



Project and Portfolio Management Service

Overview

In today's fast-paced business landscape, many organizations struggle with "work about work" - silos of information, endless email threads, and a lack of real-time visibility into project health. These inefficiencies often lead to missed deadlines, budget overruns, and team burnout.

Our Project Management Solution is a comprehensive service designed to bridge the gap between your strategic goals and daily execution. We build a tailored solution that integrates your people, processes, and technology to ensure the above challenges are addressed and every project delivers maximum value.

Solution Offering - Key Highlights

We provide an end-to-end implementation of Project and Portfolio Management solutions tailored for your organization's processes and structure, ensuring that the transition is seamless and that the solution is embraced by your team from day one.



We partner with leading vendors of PPM solutions that can be delivered as SaaS or an on-premise installation.

The recommended approach detailed below is a turnkey service with 30 days of post go live support. Subsequent enhancements are handled via change request.

The service can be delivered in a hybrid model with onsite and offsite resources.

We also provide consulting services for improving adoption and implementing best practices for optimal project management.

PPM Implementation Approach

We follow a structured, client-centered implementation methodology that minimizes disruption, accelerates adoption, and delivers lasting results across your project and portfolio management landscape.

A. Project Planning

We begin by conducting a thorough review of your existing workflows, tools, and pain points. This discovery phase gives us a clear picture of where you are today and what success looks like for your organization.

- **Gap Analysis:** Identifying what is missing in your current project delivery.
- **KPI Definition:** Establishing what success looks like
- **Planning:** High level plan, risk management, and stakeholder reporting



B. Gather Requirements

Working closely with stakeholders, we document requirements across five key dimensions:

- **Project Workflows:** How work is initiated, executed, and tracked across your organization
- **Customizations:** Custom fields, statuses, project and workplan templates unique to your business
- **Integrations:** Any integrations with other tools like agile boards, email notifications, collaboration tools
- **User Roles:** Who needs access to what, and what actions each role needs to perform
- **Custom Dashboards:** Real-time executive views for "at-a-glance" health checks.

C. Product Implementation and Customization

After the sign-off on the requirements, workflows are configured, custom fields, portfolio views, dashboards, and reports are created - all aligned to the documented requirements. Role-based access controls are applied to meet security and governance requirements. Custom integrations are created as per requirements.

D. User Acceptance Testing (UAT)

Before go-live, we conduct structured UAT sessions with key users from your team. Issues are identified, tracked, and resolved iteratively to ensure the system meets real-world needs.

E. User Training

We deliver role-specific training using hands-on sessions, documentation, and quick-reference guides tailored to your environment.

- **Role-Based Training:** Custom sessions for Project Managers, Team Members, and Executives.
- **Governance Playbook:** A "How-to" manual specific to your organization's rules and standards.

F. Go Live and production support

We support a smooth transition to production, with hypercare coverage in the days following launch to address any issues quickly and sustain confidence across your teams.

- **Support:** Immediate troubleshooting and Q&A.
- **Optimization Review:** A 30-day check-in to adjust workflows based on real-world usage data.

Why Partner With Us?

Feature	Benefit
Speed to Value	We deploy frameworks that get you up and running in a few weeks
Data-Driven	We focus on building reporting structures that provide actionable insights.
Tailored Fit	No "out of the box" templates; we build for your specific industry nuances.

About BPM Vision Technologies

BPM Vision Technologies is a leading provider of innovative solutions that empower businesses to harness the full potential of technology. With deep expertise in project and portfolio management, agile transformation, consulting, and training, we partner with organizations to drive meaningful, measurable results.

A. What We Do

1. **Project & Portfolio Management:** End-to-end PPM services ensuring projects are delivered on time, within budget, and aligned to strategic objectives.
2. **Agile Transformation:** Guiding organizations to adopt Agile methodologies and tools, increasing efficiency and adaptability.
3. **Performance Engineering:** Scale your applications with performance benchmarking and optimize your infrastructure with load and stress testing

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