

# VALUE REALIZATION REPORT

  
planview®

## > EXECUTIVE SUMMARY

### ECONOMIC IMPACT:



**Increase in ASP  
enterprise deals**

**16%**



**Increase in ASP  
strategic deals**

**93%**

### ABOUT PLANVIEW

Planview has one mission: to build the future of connected work. Planview’s solutions enable organizations to connect the business from ideas to impact, empowering companies to accelerate the achievement of what matters most. The company’s full spectrum of Portfolio Management and Work Management solutions create organizational focus on the strategic outcomes that matter and empower teams to deliver their best work, no matter how they work. The comprehensive Planview platform and enterprise success model enables customers to deliver innovative, competitive products, services, and customer experiences. Headquartered in Austin, Texas with locations around the world, Planview has more than 1,000 employees supporting 4,000 customers and 2.4 million users worldwide. For more information, visit: [www.planview.com](http://www.planview.com).

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*ValueCloud® changes the conversation for our sales teams. It allows us to move away from prospects asking, ‘Do you have what I need in the product?’ to instead asking, ‘How is it going to impact our organization?’ And that’s where the opportunity to expand the deal comes in.”*

**LINDA ROACH**  
Vice President of  
Product Marketing



**planview™**

### COMPANY PROFILE

**Industry:** Global Enterprise Software

**Location:** Austin, TX

**Number of Employees:** 1,000

## ➤ SALES CHALLENGES

Selling software to the enterprise poses a unique set of obstacles—especially when your market is comprised of companies worth over \$1 billion. Implementing any kind of change in largescale organizations is difficult. This often creates resistance because it’s always easier to keep doing things the way you’ve been doing them, even when making a change can have a significant impact on your bottom line. According to Jeff Bolke, Former Executive Vice President of Sales at Planview, “Our biggest competitor is often ‘do nothing.’” This means making the business case for Planview solutions is critical to both the number and size of deals the company is able to close.

Planview’s target customers usually have their own way of doing things, and that includes creating the business case. But they also operate with their own assumptions about exactly what Planview is selling, which are not necessarily accurate. Planview’s account executives needed to clearly communicate not just what its solutions do, but what value is delivered—the impact to the organization beyond efficiency gains. Even with the most innovative companies tending to rely on traditional, spreadsheet-based tools to make the business case, communicating this to various interested audiences or personas was also a challenge.

In addition, with sales offices all over the globe, Planview was challenged to maintain business case consistency and version control using its own spreadsheet-based systems, with account executives often relying on higher-ups for the latest insights rather than taking ownership over their own sales process. The company needed a single tool that democratized business value across sales and marketing so each group could access relevant information to communicate value to customers or markets.

Planview selected DecisionLink’s ValueCloud® 5.0 to help its sales teams establish and clarify business value so they could close more deals—and close them at a bigger amount. Linda Roach, Vice President of Product Marketing at Planview, says, “We really needed a tool that our account executives could run themselves and use as a basis to have the important conversations with customers and prospects, and also to change those conversations to be more value-focused.”

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*“When we close a deal, we’ve already put in all the work through product development, marketing, and so on—and those costs are fixed. We’re not going to lower the cost of our offering. If we can use ValueCloud® to justify the business case and get a better price, that additional income goes directly to the bottom line.”*



**JEFF BOLKE**  
Former Executive  
Vice President of  
Sales

# 3 KEY BENEFITS

## that Impact the Bottom Line

Planview identified three factors that contributed to its success by integrating ValueCloud® 5.0 into its sales motions.

### 1.

#### Professional Artifacts that Help Sell (Twice)

There are always two motions in every sale; 1) selling to the buyer and transforming them into a champion, and 2) helping the champion sell the business case internally to the CFO. Planview chose DecisionLink's ValueCloud® solution because it helps on both fronts. It creates compelling, infographic-like **business value hypothesis** outputs early in the sales process to start the conversation with a prospect. Once engaged, the seller and prospect can collaborate to refine the case online. When they come to an agreed-upon case, the platform automatically creates a beautifully branded and packaged, CFO-ready Business Case that the champion can take forward, with confidence for approval. Without the ValueCloud, the time to produce these outputs ranges from 2-3 weeks at best.

### 2.

#### Scalable Software

Planview needed a solution that would empower its teams around the world quickly and easily—at scale. ValueCloud® replaced legacy calculators, tools and documents with a single, powerful platform both Planview sellers and marketers can use to communicate business value, shifting the focus away from costs and features and shining the light on business value. With built-in backend analytics, Planview can track ValueCloud®'s impact, too. The company can see which team members are using ValueCloud® and who isn't, gaining insight into the number and size of closed deals for both its strategic and enterprise products.

### 3.

#### Increased Deal Size

Being able to visually communicate the value Planview delivers at the various levels where customers need buy-in helps its sales force increase deal size across the board. While the people who use Planview's software solutions are focused on efficiency gains, the C-suite needs to see the overall business impact in order to justify the investment. ValueCloud® makes it easy to quantify the benefits beyond the day to day, which can also help sales teams overcome natural pushback from executives, such as breaking a larger deal into smaller parts.

# > KEY BENEFIT 1

## PROFESSIONAL OUTPUTS

### Three Presentation Modes for Three Unique Audiences

ValueCloud® allows sales teams to generate unique outputs for different personas. The financial team needs detail, logic, and numbers in an in-depth Word document. The business champion wants more robust, visual information about how Planview transforms the strategy-to-delivery chain that usually is delivered in a PowerPoint presentation, and the executive-level needs it all boiled down into a succinct document that can be shared in a board meeting with the key information surfaced for speed and clarity.

*“The quality of ValueCloud®’s outputs are exceptional. Many customers we’ve worked with on the business case thank us for giving them something they can put directly into the presentation they’re going to take forward for approval.”*

—Linda Roach, Vice President of Product Marketing

Creating the business case also helps Planview realize whether or not they’re dealing with the right person. Roach explains, “If they’re mired in the day-to-day inefficiencies and can’t get to the bigger picture, that’s a good indicator that we need to bring in someone higher up in the organization.” It also helps account execs separate the high-value opportunities from those that are not likely to close by providing the confidence that they need to obtain approval.



*“I’ve used these tools throughout my career and while different people have had very effective calculation tools, the presentations were always lacking. With ValueCloud®, the output is world-class.”*

**JEFF BOLKE**, Former Executive Vice President of Sales

### > VALUE REALIZATION IMPACT

Using ValueCloud®, Planview’s account execs are able to work more closely with prospects, put numbers and value to the problems they’re trying to solve, and validate customer analysis, providing the confidence they need to obtain approval.



**REVENUE TO DATE:**  
**\$57M** through ValueCloud® business value assessments



**10%**  
**total reduction in discounting to date**

## ➤ KEY BENEFIT 2

### SCALABLE SOFTWARE

#### Say Goodbye to Legacy Tools and Version Control Issues

Planview has field and inside teams spread out across its offices in North America, Europe, and Australia. Being able to give all of those teams the same tool enabled Planview to transform its own sales motion—quickly and easily.

Planview’s account executives report that ValueCloud® helps them at every stage of a sale, from enticing prospects to spend the time analyzing what Planview can do for the organization to reopening stalled deals by steering the conversation towards business value. It even helps them show existing customers where they can move investments to increase ROI.

Having the built-in back-end analytics around adoption, use, and outcomes allows Planview to measure the direct impact that ValueCloud® has on its own sales—and its bottom line.



“What our reps love about ValueCloud® is that it helps customers see value as a driver instead of focusing on features, costs, or comparison. It’s all about putting numbers on the value to the organization and putting the investment in the context of that value.”

**LINDA ROACH**  
Vice President of  
Product Marketing

#### ➤ VALUE REALIZATION IMPACT

Planview was able to roll out ValueCloud® to teams around the world within three months.

 **50+**  
account execs  
use ValueCloud®

 **All** outputs  
used on deals  
by Planview &  
field teams

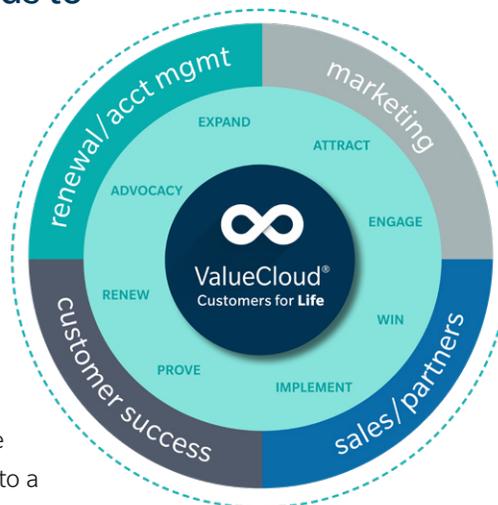
## ➤ KEY BENEFIT 3

### INCREASING CLOSED DEALS AND DEAL SIZE

#### Building a Better Business Case Leads to Better Outcomes

Prior to adopting ValueCloud®, Planview’s sales teams were spending a meaningful portion of their time on deals that never closed. Now, they can use ValueCloud® to have a more meaningful conversation early on that helps them determine whether the opportunity has real potential or if their time would be better spent elsewhere.

ValueCloud® has also helped the sales teams increase the size of deals for both its strategic and enterprise products—more than double on average. That amounts to a huge material change not just to revenue but also to growth.



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Despite our concerns going into the economic slowdown in 2020, we wanted to maximize the output of our ValueCloud® investment. We had fewer opportunities last year, but with ValueCloud® we were able to get the most out of every opportunity and grow the business. That was a big deal.”

**JEFF BOLKE,**  
Former Executive Vice President of Sales

#### ➤ VALUE REALIZATION IMPACT



**With ValueCloud® at their fingertips, Planview’s account execs have been able to double their deal size on average.**

## ➤ VALUE REALIZATION IMPACT

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*“The collaborative process gets people to think about value. And then having the result in a format customers and prospects feel confident to present or incorporate into whatever instruments they have to use internally is invaluable for our teams.”* **LINDA ROACH**, Vice President of Product Marketing



Planview began using ValueCloud® in May of 2018 and have seen significant benefits and material gains from the value it delivers.

- Customers appreciate having a professional business case they can present internally to gain buy-in and the approvals needed to move forward with transformation initiatives.
- Planview’s account executives appreciate that they can use ValueCloud® throughout the sales process, from interviewing prospects to providing justification for the investment.
- Account executives are able to change the conversation, moving away from focusing on costs to talking about the value Planview deliver—with the numbers to back it up.
- Planview has been able to weed out low-value opportunities, close more deals including many that had previously stalled, and increase the average selling price and average deal size across the board.

## ➤ WHAT'S NEXT: THE FUTURE OF PLANVIEW & VALUECLOUD®

As Planview's needs continue to evolve, its partnership with DecisionLink promises to deepen and expand across its growing portfolio.

- "In early 2021, we acquired two more companies so we need to bring the software to those teams. They do similar things to us so we definitely want to expand to those offerings as we integrate their businesses." — **Jeff Bolke**
- "We have an interesting opportunity on the value realization side and taking ValueCloud® into the customer success side of the organization, with our chief customer officer looking at our process in terms of the customer success value stream. We have a great opportunity there to integrate into their process as well." — **Linda Roach**
- "We have another business line that's very much forward-leaning, transforming our customers' business in how we go to market. The conversation on that side is more theoretical than financial and it would be great to get into more specific results and business cases there as well." — **Jeff Bolke**
- "We want to more fully integrate with ValueCloud® into Salesforce, especially as we're reconfiguring now with the three companies coming together. We'd like to be able to see where the value points are. If we can have dashboards readily available and salespeople can see that the ones using ValueCloud® are returning their quotas faster, that would be a great incentive." — **Linda Roach**



*"The collaborative process gets people to think about value. And then having the result in a format prospects feel confident to present or incorporate into whatever instruments they have to use internally is invaluable for our teams."*

**LINDA ROACH**  
Vice President of Product Marketing

## > KEY TAKEAWAYS



Planview has experienced significant benefit since implementing ValueCloud® by empowering its sales teams across the globe with an enterprise-grade, scalable tool that brings the business case to life for customers and prospects.

*“On top of everything else, DecisionLink is great to work with,” says Roach. “They’ve been excellent partners all along the way as we’ve taken this journey together, and as we were one of the earlier clients it’s been great to see and experience.”*

### ABOUT DECISIONLINK

DecisionLink's ValueCloud® is the first and leading enterprise-class solution for automating and scaling customer value management. ValueCloud® transforms customer value into strategic, actionable assets, empowering sellers, marketers, and customer success professionals to elevate tactical conversations about feature, function, and price, into outcome-based discussions of business value. The ability to do this at scale and at any point in the customer journey, ensures customers for life. DecisionLink is trusted by top enterprise businesses, including Adobe, Caterpillar, CrowdStrike, DocuSign, and Marketo as well as elite, fast growing companies like Apptio, Contrast Security, Elastic, Menlo Security, and PagerDuty.

For more information, please visit [www.decisionlink.com](http://www.decisionlink.com), call 800.670.8301 or engage with us on social media.   