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Introduction

In today's rapidly evolving business environment, business leaders face mounting pressure to deliver on strategic goals while maintaining cost discipline, agility, and measurable results. Organizations are under constant pressure to demonstrate that IT investments are aligned with strategic objectives and deliver measurable business outcomes. Yet, all too often, financial planning and portfolio execution remain siloed, leading to inefficient spend, unclear priorities, misaligned expectations, and limited visibility.

This challenge demands a unified, data-driven approach to managing IT investments. ServiceNow Strategic Portfolio Management (SPM) provides essential portfolio-level visibility and prioritization capabilities, enabling organizations to plan, align, and track work against strategic objectives. However, while SPM is powerful in defining and steering the strategic roadmap, it often lacks the financial operational depth needed to fully execute, measure, and optimize those investments.

This is where Proven Optics provides critical value. As a purpose-built IT Financial Management (ITFM) software, natively built on the ServiceNow platform, Proven Optics extends SPM with a comprehensive financial layer designed to operationalize budgeting, automate forecasting, and, most importantly, simplify and streamline the integration and reconciliation of actuals. Together, these two solutions create a comprehensive platform for strategic and operational planning, financial execution, and business performance.





Addressing Critical Customer Pain Points

Many organizations continue to grapple with significant challenges in managing their IT finances and strategic investments:

- **Reliance on Manual, Error-Prone Processes:** Many organizations still depend on cumbersome, manual processes, often involving Excel spreadsheets and email chains, for IT budgeting and forecasting. This leads to inefficient maintenance, version control issues, and a lack of scalability, making it difficult to manage the expanding demands of the IT organization.
- **Lack of Holistic Financial Visibility and Control Across All IT Spend:** Organizations struggle to gain a comprehensive and granular view of all IT costs, not just project-based ones. Existing systems may not tell the whole story, leading to an inability to understand total IT spend or measure the impact of investments.
- **Difficulty in Aligning IT Investments with Business Strategy:** It is often challenging for IT to communicate how budget spend delivers value and supports business outcomes. There is often an unclear connection between IT costs and business capabilities, leading to struggles in prioritizing projects based on strategic objectives and tracking value realization.
- **Inaccurate and Unreliable Financial Data Leading to Poor Decision-Making:** Decentralized data and manual processes often result in unreliable and imprecise financial projections, hindering faster and more informed decision-making by IT and finance leaders.
- **Limitations of ServiceNow SPM's General Financial Planning for Enterprise-Wide IT Financial Management:** While SPM offers real-time insights into portfolio performance, project prioritization, and labor cost estimation, it is a broader portfolio management approach rather than providing the more specialized and comprehensive financial management features needed for end-to-end budget formulation and a holistic view of all IT costs (run, grow, change and transform).

ServiceNow Enterprise Financial Insights Powered by Proven Optics

Proven Optics and ServiceNow are better together! Used jointly, they empower organizations with a unified IT financial strategy from enterprise-wide budget formulation to strategic portfolio execution. This powerful combination achieves its synergy by leveraging Proven Optics for robust, comprehensive IT budgeting and forecasting across all IT costs, which then seamlessly informs and optimizes financial planning and real-time performance tracking for strategic projects, demands, and epics within ServiceNow's Strategic Portfolio Management (SPM) Next Experience.

Proven Optics handles the "why" and "what" of enterprise spending, building a robust financial model, while ServiceNow SPM handles the "how" and "performance" of strategic investments within that established financial framework. This creates a non-competitive, additive value proposition.

Here's how their capabilities combine and differentiate:

- **Budget Approvals:** While SPM supports strategic planning, Proven Optics enables controlled execution of budget approvals, a capability not natively available in SPM.
- **Actuals Integration & Reconciliation:** SPM offers high-level financial planning, but it is limited when it comes to bringing in actuals, requiring manual updates or custom integrations from external financial systems. In contrast, Proven Optics was specifically designed to fill this gap. It offers a native operational and financial engine within ServiceNow that enables streamlined, automated integration of actuals. Proven Optics intelligently maps actuals to budget lines using metadata, supporting a broader, business-aligned financial view that overcomes SPM's typical project-level reconciliation limitations.
- **End-to-End Budget Formulation:** While SPM provides project-centric financial planning, Proven Optics brings full-scale budget formulation and forecasting across the entire enterprise. This includes dynamic association of budget line items and enables visibility into multi-year forecasts and reliable modelling for run, grow, change, and transform categories.

- **Forecasting:** Proven Optics offers advanced and dynamic forecasting capabilities, enabling agile financial responses to shifting business priorities, beyond SPM's more basic forecasting.
- **Operational Automation:** SPM helps prioritize and approve initiatives, but Proven Optics translates those approvals into live, executable financial plans. It enables dynamic cost plan generation, resource allocation, and ongoing updates with minimal manual intervention, which SPM does not natively offer. This minimizes administrative burden and accelerates initiative execution across the enterprise.
- **Outcome/Benefit Realization:** Proven Optics provides transparent and trackable benefit realization, connecting financial inputs to outcomes. This allows organizations to not only manage costs but also demonstrate tangible business value delivery, while SPM supports this indirectly.
- **Holistic Financial Picture & Enterprise IT Spend:** Proven Optics delivers a structured, auditable, and automated enterprise IT budget foundation, serving as a reliable financial context for funding targets managed at the SPM level. The joint offering enables a holistic financial picture by understanding the total cost of IT and optimizing all IT spend.

Tangible Business Outcomes

Combining Proven Optics with ServiceNow SPM equips organizations to make smarter, more accountable IT investment decisions, leading to significant business outcomes:

- **Unified IT Financial Strategy & Holistic Visibility:** A joint solution empowers organizations to manage their entire IT Financial lifecycle, from high-level budget allocation down to the detailed execution of strategic initiatives. Proven Optics provides a comprehensive view of all IT costs (not just work-based), helping organizations understand their total IT spend and what it delivers, which can lead to identifying and cutting redundant expenses.
- **Improved Financial Accuracy and Reliability:** Proven Optics helps eliminate reliance on error-prone manual processes such as Excel spreadsheets, by providing a single source of truth for financial data, reducing version control issues, and enhancing data reliability and trust. This grounding of plans in real-time actuals and historical data enhances forecast precision and financial control.

Tangible Business Outcomes Cont'd.

- **Strategic and Operational Alignment:** This partnership provides IT and finance leaders with the necessary information to make quicker, more informed financial decisions, optimizing overall IT spend to managing individual project forecasts. It connects SPM's strategic oversight with operational-level financial performance, ensuring projects are both aligned with corporate goals and fiscally accountable.
- **Streamlined Operations & Increased Efficiency:** Proven Optics automates and streamlines IT financial management processes like budgeting and forecasting, leading to significant efficiencies. This reduces manual effort, accelerates initiative execution, and results in lower operating costs and faster reporting cycles. For example, Hitachi Energy reduced its budgeting processing time in half (cutting three months out of the process) and achieved greater data reliability by implementing Proven Optics.
- **Faster and More Informed Decision-Making:** By bringing together enterprise-wide financial data and strategic portfolio insights, the partnership provides IT and finance leaders with the necessary information to make quicker, more informed financial decisions, optimizing overall IT spend to managing individual project forecasts. Live dashboards support performance-based decisions, enabling teams to focus resources on high-impact initiatives.
- **Enhanced IT Governance & Auditability:** The combined solution helps improve process governance with advanced workflows and version control tools, ensuring organizational alignment by standardizing processes and reducing data inconsistency. Proven Optics establishes credibility through increased transparency and repeatable, scalable processes, with clear audit trails and field-level traceability to changes in funding and budget items.
- **Clearer Benefit Realization & Optimized Investments:** Jointly, Proven Optics and SPM enables the alignment of financials to expense drivers, impact analysis, and corporate strategy, making it easier to articulate how IT supports the business and ensures investments are focused on high-value initiatives. Linking investments to outcomes allows organizations to measure value delivery and support outcome-based planning, resulting in a more agile, accountable, and outcome-focused IT organization.



Proven Success in Action

A Fortune 500 leader in transportation and logistics, modernized its project portfolio management by shifting from its legacy PPM tool, Planview, to ServiceNow SPM. While SPM provided the foundation for strategic alignment and initiative tracking, the organization recognized it lacked the operational financial functionality required to manage real-time reconciliation and reporting across its complex business structure.

By implementing Proven Optics alongside SPM, they established an operational financial layer that:

- Automated the mapping of budget data to project records.
- Streamlined the reconciliation of actual labor and non-labor costs from Workday.
- Enabled project managers and finance analysts to perform monthly forecasting, variance tracking, and dynamic reporting.
- Made dashboards and financial insights accessible to stakeholders beyond SPM Admins.

The benefits our customer experienced exemplify the power of this integration:

1. Improved Financial Accuracy and Accountability: Our customer can now trust its financial data and make faster, data-backed decisions by automating actuals reconciliation and variance tracking, supporting stronger financial stewardship.

2. Strategic and Operational Alignment: Proven Optics connects SPM's strategic oversight with operational-level financial performance, ensuring projects are both aligned with corporate goals and fiscally accountable. This empowers executives to prioritize based on value.

3. Reduced Manual Effort and Increased Efficiency: Eliminating manual reconciliation, especially with actuals flowing from Workday, freed up staff to focus on high-value work, leading to lower operating costs, faster reporting cycles, and better agility.

4. Broader Visibility Across Business Units: Through role-based dashboards and reporting enabled by Proven Optics, they democratized financial insights across departments, enhancing cross-functional accountability and allowing holistic portfolio management.

5. Modernization and Tool Consolidation: By consolidating into the ServiceNow ecosystem, they reduced tool sprawl and streamlined vendor management, with Proven Optics enhancing the value of their ServiceNow investment.

Our customer now has a single platform that links strategy, execution, and financial performance, enabling faster decisions, smarter investments, and more transparent outcomes across the enterprise.

Stronger Together For A Value-Driven Future

When combined, ServiceNow SPM and Proven Optics provide a holistic, scalable solution that enables CIOs, CFOs, and PMOs to plan strategically, execute efficiently, and govern financially. SPM sets the vision—Proven Optics ensures that vision is funded, tracked, and delivered with precision.

Together, these platforms enable organizations to:

- Achieve strategic alignment across IT investments and business objectives.
- Implement enterprise-wide financial discipline with automated planning and actuals integration.
- Drive operational efficiency through reduced manual effort and faster execution.
- Ensure outcome-based governance with clear visibility into benefit realization.
- Transform your ServiceNow environment into a unified platform for strategic planning, financial execution, and real-time decision support.

Discover how Proven Optics turns strategy into measurable outcomes and makes your strategy financially accountable.