly shortly. However, this module was not available for evaluation and is therefore not included in this assessment.

This is a fully Web-based system. 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. 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. The whole system being 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.

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, at this stage I can see no reason to question the veracity of this statement.

In my opinion, this assessment should now proceed to the Silver Stage and I have accordingly agreed a Silver Stage assessment plan with PlanView, which is attached to this report.

S. Cotterell

13 February 2006