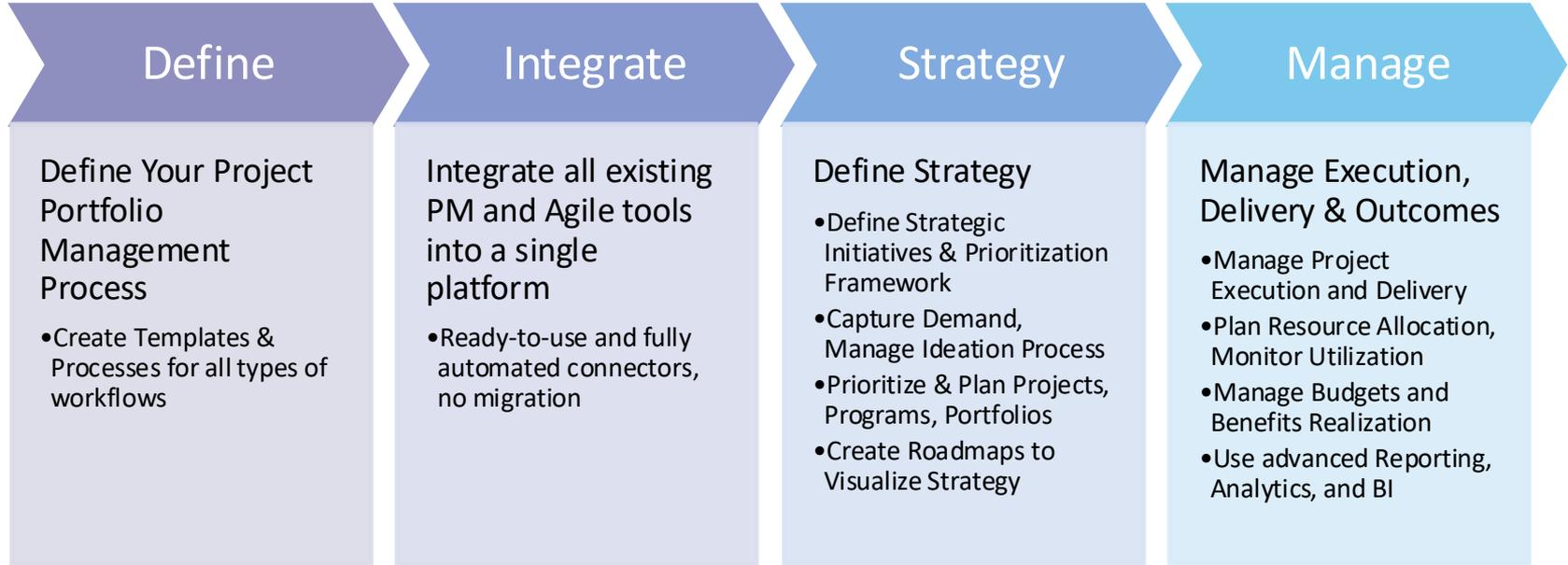




Strategic
Project Portfolio Management

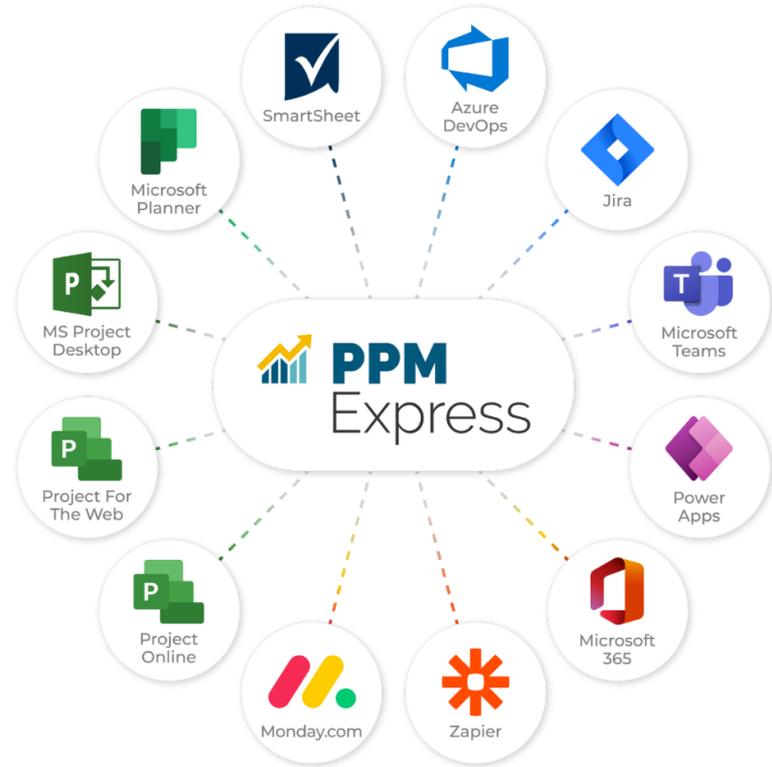
Easy to Integrate. Easy to Use. Easy to Extend. Easy to Scale

STRATEGIC PROJECT PORTFOLIO MANAGEMENT PLATFORM



Protect Existing Investments: Zero Migration Strategy

- Connect & Integrate your PM tools, **Do Not Migrate**
- **Protect Existing Investments** – Let your teams use **Existing PM Tool That Works Best** for them.
- Instantly **Ready-to-use, No-Code, Configurable** and **100% Automated** Connectors.
- **Zero Migration downtime** and **No** massive training required



AI for PRODUCTIVITY: BUY TIME BACK



Free Time for PMs

All Project Data in one place
AI Automated Project Status Reporting
AI-Generated Project Insights
AI-generated Suggestions
AI-generated Actions



Integrated Reporting

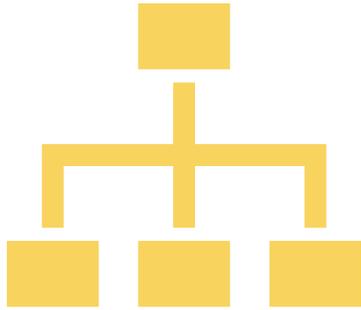
AI-Powered Project Status Reports
Hundreds of Ready-to-use Reports



Improve Quality

Monitor Project Data Quality
Implement Data Governance

Security



- Runs on **Microsoft Azure, Microsoft 365 SSO, Azure AD/Entra**
- **99.999%+ Reliability** over last 3 years period
- We meet **All** modern **Security Requirements**
- Available in **multiple datacenters and regions**
- Comprehensive **Disaster Recovery System**
- **Penetration Testing** every 6 month
- Available as **Cloud Hosted, Dedicated Cloud Hosted, Managed Customer Hosted** to meet **extreme security requirements** and **regional requirements**.

EXTENSIBILITY MODEL

- Self-Service and Self-reliance as a main principle
- PPM Express can be configured by end-users, without significant vendor involvement (after basic training)
- PPM Express implemented an Extensibility Model:
 - Embed **Reports** into PPM Express
 - Embed **Custom Web Apps** that implement custom logic
 - Apps can be created with the **Low-Code / No-Code / Vibe-Code platforms** such as PowerPlatform, Replit, Bolt, Lovable.

Differentiators

- The entire PPM market is **overpriced**, with PPM Software vendors often charging **\$50K - 500K/year**.
- PPM Express offers a flat price **with UNLIMITED Users at \$24,000/year**.
- **Save over 90%** vs any PPM competitor.
- **Get 95%+ feature parity** vs any PPM competitor
- Predictable annual 5% subscription price increase
- Unlimited Extensibility with Low-Code / Vibe Coding Platforms

SILHOUETTE
DESIGN ARCHITECTURE



LeafFilter™
GUTTER PROTECTION



Imperial College
London



A LEADING POLYTECHNIC
COMMITTED TO YOUR SUCCESS

invatron

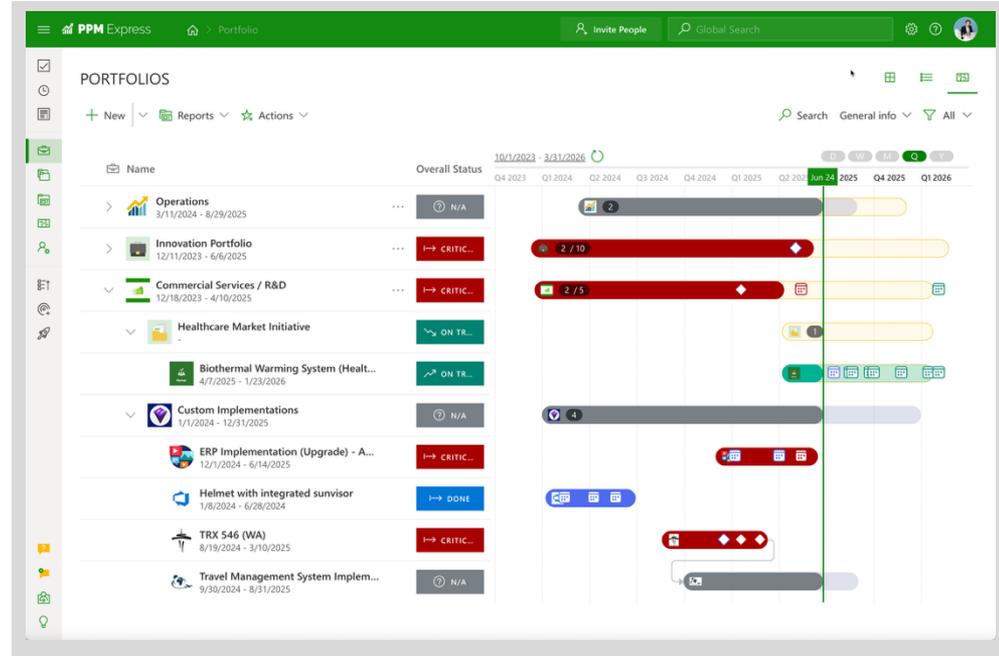


 máxima mc



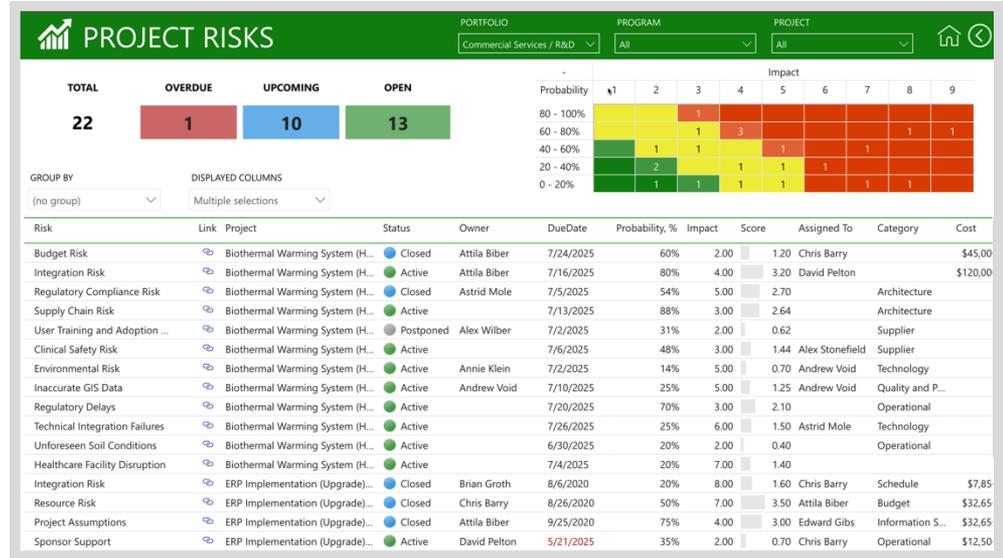
Portfolio Management

- Organize Projects and Programs into Portfolios
- Track progress, Risks, Dates, Budgets and Benefits
- View Timelines, Build Roadmaps



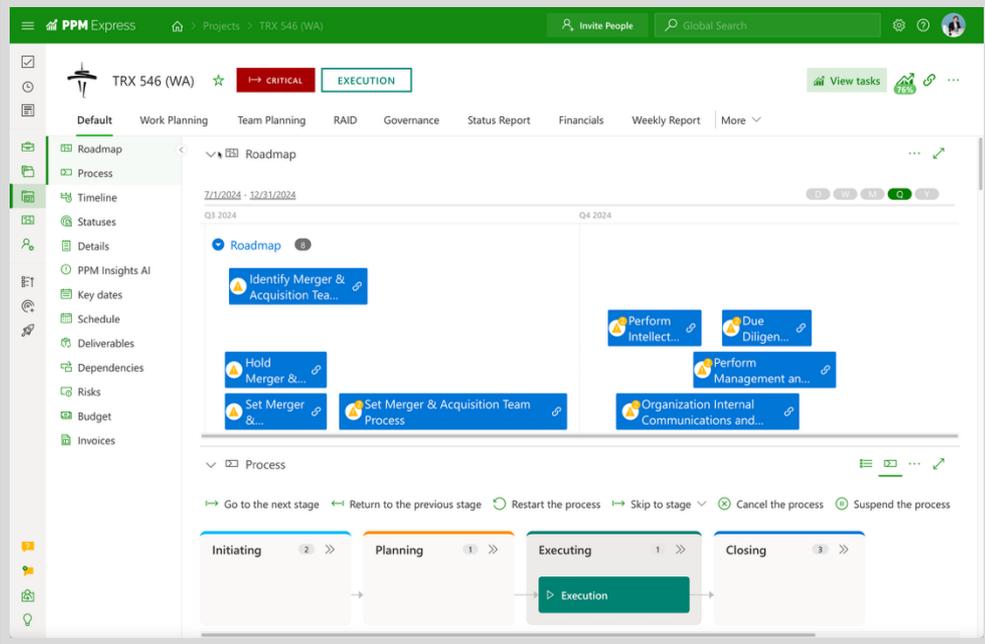
Portfolio Risk Management

Manage Risks across Portfolios and Programs



Project Dashboards

- Organize and View all Project Data in a single View
- Organize as page with section or as Tabs logically grouping information
- Embed Roadmaps and Project Status Reports

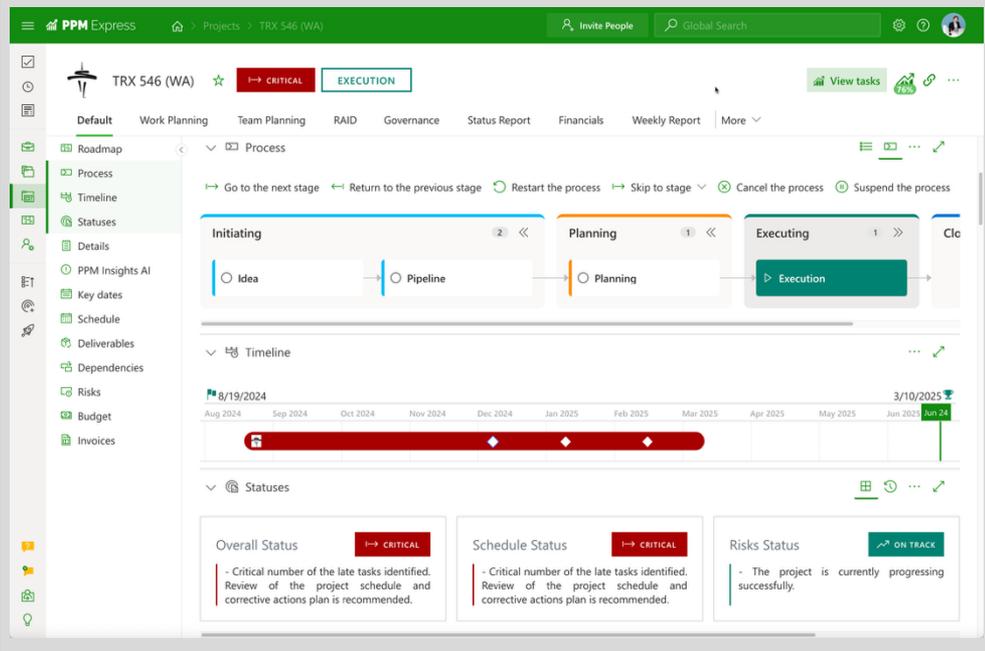


The screenshot displays the PPM Express interface for project TRX 546 (WA), which is in the EXECUTION phase. The dashboard includes a navigation menu on the left with options like Roadmap, Process, Timeline, and Statures. The main area shows a Gantt chart for the period 7/1/2024 to 12/31/2024, with tasks such as 'Identify Merger & Acquisition Tea...', 'Perform Intellect...', and 'Due Diligen...'. Below the Gantt chart, a process flow diagram shows the current stage as 'Executing' with a sub-task 'Execution' highlighted.

Project Lifecycle & Stage-Gate

- Define Custom Project Lifecycles and Workflows:
 - PMI
 - APM
 - PRINCE
 - Stage-Gate

- Track Statuses and Timelines



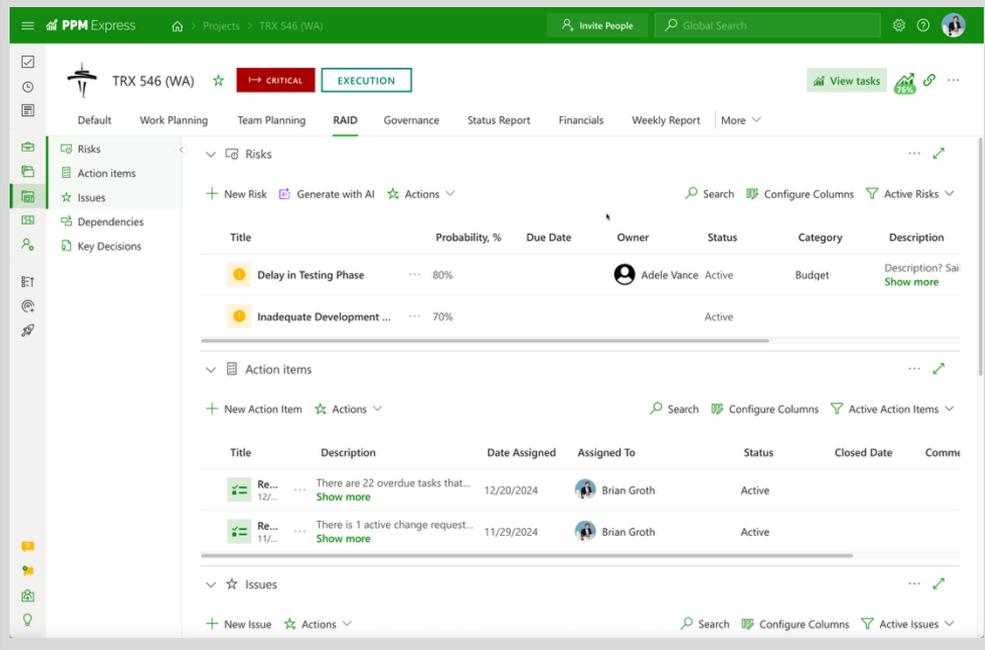
The screenshot displays the PPM Express interface for a project named 'TRX 546 (WA)'. The project is currently in the 'EXECUTION' stage, which is highlighted in a red box. The interface is divided into several sections:

- Navigation Bar:** Includes 'Default', 'Work Planning', 'Team Planning', 'RAID', 'Governance', 'Status Report', 'Financials', 'Weekly Report', and 'More'.
- Process Flow:** A horizontal flow diagram showing stages: 'Initiating' (containing 'Idea' and 'Pipeline'), 'Planning' (containing 'Planning'), and 'Executing' (containing 'Execution'). Navigation arrows allow moving between stages.
- Timeline:** A Gantt chart view showing a red bar representing a task or milestone from August 19, 2024, to June 10, 2025.
- Statuses:** Three summary cards at the bottom:
 - Overall Status:** CRITICAL. Description: '- Critical number of the late tasks identified. Review of the project schedule and corrective actions plan is recommended.'
 - Schedule Status:** CRITICAL. Description: '- Critical number of the late tasks identified. Review of the project schedule and corrective actions plan is recommended.'
 - Risks Status:** ON TRACK. Description: '- The project is currently progressing successfully.'

RAID Logs

Identify, Track and Manage:

- Deliverables
- Risks
- Issues
- Dependencies
- Decisions
- Action Items
- Lessons Learned
- Change Requests



The screenshot shows the RAID Logs interface in PPM Express for project TRX 546 (WA). The interface is divided into several sections:

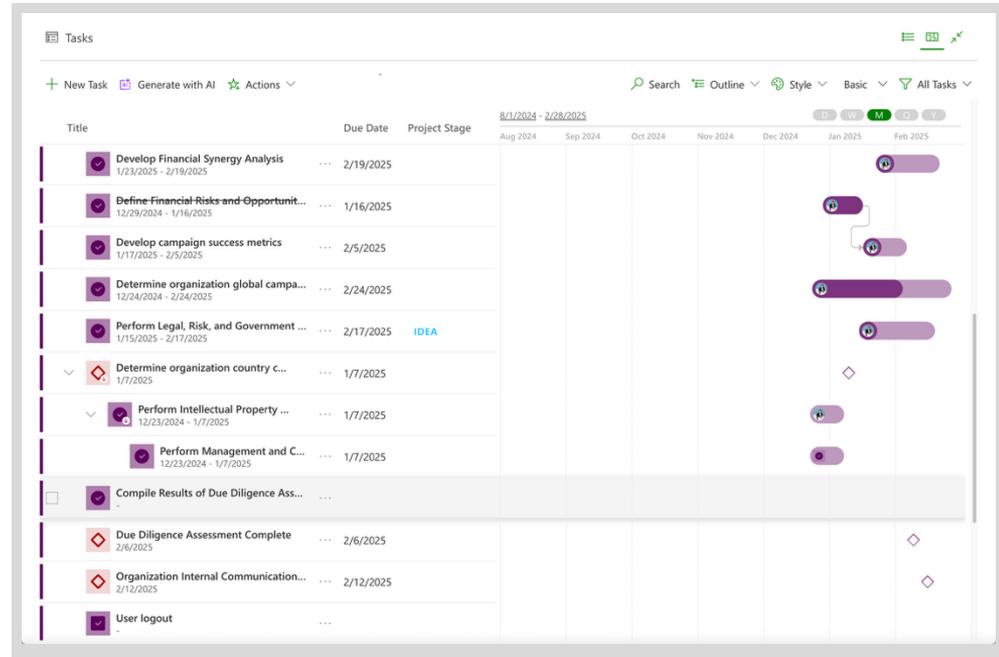
- Header:** PPM Express logo, project name (TRX 546 (WA)), status (CRITICAL), and phase (EXECUTION).
- Navigation:** Tabs for Default, Work Planning, Team Planning, RAID (selected), Governance, Status Report, Financials, and Weekly Report.
- Left Sidebar:** A vertical menu with icons for Risks, Action Items, Issues, Dependencies, and Key Decisions.
- Risks Section:**
 - Buttons: + New Risk, Generate with AI, Actions
 - Search, Configure Columns, Active Risks

Title	Probability, %	Due Date	Owner	Status	Category	Description
Delay in Testing Phase	80%		Adele Vance	Active	Budget	Description? Show more
Inadequate Development ...	70%			Active		
- Action Items Section:**
 - Buttons: + New Action Item, Actions
 - Search, Configure Columns, Active Action Items

Title	Description	Date Assigned	Assigned To	Status	Closed Date	Comments
Re... 12/...	There are 22 overdue tasks that...	12/20/2024	Brian Groth	Active		Show more
Re... 11/...	There is 1 active change request...	11/29/2024	Brian Groth	Active		Show more
- Issues Section:**
 - Buttons: + New Issue, Actions
 - Search, Configure Columns, Active Issues

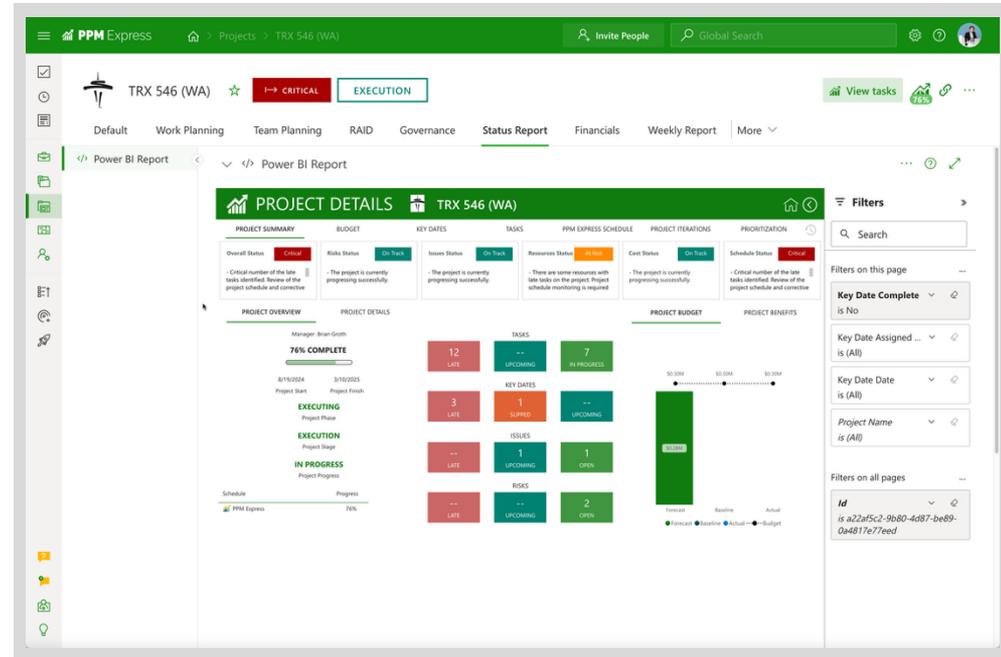
Task Management

- Manage Schedules, Task Lists & Backlogs
- Unlimited hierarchy, subtasks, dependencies, lead/lag times
- Baseline Schedule to track variances
- Multiple Modes:
 - Average Progress
 - Efforts
 - StoryPoints
- Automatic Status Calculation



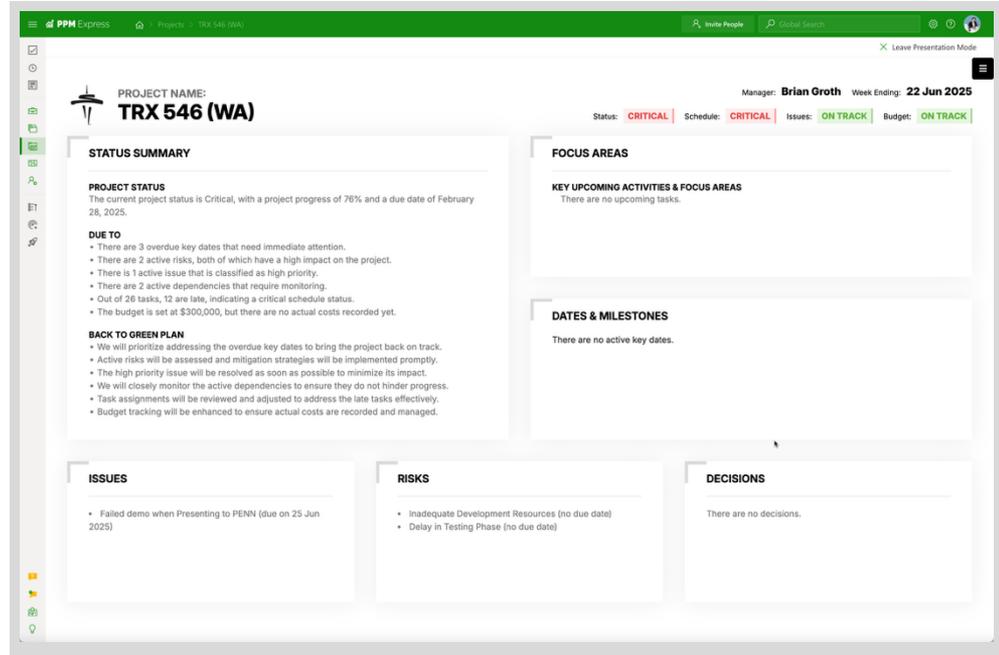
Integrated Executive Reporting

- Embed Microsoft Power BI reports into Project Dashboards for unified user experience
- Hundreds of Ready-to-use Reports available as part of the product



AI-Generated Status Reports

- Modern and Contemporary Reports
- Generated **with AI / LLM**
- Scheduled Distribution as **PDFs** to leadership, stakeholders and project sponsors automatically



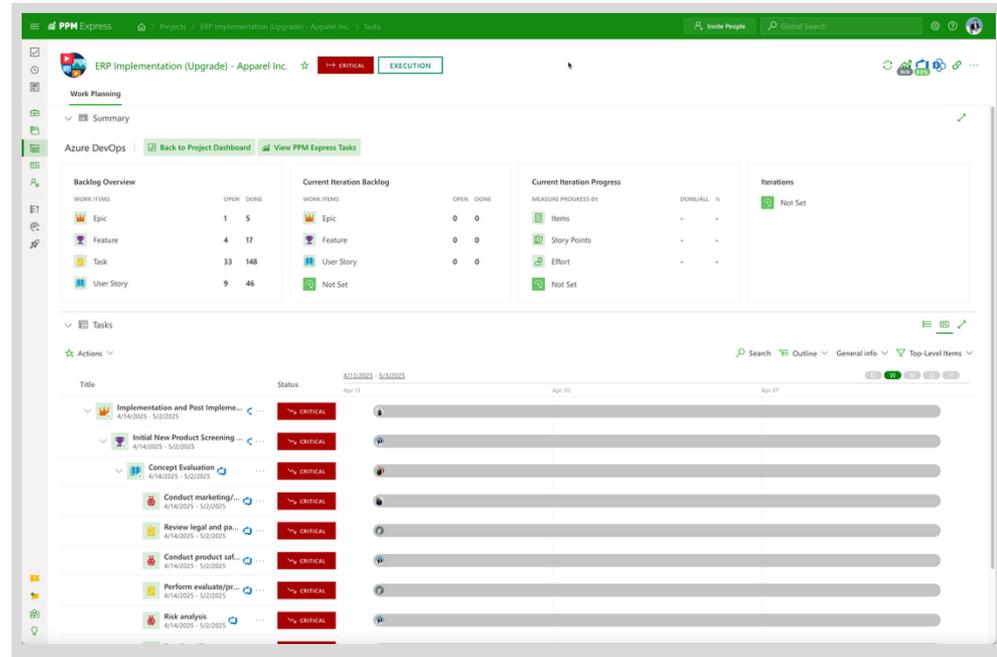
The screenshot displays a project status report interface for 'TRX 546 (WA)'. The report is categorized as 'CRITICAL' and shows a 76% project progress. Key sections include:

- STATUS SUMMARY:**
 - PROJECT STATUS:** The current project status is Critical, with a project progress of 76% and a due date of February 28, 2025.
 - DUE TO:**
 - There are 3 overdue key dates that need immediate attention.
 - There are 2 active risks, both of which have a high impact on the project.
 - There is 1 active issue that is classified as high priority.
 - There are 2 active dependencies that require monitoring.
 - Out of 26 tasks, 12 are late, indicating a critical schedule status.
 - The budget is set at \$300,000, but there are no actual costs recorded yet.
 - BACK TO GREEN PLAN:**
 - We will prioritize addressing the overdue key dates to bring the project back on track.
 - Active risks will be assessed and mitigation strategies will be implemented promptly.
 - The high priority issue will be resolved as soon as possible to minimize its impact.
 - We will closely monitor the active dependencies to ensure they do not hinder progress.
 - Task assignments will be reviewed and adjusted to address the late tasks effectively.
 - Budget tracking will be enhanced to ensure actual costs are recorded and managed.
- FOCUS AREAS:**
 - KEY UPCOMING ACTIVITIES & FOCUS AREAS:** There are no upcoming tasks.
 - DATES & MILESTONES:** There are no active key dates.
- ISSUES:**
 - Failed demo when Presenting to PIENN (due on 25 Jun 2025)
- RISKS:**
 - Inadequate Development Resources (no due date)
 - Delay in Testing Phase (no due date)
- DECISIONS:** There are no decisions.

Additional report details: Manager: Brian Groth, Week Ending: 22 Jun 2025. Status: CRITICAL, Schedule: CRITICAL, Issues: ON TRACK, Budget: ON TRACK.

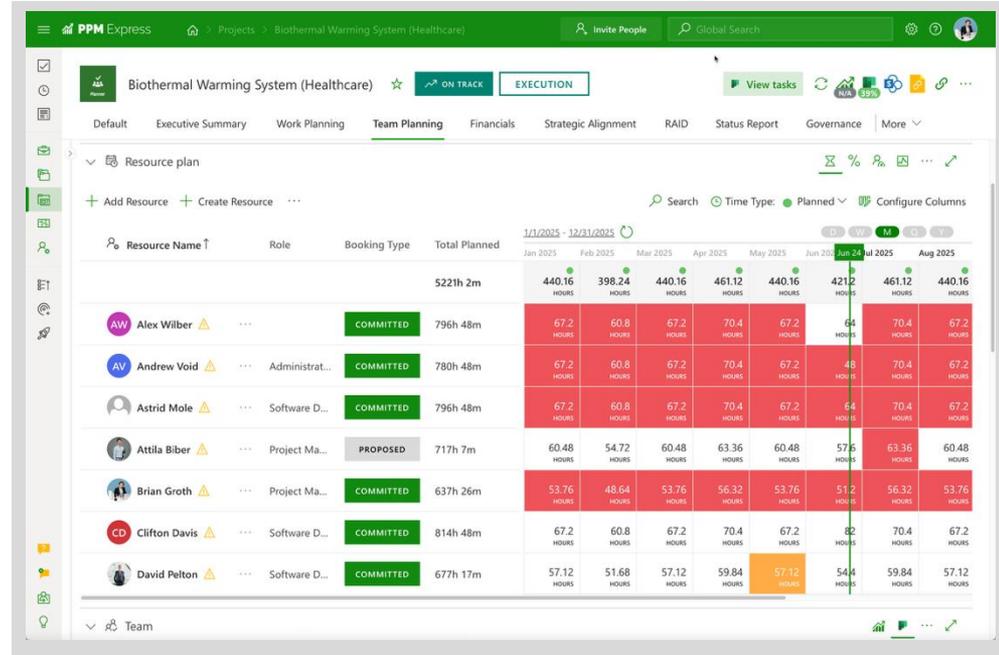
Azure DevOps Integration

- Integrated with Azure DevOps.
- Integration is available as standard offering, not additional fees & charges
- Integration options:
 - **One-way** (from DevOps)
 - **Two-way** (Add Work Items to Task Management as Tasks) via Extension Model
 - **Push** (create Ideas as ADO Work Items)



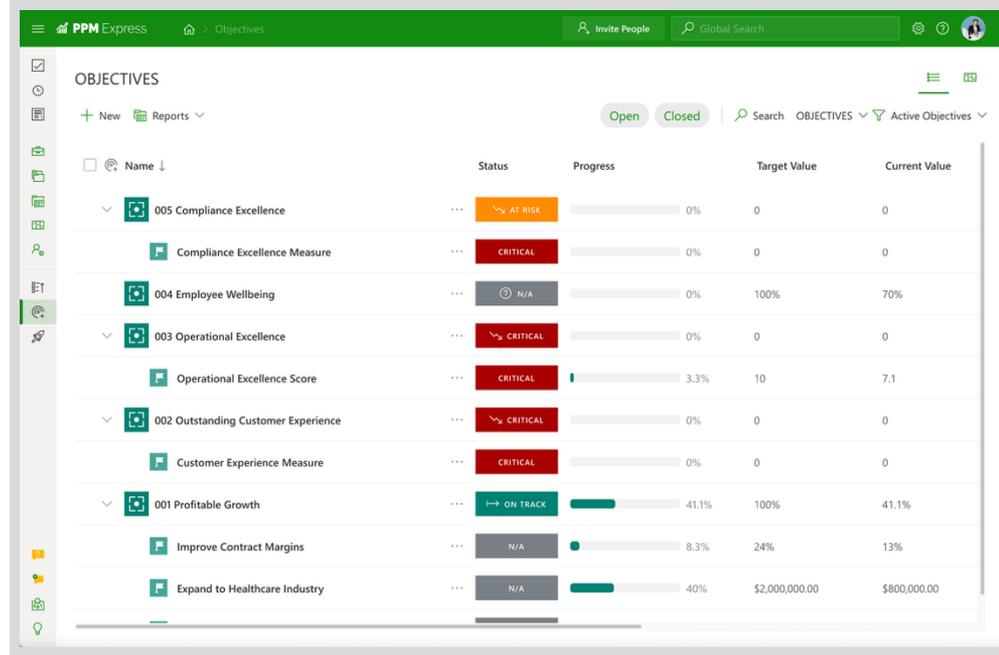
Resource Planning

- Plan and Allocate Resources
- Analyze and Manage Resource Utilization
- Proactively resolve resource allocation conflicts
- Understand Resource Allocation & Workload across multiple projects



Strategy & OKR

- Define Strategic Priorities
- Define Enterprise-level, Department and Team-level Objectives and Key Results
- Map project that deliver to Strategic Initiatives and Objectives

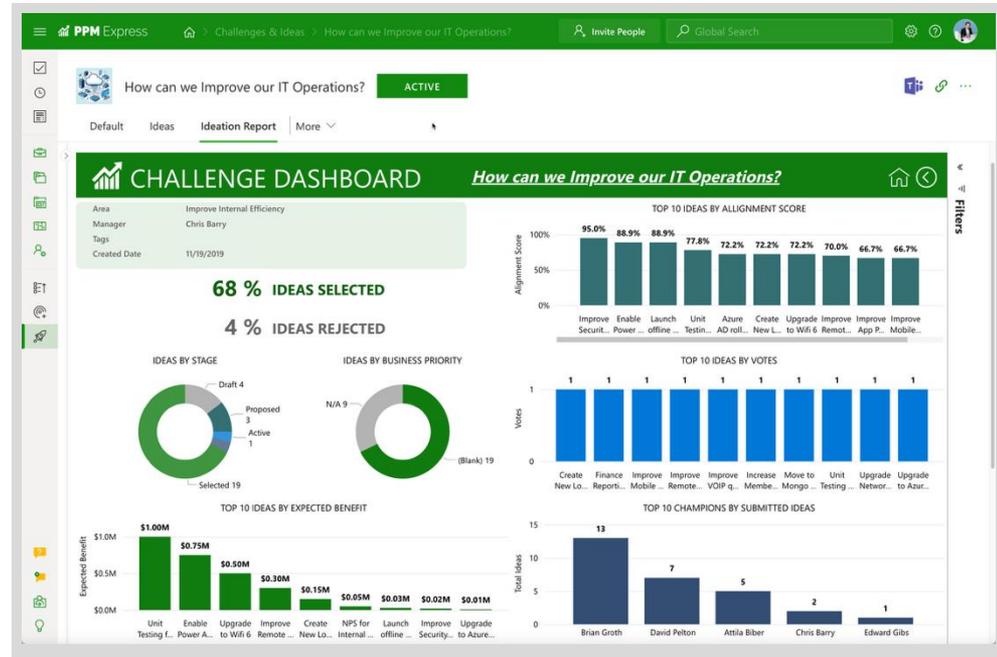


The screenshot shows the 'OBJECTIVES' dashboard in PPM Express. It features a table with columns for Name, Status, Progress, Target Value, and Current Value. The table is organized into a hierarchy of objectives and measures. The status of each objective is indicated by a colored box: orange for 'AT RISK', red for 'CRITICAL', and grey for 'N/A' or 'ON TRACK'. Progress is shown as a percentage with a corresponding bar chart.

Name	Status	Progress	Target Value	Current Value
005 Compliance Excellence	AT RISK	0%	0	0
Compliance Excellence Measure	CRITICAL	0%	0	0
004 Employee Wellbeing	N/A	0%	100%	70%
003 Operational Excellence	CRITICAL	0%	0	0
Operational Excellence Score	CRITICAL	3.3%	10	7.1
002 Outstanding Customer Experience	CRITICAL	0%	0	0
Customer Experience Measure	CRITICAL	0%	0	0
001 Profitable Growth	ON TRACK	41.1%	100%	41.1%
Improve Contract Margins	N/A	8.3%	24%	13%
Expand to Healthcare Industry	N/A	40%	\$2,000,000.00	\$800,000.00

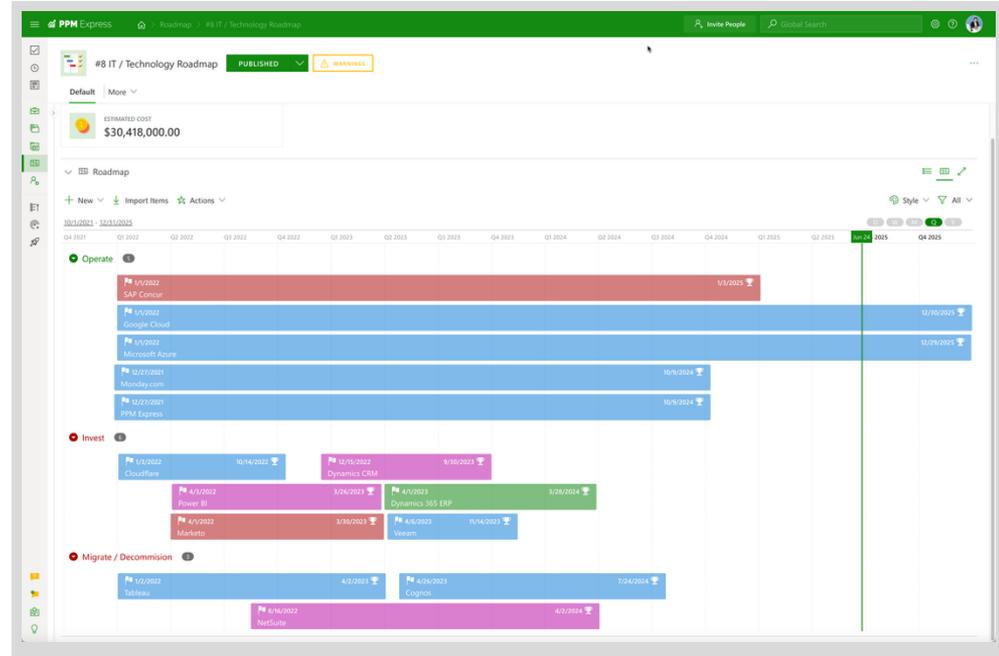
Ideation and New Work Intake

- Create Ideation Workspaces
- Capture Ideas, Change Requests, Feedback and new project requests
- Evaluate, Build Business Cases, Prioritize and Select Ideas
- Use Existing Intake forms and send requests via Rest API



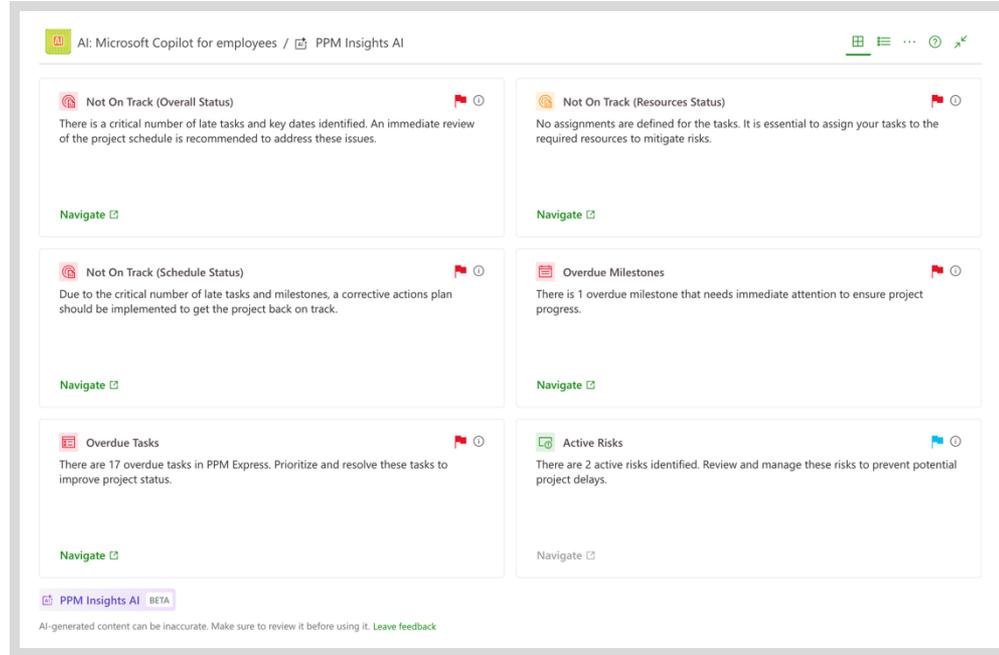
Roadmaps

- Build Portfolio Roadmaps
- Build Initiative Roadmaps
- Project Level Roadmap
- Program Increment Roadmaps



AI Insights

- PPM Express uses Open AI ChatGPT and Azure Open AI
- PPM Insights AI will constantly monitor projects, identify potential issues and signal to Project Manager
- Objective is to proactively prevent issues and stay in control.



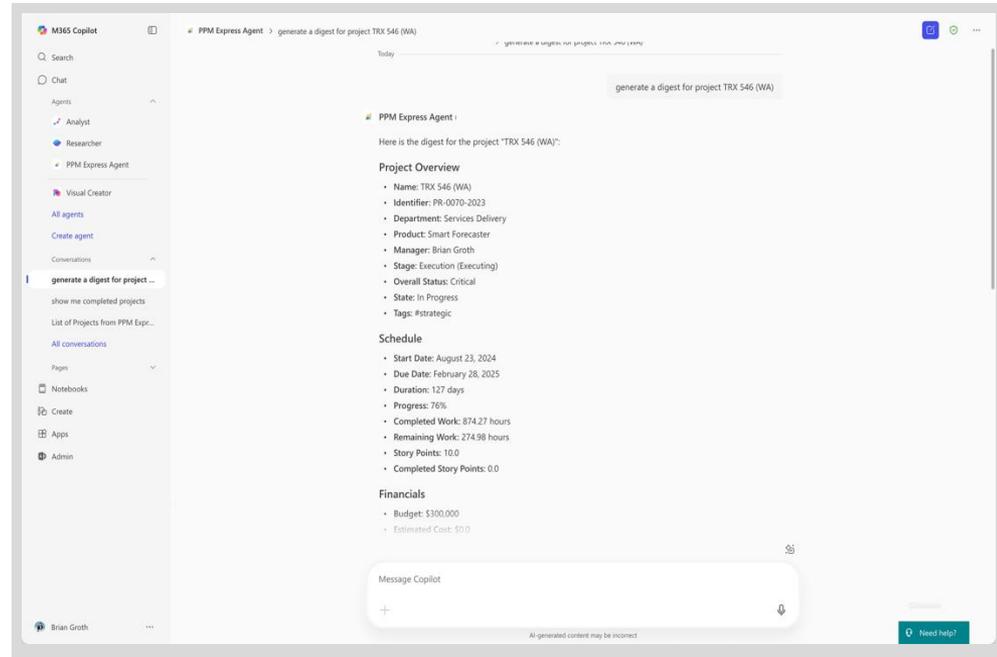
The screenshot displays the 'PPM Insights AI' interface, which provides a comprehensive overview of project health. The dashboard is organized into a grid of six key alert cards, each with a 'Navigate' button for further details. The alerts include:

- Not On Track (Overall Status):** Alerts for a critical number of late tasks and key dates, recommending an immediate review of the project schedule.
- Not On Track (Resources Status):** Alerts for missing resource assignments, emphasizing the need to assign tasks to required resources to mitigate risks.
- Not On Track (Schedule Status):** Alerts for a high number of late tasks and milestones, suggesting a corrective actions plan to get the project back on track.
- Overdue Milestones:** Alerts for overdue milestones that require immediate attention to ensure project progress.
- Overdue Tasks:** Alerts for 17 overdue tasks in PPM Express, prioritizing their resolution to improve project status.
- Active Risks:** Alerts for 2 active risks identified, advising review and management to prevent potential project delays.

At the bottom of the dashboard, there is a 'PPM Insights AI BETA' label and a disclaimer: 'AI-generated content can be inaccurate. Make sure to review it before using it. [Leave feedback](#)'.

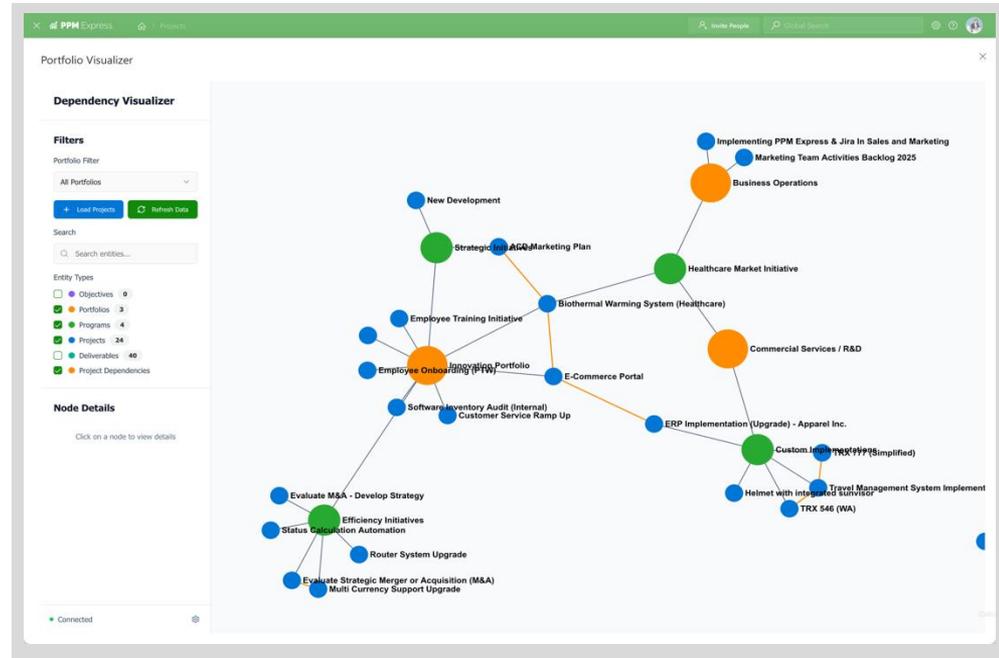
AI / Microsoft Copilot

- Use Microsoft Copilot to work with PPM Express
- Query any data from PPM Express
- Create Ideas using AI



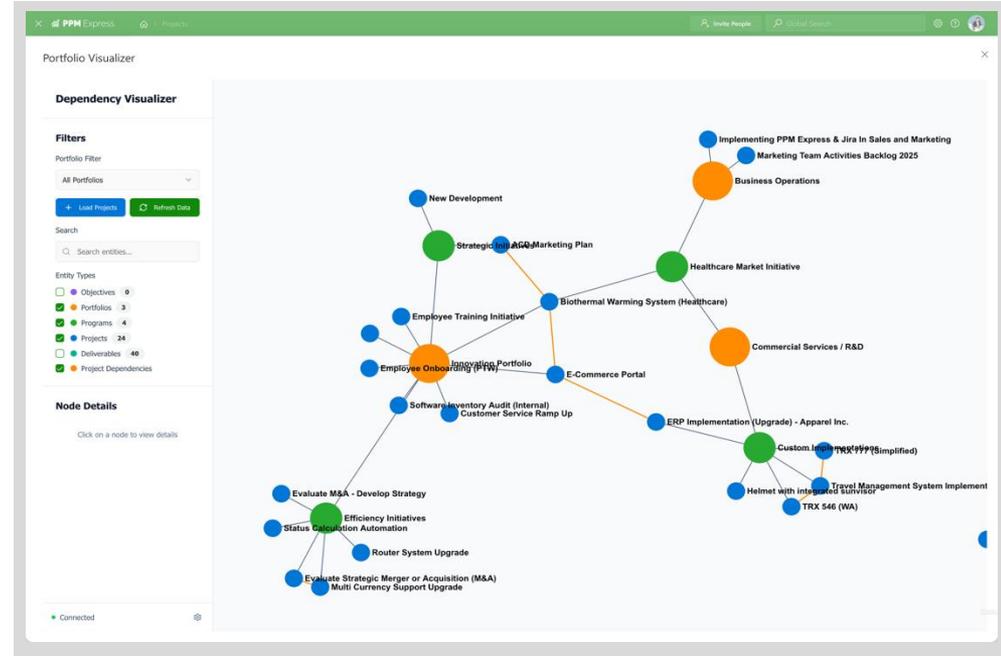
Extensibility Model / Plugins

- Visualize Portfolio Graphs
- 2-Way Sync with Azure DevOps / Jira
- Create Issues in Jira, work items in ADO from Ideas
- Portfolio, Program, Project Budget Balancing
- Project Dashboards and Visualizations



Extensibility Model & Vibe Coding

- Build Custom Apps for PPM Express using vibe-Coding tools
- Replit, Bolt, Lovable and Power Platform
- Connect to PPM Express API, host at your environment, embed into PPM Express



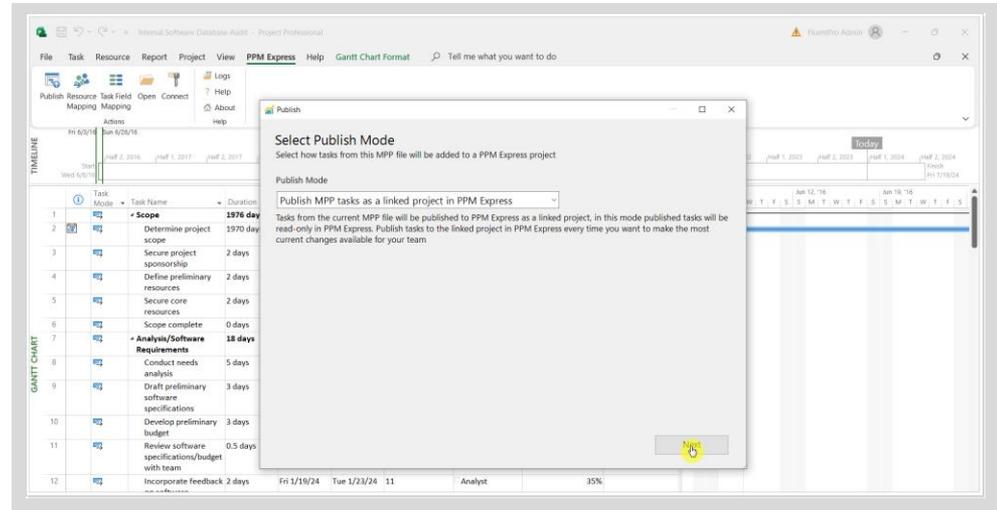
Reporting with Power BI

- **200+ Reports** available out of the box, included with a product.
- Executive Reports
- Ideation / Demand Management Report
- Governance & RAID Logs Reports
- Financials, Resource Planning and more
- Power BI Report Templates provided



Microsoft Project Integration

- **Model 1:** Import MPPs for Projects into PPM Express task management and use the PPM Express web interface for Project Management
- **Model 2:** Publish Projects from MPP periodically into PPM Express (“Reporting / Visibility Mode”). Edits are still done in MPPs
- **Model 3:** Migrate from Project Online by transferring connected projects to PPM Express Task Management





Advisory Services



Our expert consultants collaborate with you to:

- Identify business goals
- Define KPIs and success metrics
- Build a strategic roadmap for transformation

Achieve clarity and confidence from day one.



Implementation Services

Ensure a seamless and efficient implementation aligned with your business processes. We offer:

- Tailored system configurations
- Business process alignment
- High adoption and accelerated value realization

Faster go-live. Lasting results.

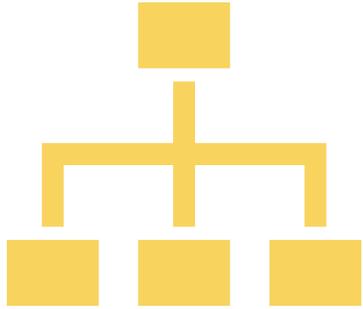
Training Services

Accelerate adoption and capability across your teams with **Online Help Portal, Videos and Guides**:

- Scalable training for all roles
- Supports diverse learning styles

Train for today. Scale for tomorrow.

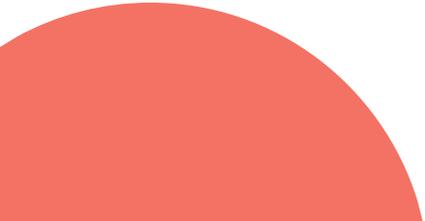
Pricing



Enterprise Ultra

Starting at \$24,000/year

- All Features
- Unlimited Users
- Unlimited Team Members / Viewers
- Premium Support

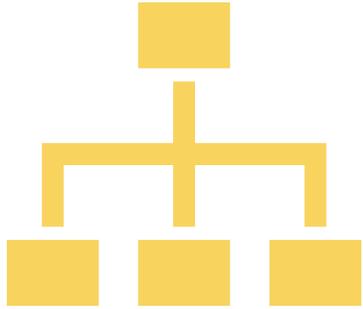


Enterprise Ultra

Features and Capabilities

Category	Features Included
User Access	<ul style="list-style-type: none">✔ Unlimited Users
Core PPM Capabilities	<ul style="list-style-type: none">✔ Project Management✔ Program Management✔ Portfolio Management
Time & Reporting	<ul style="list-style-type: none">✔ Unlimited Time Tracking✔ 200+ Microsoft Power BI Reports✔ Enterprise-grade Time Tracking Capabilities
Project Intelligence	<ul style="list-style-type: none">✔ Integrated Project Status Reports (Core & Advanced)✔ Project Management AI✔ Advanced AI for Project Management
Planning & Management	<ul style="list-style-type: none">✔ Resource Planning & Utilization (Unlimited Resources)✔ Financials & Benefit Realization Planning✔ Innovation & Ideation Management✔ Roadmaps✔ OKR and Strategy Alignment
Integrations	<ul style="list-style-type: none">✔ Azure DevOps✔ Jira✔ Microsoft Planner✔ Microsoft Project / Project Online✔ Monday.com✔ Smartsheet✔ REST API✔ Zapier✔ Power Automate
Security & Admin	<ul style="list-style-type: none">✔ Advanced Security Options✔ Active Directory Integration✔ Audit Log✔ Private Projects✔ Archive Projects
Governance & Extensions	<ul style="list-style-type: none">✔ Advanced Stage-Gate✔ Extensibility & Add-Ons
AI & Automation	<ul style="list-style-type: none">✔ Microsoft Copilot Integration

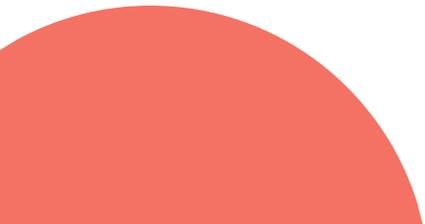
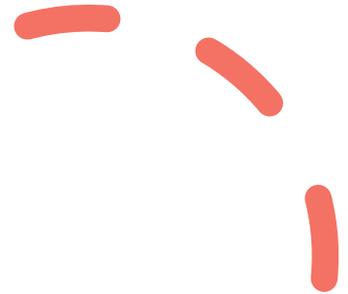
Pricing



PPM Express Enterprise

\$7,200/year

- **Project Portfolio Management**
- **All Core Features**
- **Unlimited Users**
- **Unlimited Team Members / Viewers**



Enterprise

Features and Capabilities

Category

Core Capabilities

Feature

- ✔ Project Management
- ✔ Program Management
- ✔ Portfolio Management
- ✔ Unlimited Time Tracking
- ✔ 200+ Microsoft Power BI Reports
- ✔ Integrated Project Status Reports (Core Features)
- ✔ Resource Planning and Utilization (Unlimited Resources)
- ✔ Financials and Benefit Realization Planning
- ✔ Project Management AI
- ✔ Innovation & Ideation Management
- ✔ Roadmaps
- ✔ OKR and Strategy Alignment
- ✔ Azure DevOps
- ✔ Jira
- ✔ Microsoft Planner
- ✔ Microsoft Project
- ✔ Microsoft Project Online
- ✔ Monday.com
- ✔ Smartsheet
- ✔ REST API, Zapier, and Power Automate Connectors
- ✘ Advanced AI for Project Management
- ✘ Integrated Project Status Reports (Advanced Capabilities)
- ✘ Advanced Security Options
- ✘ Audit Log
- ✘ Archive Projects
- ✘ Private Projects
- ✘ Advanced Stage-Gate
- ✘ Extensibility & Add-Ons

Planning & Intelligence

Integrations

Advanced Capabilities

Security & Admin

Governance & Extensibility