

Acuity PPM Plus  
Get the most value for your PMO

## Portfolio Management in Acuity PPM



**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.

”

### Portfolio Management Capabilities

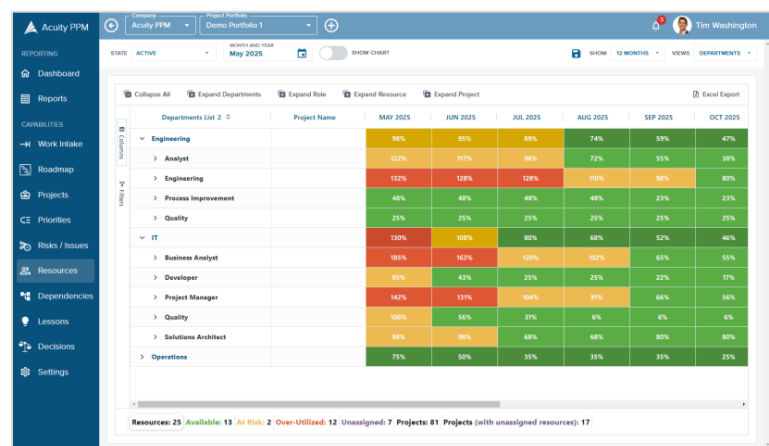
Acuity PPM is firstly a great portfolio management solution, designed to help organizations graduate from spreadsheets to an easy-to-use solution in the cloud. Your PMO can fully manage your project portfolios within Acuity PPM including the following capabilities:

- Work Intake
- Prioritization Scoring Model
- Dashboards
- Risk-Value Bubble Chart
- Project Tracker
- Portfolio Roadmap
- Resource Capacity Management
- Project Interdependency Tracker
- Portfolio Risks

#### PORTFOLIO DASHBOARD



#### PORTFOLIO CAPACITY PLAN



Acuity PPM Starter  
Get the most value for your PMO

# Your PMO deserves something better than spreadsheets

For most organizations, Acuity PPM’s lightweight portfolio software is the ideal balance of usability and functionality by blending project tracking and portfolio management into one intuitive interface. Acuity PPM’s Starter module enables you to track their portfolio in the cloud for maximum visibility without spreadsheets.

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

ACUITY PPM STARTER



## 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 enables you to [track your portfolio](#) so that senior leaders have centralized visibility of key initiatives.



## Portfolio Roadmaps

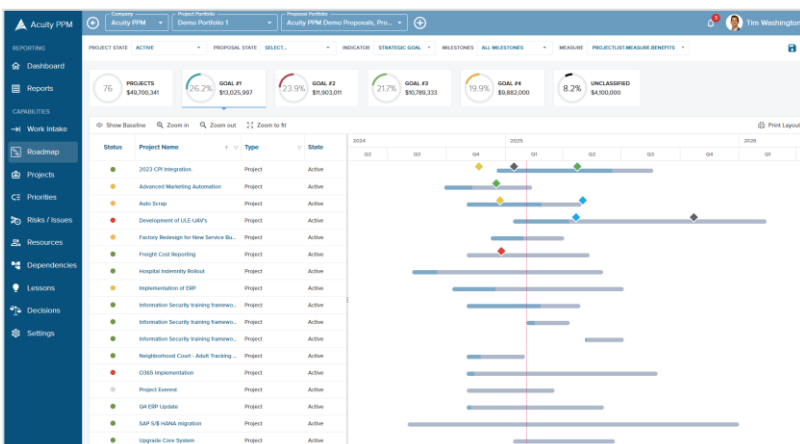
[Roadmaps](#) support strategic planning and help leadership visualize the timing and sequencing of projects to identify dependencies and avoid organizational conflicts. Zoom out to gain strategic visibility of projects, zoom in to get a tactical view of key projects with their upcoming milestones to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

Acuity PPM

Project ID

Demo Portfolio 1, Demo Portfolio 2

Tim Washington

REPORTING

CAPABILITIES

TOOLSET

HELP

SETTINGS

LOGOUT

Demo Portfolio 1

STATUS REPORT INFORMATION TIMELINE RISKS ISSUES PROJECT SCORES RESOURCE PLAN BENEFITS FINANCIALS DECISIONS LESSONS LEARNED DEPENDENCIES

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

Total Financial Benefits

Planned: \$904,015

Total Financial Planning

2024

ANNUAL

MONTHLY

Plan

SHIFT

| Group / Name       |                | Information          | Notes | JAN  | FEB   | MAR    | APR   | MAY    | JUN    | JUL  | AUG  | SEP  |
|--------------------|----------------|----------------------|-------|------|-------|--------|-------|--------|--------|------|------|------|
|                    |                |                      |       | Plan | Plan  | Plan   | Plan  | Plan   | Plan   | Plan | Plan | Plan |
| Financial Benefits |                |                      |       | 15   | 1,000 | 1,000  | 1,000 | 25,000 | 25,000 | 0    | 0    | 0    |
|                    | Cost Avoidance | Cost Center #4356A   |       | 0    | 1,000 | 1,000  | 1,000 | 0      | 0      | 0    | 0    | 0    |
|                    | Cost Avoidance | Cost Center #4359B   |       | 15   | 0     | 0      | 0     | 0      | 0      | 0    | 0    | 0    |
|                    | Cost Savings   |                      |       | 0    | 0     | 0      | 0     | 25,000 | 25,000 | 0    | 0    | 0    |
|                    | Sales Revenue  | Cost Center #4356A   |       | 0    | 0     | 0      | 0     | 0      | 0      | 0    | 0    | 0    |
| Operation Expense  |                |                      |       | 0    | 0     | 50,000 | 0     | 0      | 0      | 0    | 0    | 0    |
| External Costs     | PS #3001       | Software             |       | 0    | 0     | 0      | 0     | 0      | 0      | 0    | 0    | 0    |
| Internal Costs     | PA #2035       | Comms and Engagement |       | 0    | 0     | 50,000 | 0     | 0      | 0      | 0    | 0    | 0    |
| Internal Costs     | PA #0036       |                      |       | 0    | 0     | 0      | 0     | 0      | 0      | 0    | 0    | 0    |



# Work Intake is Critical to Portfolio Management

Our Work Intake module helps your team create new proposals and present them to leadership for review. Now you can track all proposals in one place and maintain historical metrics easily in one place. Once proposals are approved, they are automatically added to your project portfolio for visibility and tracking.

Click [here](#) to learn more about the work intake process. With the added prioritization functionality, you can score and evaluate proposed projects before they are approved to ensure that you are maximizing the value of the portfolio.

## PPM ESSENTIALS



### 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.

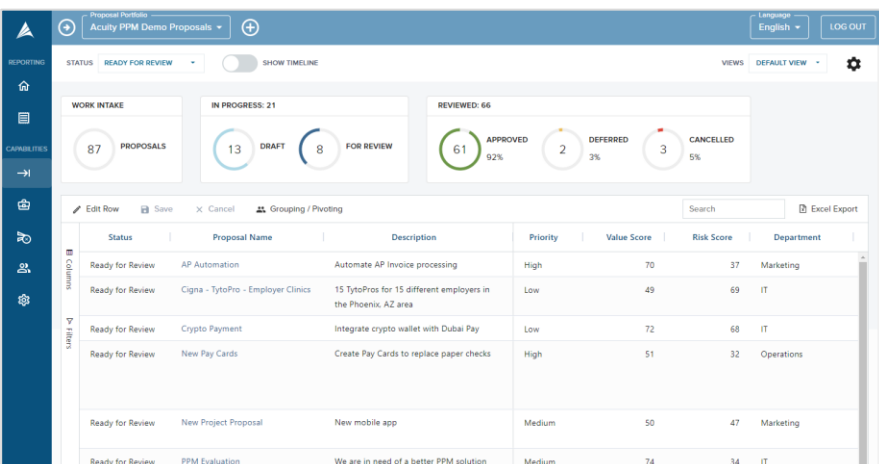


### Configurable Proposals

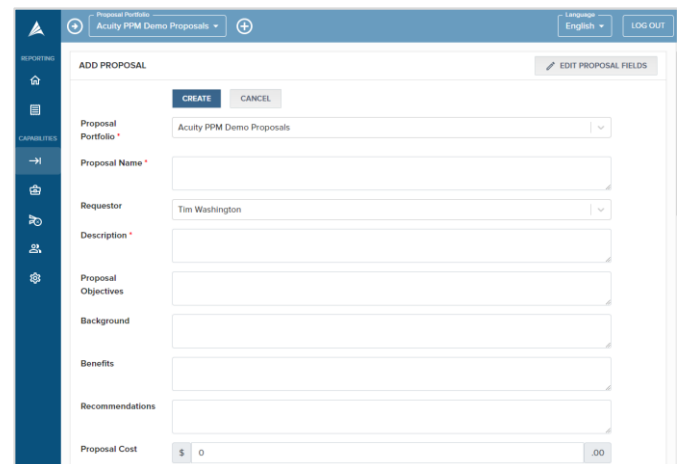
With Acuity PPM, you can configure your intake forms to collect the right amount of information to initiate the intake process. This means your teams are spending the right amount of effort to create a proposal for senior leadership review.

## WORK INTAKE PROPOSAL LIST

## PROPOSAL FORM



| Status           | Proposal Name                      | Description                                                    | Priority | Value Score | Risk Score | Department |
|------------------|------------------------------------|----------------------------------------------------------------|----------|-------------|------------|------------|
| Ready for Review | AP Automation                      | Automate AP Invoice processing                                 | High     | 70          | 37         | Marketing  |
| Ready for Review | Cigna - TytoPro - Employer Clinics | 15 TytoPros for 15 different employers in the Phoenix, AZ area | Low      | 49          | 69         | IT         |
| Ready for Review | Crypto Payment                     | Integrate crypto wallet with Dubai Pay                         | Low      | 72          | 68         | IT         |
| Ready for Review | New Pay Cards                      | Create Pay Cards to replace paper checks                       | High     | 51          | 32         | Operations |
| Ready for Review | New Project Proposal               | New mobile app                                                 | Medium   | 50          | 47         | Marketing  |
| Ready for Review | PPM Evaluation                     | We are in need of a better PPM solution                        | Medium   | 74          | 34         | IT         |



ADD PROPOSAL

CREATE CANCEL

Proposal Portfolio: Acuity PPM Demo Proposals

Proposal Name:

Requestor: Tim Washington

Description:

Proposal Objectives:

Background:

Benefits:

Recommendations:

Proposal Cost: \$ 0 .00



# Prioritization is an Essential Part of Portfolio Management

Acuity PPM’s Essentials module helps you build a prioritization scoring model to evaluate project value and risk. Project scoring helps align leadership on the most important work and enables ranking and complete prioritization in transparency.

Once you have scored and evaluated your projects, you can view the risk-value bubble chart within Acuity PPM. Those same scores will also indicate the level of risk in your portfolio. Click [here](#) to learn more about prioritization.

PPM ESSENTIALS



## Scoring Model

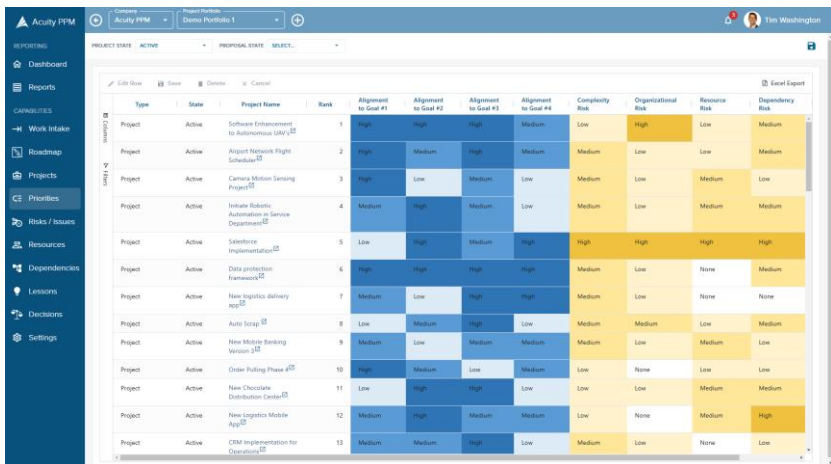
The right [scoring model](#) will help your leadership team effectively evaluate the relative value of projects for inclusion in the portfolio. Effective prioritization is an essential component for successful portfolio management because you clearly identify the most important work and maximize portfolio value.



## Balanced Portfolio View

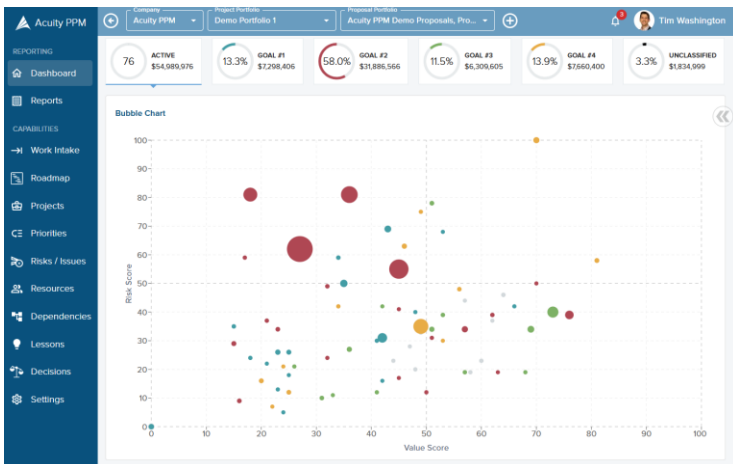
The [risk-value bubble chart](#) is a valuable output that graphically portrays all the investments in the portfolio across two axis: risk and value. It informs leadership of how much work may be going on in the higher risk/lower value quadrant that should be reduced.

PRIORITIES PAGE



| Type    | Status | Project Name                                            | Rank | Alignment to Goal #1 | Alignment to Goal #2 | Alignment to Goal #3 | Alignment to Goal #4 | Complexity Risk | Organizational Risk | Resource Risk | Dependency Risk |
|---------|--------|---------------------------------------------------------|------|----------------------|----------------------|----------------------|----------------------|-----------------|---------------------|---------------|-----------------|
| Project | Active | Software Enhancement for Autonomous User (S)            | 1    | High                 | High                 | High                 | Medium               | Low             | Low                 | Low           | Medium          |
| Project | Active | Airport Network Flight Schedule (S)                     | 2    | High                 | Medium               | High                 | Medium               | Medium          | Low                 | Low           | Medium          |
| Project | Active | Camera Motion Sensing Project (S)                       | 3    | High                 | Low                  | Medium               | Low                  | Medium          | Low                 | Medium        | Low             |
| Project | Active | Integrate Robotics Automation in Service Deployment (S) | 4    | Medium               | High                 | Medium               | Low                  | Medium          | Low                 | Medium        | Medium          |
| Project | Active | Satellite Implementation (S)                            | 5    | Low                  | High                 | Medium               | High                 | High            | High                | High          | High            |
| Project | Active | Data protection framework (S)                           | 6    | High                 | High                 | High                 | High                 | Medium          | Low                 | None          | Medium          |
| Project | Active | New logistics delivery app (S)                          | 7    | Medium               | Low                  | High                 | High                 | Medium          | Low                 | None          | None            |
| Project | Active | Auto Strip (S)                                          | 8    | Low                  | Medium               | High                 | Low                  | Medium          | Medium              | Low           | Medium          |
| Project | Active | New Machine Banking Version 1 (S)                       | 9    | Medium               | Low                  | Medium               | Medium               | Medium          | Low                 | Medium        | Low             |
| Project | Active | Order Pulling Phase (S)                                 | 10   | High                 | Medium               | Low                  | Medium               | Low             | None                | Low           | Low             |
| Project | Active | New Chocolate Distribution Center (S)                   | 11   | Low                  | High                 | High                 | Low                  | Low             | Low                 | Medium        | Medium          |
| Project | Active | New Logistics Mobile App (S)                            | 12   | Medium               | High                 | Medium               | Medium               | Low             | None                | None          | High            |
| Project | Active | CRM Implementation for Operations (S)                   | 13   | Medium               | Medium               | High                 | Low                  | Medium          | Low                 | None          | Low             |

RISK-VALUE BUBBLE CHART



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## Ensure Critical Resource Availability

Resource capacity planning is a critical function of portfolio management. Organizations commonly want to understand resource availability because every company has a limited number of people. However, resource capacity planning is the most difficult capability of PPM

Acuity PPM takes an approach to make this as easy as possible. Our goal is to help you monitor the utilization of critical resources and make strategic decisions accordingly. Click [here](#) to learn more about the challenges of resource capacity planning.

PPM PLUS



### Project Resource Planning

Creating a good resource plan is an essential element of project planning. Getting the right resources on your project can make or break the success of that project. Even more, ensuring that you have adequate support from every team member will determine whether a project can deliver on time and quality. Acuity PPM gives you clear visibility into how much effort is needed from every team member.

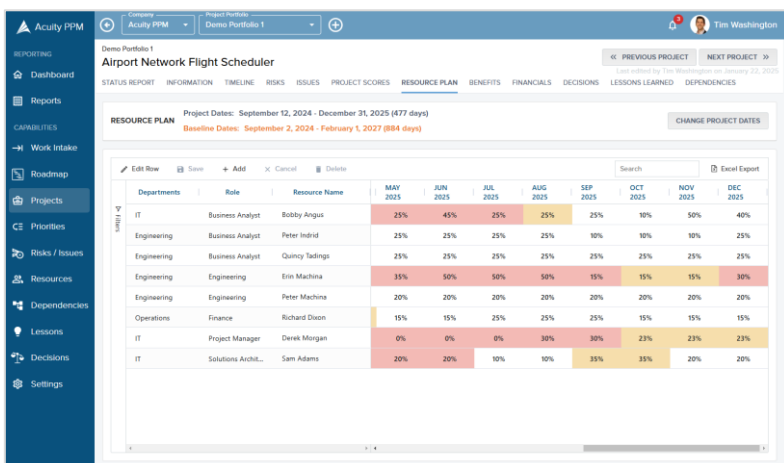


### Portfolio Capacity Planning

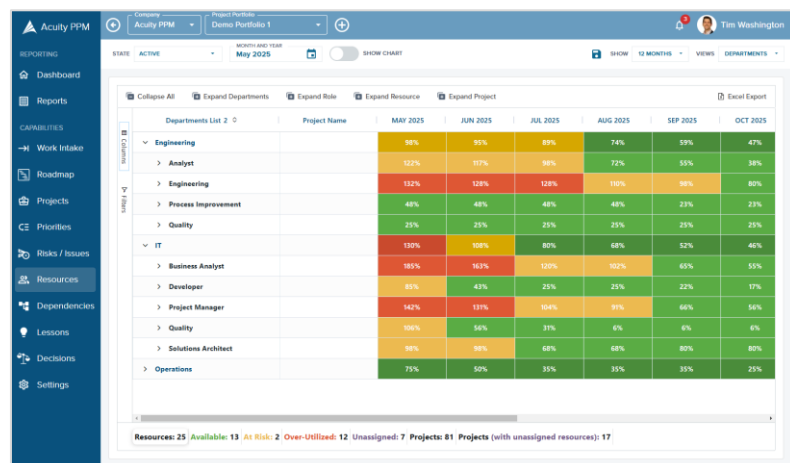
At the portfolio level, you need visibility of which roles and individuals are over-utilized; otherwise you jeopardize portfolio delivery. Acuity PPM utilizes the project resource plans and aggregates this data in a way that will actually help you manage the portfolio.

#### PROJECT RESOURCE PLAN

#### PORTFOLIO CAPACITY PLAN



| Departments | Role               | Resource Name   | MAY 2025 | JUN 2025 | JUL 2025 | AUG 2025 | SEP 2025 | OCT 2025 | NOV 2025 | DEC 2025 |
|-------------|--------------------|-----------------|----------|----------|----------|----------|----------|----------|----------|----------|
| IT          | Business Analyst   | Bobby Angus     | 25%      | 45%      | 25%      | 25%      | 25%      | 10%      | 50%      | 40%      |
| Engineering | Business Analyst   | Peter Indrid    | 25%      | 25%      | 25%      | 25%      | 10%      | 10%      | 10%      | 25%      |
| Engineering | Business Analyst   | Quincy Tadrings | 25%      | 25%      | 25%      | 25%      | 25%      | 25%      | 25%      | 25%      |
| Engineering | Engineering        | Evin Machina    | 35%      | 50%      | 50%      | 50%      | 15%      | 15%      | 15%      | 30%      |
| Engineering | Engineering        | Peter Machine   | 20%      | 20%      | 20%      | 20%      | 20%      | 20%      | 20%      | 20%      |
| Operations  | Finance            | Richard Dixon   | 15%      | 15%      | 25%      | 25%      | 25%      | 15%      | 15%      | 15%      |
| IT          | Project Manager    | Derek Morgan    | 0%       | 0%       | 0%       | 30%      | 30%      | 23%      | 23%      | 23%      |
| IT          | Solutions Archi... | Sam Adams       | 30%      | 20%      | 10%      | 10%      | 33%      | 33%      | 20%      | 20%      |



| Departments List 2  | Project Name | MAY 2025 | JUN 2025 | JUL 2025 | AUG 2025 | SEP 2025 | OCT 2025 |
|---------------------|--------------|----------|----------|----------|----------|----------|----------|
| Engineering         |              | 58%      | 50%      | 83%      | 74%      | 59%      | 47%      |
| Analyst             |              | 122%     | 117%     | 96%      | 72%      | 55%      | 38%      |
| Engineering         |              | 132%     | 120%     | 128%     | 100%     | 80%      | 60%      |
| Process Improvement |              | 48%      | 48%      | 48%      | 48%      | 23%      | 23%      |
| Quality             |              | 25%      | 25%      | 25%      | 25%      | 25%      | 25%      |
| IT                  |              | 130%     | 100%     | 80%      | 68%      | 52%      | 46%      |
| Business Analyst    |              | 185%     | 163%     | 110%     | 102%     | 65%      | 55%      |
| Developer           |              | 81%      | 43%      | 23%      | 25%      | 22%      | 17%      |
| Project Manager     |              | 142%     | 101%     | 104%     | 91%      | 66%      | 56%      |
| Quality             |              | 100%     | 56%      | 31%      | 6%       | 6%       | 6%       |
| Solutions Architect |              | 98%      | 50%      | 68%      | 68%      | 80%      | 80%      |
| Operations          |              | 75%      | 50%      | 35%      | 35%      | 35%      | 25%      |

Resources: 25 Available: 13 At Risk: 2 Over-Utilized: 12 Unassigned: 7 Projects: 81 Projects (with unassigned resources): 17



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## Manage Projects in Acuity PPM



“

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

”

**Victoria Choo**

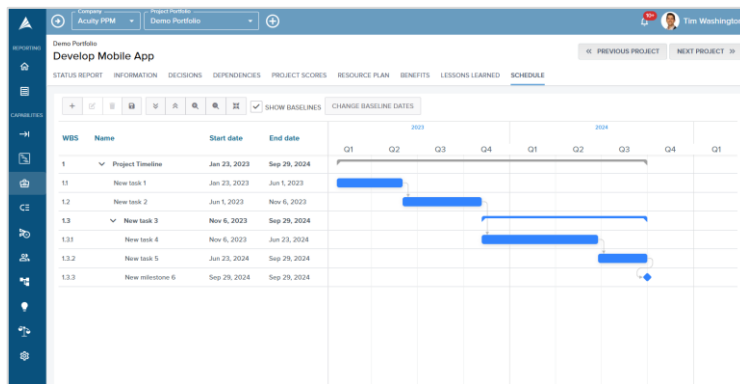
Kaiser Permanente

### Project Management Capabilities

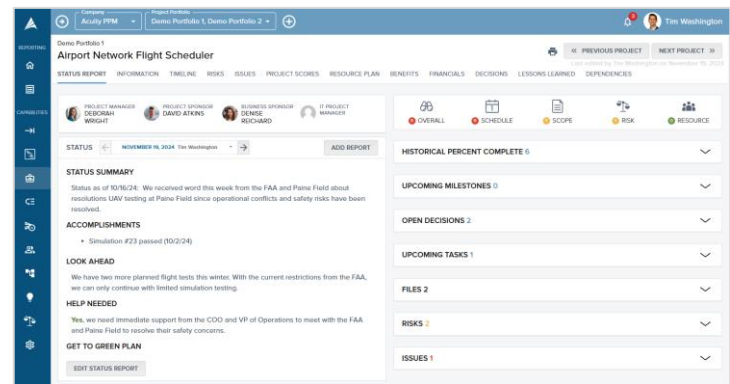
Acuity PPM is not only a great portfolio management solution, but we provide a wide variety of project managements capabilities you may not find in traditional solutions. Your PMO can manage projects and portfolios within Acuity PPM including:

- Status Reports
- Risk Logs
- Issue Logs
- Resource Plan
- Financial Tracker
- Lessons Learned
- Decision Log
- Dependency Tracker
- Benefit Plan

#### PROJECTS SCHEDULES



#### STATUS REPORTS



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## Testimonials and Reviews



**100%**  
**Love working  
with Acuity PPM**



A Division of Info-Tech Research Group



July 2024

**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.

**Contact Us:**  
www.acuityppm.com  
info@acuityppm.com



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



Acuity PPM  
3600 136th PI SE #300  
Bellevue, WA 98006



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## Acuity PPM is a Mid-Market Leader



### ACUITY PPM Project Portfolio Management



#### DEGREE OF SATISFACTION

Delights



Highly Satisfies



Almost Satisfies

Disappoints

**RANKED**  
**1st**

OF 12 IN PROJECT PORTFOLIO  
MANAGEMENT - MIDMARKET

**95%**  
**SATISFACTION**

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July 2024

Integrate with the tools you already use



**Contact Us:**  
[www.acuityppm.com](http://www.acuityppm.com)  
[info@acuityppm.com](mailto:info@acuityppm.com)



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



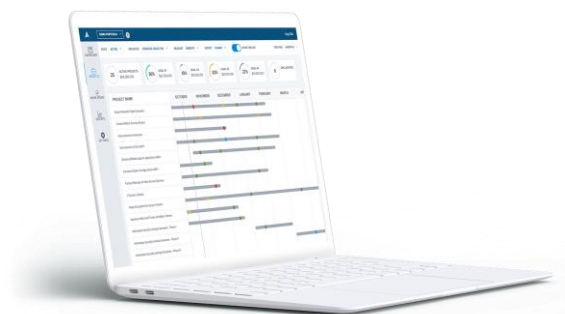
Acuity PPM  
3600 136th PI SE #300  
Bellevue, WA 98006

## Acuity PPM Software Pricing

Acuity PPM provides a unique module approach so that you *pay for what you need and not pay for what you don't need*.

| MODULES                                                                                                                                | FEATURES                                                                                                                                                                                                                                    | LICENCING COST                                                                       |
|----------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------|
| <b>PPM Starter</b><br>(includes 5 user licenses*)<br> | <ul style="list-style-type: none"> <li>Portfolio dashboard</li> <li>Portfolio tracking (mini-dashboard, project grid)</li> <li>Project and portfolio timelines</li> <li>Project status reports</li> <li>Risk and issue logs</li> </ul>      | <b>Company pricing begins at:</b><br>\$750/month (USD)<br>Includes 5 user licenses*  |
| <b>PPM Essentials</b><br>                           | <ul style="list-style-type: none"> <li>Includes PPM Starter</li> <li>Project scoring and ranking</li> <li>Risk-value bubble chart (in dashboard)</li> <li>Proposal grid and Intake dashboard</li> <li>Simplified intake workflow</li> </ul> | <b>Company pricing begins at:</b><br>\$1050/month (USD)<br>Includes 5 user licenses* |
| <b>PPM Plus</b><br>                                 | <ul style="list-style-type: none"> <li>Includes PPM Essentials</li> <li>Resource capacity dashboard</li> <li>Team capacity views</li> <li>Resource capacity views</li> <li>Over/under utilization</li> </ul>                                | <b>Company pricing begins at:</b><br>\$1500/month (USD)<br>Includes 5 user licenses* |
| <b>PPM Enterprise</b><br>                           | <ul style="list-style-type: none"> <li>Includes PPM Plus</li> <li>Customized PMO playbook</li> <li>Enterprise Single-Sign On</li> <li>Software integrations</li> </ul>                                                                      | <b>Cost:</b> Contact us for pricing                                                  |

\*Additional user licenses are \$20/user/month; read-only is free



## 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](mailto:sales@acuityppm.com)

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## The Value of Portfolio Management Software

General purpose tools can result in intolerable levels of inefficiency. Teams that utilize spreadsheets and other tools to track their portfolio can spend hours reconciling data from multiple sources in order to create even basic portfolio reports. Data from spreadsheets and disparate tools are static and often out-of-date by the time the information is reported to senior leadership.

PPM software enables real-time reporting. Improved visibility to the portfolio can result in eliminating redundant and low-value projects. Greater data integrity means that teams will spend less time cleaning data and more time analyzing data. All of this results in better decision making which enables successful strategic execution

### Why Acuity PPM?

#### Expertise



- Acuity PPM has 15+ years of portfolio management experience with the Fortune 500
- We have built Project Management Offices (PMO's), governance frameworks (i.e. Stage-Gate), intake processes, and portfolio management processes for numerous companies

#### Right-sized solutions



- Based on our experience, we know that one size does not fit all
- We take an iterative and adaptive approach to ensure that our solutions are right-sized according to company culture and organizational maturity.

#### Collaborative



- We work along side you and your team to develop solutions that will be well received by your organization
- We believe an agile approach is the best way to implement portfolio management
- We share our knowledge and experience so your team can continue successfully after we finish



## Acuity PPM Architecture

Acuity PPM hosts all compute and storage resources in the Amazon Web Services (AWS) PaaS and is also hosted on AWS, the world's leading cloud platform providers. We utilize data centers in the USA and Europe.

Acuity PPM uses end-to-end encryption for all data in transit on the public internet, between users and the cloud service, and between the cloud service and any and all third-party service providers, using, at minimum, industry standard 256-bit encryption techniques.



### Software as a Service (SaaS)

Software deployed over the internet. Acuity PPM delivers lightweight portfolio management software to help organizations manage their portfolio.



### Platform as a Service (PaaS)

Application development delivered over the internet. AWS Elastic Beanstalk delivers tools that enable software development, allowing businesses to quickly deploy, build, manage, and scale enterprise-level applications. It acts as the middle-man between hosting/infrastructure and Acuity PPM.



### Infrastructure as a Service (IaaS)

Computing resources accessed via the internet. Amazon Web Services (AWS) manages computing resources, load balancing, operating system selection, servers, networks, storage, logging and monitoring of the server, monitoring the health of the application, and establishing container organization.

