

Project Control in Planisware

14 February 2024

By: Rameez Khan



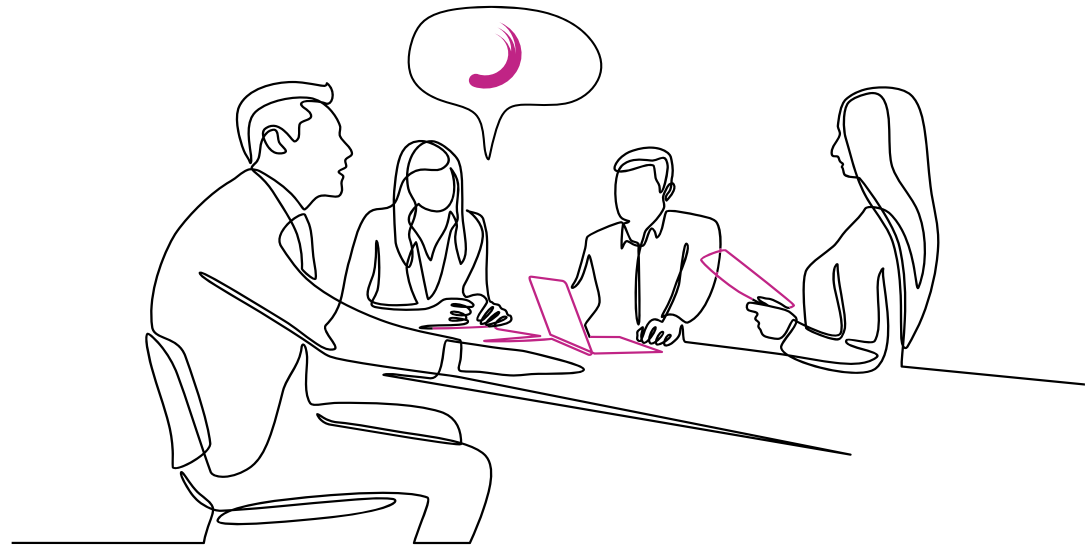
Who we are



Subtitle

Who we are & What we do

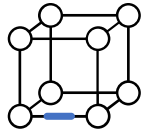
#2024



 **Planisware**

 **Project Controls**
EXPO
UAE, Middle East

Who we are



Privately owned
software
company



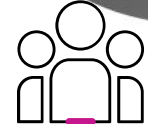
800,000+
Users
Worldwide



Worldwide
Coverage
Partner
Network



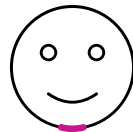
15%
YoY Growth
since 1996



600+
Employees
25% Growth
in 2022



ISO 27001
& SOC II
certified



98%
Customer
Retention
Rate



Recognized as a
Market Leader
by analysts



Provides
Industry
Expertise
since 1996



Revenue
2022 - \$140M

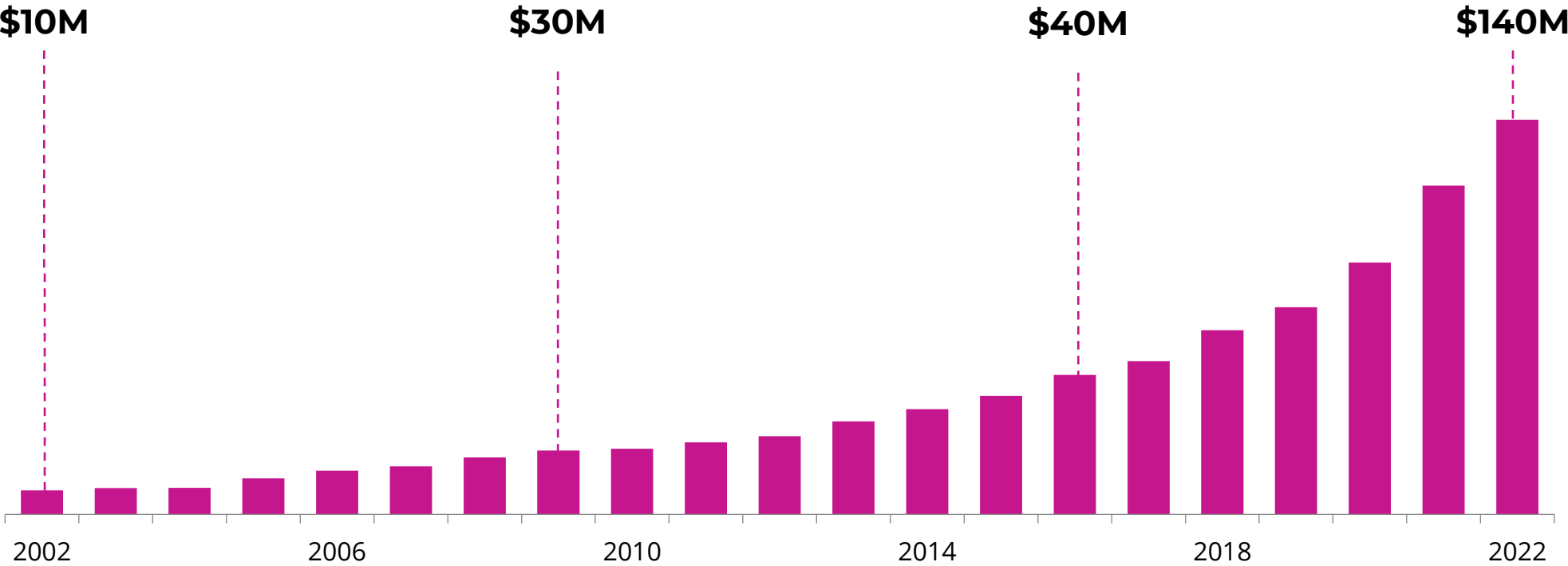
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History of growth and success

15% YOY growth since 1996

Global revenues in USD





San Francisco

Denver

Montreal

Philadelphia

Paris

Toulouse

Nice

Tunis

Manchester

Munich

Lyon

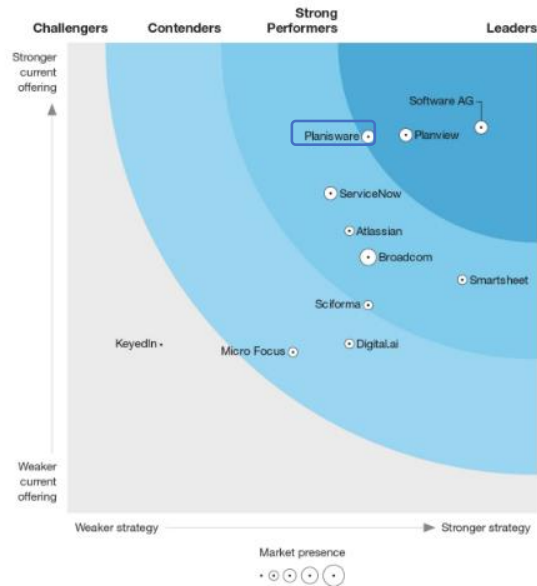
Dubai

Tokyo

Singapore

14 Offices globally

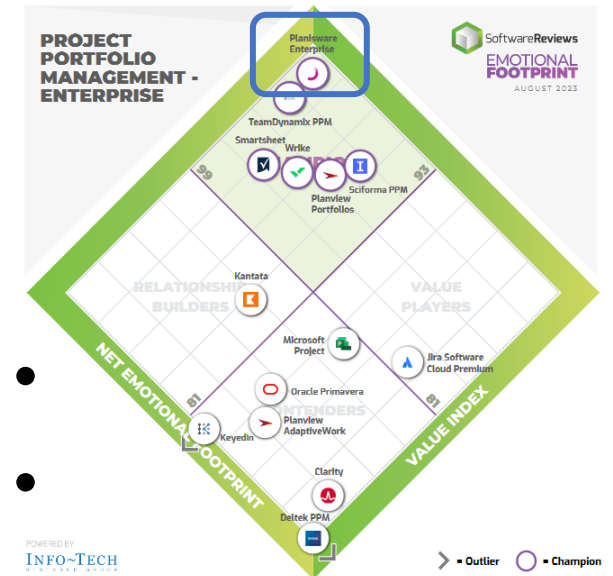
Recognized market leader



The Forrester Wave™:
Strategic Portfolio Management
Tools Q1 2022



Magic Quadrant for Adaptive Project
Management and Reporting, 2023



POWERED BY
INFO-TECH
RESEARCH GROUP



PPM Emotional Footprint, 2023



Trusted by industry leaders worldwide

AUTOMOTIVE



ENERGY



LIFE SCIENCES



CHEMICALS



HIGH-TECH



FINANCIAL INSTITUTIONS



Trusted by industry leaders worldwide

LEISURE & APPAREL



ENGINEERING



AEROSPACE & DEFENSE



CONSUMER PRODUCT GOODS



PROFESSIONAL SERVICES



TRANSPORTATION



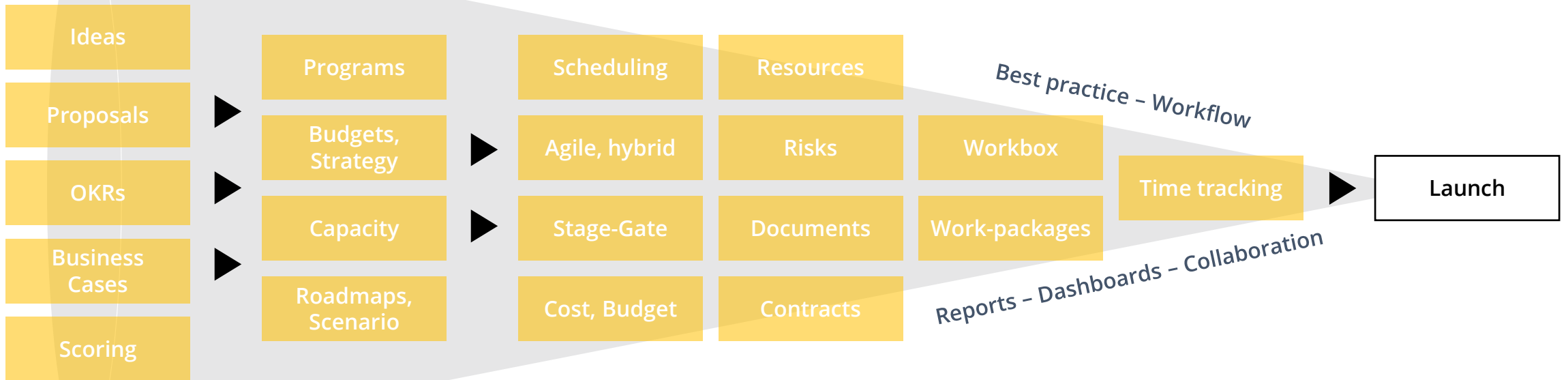
Product overview

Strategic portfolio management

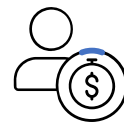
“Do the right projects”

Operational project management

“Do the projects right”



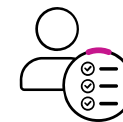
Portfolio Manager



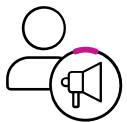
Project Manager



Resource Manager



Team Member



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Extensive integration capabilities



Extensive integration capabilities



User

1-click export
Drag and drop excel import



Authentication

LDAP / LDAPS
SSO
Active Directory



PLANISWARE
ENTERPRISE



Standard connectors

Preconfigured interfaces (web services)
Out-of-the-box configuration and administration



Export to BI Tools

Planisware BIBOX



Build your own

Open REST API: Self-service browser
No-code integration studio
iPaaS: Tray.io, Workato



Technical interfaces

Modern integration technologies | Server or Client

Integration technologies | Protocols

Data exchange (CSV, XML, JSON)
Web services (SOAP / REST / JSON / OData)

Routine

On demand | Event triggered | Batch mode

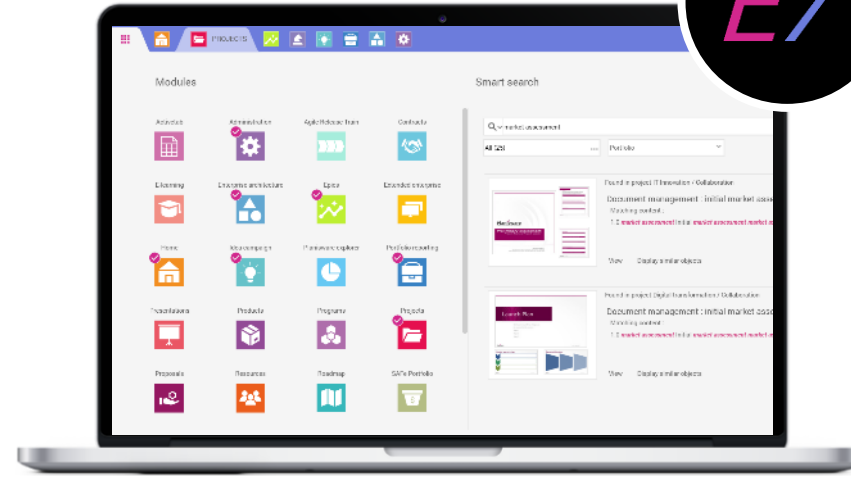
Examples



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At a glance



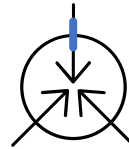
Lean

New user experience
Zero-code configuration
PM Go



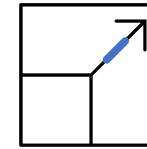
Smart

Integrated chat
Smart search



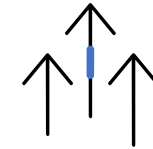
Native

Mobile app
New connectors
BI Box



Expanded

Enterprise
Architecture
Capital Requests



Evolved

Strategic Planning
ActiveTab, Extended
Enterprise, Contract
Management, & more.



Some of our customers



ADNOC



- INITIATIVES MANAGEMENT SYSTEM
- The State-owned oil company of the United Arab Emirates and 12th largest oil company by production in the world. For the first year:
 - 1600 open initiatives
 - 2500 users
 - ADNOC Project Light

- The solution

- Initiative lifecycle: workflow per phase
- Roles assignment
- Business Case: savings forecast
- Roadmap: milestones & recognized savings
- Implementation: workflow per milestones, actual savings
- Portfolio reporting, savings progress, historization...

- The benefits

- Governance & transparency over initiatives
- Track savings progress (planned/recognized/realized)
- Align with 2030 strategy: “do more with less”, promote lean way of working, 100% HSE, increased efficiency...

Etisalat



- IMPLEMENTATION

- Governance of investments (home, mobile, internet)
- Roadmap execution
- 400+ users
- 10,000+ projects tracked (new product, geographic expansions, services)

- The solution

- Project Management
- Stage & Gate + Deliverables
- Meetings
- Staffing
- Strategic Portfolio
- Costs & Gains

- Portfolio reporting

- The benefits

- Single source of truth for Gate decisions
- Optimization of cost management
- Centralized access to documents
- No more staffing via Excel
- Real time reporting
- Meeting minutes automatically generated

Aramco



- ENGINEERING IMPLEMENTATION
- The Saudi Arabian national petroleum and natural gas company
 - 10 Locations across the world
 - 600 users
 - 2500 projects

- The solution

- Project Management
- Program Management
- Intellectual Property (Agreements, Invention Disclosures, Patent Application and Filing)
- Master Appropriation and Capital Equipment Acquisition and Management
- Invoice tracking and Management

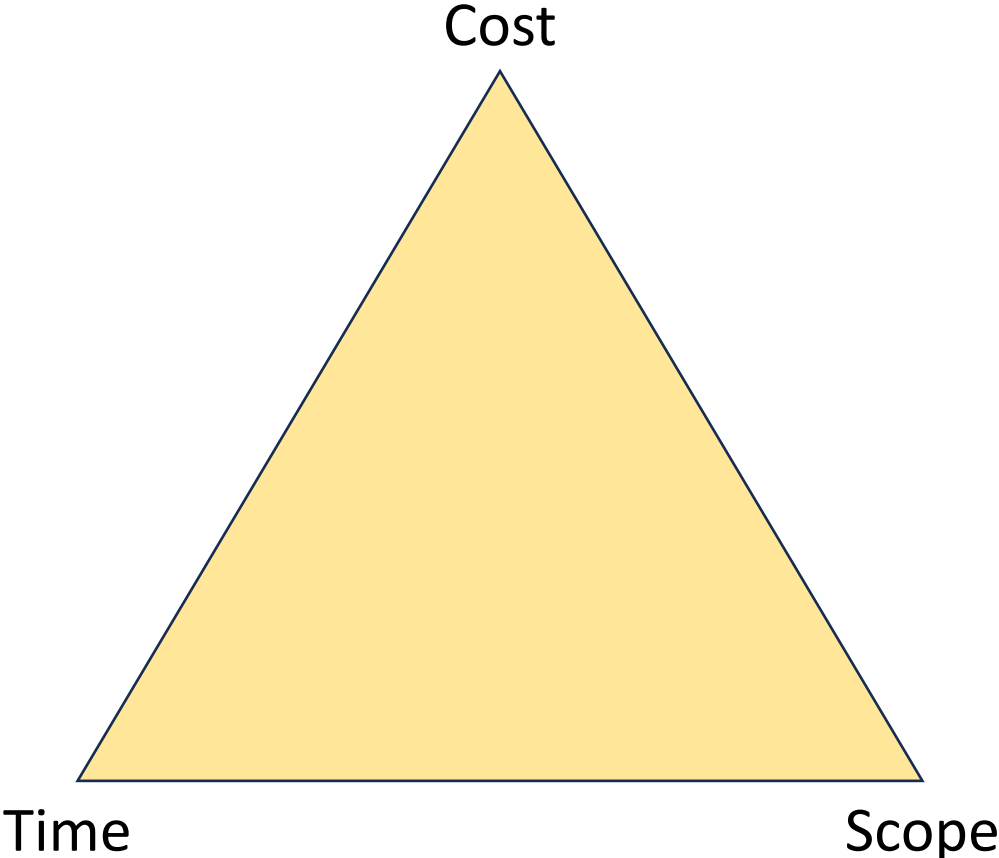
- The benefits

- Gain of efficiency by eliminating errors and tons of Excel sheets
- Integrated different aspects of portfolio, project and program management
- Fostered global collaboration and knowledge sharing through easy access to data
- Enabled cost planning, forecasting and budget tracking
- Automation of reports printing (no need for analysts to consolidate data)

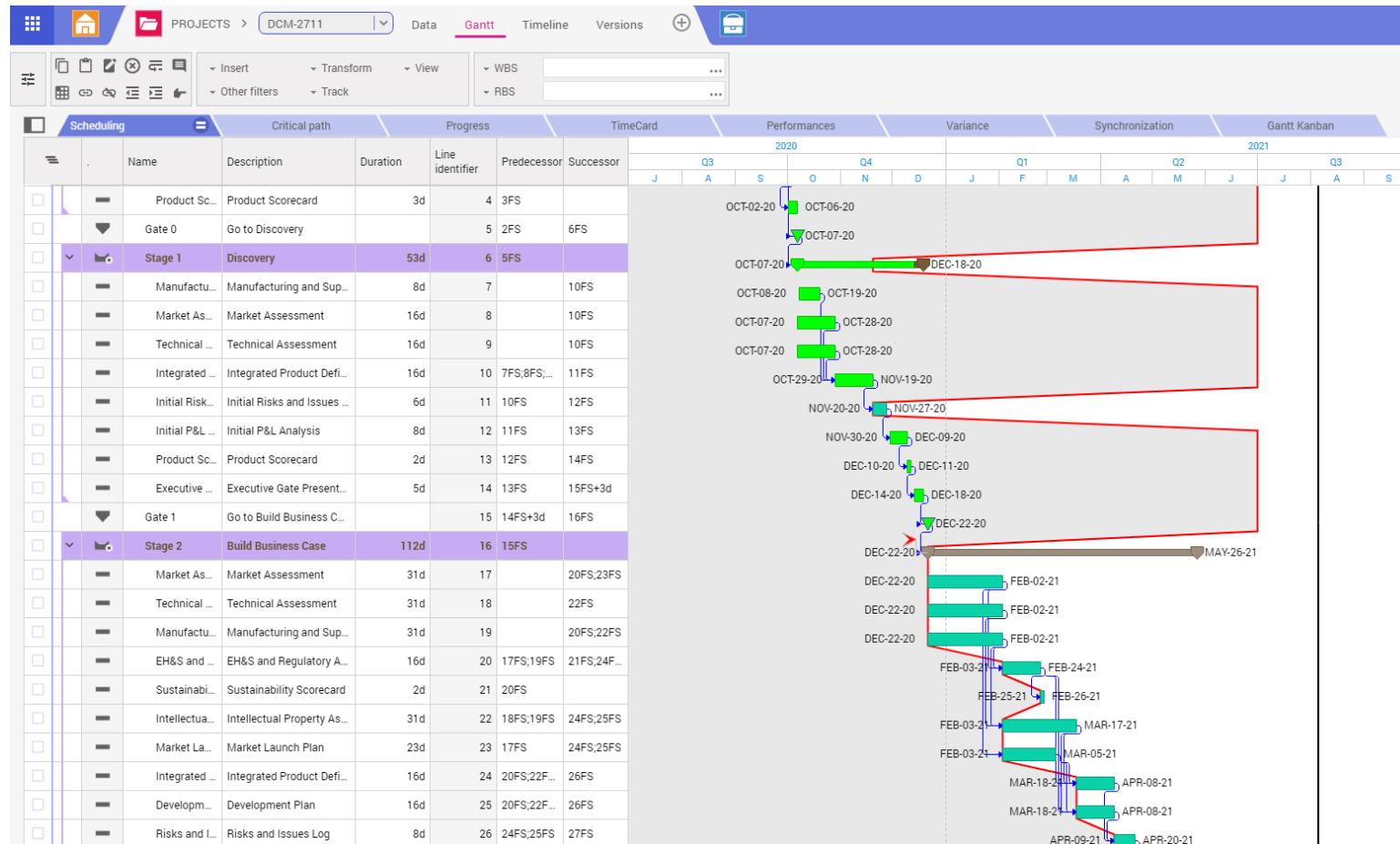
Project Controls



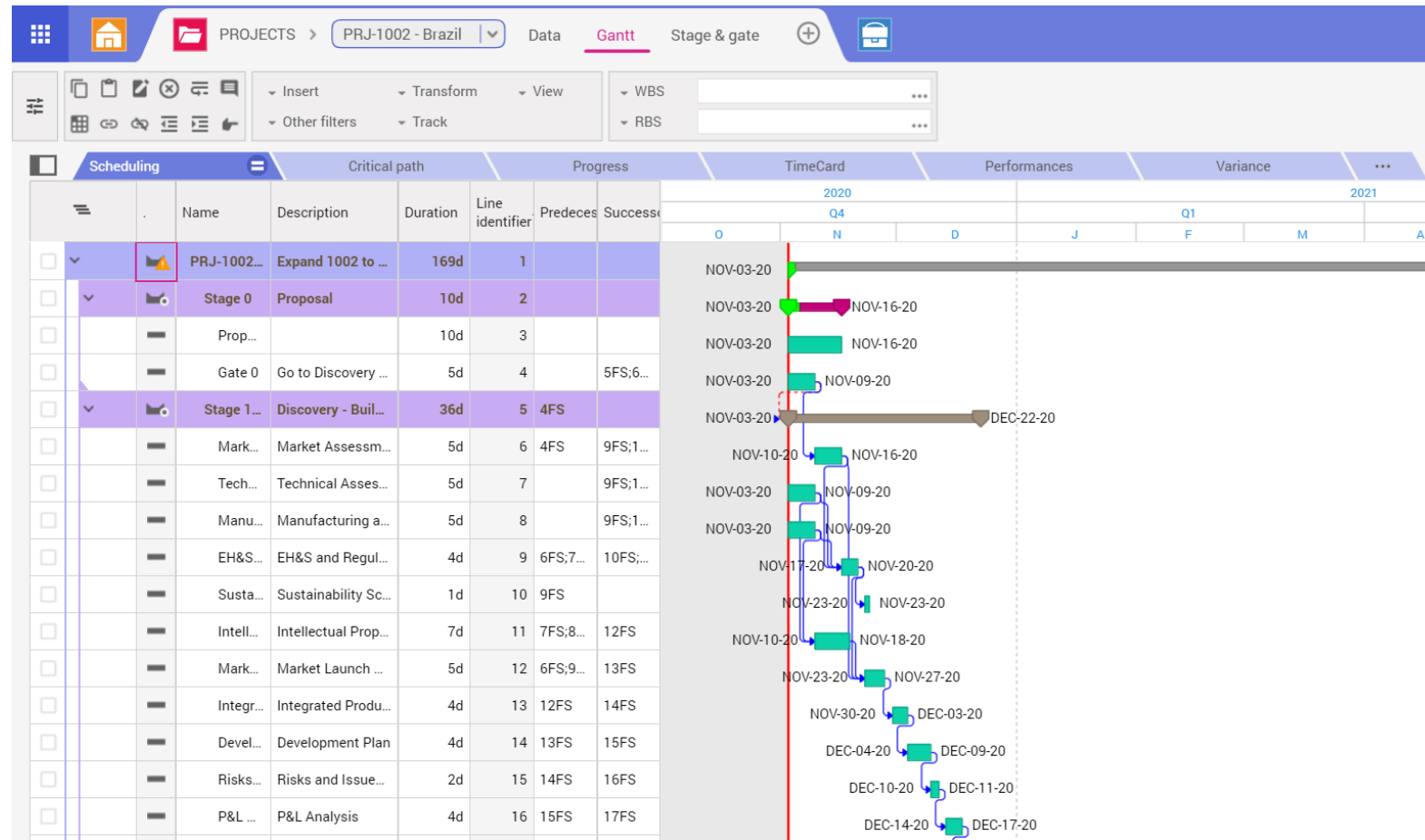
Let's break this down



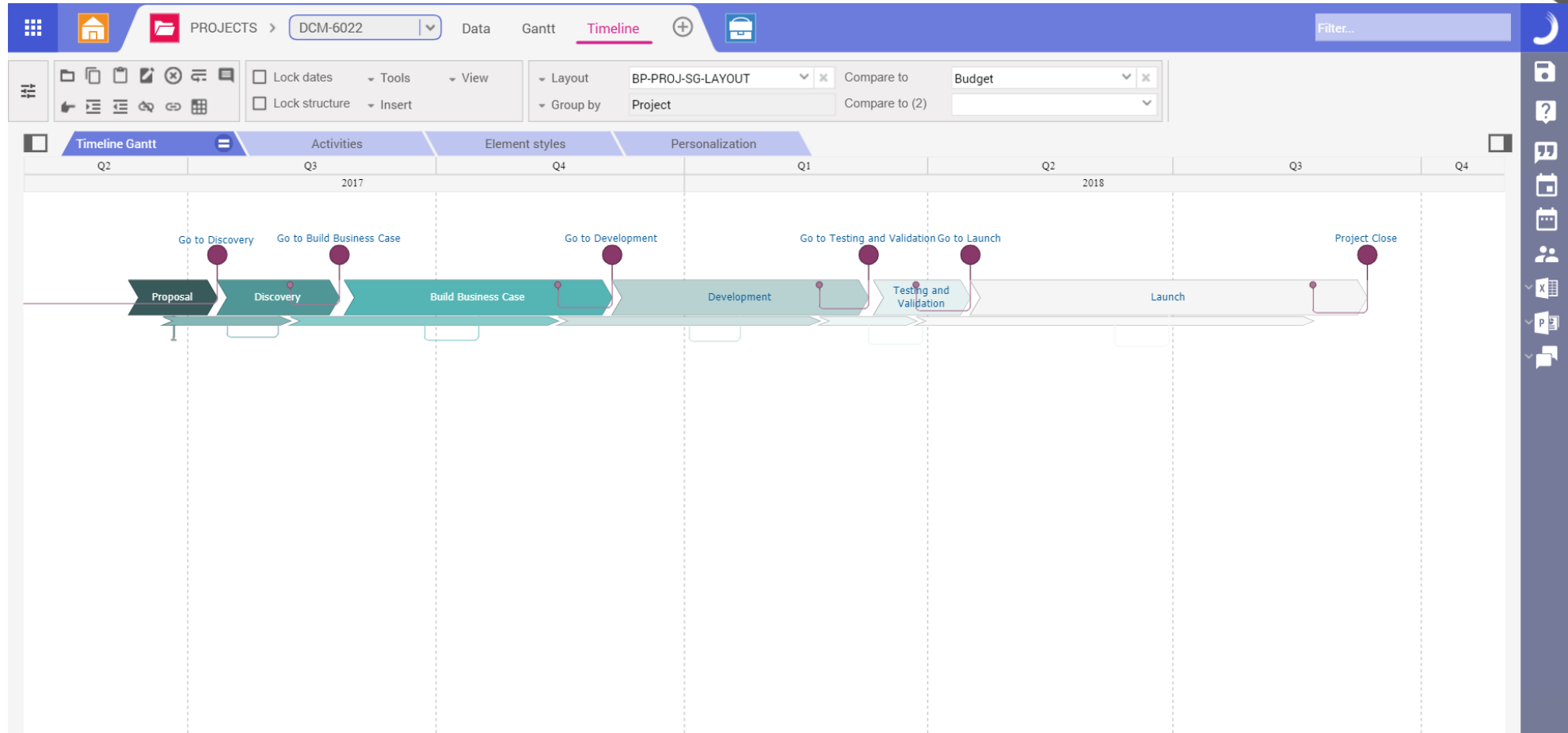
Project tracking



Manage your schedule



Timeline



Variance analysis

PROJECTS > DCM-2711 | Data | Gantt | Timeline | Filter...

Insert | Transform | Track | View | WBS

Overspending & overdelays

Search...

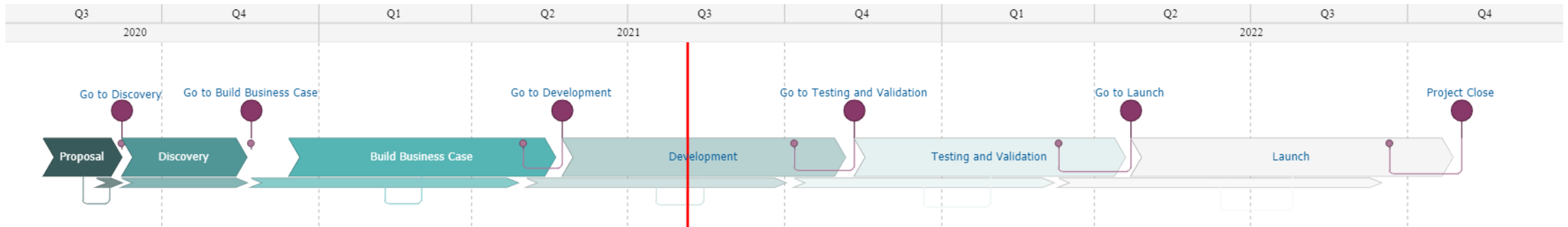
Bookmarks

▼ Tabs

- Activetab snapshots
- Activities
- Actual expenditures
- Actual hours
- Budget lines
- Changes
- Chargeback coefficients
- Escalations
- Hours and expenditures
- Ideas
- Inter-project links
- Issues
- Jira interface
- Links
- Meeting Minutes
- Meetings
- Objectives & Key results
- Order line
- Overspending & overdelays**
- Planned expenditures
- Planned hours
- PNL outputs
- Progress percentage complete
- PTRS
- Purchase order
- Requirement assignments
- Requirements
- Risks
- Schedule vs Governance Variance
- Subscription link
- Synchronized in programs
- Subscribed with website

Name	Description	overdelay	Overspending	Resource overspending
DCM-2711	New Data Center Monitoring 271	●	●	●
Stage 0	Proposal	●	●	●
Product Concept	Product Concept	●	●	●
Product Scorecard	Product Scorecard	●	●	●
Gate 0	Go to Discovery	●	●	●
Stage 1	Discovery	●	●	●
Manufacturing and Supply C...	Manufacturing and Supply Chain Assessment	●	●	●
Market Assessment	Market Assessment	●	●	●
Technical Assessment	Technical Assessment	●	●	●
Integrated Product Definition	Integrated Product Definition	●	●	●
Initial Risks and Issues Log	Initial Risks and Issues Log	●	●	●
Initial P&L Analysis	Initial P&L Analysis	●	●	●
Product Scorecard	Product Scorecard	●	●	●
Executive Gate Presentation	Executive Gate Presentation	●	●	●
Gate 1	Go to Build Business Case	●	●	●
Stage 2	Build Business Case	●	●	●
Market Assessment	Market Assessment	●	●	●
Technical Assessment	Technical Assessment	●	●	●
Manufacturing and Supply C...	Manufacturing and Supply Chain Assessment	●	●	●
EH&S and Regulatory Asses...	EH&S and Regulatory Assessment	●	●	●
Sustainability Scorecard	Sustainability Scorecard	●	●	●
Intellectual Property Assess...	Intellectual Property Assessment	●	●	●
Market Launch Plan	Market Launch Plan	●	●	●
Integrated Product Definition	Integrated Product Definition	●	●	●
Development Plan	Development Plan	●	●	●

Variance analysis



Managing risks

Number of risks: 4

Number of opportunities: 0

Description	Activity	Impact	Probability of occurrence	Cost impact (\$)	Risk mitigation cost (\$)	Mitigate	Risk cost	Closed
NFR-1002								
Use of pectin in a cake/brownie product caused ...	NFR-1002	Very high	80 %	150,000.00	50,000.00	<input type="checkbox"/>	120,000.00	<input type="checkbox"/>
Supply Chain issue	NFR-1002	Medium	50 %	0.00	0.00	<input type="checkbox"/>	0.00	<input type="checkbox"/>
Go to Development								
Delay in investment approval	Gate 2	High	50 %	0.00	0.00	<input type="checkbox"/>	0.00	<input type="checkbox"/>
Go to Launch								
Trail run delay	Gate 4	Low	30 %	0.00	0.00	<input type="checkbox"/>	0.00	<input type="checkbox"/>

Risks: IS-01999845

Description

Identification

Description: Use of pectin in a cake/brownie product caused a dry product

Project: NFR-1002 Activity: NFR-1002

Deadline: 01-OCT-13 Category: Risk

Details

Document: _____

Document URL: _____

Impact: Very high Probability of occurrence: 80 %

Delay impact: 0d

Risk mitigation cost (\$): 50,000.00 Cost impact (\$): 150,000.00

Mitigate Closed

Notepad

Need to revise formulation to counteract the dry texture of the initial product from the Test Kitchens

Follow the money

- **Portfolio prioritization**

- Assess the total investment (and the total benefits/revenue) of your project proposal to prioritize projects within your portfolio during the budget exercise

- **Ensure projects stay within budget**

- Projects rarely happen according to plan. One of the key responsibilities of the PM is to track the schedule changes, the actual spending amounts, the actual FTEs and to monitor whether the project is within budget

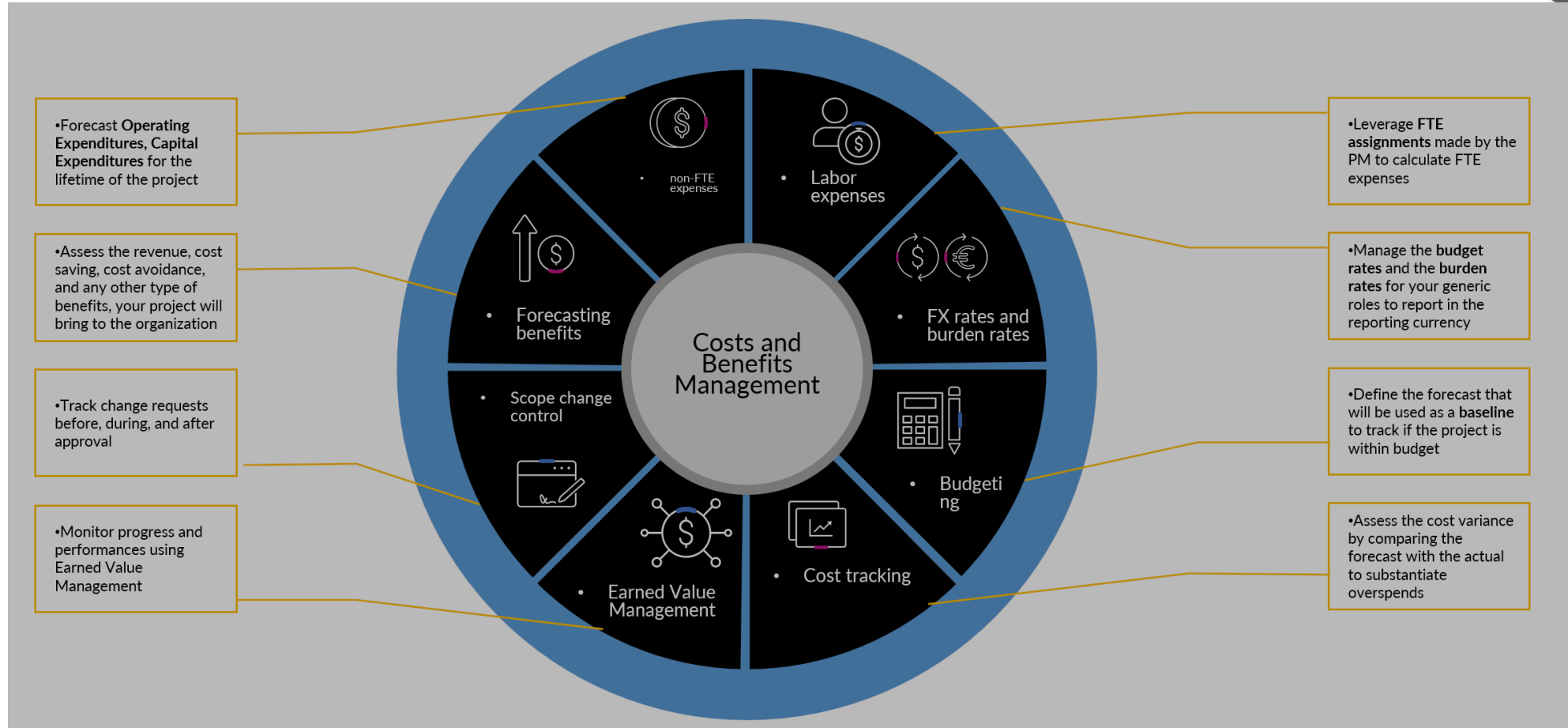
- **Investment decisions**

- Gate reviews are first and foremost an investment decision: should we continue investing in this project?
- Having clear project financials readily available will support the decision-making during the gate meetings.

- **Earned Value Management**

- For projects requiring a large investment over many years, earned value management provides a tracking mechanism to monitor progress and performance.
- It may be mandated by your organization or by contract

Managing your costs and benefits



Forecast/actual budget

	Description	Forecast EUR	Actual EUR	Budget EUR	Estimate to complete (ETC)	Actual cost (ACWP)	Estimate at completion (EAC)
☑	Costs splitted by...	7 000	Ⓢ+	Ⓢ+	7 000 EUR		7 000 EUR
☑	Start milestone	Ⓢ+	Ⓢ+	Ⓢ+			
☑	Workpackage 1	3 000	Ⓢ+	Ⓢ+	3 000 EUR		3 000 EUR
☑	Task 1	1 000	Ⓢ+	Ⓢ+	1 000 EUR		1 000 EUR
☑	Task 2	1 000	Ⓢ+	Ⓢ+	1 000 EUR		1 000 EUR
☑	Task 3	Ⓢ+	Ⓢ+	Ⓢ+			
☑	Task 4						1 000 EUR
☑	Workpackage 2						4 000 EUR
☑	Task 5		Ⓢ+	Ⓢ+	1 000 EUR		1 000 EUR
☑	Task 6		Ⓢ+	Ⓢ+			
☑	Task 7		Ⓢ+	Ⓢ+			
☑	Task 8		Ⓢ+	Ⓢ+			
☑	End milestone	Ⓢ+	Ⓢ+	Ⓢ+			

Task 3	105 000	Ⓢ+	Ⓢ+	105 000 EUR
Task 4		Ⓢ	CapEx	100 000 EUR
Workpackage 2		Ⓢ	OpEx	5 000 EUR
Task 5				
Task 6		Ⓢ	OpEx	EUR

One column per cost account

The screenshot displays the Planisware interface. On the left, a task list is shown with columns for Description, OPEX, and CAPEX. The tasks include IT-0014, Business Case, Start development, Development, Start UAT, Tests, Go-live, Stabilization, and End of project. The OPEX and CAPEX values are listed for each task. On the right, a Gantt chart shows the project schedule from 2023 to 2024, with tasks represented by horizontal bars and dependencies indicated by arrows. A dialog box titled 'Add cost accounts' is open, showing a text input field with 'OPEX|CAPEX' and buttons for 'OK' and 'Apply'.

Description	OPEX	CAPEX
IT-0014	9,523.0	22,654.0
Business Case	5,000.0	10,000.0
Start development	0.0	0.0
Development	4,523.0	12,654.0
Start UAT	0.0	0.0
Tests	5500	0.0
Go-live	0.0	0.0
Stabilization	0.0	0.0
End of project	0.0	0.0
New task		

Spreadsheet entry

PROJECTS > [DS0009]Kalausi

Dashboard Data Gantt Assignments Versions **Cost and load** Filter...

WBS Style Forecast entry

Distributed cost **Spreadsheet entry *** Curves Project Cost & Load In... Expense input Load & Cost input Forecast

	Name	Description	JUL				Forecast	
			Building	Hardware	Internal Labor	Subcontracting	Building	Hardware
<input checked="" type="checkbox"/>	DS0009	Kalausi	1,500,000	144,000	978,500	465,000		
<input type="checkbox"/>	> Stage 0	Proposal		10,000				
<input type="checkbox"/>	Gate 0	Go to Discovery						
<input type="checkbox"/>	> Stage 1	Discovery		45,000	20,000			
<input type="checkbox"/>	Gate 1	Go to Build Business Case						
<input type="checkbox"/>	> Stage 2	Build Business Case						
<input type="checkbox"/>	Gate 2	Go to Development						
<input type="checkbox"/>	> Stage 3	Development	500,000	89,000	360,000	15,000		
<input type="checkbox"/>	Gate 3	Go to Testing and Validation						
<input type="checkbox"/>	> Stage 4	Testing and Validation			546,500	450,000		
<input type="checkbox"/>	Gate 4	Go to Launch						
<input type="checkbox"/>	> Stage 5	Launch	1,000,000		52,000			
<input type="checkbox"/>	Gate 5	Project Close						



THANK YOU



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