

The logo consists of a stylized magenta shape resembling a curved line or a partial arc with a tail, positioned above the letter 'i' in the word 'Planisware'.

Planisware

SINGLE SOURCE OF TRUTH:

**INTEGRATING CONTRACT MANAGEMENT
SEAMLESSLY INTO YOUR PROJECTS AND PORTFOLIO
WORLD**

Planisware

PRESENTER

Kai has more than 15 years managing projects in different industries from automotive to software and IT as well as managing multiple suppliers in the process. Currently running the UK arm of Planisware.



Kai Ojo

Managing Director – Planisware UK

AGENDA

1

Intro...

2

Key Challenges: Getting started

3

Key Challenges: Managing the detail

4

Some key take away points

5

Questions

ABOUT PLANISWARE



Privately owned
software
company



500+ Clients
supported
worldwide



\$80M
in revenues
in 2018



400+
employees



ISO 27001
& SOC II
certified



Worldwide
Partner
Network



Recognized as a
Market Leader
by analysts

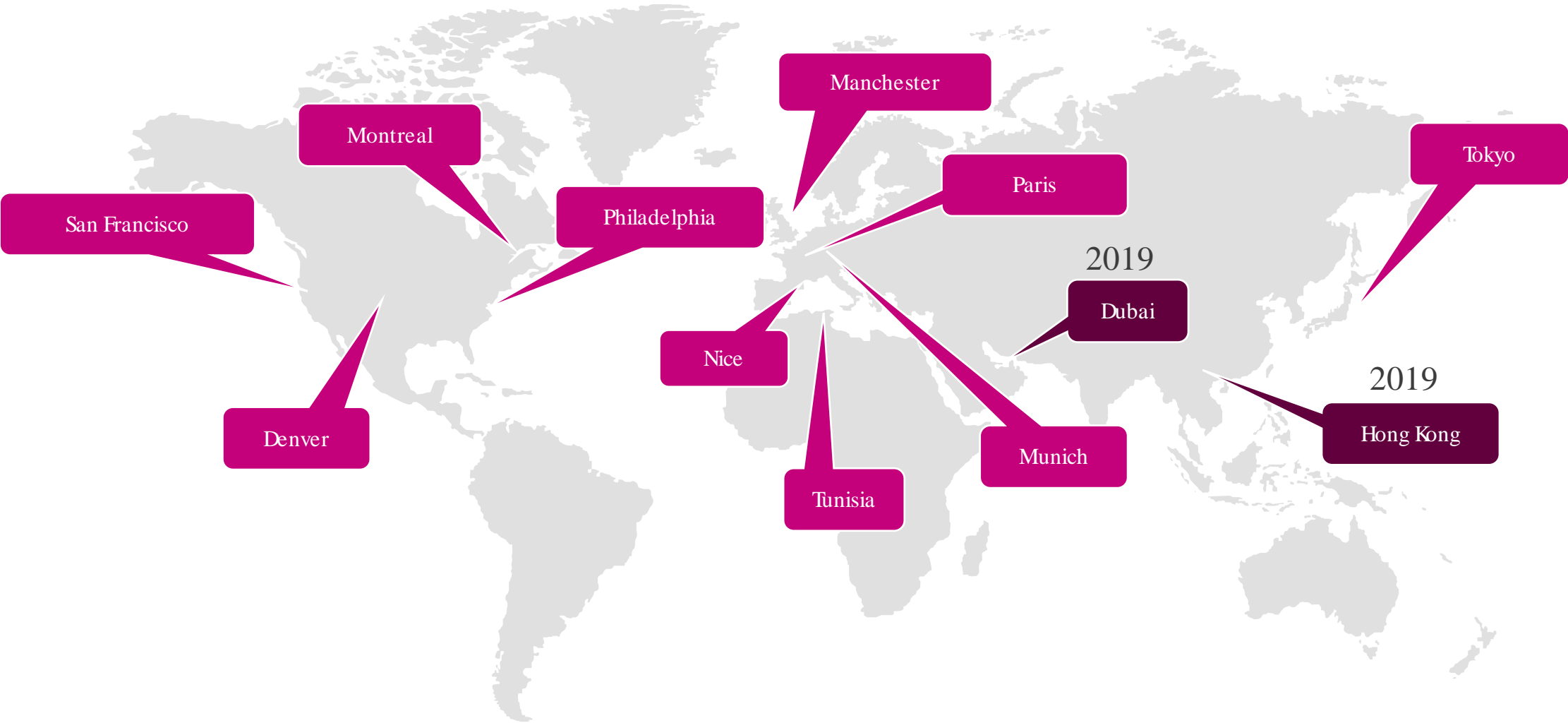


22 years
of experience

OUR OFFICES

Long-Standing Offices

New Offices



TRUSTED BY INDUSTRY LEADERS

AUTOMOTIVE



ENERGY



LIFE SCIENCES



AEROSPACE & DEFENSE



ENGINEERING



TRANSPORTATION

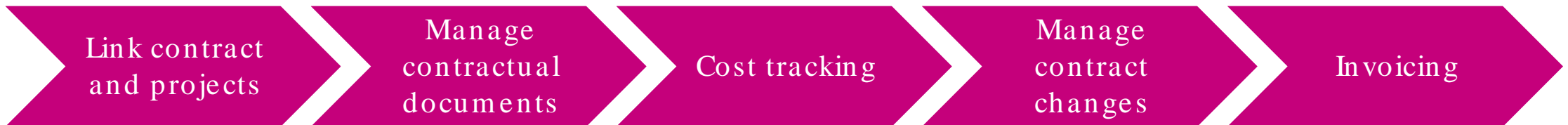


WHAT DOES CONTRACT MANAGEMENT DONE WELL LOOK LIKE?

▪ Bid Management



▪ Contract execution tracking



THE CHAOS OF DISCONNECTED INFORMATION

- The Project Management Institute (PMI) reports that less than two-thirds of projects actually meet their goals and business intent. In fact, it is estimated that for every \$1 billion spent on a failed project, \$135 million is lost forever...unrecoverable.
- According to a study by Meta Group, 60% to 80% of project failures can be attributed directly to poor requirements gathering, analysis, and management.
- **Getting rid of the Excel spreadsheet culture** and getting everything into one solution to manage bids; both customer's and supplier's contracts, and execute projects.

<https://www.pmi.org/-/media/pmi/documents/public/pdf/learning/thought-leadership/pulse/pulse-of-the-profession-2013.pdf>

KEY CHALLENGES: GETTING STARTED

- **Large scale bids**
- **Multiple process steps**
- **Multiple stakeholders**
- Multiple documents
- Multiple workflows
- **Dependency-based timeline**
- Understand similarities to previous bids
- Consolidating requirements across all stakeholders
- Building cost models and estimates from catalogues
- Amendments to initial proposal – mid proposal building

PLAN DELIVERY OF PROPOSALS

Run contracts like a project

- **Stage & Gate** – manage your contracts like a project alongside you projects

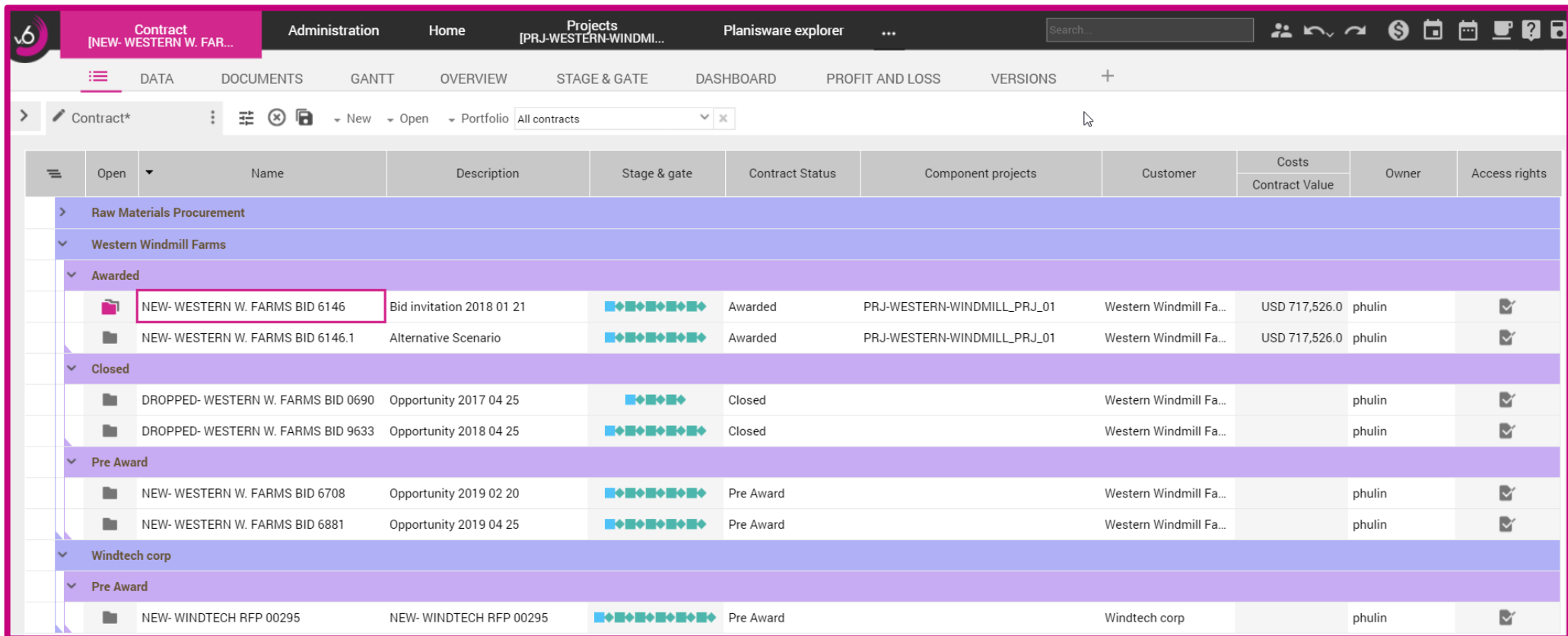


- **Templates** can be created based on bid size to help facilitate different processes

Open	Name	Stage & gate
▼	Pre Award	
▼	Large bid	◆◆◆◆◆◆◆◆◆◆
▼	Small bid	◆◆◆◆
▼	Typical bid	◆◆◆◆◆◆◆◆

CONTRACT MODULE

- **Planisware module** for all your contractual needs
- **Repository of contracts** which maintains all your key information (i.e. status, customer, product, etc.)



The screenshot displays the Planisware Contract Module interface. The top navigation bar includes tabs for Administration, Home, Projects, and Planisware explorer. Below this, a secondary navigation bar lists various views: DATA, DOCUMENTS, GANTT, OVERVIEW, STAGE & GATE, DASHBOARD, PROFIT AND LOSS, and VERSIONS. The main content area shows a table of contracts with columns for Name, Description, Stage & gate, Contract Status, Component projects, Customer, Costs (Contract Value), Owner, and Access rights. The table is organized into sections: Raw Materials Procurement, Western Windmill Farms (subdivided into Awarded, Closed, and Pre Award), and Windtech corp (subdivided into Pre Award). The 'NEW- WESTERN W. FARMS BID 6146' contract is highlighted with a red box.

Open	Name	Description	Stage & gate	Contract Status	Component projects	Customer	Costs Contract Value	Owner	Access rights	
>	Raw Materials Procurement									
>	Western Windmill Farms									
>	Awarded									
	NEW- WESTERN W. FARMS BID 6146	Bid invitation 2018 01 21	◆◆◆◆◆◆◆◆	Awarded	PRJ-WESTERN-WINDMILL_PRJ_01	Western Windmill Fa...	USD 717,526.0	phulin	✓	
	NEW- WESTERN W. FARMS BID 6146.1	Alternative Scenario	◆◆◆◆◆◆◆◆	Awarded	PRJ-WESTERN-WINDMILL_PRJ_01	Western Windmill Fa...	USD 717,526.0	phulin	✓	
>	Closed									
	DROPPED- WESTERN W. FARMS BID 0690	Opportunity 2017 04 25	◆◆◆◆◆	Closed		Western Windmill Fa...		phulin	✓	
	DROPPED- WESTERN W. FARMS BID 9633	Opportunity 2018 04 25	◆◆◆◆◆◆◆◆	Closed		Western Windmill Fa...		phulin	✓	
>	Pre Award									
	NEW- WESTERN W. FARMS BID 6708	Opportunity 2019 02 20	◆◆◆◆◆◆◆◆	Pre Award		Western Windmill Fa...		phulin	✓	
	NEW- WESTERN W. FARMS BID 6881	Opportunity 2019 04 25	◆◆◆◆◆◆◆◆	Pre Award		Western Windmill Fa...		phulin	✓	
>	Windtech corp									
>	Pre Award									
	NEW- WINDTECH RFP 00295	NEW- WINDTECH RFP 00295	◆◆◆◆◆◆◆◆	Pre Award		Windtech corp		phulin	✓	

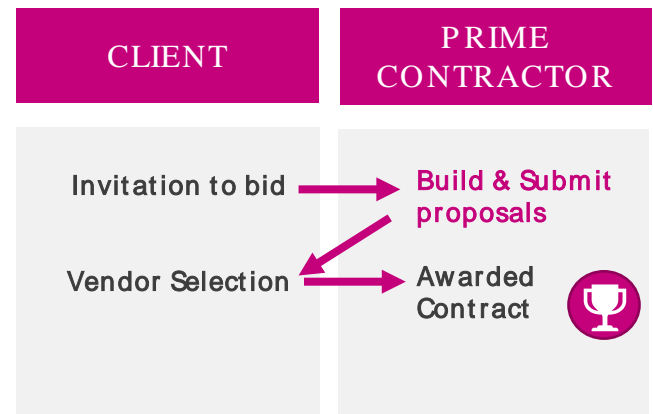
KEY CHALLENGES: MANAGING THE DETAIL

- **Understand similarities to previous bids**
- **Consolidating requirements across all stakeholders**
- Building cost models and estimates from catalogues
- Amendments to initial proposal – mid proposal building
- Managing exchange rates
- Managing pricing books
- **Tracking all the variables + subcontractors**
- Change management
- Workflows

BUILD COST PROPOSAL (2/2)

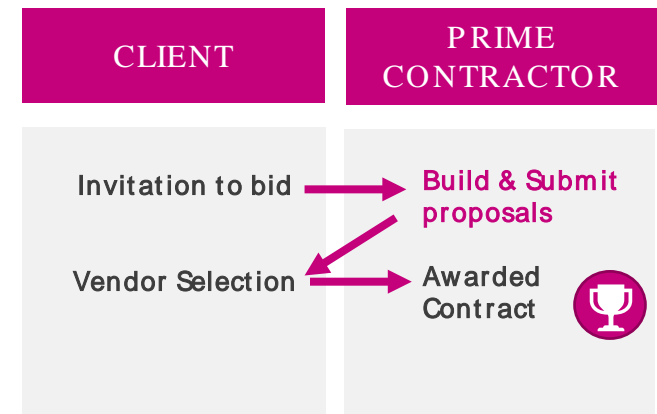
Use Case 2: Requirement is Specific

- Create a new library and **delegate** it to SMEs for quotes
- Request **Ad-hoc estimates** from subject matter experts (SMEs)

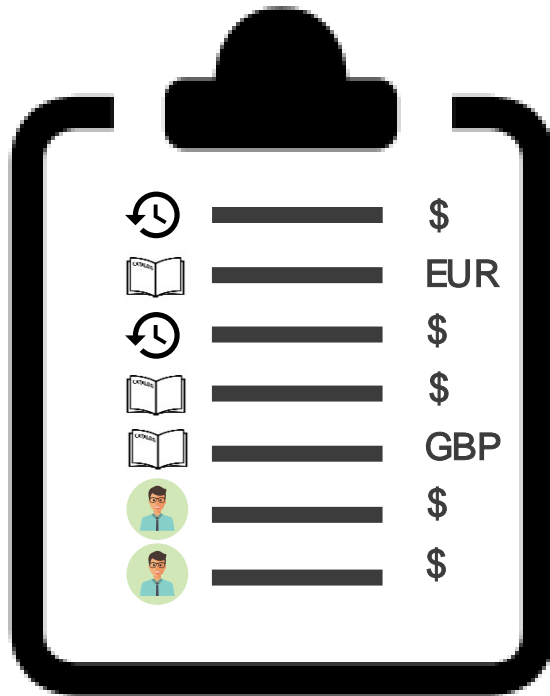


BUILD SCENARIOS

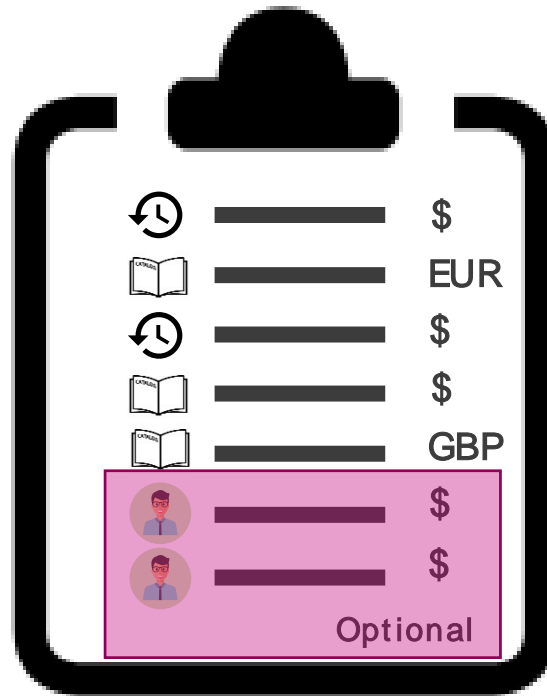
- Planisware versioning and comparison features help build several scenarios



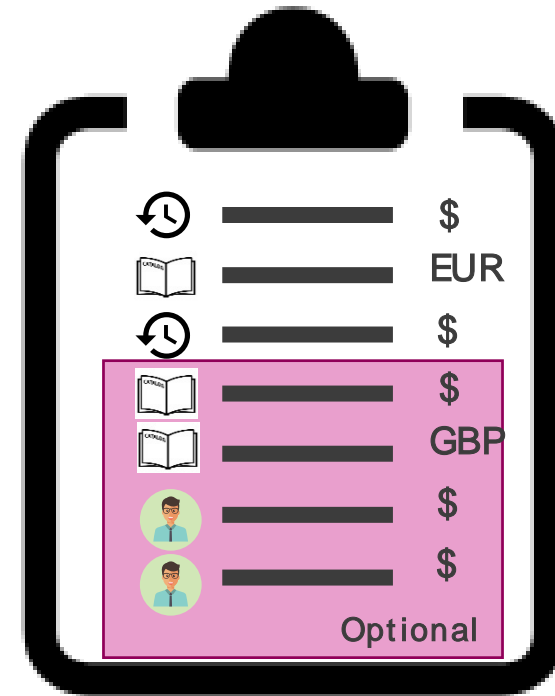
Scenario A



Scenario B



Scenario C



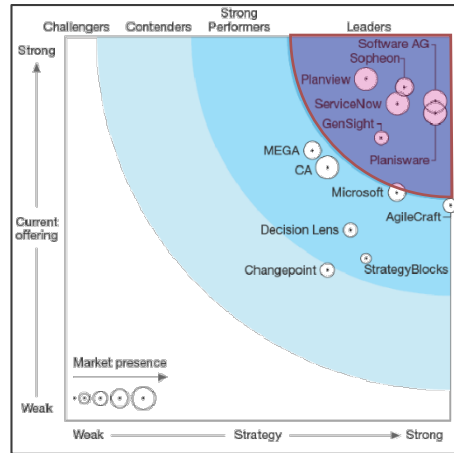
TRACKING EXAMPLES

- **Contract value** versus **committed value**
 - *How much have been ordered yet on this contract?*
- **Committed value** versus **payment request** (aka. Invoiced)
 - *How much is left on this PO? Is this funding enough for what we have to do?*
- **Payment request** versus **project actual cost**
 - *How much do we still have to invoice?*
- **Payment schedule** versus **project billing milestones**
 - *Are we still on track with billing milestones?*

CONCLUSION - VALUE PROPOSITION

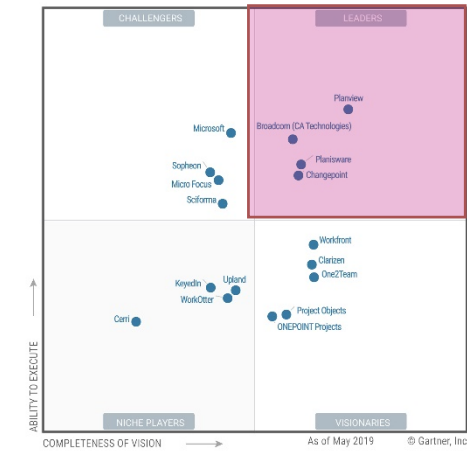
- Contracts and projects in the same Planisware system
 - Centralized information, reduced data administration, collaboration
- Bid management process
 - More accurate costing and pricing of proposals
- Tracking process
 - Live reporting, advanced tracking capabilities
- Leverage additional Planisware features
 - Extended enterprise for suppliers management
 - PlaniswareBot
 - Predictive analysis
 - ActiveTab

RECOGNIZED MARKET LEADER



The Forrester WaveTM
Strategic Portfolio Management Tools Q3 2017

Figure 1. Magic Quadrant for Project and Portfolio Management



Source: Gartner (May 2019)



The Magic Quadrant For PPM,
Worldwide, 2019

RECAP

1

Intro...

2

Key Challenges: Getting started

3

Key Challenges: Managing the detail

4

Some key take away points

5

Questions

THANK YOU

KAI OJO

www.planisware.com

Kai.ojo@planisware.com

+44 7500 346 091



STILL WANT TO USE EXCEL?



- Think about **Planisware Activetab** to get your favorite Excel spreadsheets into Planisware

The screenshot displays the Planisware Activetab Bid Grid interface. The main table shows resource allocation across five sprints for various resource types. Below the main table, there are two summary tables: 'Project drivers' and 'Hourly Rates'.

Resource Type	Type	Man Days							
		Sprint 1	Sprint 2	Sprint 3	Sprint 4	Sprint 5	Sprint 1	Sprint 2	Sprint 3
HW Development	Load	11.25	41.25	45	52.5	37.5	\$16,875.00	\$61,875.00	\$37,875.00
Operations	Load	7.5	18.75	7.5	37.5	30	\$7,500.00	\$18,750.00	\$22,500.00
Professional Services	Load	15	33.75	37.5	22.5	3.75	\$18,000.00	\$40,500.00	\$6,750.00
Program Management	Load	37.5	56.25	75	18.75	3.75	\$33,000.00	\$49,500.00	\$6,750.00
SQA	Load	7.5	7.5	30	52.5	75	\$5,400.00	\$5,400.00	\$67,500.00
							\$80,775.00	\$176,025.00	\$117,375.00

Project drivers	
Nb Prototypes	< 5
Project Type	Repackaging

Hourly Rates	
HW Development	\$187.50
Operations	\$125.00
Professional Services	\$150.00
Program Management	\$110.00
SQA	\$90.00

EXTENDED ENTERPRISE

RATE MANAGEMENT

- Rates can be **shared** between project and contracts
 - Save time on data administration and improve quality
- If needed, define **specific rates** for a proposal
 - Currency exchange rates
 - **Protect your rates**
 - Labor and non labor
 - Cost of employees: Use the **most up-to-date** figures



PROTECT YOUR PROFITS

Set the right selling price!



- **Profit and Loss** feature: go **from direct cost to selling price** easily
- Get your own calculation model into Planisware
 - Basic Example:

	Type	Description	Definition	Unit type
	Curve	Direct Cost	Archived estimate at completion	Monetary
	Input	Markup (%)		No unit
	Input	Burden rate (%)		No unit
	Formula	Burden Amount	$DIRECT_COST * BURDEN_RATE$	Monetary
	Formula	Total Cost	$DIRECT_COST + BURDEN_AMOUNT + (DIRECT_COST * MARKUP)$	Monetary
	Input	Gross Margin (%)		No unit
	Formula	Gross Margin	$GROSS_MARGIN_PCT * TOTAL_COST$	Monetary
	Formula	Selling Price	$TOTAL(SELLING_PRICE_CALC)$	Monetary

CHANGE OF SCOPE –WHAT IF SIMULATIONS

- Create Planisware version and use the what if simulation feature

