PROGRESSIVE PMO™

Progressing Your Business

PortfolioQuest™

Smart and Effective Solution for Project Portfolio Management (PPM)
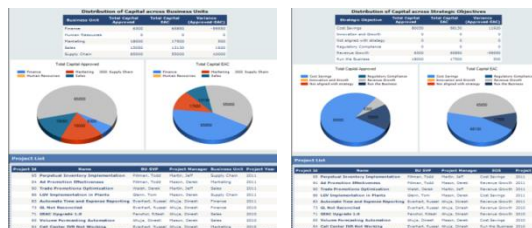
About PortfolioQuest™

PortfolioQuest™ is a simple yet effective Project Portfolio Management (PPM) tool that delivers industry leading best practices without the complexities of traditional PPM tools, allowing you to rapidly mobilize your workforce and jumpstart your PPM journey!

Be ahead of the competition, maximize return on IT investments and truly manage the IT portfolio by:

- **Aligning projects** to corporate strategies

- **Capturing business cases** and tracking benefits

- **Prioritizing enterprise-wide** IT requests

- **Balancing portfolio risks** vs. value

- **Adapting to changes** and adjusting project portfolio

- **Executing projects efficiently**

- **Matching demand to capacity** for resources

- **Monitoring utilization** of dollars and resources

- **Governing projects** moving through lifecycle

- **Canceling low-value** projects

- **Establishing corporate-level** investment governance

- **Gaining insight** into key IT operational metrics

- **Understanding investment allocation** across strategy, LOBs, type of work, etc.

(Personalized Project Dashboard with real-time status)

(Cost and Effort Distribution Charts with drill-down)

(Integrated Timesheet Function)

Why PortfolioQuest™?

With **PortfolioQuest™**, you get latest industry-standard PPM thought-leadership and an easy-to-use tool that significantly reduce implementation timeframe and drives quicker adoption at various levels of end-users.

PortfolioQuest™ also integrates all IT work (projects, enhancements, on-going support and incidents) and consumption of resources and dollars across these work types to provide key insights on IT delivery, productivity, quality, cost / effort forecast accuracy and ROI for middle, senior and executive management.

Our Implementation Approach

We thoroughly understand the organization mobilization needs Our experienced consultants understand that achieving success in deploying Project Portfolio Management (PPM) requires strong focus on process and people (in addition to tools). Hence, as an option, we offer a unique ITIL process-based approach called **TotalPPMConnect™** which leverages industry best practices, delivery methodologies and real-world insights to deploy solid process and governance models in support of your PMO / PPM efforts.

So, what are you waiting for? Contact us today to find out more about **PortfolioQuest™** and **TotalPPMConnect™** and discuss the next steps. Now you don't have to hold back on your aspirations for a solid and mature PPM practice. There is a simpler and more effective way to get to your destination and Progressive PMO LLC is your partner in getting there.

For more information or to discuss further, contact our Vice President of PMO Practice at (210) 325 1588.
Email info@progressivepmo.com or visit www.progressivepmo.com.

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PortfolioQuest™, a leading collaborative project portfolio management solution, packs a punch when it comes to delivering effectiveness and efficiency with simplicity! The main functional modules are listed below.

Demand Management

- Build requests repository
- Classification of requests
- Key attributes capture
- TCO-based Business Case
- Strategic Alignment and Prioritization
- Integrated Risk Analysis
- Review of demand by business, strategy, etc.

Resource Management

- Resources and skills repository
- Resource roles
- Internal and External resource tracking
- Consultant start and end dates
- Resource capacity planning and utilization
- Allocation monitoring and conflict resolution
- Demand Vs Supply balance

Project Management

- Project Status updates and tracking of KPIs
- Automated project charter and routing workflow
- Automated on-demand status reporting
- Integrated issues and risk management
- Schedule of Project milestones and deliverables
- Phase-based baseline Vs actual dates tracking
- On-demand report on latest costs on projects

Portfolio Management

- Annual Operating Planning Support
- Quarterly portfolio re-planning support
- Portfolio what-if scenarios
- Portfolio Analytics and Insights
- Distribution of efforts and costs across key dimensions
- On-going portfolio conflicts resolution
- Weekly portfolio management

Financial Management

- Multi-year project expense and capital budget
- Approved, Actuals, Remaining, Projected Variance
- Project / program and portfolio financial reporting

Time Management

- Integrated Weekly / Daily time entry
- Plan Vs actual time reporting by project and team
- Unified view of time - projects, requests and incidents

Program Management

- Program-level grouping of projects
- Program level budget reporting
- Program issues and risk management

Incident / Problem Management

- Integrated incident capture and tracking
- Time and cost reporting
- Linking of incidents to projects for root-cause

Collaborative, security and efficiency features

- Role-based access to tool and its features. Personalized dashboard, workflow and alerts for efficiency
- Export of reports and charts to – Word, Excel and PDF. Administrative panels reducing reliance on support
- Fully web-based application, built on ASP .NET technology and MS SQL Server database. Available in on-premise or SaaS model

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PortfolioQuest™, allows customers the flexibility to deploy a wide array of capabilities from basic to advanced depending on their maturity level, desired pace of change and consideration to organizational change management. Regardless of the capability being deployed, customers can expect to see quick return on their investment in the solution!

Basic Capabilities

(Project, resource and Risk Management)

- Centrally capture and manage all demand (projects, incidents, requests and enhancements) from internal and business users
- Define project attributes, deliverables, timelines, budget and resources.
- Track/ manage overall projects status, distribute automated status reports
- Automated on-demand project and portfolio dashboards
- Manage issues and risks with routing and workflow
- Report actual hours worked across all demand
- Visibility into past and upcoming project completions and pipeline
- On-demand report on baseline portfolio budget Vs. projected costs

Intermediate Capabilities

(Efficiency, Cost and Value Focus)

- TCO-based project business cases and financial analysis
- Project Scoring and Prioritization
- Project execution lifecycle support
- Multi-year project and portfolio financial management
- Resource maintenance, request, allocation and utilization analysis
- Automated workflow-based routing / approval of key project documents like project charter, business case, status report, issues / risks, etc.
- Integrated view and varied reporting into projects, incidents, requests and enhancements.

Advanced Capabilities

(Strategic Portfolio Management)

- Resource demand Vs. capacity analysis
- Project and resource conflict resolution
- Portfolio what-if scenarios / optimization
- Portfolio analytics – Distribution of effort and cost (capital and expense) across business units, work type, strategic objectives, etc.
- Portfolio Risk Vs. Value Balancing
- Support for annual portfolio planning and quarterly re-planning
- Program level rollup of issues, risks and financials.
- Support for internal Vs. external labor hours

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PortfolioQuest™, a leading collaborative project portfolio management solution, packs a punch when it comes to delivering effectiveness and efficiency with simplicity! The main functional features are listed below.

- ✓ **Standard business case, value and risk assessment**
  - ▪ Total cost of ownership (TCO) based business cases
  - ▪ Projects scored objectively based on strategic alignment and ROI
  - ▪ Project risks assessment
  - ▪ Balancing portfolio risks Vs. value

- ✓ **Automated generation, routing and approval of key project documents**
  - ▪ Project Status Report, Project Charter, Business Case, Issues and Risks, Deliverables / Milestone chart, etc.
  - ▪ Automated approval for documents on the go (i.e. via mobile phones)

- ✓ **Resource capacity, allocation and utilization monitoring**

- ✓ **Demand vs. Supply matching and portfolio what-if scenarios**

- ✓ **Real-time project and resource conflict resolution**

- ✓ **Key project status updates and KPI capture**
  - ▪ SPI, CPI, % Complete, Delivery Status, Project Status, etc.
  - ▪ Key milestones and deliverables, Project phases stage-gate status

- ✓ **On-Demand Portfolio Financial Variance Reporting**

- ✓ **Integrated Risk and Issue Management**

- ✓ **Integrated Incident and Tickets capture**

- ✓ **Integrated time entry and plan vs. actual analysis**

- ✓ **Advanced Portfolio Analytics and Insights**
  - ▪ Planned and revised distribution of efforts across strategic objectives, business areas, work type, etc.
  - ▪ Planned and revised distribution of investments across strategic objectives, business areas, work type, etc.

PortfolioQuest™ - Sample Outputs and Reports

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On-Demand Portfolio Financial Variance Reporting

Real-time visibility into Resource Assignment, Project Conflicts and Resource Utilization

On-demand Advanced Portfolio Analytics and Insights, exported to PDF format.
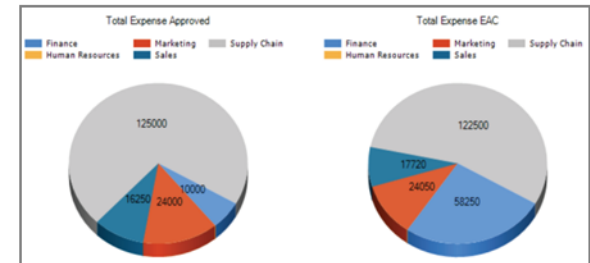
Integrated Risk and Issue Management with workflow and routing

Automated generation and routing of key project documents such as Status Report, Project Charter, Business Case, etc.

PortfolioQuest™, is built on latest industry technology and offers integration with other systems and scalable infrastructure. The details are listed below.

- ✓ **Technology Platform**

  - Uses industry standard ASP, .NET 3.5, Microsoft Chart Controls framework

  - Underlying database - MS SQL SERVER 2008/2005

  - Can be deployed in on-premise or SaaS models.

  - Separate and secure database on a scalable server infrastructure with 99.9% up-time for SaaS.

  - The data model lends itself to easier integration with other systems as and when needed.

- ✓ **Deployment Approach and Key Deliverables**

  - General implementation timeframe – 30-45 days

  - Finalization of Customer Agreement and Statement of Work.

  - Joint project plan development and signoff

  - Facilitation of business rules, configuration and additional reporting requirements

  - Organization change management support

  - System configuration and reports build-out

  - Process change documentation

  - Deployment – SaaS or On-premise

  - 1-year post go-live support (included)

- ✓ **On-going support and maintenance**

  - On-going support for issues and / or questions provided based on silver, gold and platinum levels

  - Access to dedicated customer support line for all customers

  - Minor software releases and product roadmap updates on a semi-annual basis included in the on-going support and maintenance.

  - Major software releases with significant new functionality may require additional licensing.