



Acuity PPM is the right starting point for growing PMOs

AI-Ready Today. AI-Powered When You Are.

80% of PMO's are Level 1 or Level 2 maturity; while many enterprise PPM solutions are designed for highly mature, process-heavy organizations, **Acuity PPM focuses on what Level 1 and Level 2 PMOs need most**: clear visibility, standardized intake and prioritization, and simple capacity and portfolio views—without overwhelming teams with unnecessary complexity.

As organizations mature toward Level 3, Acuity PPM scales with them, adding more advanced capabilities without forcing a complete tool change.

Acuity PPM will help you mature your PMO



- **Right-sized for Level 1–2 PMOs** – Standardize intake, scoring, and portfolio views without requiring fully formalized project management processes.
- **Fast to adopt** – Simple, intuitive interfaces that business stakeholders and project owners can use without extensive training.
- **Focused on decisions**, not data entry – Capture just enough information to make clear portfolio and capacity decisions, rather than burdening teams with complex templates and forms.
- **Expandable for Level 3** – As governance, data quality, and processes mature, Acuity PPM can support additional portfolio analysis, capacity planning, and scenario-based decision making—without moving to another system.

RESULT: leave spreadsheet chaos behind and build a sustainable PMO foundation without overspending on tools you are not ready to use.





Built for where you are today, ready for where you are going



Adam Sykes

Ocean State Job Lot



We tried to build a PPM tool inside Smartsheet, but outgrew that. We made the switch to Acuity as our PPM tool. We built a new project delivery methodology with a number of different steps, tools, templates. Acuity PPM has been really helpful because it's very simple to use, very configurable, and has been able to grow with us as we're continually evolving our methodology.



Most PPM platforms assume a fully established PMO with rigid processes, extensive data, and dedicated administrators. For many organizations, that is not the reality. **Acuity PPM is intentionally designed for emerging and developing PMOs**—those moving from spreadsheets and ad-hoc reports to a structured, value-driven portfolio. You get the essentials to manage demand, prioritize projects, and understand capacity, with a pathway to more advanced capabilities as your maturity grows, not before.

PORTFOLIO DASHBOARD

PORTFOLIO CAPACITY PLAN





PPM Starter

The best first step beyond spreadsheets

Many organizations stay in spreadsheets far too long because the alternative feels like 'too much tool.' But jumping into enterprise PPM tools often creates more administration than value. PPM Starter gives you the structure to get out of spreadsheets without the overhead that slows you down.

The **PPM Starter** module includes:

- Dashboards
- Project and portfolio tracking
- Status reports, Risk logs, Issue logs
- Decision logs, Lessons learned logs
- Financial management
- Portfolio roadmaps



Project and Portfolio Tracking

You can't manage what you can't see. Acuity PPM becomes your "single source of truth" of key project information to simplify the reporting process. Acuity PPM Starter replaces spreadsheets and home-grown databases to enable you to [track your portfolio](#) so that senior leaders have centralized visibility of key initiatives.



Portfolio Roadmaps

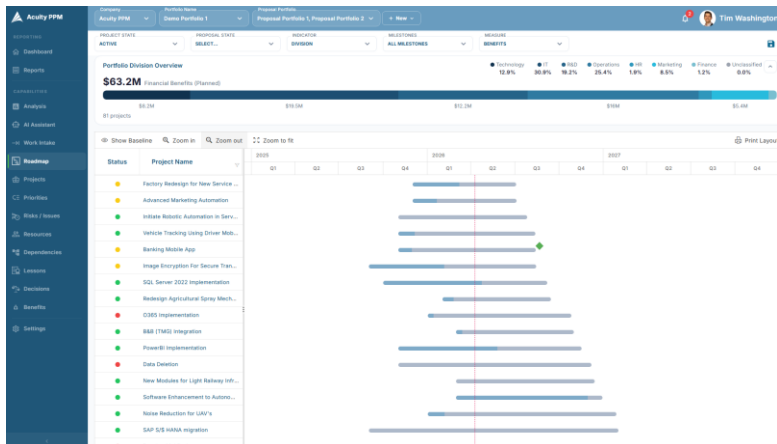
[Roadmaps](#) support strategic planning and help leadership visualize the timing and sequencing of projects to identify dependencies and avoid organizational conflicts. Zoom out to gain strategic visibility of projects, zoom in to get a tactical view of key projects with their upcoming milestones to better manage your portfolio.



Project Financials

Financial planning is an important part of project management. Track project budget and actuals according to your organization's configuration. Financial data is aggregated to portfolio dashboard.

PORTFOLIO ROADMAP



PROJECT FINANCIALS

The screenshot shows a detailed financial table for the "Airport Network Flight Scheduler" project. Key metrics include: Total Cost (Planned: \$1,968,505, Actual: \$259,454), Total Operational Expenses (Planned: \$783,505, Actual: \$59,450), Total Capital Expenses (Planned: \$1,185,000, Actual: \$200,004), and Total Financial Benefits (Planned: \$2,294,015, Actual: \$300,000). The table below provides a monthly breakdown of costs and benefits from January to December.

GROUP / ITEM	INFORMATION	NOTES	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	TOTAL	PLANNED
Financial Benefits	Cost Avoidance	Cost Center A...		60,000	70,000	80,000	90,000	120,000	130,000	220,000	220,000	270,000	270,000	270,000	1,830,000	2,884,000
	Cost Avoidance	Cost Center A...		60,000	70,000	80,000	90,000	100,000	110,000	200,000	200,000	210,000	210,000	210,000	1,660,000	1,684,000
	Cost Savings	Cost Center A...														
	Sales Revenue	Cost Center A...						25,000	25,000	25,000	25,000	25,000	25,000	25,000	175,000	215,000
Operation Expense	External Costs	FA-K5001 Software		45,000	45,000	35,000	25,000	200,000				80,000	80,000		565,000	783,505
	Internal Costs	FA-K5055 Comm and...		45,000	25,000	25,000	25,000	200,000							320,000	422,500
	Internal Costs	FA-K5258														
Capital Expense	Equipment	Equip 3456 Heavy Mac...			140,000	45,000	50,000	80,000	80,000						395,000	1,185,000
	Equipment	Equip 3456 Heavy Mac...			140,000	45,000	50,000	80,000	80,000						395,000	395,000





PPM Essentials

Work Intake is Critical to Portfolio Management

Work Intake is the front door of your portfolio. Without a structured process, project requests arrive through emails, hallway conversations, and spreadsheets — with inconsistent information and no way to evaluate them against each other. Our Work Intake module gives your team a disciplined process to capture, evaluate, and present proposals for leadership review. Once approved, projects are automatically added to your portfolio.

Click [here](#) to learn more about the work intake process. With built-in prioritization scoring, you can evaluate proposed projects before they are approved — ensuring your portfolio is filled with the highest-value work, not just the loudest requests.

Work Intake answers the most important portfolio question: 'Should we do this work?'



Work Intake

[Work Intake](#) refers to the ability to create and manage new project requests. Successful Work Intake is one of the most important factors for successful portfolio management because you can control the amount of work and quality of work coming into the project portfolio.



Configurable Proposals

With Acuity PPM, you can configure your intake forms to collect the right amount of information to initiate the intake process. This means your teams are spending the right amount of effort to create a proposal for senior leadership review.

WORK INTAKE PROPOSAL LIST

PROPOSAL NAME	PROPOSAL STATE	DATE CREATED	PROPOSAL DESCRIPTION	CATEGORY	STRATEGIC GOAL	TOTAL COST (PLANNED)	PROJECT SPONSOR	REQUESTOR
AI Test	Open	Mar 1, 2023	Looking at the approval process	Transform	Qualif2	\$118,800	Betsy Hunter	Andrew Ingaly
AP Automation	Open	Feb 24, 2023	Automate AP Invoice processing	Transform	Qualif2	\$225,000	Jean Franklin	
Automate HR services	Open	Jul 21, 2022	Automate HR services for HR	Oper	Qualif2	\$1,000,000	Betsy Hunter	Alyson Anagnost
Biological Department Update	Cancelled	Aug 5, 2024	This is a new proposal description.	Oper	Qualif1	\$3,000	Betsy Hunter	Katherine Stambaska
ESD Project Sample	Open	Mar 21, 2024	Sample RFP project	Oper	Qualif2	\$0		Elaine Roberts
Omega - Typilio - Employee Clinics	Open	Nov 10, 2023	15 Typilio for 15 different employees in the Phoenix, AZ area	Oper	Qualif1	\$0		Adam Beale
Crypto Payment	Open	May 18, 2022	This project will integrate crypto wallets with the upcoming V2 of our online banking platform.	Oper	Qualif1	\$1,000,000	David Atkins	David Randall
Digital	Open	Jun 24, 2020	This new marketing solution would support digital marketing.	Oper	Qualif1	\$10,000,000	Brandon Johnson	David Schneider
DM Increasing Storage	Open	Aug 4, 2025	Increase storage	Oper	Qualif1	\$100,000		David Massey
Enhancements to Mobile App	Cancelled	Jul 1, 2019	Operations has asked for enhancements to our mobile app.	Oper	Qualif2	\$0		Tim Washington
Enhancements to Salesforce	Open	Jul 1, 2019	Our Sales and Marketing team is requesting new enhancements to improve the sales process.	Oper	Qualif4	\$0		Loft Jensen

PROPOSAL FORM

ADD PROPOSAL

CREATE CANCEL

Proposal Portfolio * Acuity PPM Demo Proposals

Proposal Name *

Requestor Tim Washington

Description *

Proposal Objectives

Background

Benefits

Recommendations

Proposal Cost \$ 0





PPM Essentials

Prioritization is an Essential Part of Portfolio Management

Every organization has more project ideas than capacity to deliver. Acuity PPM's scoring model gives your leadership team a transparent, defensible way to evaluate project value and risk — so prioritization decisions are based on shared facts, not opinions or politics.

Once projects are scored, the risk-value bubble chart gives leaders a visual map of portfolio balance — showing at a glance where too much investment may be concentrated in high-risk, low-value work. Click [here](#) to learn more about prioritization.



Scoring Model

The right [scoring model](#) turns subjective debates into objective conversations. Configure value and risk criteria that reflect your organization's strategic priorities, then score consistently across all projects to clearly identify which work maximizes portfolio value.

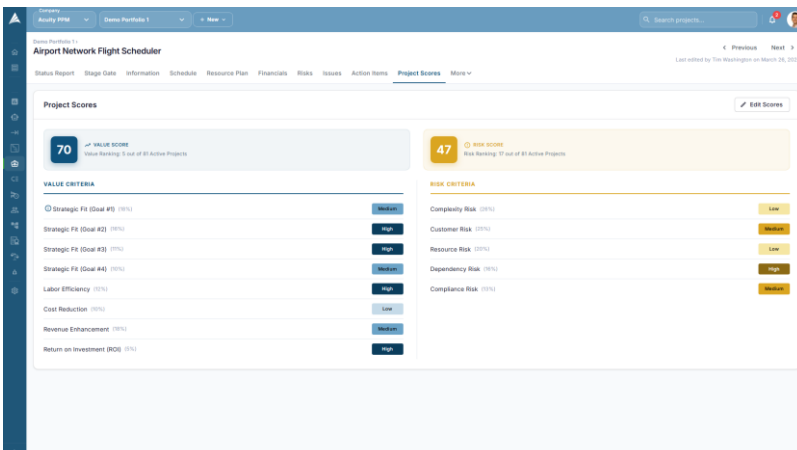


Balanced Portfolio View

The [risk-value bubble chart](#) is a valuable output that graphically portrays all the investments in the portfolio across two axis: risk and value. It informs leadership of how much work may be going on in the higher risk/lower value quadrant that should be reduced.

SCORING PAGE

RISK-VALUE BUBBLE CHART





PPM Plus

Ensure Critical Resource Availability

Resource capacity planning answers the question every PMO Director dreads: 'Do we have the people to deliver what we've committed to?' Organizations commonly overcommit their teams because they lack visibility into who is available and when. Acuity PPM makes capacity planning practical — even for PMOs without a dedicated resource manager.

With portfolio scenario planning, you can model different portfolio options and see the capacity impact before committing — helping you make better strategic decisions with confidence. Click [here](#) to learn more about the challenges of resource capacity planning.



Project Resource Planning

Projects succeed when resources are planned well and teams are fully supported. Acuity PPM gives clear insight into the effort expected from every team member.



Portfolio Capacity Planning

At the portfolio level, you need visibility of which roles and individuals are over-utilized; otherwise, you jeopardize portfolio delivery. Acuity PPM utilizes the project resource plans and aggregates this data in a way that will actually help you manage the portfolio.



Portfolio Scenario Planning

The Analysis page enables scenario planning to evaluate portfolio options by budget, benefits, and objectives. It also supports project grouping with subtotals, and scenarios carry through to the Risk-Value Bubble Chart and Resources Page.

PORTFOLIO CAPACITY PLAN

DEPARTMENT	APR 2026	MAY 2026	JUN 2026	JUL 2026	AUG 2026	SEP 2026	OCT 2026	NOV 2026	DEC 2026
Engineering	100%	100%	100%	100%	80%	80%	80%	80%	70%
IT	100%	80%	80%	80%	70%	80%	80%	80%	80%
Business Analyst	100%	100%	100%	80%	80%	80%	80%	80%	80%
Human Resources	0%	0%	0%	0%	0%	0%	0%	0%	0%
Bethany Alder	100%	80%	80%	80%	80%	80%	80%	80%	80%
Bill Anderson	100%	70%	80%	70%	80%	80%	80%	80%	80%
Project Work	100%	100%	80%	80%	80%	80%	80%	80%	80%
Non-Project Work	10%	10%	10%	10%	10%	10%	10%	10%	10%
Bobby Argue	100%	140%	100%	100%	80%	80%	80%	80%	80%
Developer	100%	80%	80%	80%	80%	80%	80%	80%	80%
Project Manager	100%	100%	100%	80%	80%	80%	80%	80%	80%
Solutions Architect	80%	80%	80%	80%	80%	80%	80%	80%	80%
Operations	80%	40%	40%	40%	40%	40%	40%	40%	40%

PORTFOLIO SCENARIO PLANNING

Scenario	IN RANGE COST	PLANNED BENEFITS	RISK SCORE	GOALS
Scenario #1	\$4.2M	\$11.30M	11%	Goal 1 and 2
Scenario #2	\$1.5M	\$17.6M	10%	Goal 2 and 3
Scenario #3	\$21.6M	\$16.5M	14%	Goal 1 and 2

PROJECT NAME	RANK	VALUE SCORE	RISK SCORE	TOTAL COST PLANNED	FINANCIAL BENEFITS PLANNED	STRATEGIC GOAL
Software Enhancement to Autonomous UAV	1	85	14	\$30,000	\$6,000,000	Goal#1
Digital Marketing	3	78	30	\$30,000	\$75,000	Goal#1
Regulatory Compliance Platform	3	77	40	\$100,000	\$0	Goal#1
Camera Motion Sensing Project	4	73	40	\$60,000	\$0	Goal#1
Auto Strip	5	71	40	\$18,000	\$17,222	Goal#1
Airport Network Flight Scheduler	6	70	47	\$1,968,000	\$2,054,015	Goal#1
Vehicle Robotics Autonomous Service Department	7	70	50	\$0	\$1,400,000	Goal#1





The Five Pillars of Portfolio Management Intelligence

The Problem: Most AI in project management focuses on execution speed — helping teams deliver faster. But speed doesn't matter if you're delivering the wrong work.

The Solution: Acuity PPM applies AI to the five pillars of portfolio governance — improving the quality of decisions about what to fund, what to prioritize, and where to invest scarce resources. AI anchors decisions. Humans decide.



Work Intake Intelligence: AI improves what enters the portfolio. AI-assisted proposal creation helps requesters submit complete, structured proposals. Delivery confidence scoring gives leaders a data-driven view of likelihood of success before approval — so governance starts at the front door.



Prioritization Intelligence: AI establishes a defensible baseline for every governance conversation. Consistent, explainable draft scoring anchors leadership discussions in shared facts. Trade-off analysis models the full portfolio impact of funding one project over another across resources, financials, and strategic alignment.



Portfolio Planning Intelligence: AI evolves planning from a static timeline into active decision support. Fragility analysis highlights where the active roadmap is most likely to break based on signals from status reports, risk logs, resource plans, and priority scores. Scenario generation builds and compares alternative portfolio configurations.



Resource Capacity Intelligence: AI transforms capacity from passive reporting into active stewardship. When congestion occurs, AI generates relief options — adjust timing, reduce scope, or rebalance teams — with clear trade-offs. AI-inferred resource plans draft realistic staffing models for new proposals.



Risk Management Intelligence: AI elevates risk from a project-level register to a portfolio-level governance discipline. Cross-project risk correlation detects when individual project risks combine into portfolio-level threats. Opportunity intelligence identifies where calculated risk-taking could accelerate strategic outcomes.





Manage Projects in Acuity PPM



Victoria C.

Large Healthcare Org



By documenting everything in Acuity PPM, our Project Managers spend 30-40% less time compared to before when they had to touch multiple documents.



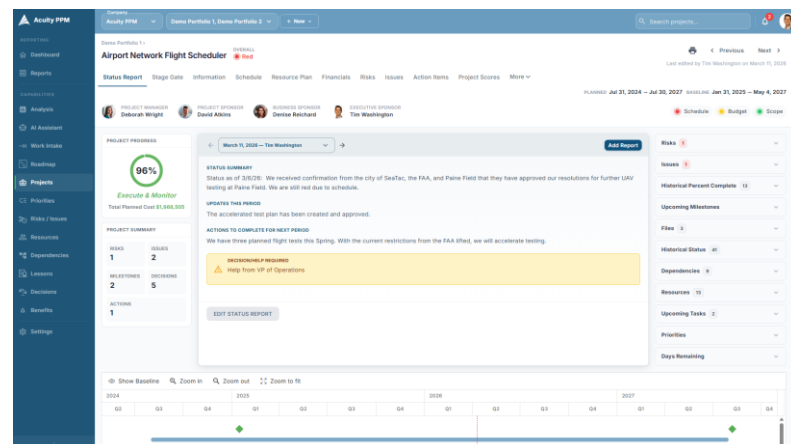
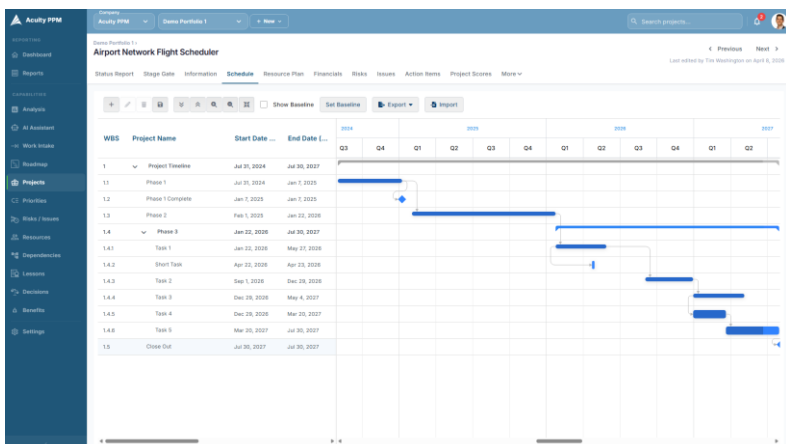
Project Management Capabilities

Acuity PPM isn't just a portfolio management solution — it gives your PMO a complete set of project management capabilities in one place, so your team stops juggling multiple tools and documents:

- Status Reports
- Risk Logs
- Issue Logs
- Resource Plan
- Financial Tracker
- Project Schedule (Gantt)
- Lessons Learned
- Decision Log
- Dependency Tracker
- Benefit Plan

PROJECTS SCHEDULES

STATUS REPORTS





PMO Operations AI Agents

The Team Your PMO Never Had

The Problem: Level 1 and Level 2 PMOs are almost always understaffed. There is no dedicated risk analyst, no communications specialist, no one tracking whether projected benefits actually materialize. The work either doesn't get done — or gets done late at night.

The Solution: PMO Operations agents perform the research, monitoring, synthesis, and create deliverables that even a fully staffed PMO may not be able to do. AI does the preparation work to support project execution; humans exercise judgment.



Risk Research & Preparation: Conducts overnight due diligence on project risks — researching vendor health, regulatory changes, and technology decisions so risk reviews start with substance, not blank registers.



Status Intelligence: Synthesizes status reports, risk logs, issue logs, and resource data into portfolio-level status briefs — so the PMO Director walks into Monday's meeting already informed.



Document Generation: Drafts governance-ready documents — business cases, project charters, closeout reports — from existing portfolio data, eliminating hours of manual formatting and compilation.



Portfolio Communication: Produces tailored portfolio updates for different stakeholder audiences — executive summaries, sponsor briefings, and governance decision communications — so the right message reaches the right people.



Benefits Realization: Tracks whether approved projects deliver the benefits that justified their funding. Monitors in-flight conditions that threaten projected value and feeds realization data back into future prioritization.



Dependency Monitoring: Continuously watches cross-project dependencies and alerts downstream project managers when upstream changes affect their timelines — before surprises become crises.

PMO Operations doesn't replace your team. It gives your PMO the operational depth of a fully staffed portfolio management function — without the headcount.

Contact Us:

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Click [HERE](#) to schedule
a software demo



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Testimonials and Reviews

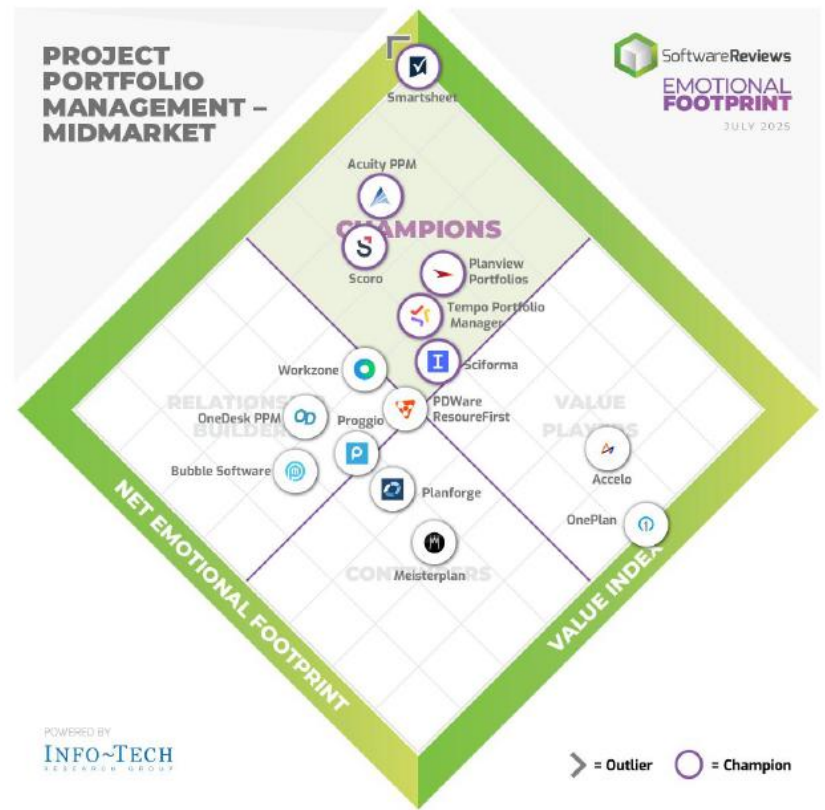


100%

Love working with Acuity PPM



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TERESA L.

PMO Director
Electric Cooperative

“We have been so pleased with the Acuity platform....You have built an incredible platform that has really aided in our transformation this past year.”

MATT M.

Sr. PMO Director
Transportation

Acuity PPM is the perfect tool for our organization. The user interface is fantastically straightforward. Tremendous flexibility in configuring the tool to meet our specific needs. User adoption is high with such a logical, clean interface. The support we receive is outstanding.

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Acuity PPM is a Mid-Market Leader



ACUITY PPM
Project Portfolio Management

RANKED
1st

OF 12 IN PROJECT PORTFOLIO
MANAGEMENT - MIDMARKET



DEGREE OF SATISFACTION

Delights



Highly Satisfies



Almost Satisfies

Disappoints

95%
SATISFACTION



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July 2024

Integrate with the tools you already use



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Getting Started is Easy!

Our implementations are measured in **DAYS**, not weeks or months!

- 1 Schedule a demo ([Link](#))
- 2 Try out Acuity PPM for yourself with pre-populated data (do you need a trial with your own data? Let us know and we'll set it up for you)
- 3 Let us know which module you want and how many users
- 4 Sign the licensing agreement
- 5 Send us your data in a spreadsheet and we'll upload it for you and configure Acuity PPM accordingly.
- 6 Schedule time to conduct training

Questions? Contact sales@acuityppm.com

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Click [HERE](#) to schedule
a software demo



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Stop Using Spreadsheets!

General purpose tools create intolerable inefficiency. Teams using spreadsheets to track their portfolio spend hours reconciling data from multiple sources to create even basic reports. That data is static and often out-of-date by the time leadership sees it. PPM software enables real-time reporting, data integrity, and better decisions — which is what drives successful strategic execution.

Why Acuity PPM?

Intuitive, Purpose-Built Design



Our intuitive interface streamlines processes and drives adoption. Customers report 30-40% productivity improvements due to our user-centric approach.

Rapid, Hassle-Free Implementation



Unlike complex PPM solutions that take months to deploy, Acuity PPM implementations are measured in days — not weeks or months.

Deep Expertise Real-World Insight



With nearly 20 years of PPM experience, we are trusted advisors guiding clients from spreadsheet chaos to portfolio clarity with measurable outcomes.

Flexible, Scalable Solution



Acuity PPM's modular design adapts to your needs and maturity level. Start with traditional capabilities today, and activate Portfolio Intelligence when you're ready.

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