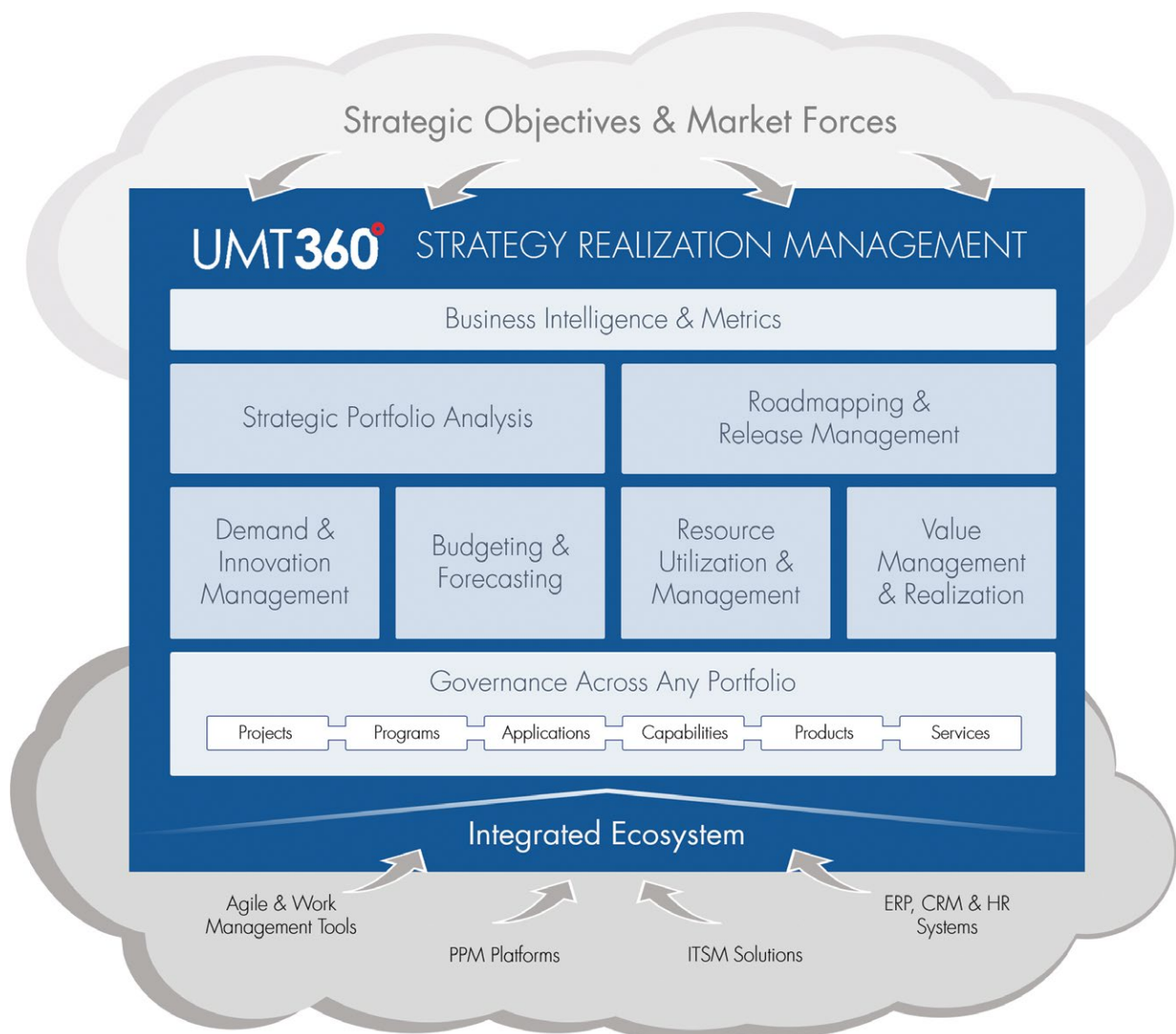# UMT**360°**

Strategy Execution Management

One comprehensive solution to help you align execution with strategy and accelerate business transformation.

UMT360°

We deliver the powerful portfolio management capabilities you need to align investments with strategy and accelerate business transformation.

One comprehensive Strategy Realization Management solution enables every organization to establish the top-down business planning and controls required to integrate all portfolios and improve project execution to accelerate business transformation.

Strategic Objectives & Market Forces

UMT360° STRATEGY REALIZATION MANAGEMENT

Business Intelligence & Metrics

Strategic Portfolio Analysis	Roadmapping & Release Management

Demand & Innovation Management	Budgeting & Forecasting	Resource Utilization & Management	Value Management & Realization

Governance Across Any Portfolio

Projects	Programs	Applications	Capabilities	Products	Services

Integrated Ecosystem

Agile & Work Management Tools

PPM Platforms

ITSM Solutions

ERP, CRM & HR Systems

Two realities must be acknowledged to effectively drive business transformation.

1. Every organization struggles with the "tri-modal reality" — employing a combination of waterfall, Agile, and back-of-the-napkin project execution methodologies across the enterprise.

2. No initiative, no matter how it's executed, exists in a vacuum. Projects and programs are funded for only one reason – to transform the capabilities, products and services that enable an organization to deliver value to customers. Connecting and aligning all execution (operational and discretionary spend) with strategy is critical to driving growth and fueling a competitive advantage.

Addressing these two realities is absolutely an essential foundation of any effective strategy realization management solution.

Key components of UMT360's comprehensive solution:

Governance Controls Across Any Portfolio

Some consider governance to be just a bunch of arduous rules and processes that place an undue burden on stakeholders and users alike. Savvy organizations understand that robust portfolio governance controls need to be smart and flexible enough to meet the needs of a wide variety of stakeholders, and include:

- Standardized inventory / portfolios for projects, programs, strategies, capabilities, products, services, etc.
- Flexible workflow editor for governing all investments
- Notifications, approval and audit capabilities
- Powerful, auditable snapshots
- Reports, dashboards and analytics
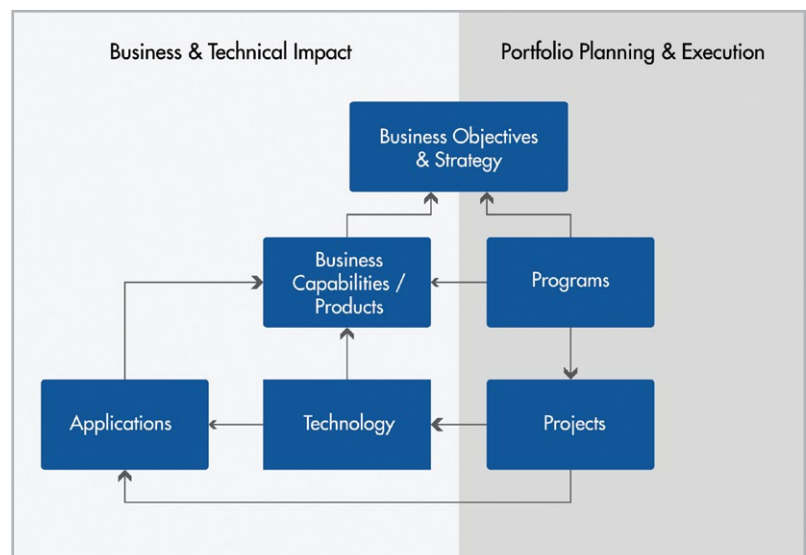
Demand & Innovation Management

You never know where project requests might come from. But one thing is clear – to do more than simply choose the best from a bad list of ideas, you'll need demand management capabilities that help provide visibility across all work, making it easy to:

- Consolidate and standardize all requests

- Generate top-down demand (from lifecycle decisions on products, services, capabilities, etc.)

- Build structured business cases to evaluate all requests

- Consolidate and streamline cost and benefit analysis

- Assess resource requirements and capacity

- Capture key dependencies with entities from other portfolios

- Prioritize requests from a variety of dimensions, including strategic value, risk, probability of success, architectural fit and more

- Quickly identify potentially redundant initiatives

- Generate comprehensive reports, dashboards and analytics
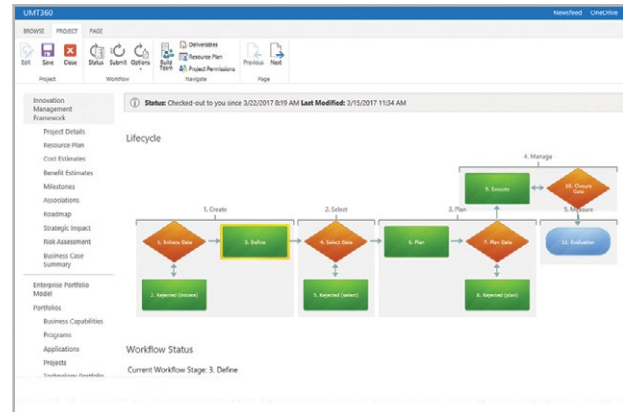
Budgeting & Forecasting

To truly accelerate business transformation, you must manage all portfolios and execution as the strategic business investments they are. Integrating and streamlining budgeting and forecasting information enables all stakeholders to understand the impact of any change across all portfolios, making it easy to:

- Standardize investment governance

- Streamline top-down budgeting

- Improve cost and benefit estimating

- Track financial performance and automate variance analysis

- Built-in ERP integration for SAP, Oracle Financials and more

- Streamline funding approvals and audits

- Manage change requests and controls

- Reallocate funds on a continuous basis across the portfolio

- Derive total-cost-of-ownership
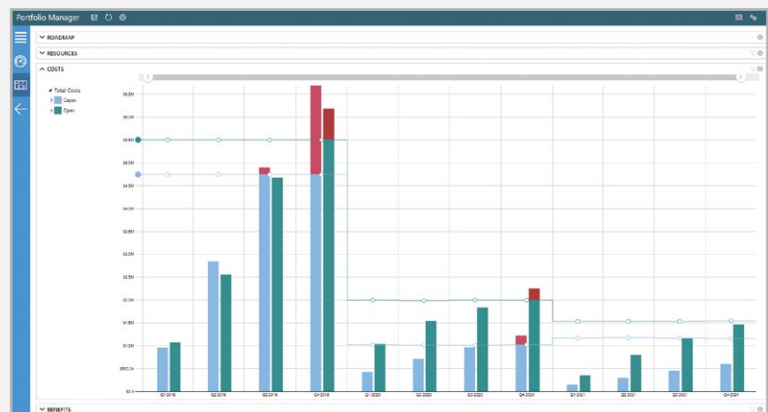
Resource & Capacity Planning

Resources must now be managed across Agile, waterfall or even non-project-orientated work systems. Gaining visibility across all resources – and optimizing utilization – is a critical challenge for any organization hoping to fully realize its business strategy. So it's critical that you can:

- Gain visibility and control of all resources
- Manage all resources across projects managed in different methodologies
- Improve accuracy of resource demand (estimates and forecasts)
- Easily find the right people / team for each project
- Manage resource commitments
- Simplify Capacity Planning to improve resource utilization
- Model the impact of portfolio changes
- Track time and streamline Capitalization reporting

Value Management & Realization

Portfolio analysis tools and processes are critical to help any organization communicate and track the value of each investment. Aligning all execution with strategy enables each stakeholder to establish the framework needed to track actual benefits realized, and make it easy to:

- Standardize benefit structures & governance controls
- Consolidate benefit estimates for all initiatives
- Dynamically reforecast benefits for all initiatives
- Track benefits by project, program or other enterprise portfolios
- Continuously rebalance portfolios to maximize ROI
- Derive metrics & generate powerful reports & dashboards

Portfolio What-if Analysis

To generate what-if scenarios and model potential outcomes based on ad hoc questions, teams typically need to stay late and manually crunch numbers. But what if your team had the tools to respond to any possible question about any portfolio with just a few clicks? You would be able to:

- Measure impact against key portfolio metrics
- Generate visual and interactive near-term and long-term roadmaps
- Take action and model the impact of any change
- Support both traditional annual planning and continuous / dynamic portfolio planning
- Optimize resource utilization
- Support multi-year financial planning and budgeting
- Maximize ROI and accelerate payback

Roadmaps & Dependency Management

Roadmaps are powerful tools that help ensure that all investment decisions are clearly understood across the organization. By visualizing and communicating key dependencies enterprise-wide, roadmaps serve to help harmonize decisions and track progress across all investments, helping you to:

- Automate near-term and multi-year roadmaps
- Track key milestones and outcomes
- Visualize dependencies across all portfolios
- See trends through powerful snapshots
- Share roadmaps to communicate and stay in control
- Drill down to learn more about any investment
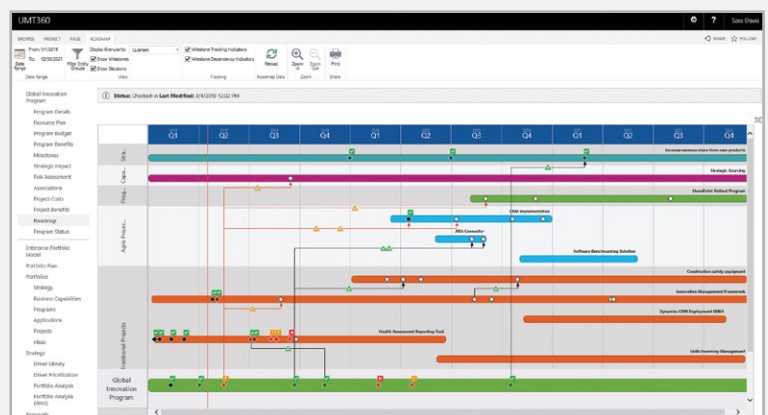
Business Intelligence & Metrics

Critical project and program data is too often locked up in various systems across the enterprise. Getting that data into the hands of portfolio analysts so they can quickly respond to ad hoc questions and create reports hasn't always been easy. This solution offers:

- Packaged dashboards and reports
  - Strategic Planning and Demand Management
  - Financial Tracking & Performance
  - Resource Capacity Planning & Utilization
  - Governance Controls & Velocity
  - Project & Portfolio Status Reporting
  - Benefits Management & Realization
- Self-service business intelligence
- Snapshots and trending analysis
- Modeling and predictive analysis
- Strategic and technology roadmaps
- Integration with third-party business intelligence solutions from Microsoft, Tableau, QlikView and more
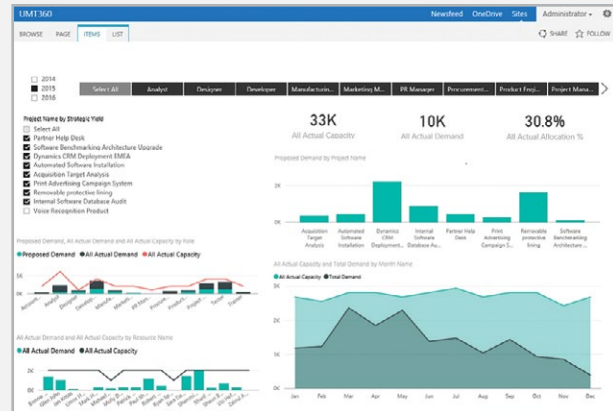
Integrated Ecosystem

How effectively does your current portfolio management process integrate data between key portfolios, key line-of-business processes and systems of record? Chances are, you're still grappling with manual processes and silos of information. A comprehensive solution helps you easily integrate:

- Enterprise Resource Planning systems
- PPM tools
- Agile tools & execution
- Work management solutions
- Enterprise Architecture tools
- ITSM solutions
- Customer Relationship Management tools
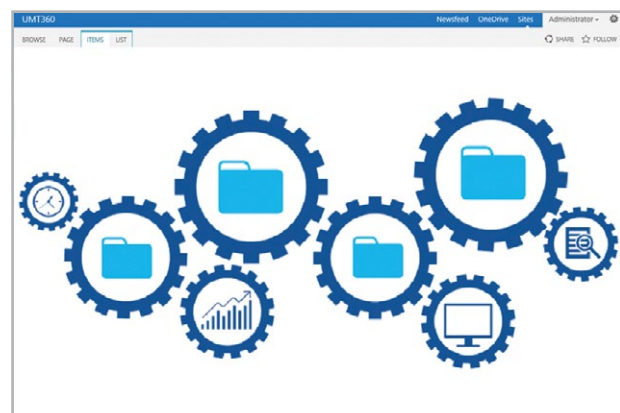
UMT360 provides SRO, PMO, IT, business and finance leaders with the right combination of software, consulting services and best practices expertise to help them more effectively align all execution with strategy. Our unique approach helps clients incrementally deploy the specific capabilities needed to attain visibility, gain insight and establish the enterprise connections needed to improve decision-making and accelerate business transformation.

UMT360°

Connect

Business Capability Portfolios
Application Portfolios
Technology Portfolios
Product / Service Portfolios

Integrated Ecosystem

Visibility

Team Collaboration
Program Management
Change Request Management
BI & Analytics
Status Reporting
Time Management
Schedule Mgmt. / Roadmaps
Benefits Management
Cost Management
Resource Management
Demand Management
Portfolio Management
Portfolio Governance

Insight

Multi-year winner of Microsoft's Partner of the Year award for Project & Portfolio Management (PPM).

P Project

Multi-year visionary in Gartner's Magic Quadrant for Integrated IT Portfolio Analysis.

Gartner

Recognized as a Gartner Cool Vendor in PPM for managing and controlling project finances.

Gartner

Featured in Gartner market scope reports for Strategy Execution, NPD, ITFM, and PPM Services.

Gartner

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