

**PROGRESSIVE PMO™**  
Progressing Your Business



## PortfolioQuest™

Smart and Effective Solution for Project Portfolio Management (PPM)

## About PortfolioQuest™

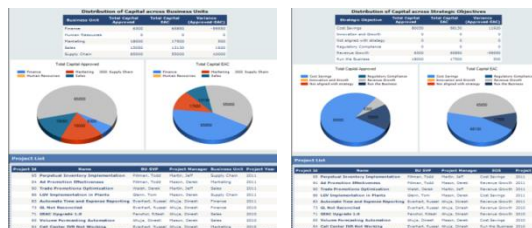
**PortfolioQuest™** is a simple yet effective Project Portfolio Management (PPM) tool that delivers industry leading best practices without the complexities of traditional PPM tools, allowing you to rapidly mobilize your workforce and jumpstart your PPM journey!

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](mailto:info@progressivepmo.com) or visit [www.progressivepmo.com](http://www.progressivepmo.com).

**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

**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

**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.

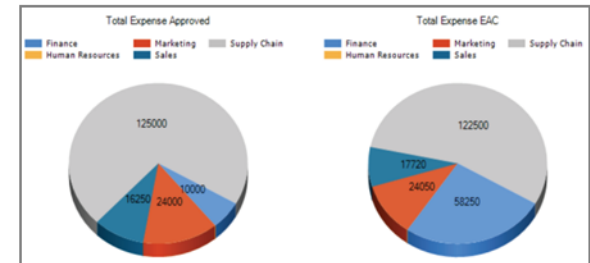
## On-Demand Portfolio Financial Variance Reporting

Project ID/Name	Project Manager	Project Year	Requested Budget	Approved Budget	Actual Spend	Remaining Spend (ETC)	Estimated At Completion	Variance Proj
64-Call Center IVR Not Working	Ahija, Dinesh	2010	20000	24000	22000	1250	24050	-50
65-Volume Forecasting Automation	Mason, Derek	2010	32000	16000	12000	5000	17600	-16000
71-GBAC Upgrade 1.0	Ahija, Dinesh	2010	0	0	0	0	0	0
73-GL Not Reconciled	Ahija, Dinesh	2010	2500	1000	1200	50	1250	-250
83-Automate Time and Expense Reporting	Ahija, Dinesh	2011	40000	4000	3000	50000	53000	-49000
86-LDV Implementation in Plants	Mason, Derek	2011	280000	128000	120000	2500	128500	2500
90-Trade Promotions Optimization	Martin, Jeff	2011	0	0	0	0	0	0
94-Ad Promotion Effectiveness	Mason, Derek	2011	0	0	0	0	0	0
95-Perpetual Inventory Implementation	Martin, Jeff	2011	0	0	0	0	0	0
<b>Total</b>			<b>350500</b>	<b>170000</b>	<b>139600</b>	<b>58000</b>	<b>218400</b>	<b>-68400</b>

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

Project ID/Name	Project Manager	Project Phase	Request Type	11-2009	12-2009	1-2010	2-2010	3-2010	4-2010	5-2010	6-2010	7-2010	8
86-LDV Implementation in Plants	Mason, Derek	01 Concept	Business Improvement	0	0	0	0	170	160	150	215	250	
73-GL Not Reconciled	Ahija, Dinesh	06 Sustain	Production Support	0	0	20	20	20	20	20	20	20	
95-Perpetual Inventory Implementation	Martin, Jeff	01 Concept	Business Improvement	0	0	0	0	0	0	0	0	0	
				0	0	20	20	190	180	170	235	270	
				168	164	148	140	-6	-4	-2	-59	-94	

## On-demand Advanced Portfolio Analytics and Insights, exported to PDF format.



## Integrated Risk and Issue Management with workflow and routing

**PortfolioQuest**  
Issue and Risk Management for Project Portfolio

Welcome, ahija, d... | Change Password | Sign Out

Home | Dashboard | My Portfolio | My Projects | My Issues | My Risks | My Reports | My Settings

Date Entered: [ ] | Category: [Technical] | Issue Description: [ ] | Assigned To: [Martin, Jeff] | Status: [Pending] | Due Date: [ ]

ID	Issue	Date Entered	Issue Category	Priority	Resolution	Resolution Date	Resolution Status	Resolution Owner
648	Issue	11/24/2010	Technical	01 High	Business System unavailable for approving the user testing.		Escalated to the service provider.	Martin, Jeff
649	Issue	11/24/2010	Business	03 High	Business System unavailable for approving the user testing.		Available to Executive Business Approval for Assignment of other Business personnel.	Martin, Jeff

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

Project Status Report			
Project Name:	Automate Time and Expense Reporting	Project ID:	83
Request Type:	Business Improvement	Strategic Objective:	Revenue Growth
Business Unit SVP:	Bethany Russell	Project Manager:	Ahija, Dinesh
Executive Sponsor:	Ahija, Dinesh	Project Business:	Glenn, Tom

Project Charter			
Project Name:	LDV Implementation in Plants	Project ID:	86
Request Type:	Business Improvement	Strategic Objective:	Cost Savings
Business Unit SVP:			

Project Business Case			
Project Name:	Automate Time and Expense Reporting	Project ID:	83
Business Unit SVP:	Bethany Russell	Project Manager:	Ahija, Dinesh
Net Present Value:	\$111,880	Payback:	2.4
Project Cost/Benefit Definition:	Introduction: This project implements new capabilities for Business Units. The project will leverage and extend the Performance Management Cost modeling applications to generate annual production and pricing plans for all seasonal based products across fruits, vegetables, and commodities.		
Proposed Solution, Improvements and Benefits:	These models will be utilized by the team and the output will be shared with multiple functions including Operations, Marketing and Customer Marketing.		

Cash Outflows						
Description	Year 1	Year 2	Year 3	Year 4	Year 5	Total
Travel Expense	2,000	0	0	0	0	2,000
Admin Expense	1,500	1,444	1,300	1,000	1,000	14,644
Travel Expense	10,000	0	0	0	0	10,000
One Time Expense	20,000	0	0	0	0	20,000
Annual Recurring	1,500	1,500	1,500	1,500	1,500	10,500
Total Cash Outflows	55,000	6,944	1,300	1,500	1,500	70,744

**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.