

Software solution for efficient Project and Program Performance Management



## Get the most out of your projects and programs

Ensure maximum project success with minimal costs and optimal quality. Plan, manage, and report on Projects and Programs in one central system.

## Solve all challenges in Project and Program Performance Management

Do you lack transparency regarding current project costs and their development in relation to the budget? Is resource allocation suboptimal, leading to bottlenecks and negatively affecting project timelines?

In multi-project decision-making situations, managers often lose track or have to make decisions based on insufficient data. With the Project and Program Management and optimization software from smartPM.solutions, these challenges are a thing of the past.

Easily gain real-time insight into budgets, expenses, and resource availability. Automated reports and dashboards help you stay on top and make necessary adjustments on time.

Reduce manual effort, such as in reporting, and ease the workload of your employees with a central system that consolidates all relevant data. This way, you optimize your project planning, management, and reporting, ensuring maximum project success.

### In this factsheet, you will learn how to:

- 1 Ensure data transparency and strong project governance (e.g., according to PMBOK, PRINCE2).
- 2 Plan projects efficiently and prioritize them effectively along strategic goals.
- 3 Allocate project resources optimally, manage risks, and prevent bottlenecks early.
- 4 Ensure efficient monitoring with clear and concise dashboards.
- 5 Save time and effort through automated, standardized reports and integrated communication tools.
- 6 Make better decisions based on reliable data, AI, and scenario analysis.

"With a central project and program performance management tool as the core of all project-related processes, you can save a significant amount of time, effort, and money. The consultants at smartPM.solutions have played a key role in helping Hamburg Airport save several million euros per year through the system's inherent, rigorous cost management in the project management tool - while system costs remain in the low six-figure range."

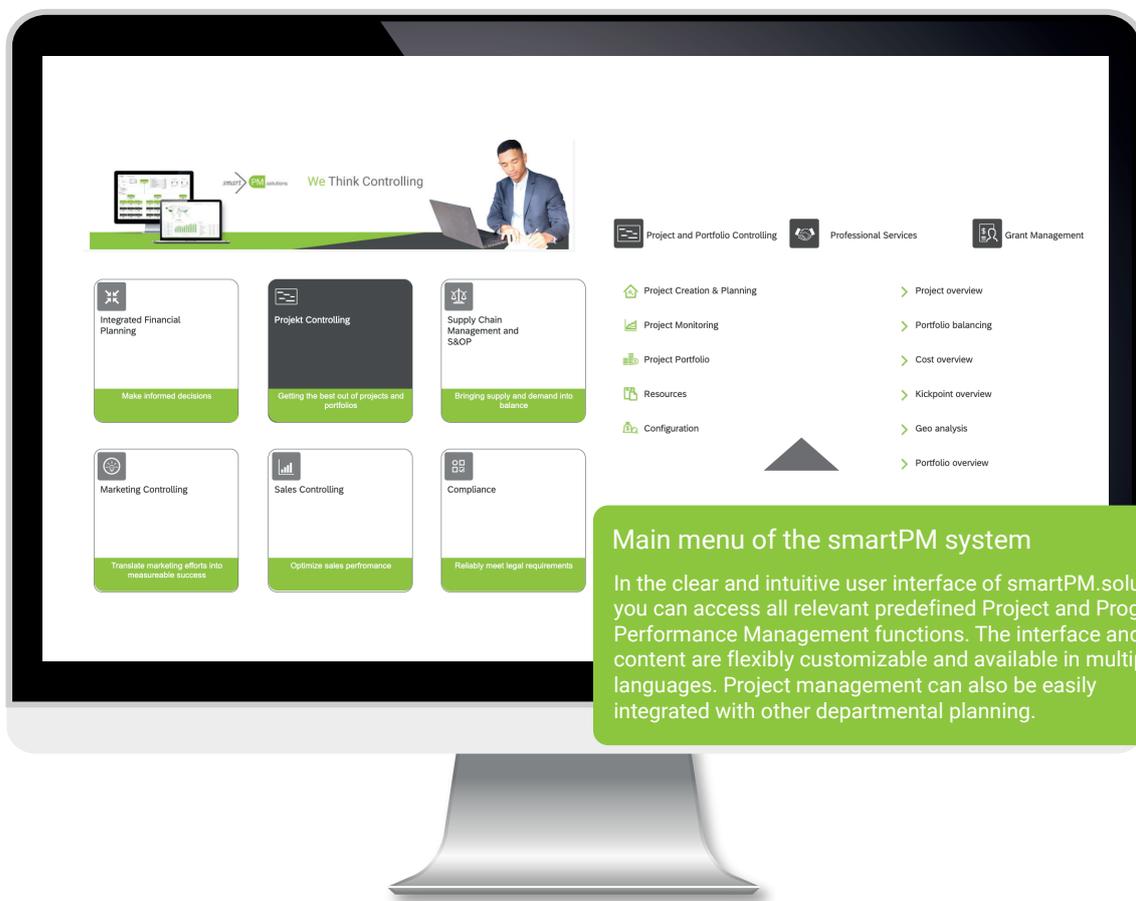
Julian Jirsak, Head of Project and Program Management at Hamburg Airport



## Effortlessly keep track of all projects

With smartPM's Project and Program Performance Management, you support both the strategic and operational control of your projects in a fully integrated system. The intuitive user interface and workflow guide you seamlessly from project setup through planning, portfolio optimization, and management reporting.

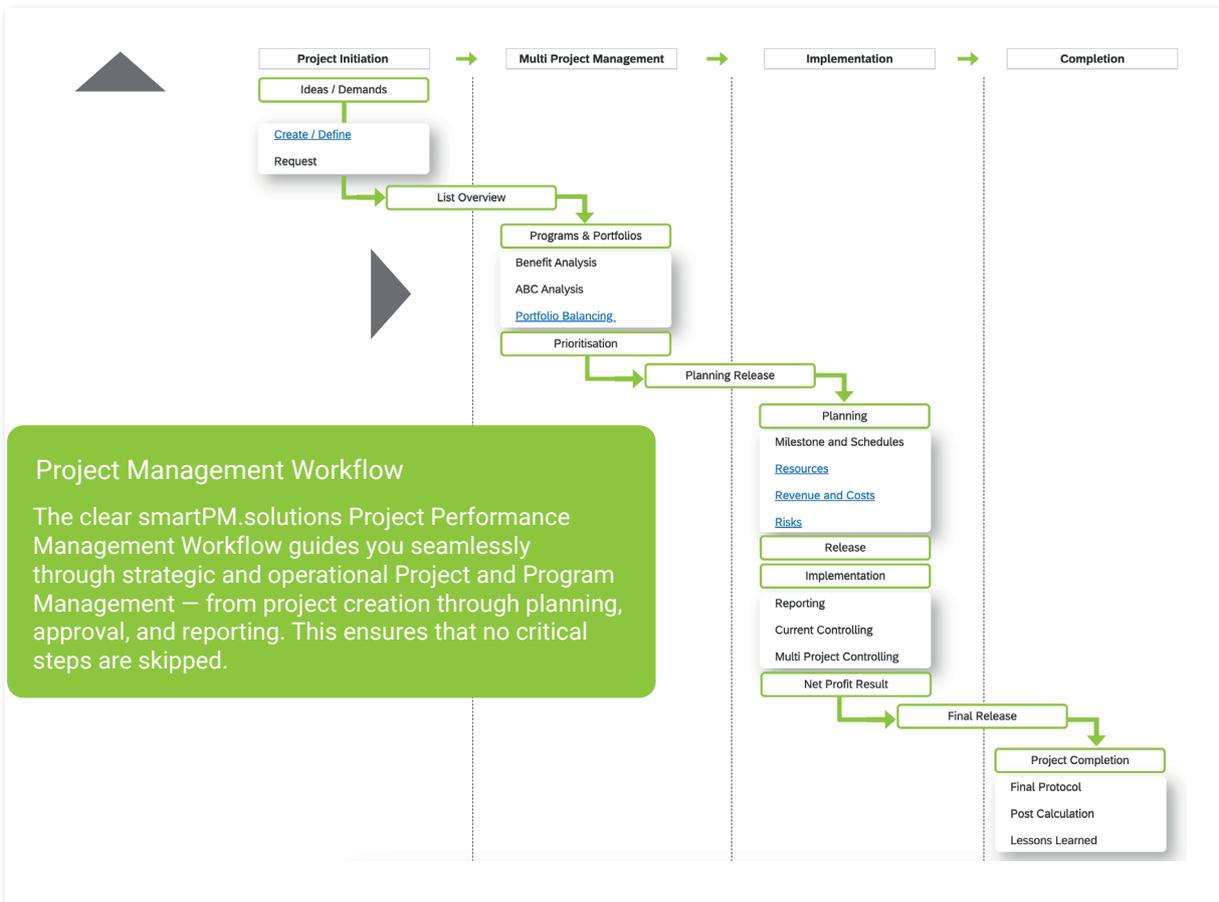
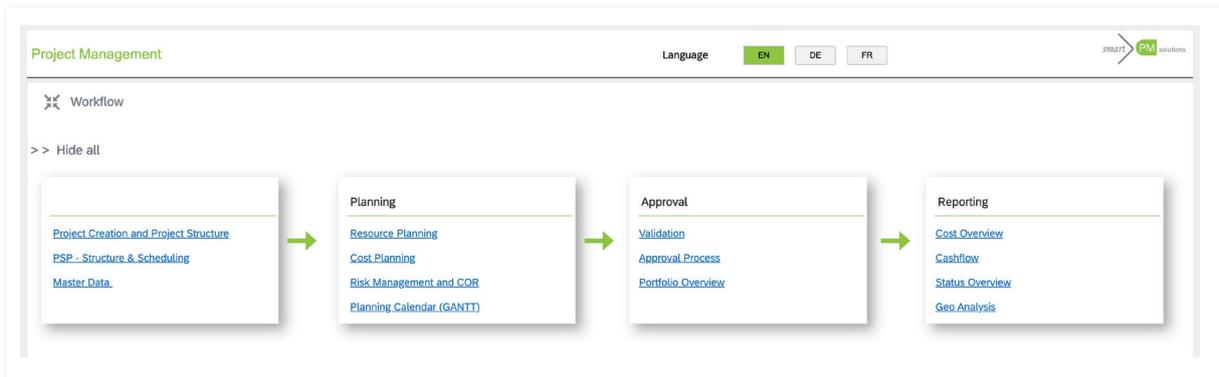
At every step, you benefit from proven project management content and templates based on 25 years of project experience. Additionally, role and authorization concepts, as well as integrated communication tools, ensure structured workflows and transparent documentation. This enables you to drive your projects to success cost-efficiently, with minimal time investment and maximum quality.



**Main menu of the smartPM system**

In the clear and intuitive user interface of smartPM.solutions, you can access all relevant predefined Project and Program Performance Management functions. The interface and all content are flexibly customizable and available in multiple languages. Project management can also be easily integrated with other departmental planning.





**Project Management Workflow**

The clear smartPM.solutions Project Performance Management Workflow guides you seamlessly through strategic and operational Project and Program Management – from project creation through planning, approval, and reporting. This ensures that no critical steps are skipped.



**Expertise from 25 years of market experience**

"Our project-experienced consulting team not only tailors the planning solutions to the company's requirements but also helps establish smart workflows and optimize processes.

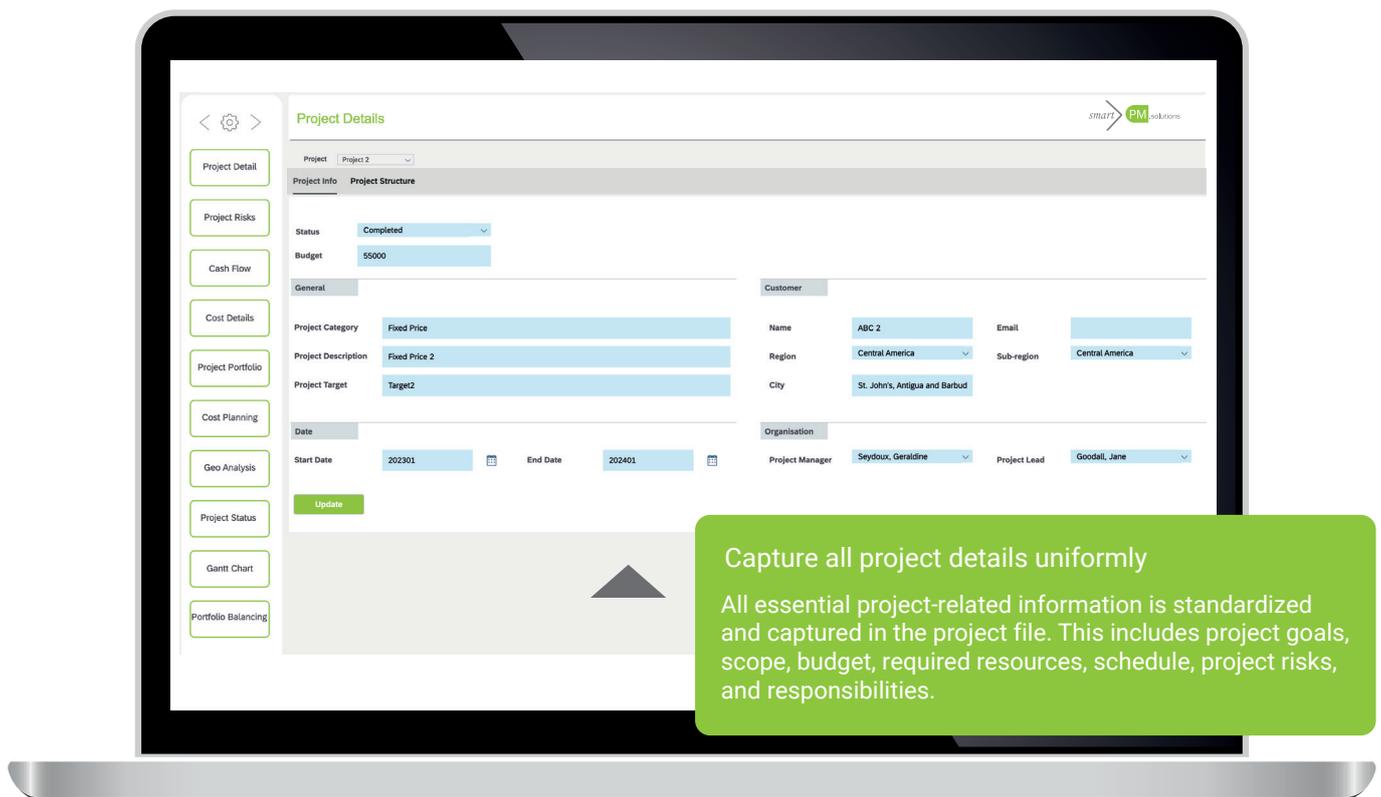
Our advantage: extensive expertise and proven solutions from over 25 years of market experience."

Alexander Hein, CEO smartPM.solutions



## Ensure project governance through standardized project files

In the smartPM.solutions Project and Program Performance Management system, you can choose from all common standardized project templates and integrated industry standards (such as PRINCE2, PMBOK) to manage your projects efficiently and ensure adherence to best project management practices. Flexibly adapt the included Governance standards to your specific requirements, ensuring quick successes.



Capture all project details and interactions between project participants, escalation processes, authorization levels, and control results in the clearly structured, web-based interface with mouse-over explanations. Automated, transparent documentation, as well as user and authorization concepts, simplify collaboration. Detailed information can be accessed anytime, anywhere, and from any device.



### What we offer ...

The best technology for integrated planning, analysis, budgeting, forecasting, reporting, and consolidation, combined with business consulting and excellent service!

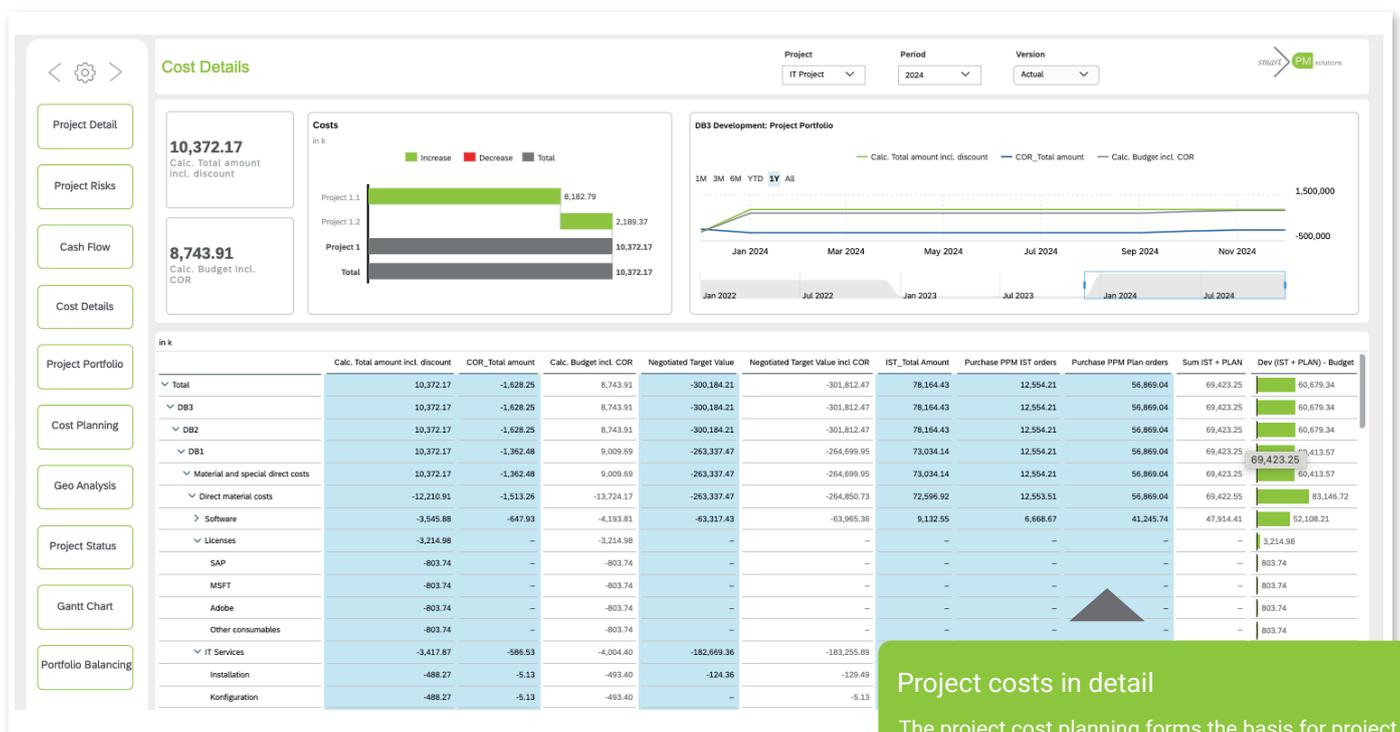
4,9/5 ★ Project Satisfaction   6,8/7 ★ Support Satisfaction   4,8/5 ★ Employee Satisfaction

## Ensure transparency in project approval

Project governance standards also play a central role in defining criteria for project approval. When submitting a request, projects often need to meet specific criteria to qualify for the next phase (e.g., start and end dates, uniqueness, duration).

This is supported by system-integrated PMBOK guidelines (Guide to the Project Management Body of Knowledge), which detail the roles and responsibilities of project participants as well as the approach for successfully managing projects.

Project approval and budget release can only occur based on solid planning. Once the project is approved, the cost planning serves as a reference point for ongoing project performance management, allowing deviations to be identified and managed early on.



**Project costs in detail**  
The project cost planning forms the basis for project approval, as it provides a detailed overview of the estimated costs and thus evaluates the economic feasibility of the project.

Project managers regularly work to adhere to predefined cost and time schedules. The top-down goals set at the beginning can be directly assigned or broken down into individual projects.

To link these objectives with project execution, bottom-up estimates from the directly involved stakeholders are essential. Gaps can be addressed by setting and tracking initiatives directly within the system.

## Prioritize projects according to strategic goals and optimize the project portfolio

Ensure that your projects align with overarching business goals to optimize the project portfolio and maximize value creation through targeted prioritization. Objectivity is guaranteed by using predefined criteria, which serve as the foundation for all project decisions.

Optimized resource allocation across the entire project portfolio prioritizes those projects that most effectively support the company's strategic and operational goals. This approach ensures a transparent overview of all ongoing and new projects, as well as a clear justification for their prioritization.



**Portfolio Balancing - clear and transparent**

In Portfolio Balancing, projects are evaluated based on clearly defined criteria such as strategic relevance, opportunity costs, project costs, contribution margin, and resource utilization. "Must-do projects" are automatically prioritized. Flexible adjustments through wildcards or the "CEO button" can be documented in a traceable and auditable manner.

"Since the smartPM.solutions team implemented the new planning and Project and Program Management solution, we save €450,000 per project annually. The software and implementation costs were recouped in a very short time. Additionally, there have been significant qualitative improvements, such as the focus on core tasks. The simplifications in processes and thus in quality have not even been accounted for yet. Beyond a certain company size, Excel simply no longer works. We no longer discuss formulas or doubt data; instead, we take action. Scenario-based thinking has become established, and employees work value-adding according to their qualifications."

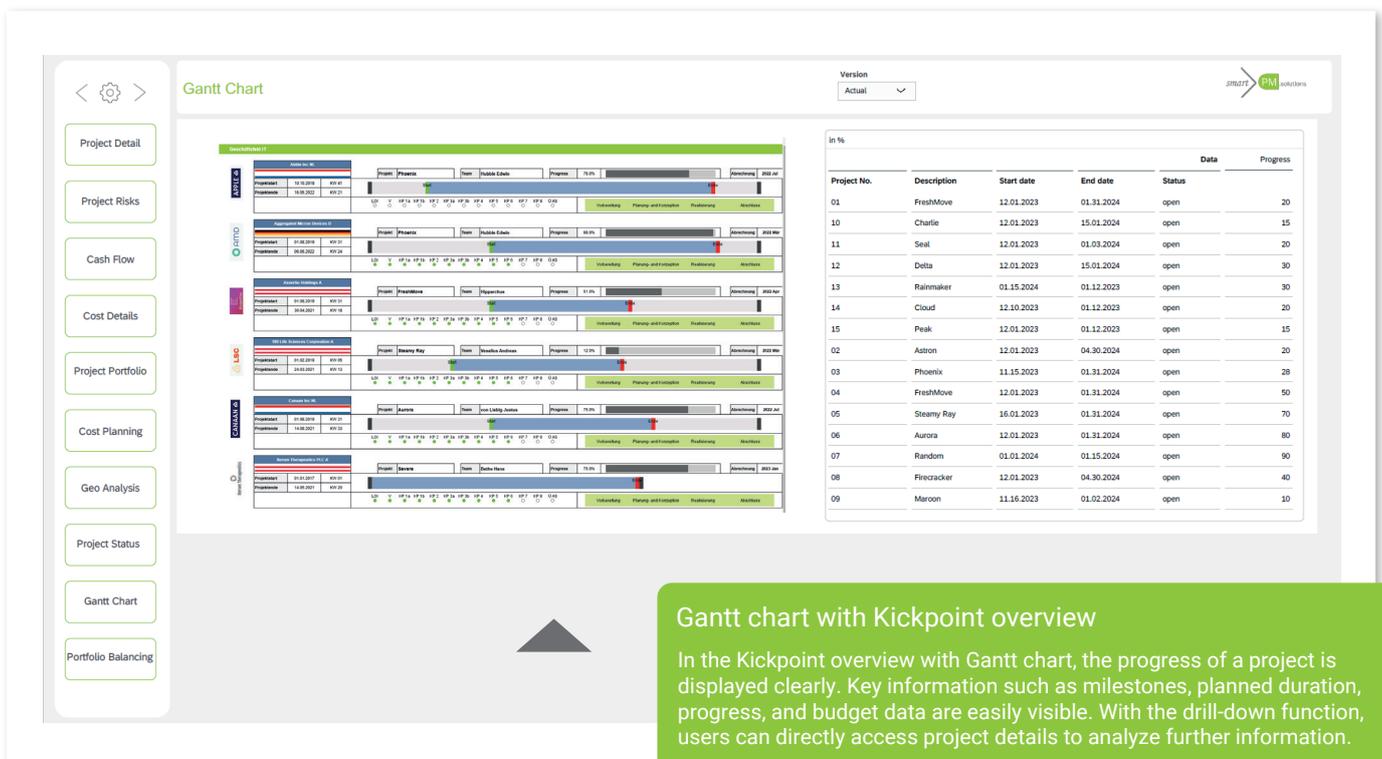
Arbi Araks, Director for Finance and Controlling, List GC



## Capture all projects and key KPIs at a glance

A powerful project performance management tool supports the project manager by providing transparency over resources, costs, and schedules. Features such as project budget limits, obligation monitoring, and the analysis of actual costs or revenues down to the document level significantly ease monitoring and control.

A very good overview of the progress, risks, and potential deviations of multiple strategic projects is provided by the smartPM Kickpoint report on the portfolio. This report offers a compact and meaningful presentation that allows decision-makers and project participants to quickly assess the overall situation of the project portfolio.



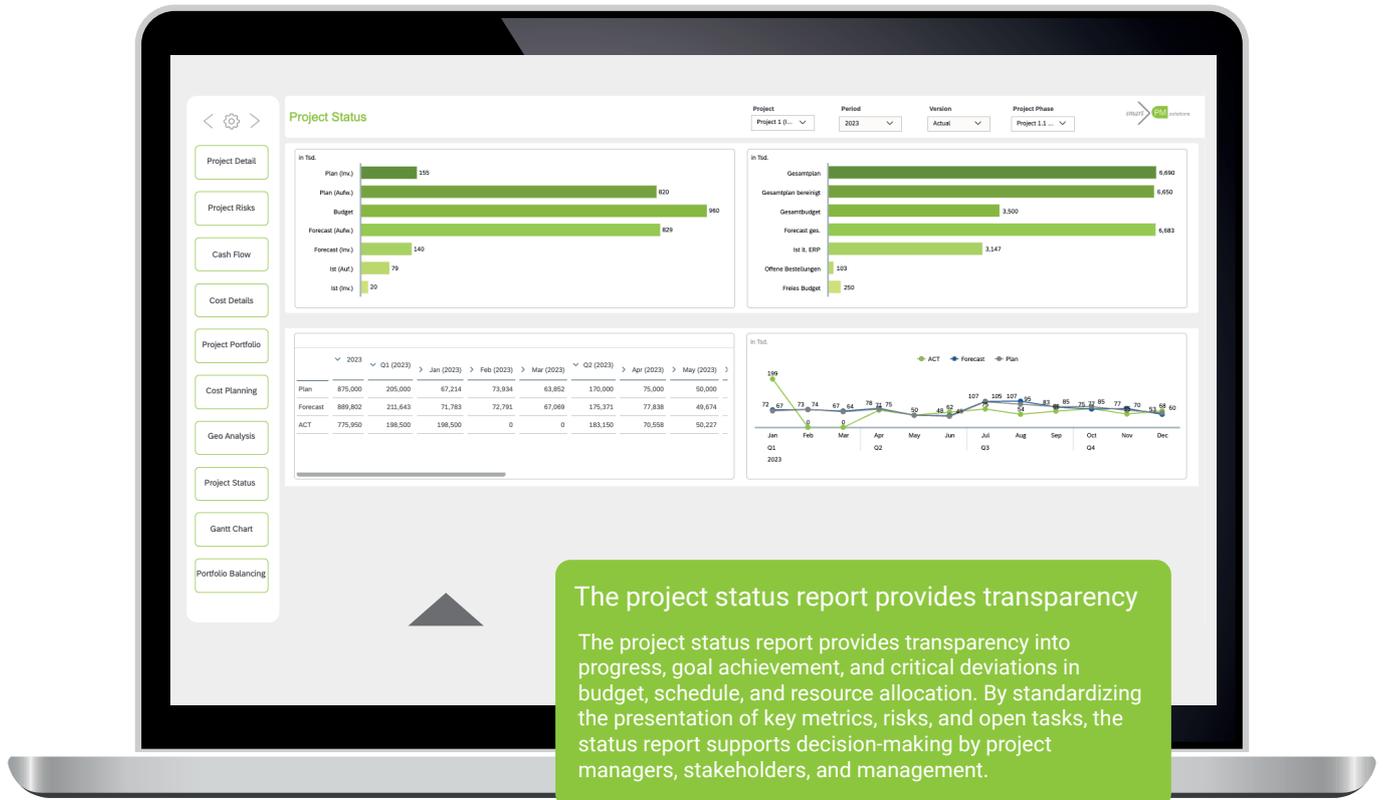
### Gantt chart with Kickpoint overview

In the Kickpoint overview with Gantt chart, the progress of a project is displayed clearly. Key information such as milestones, planned duration, progress, and budget data are easily visible. With the drill-down function, users can directly access project details to analyze further information.

A central tool in project performance management is the project status report (see illustration on page 8). It documents the current status of a project regularly and systematically, allowing problems to be identified early and targeted measures for control to be initiated.

This allows problem projects that are not progressing as planned to be identified more quickly and then replanned or rescheduled. Through drill-down functions, users can navigate from the aggregated level down to individual projects.

Ad-hoc analyses, precise AI-powered forecasts, and scenario simulations support informed project decisions. Automatic report distribution relieves project participants such as portfolio managers, project managers, department managers, and project teams.



The project status report provides transparency into progress, goal achievement, and critical deviations in budget, schedule, and resource allocation. By standardizing the presentation of key metrics, risks, and open tasks, the status report supports decision-making by project managers, stakeholders, and management.

Additionally, the work breakdown structure (WBS) ensures transparency by clearly visualizing work packages within project phases and their dependencies. Projects are considered in a holistic, "planned-out" manner.

## The smartPM.solutions Health Check

### Software analysis for performance improvement

Are you dissatisfied with the performance of your current controlling software? Are you unsure if you're fully utilizing the potential of existing or new features? During the smartPM.solutions Health Check, our experienced consultants thoroughly assess your controlling tool and identify opportunities for performance improvement.

<https://smartpm.solutions/healthcheck>



## Optimally and transparently allocate project-related resources

With the project and program performance management software from smartPM.solutions, you can manage and allocate your project resources – personnel, materials, and finances – optimally, avoid bottlenecks, and sustainably increase the efficiency of your projects.

As projects often compete for the same limited resources, such as key competencies, suppliers, or production facilities, strategic and proactive resource allocation is essential.

The fully automated connection to all relevant data sources within the company (e.g., time tracking, order intake, backlog information, or procurement times) enables comprehensive analysis of the resource situation.

Alarm systems proactively inform about potential conflicts and automatically suggest AI-driven solutions, such as from the perspective of team leaders. Additionally, the smartPM project time overview provides detailed information on hour planning and tracking per project.

With this approach, you enhance the transparency and predictability of your projects, ensuring their success.



Internal and external personnel costs, which often make up the largest share of project costs, can be integrated into the project calculation—either separately (for data privacy reasons) or directly in the form of hourly rates.

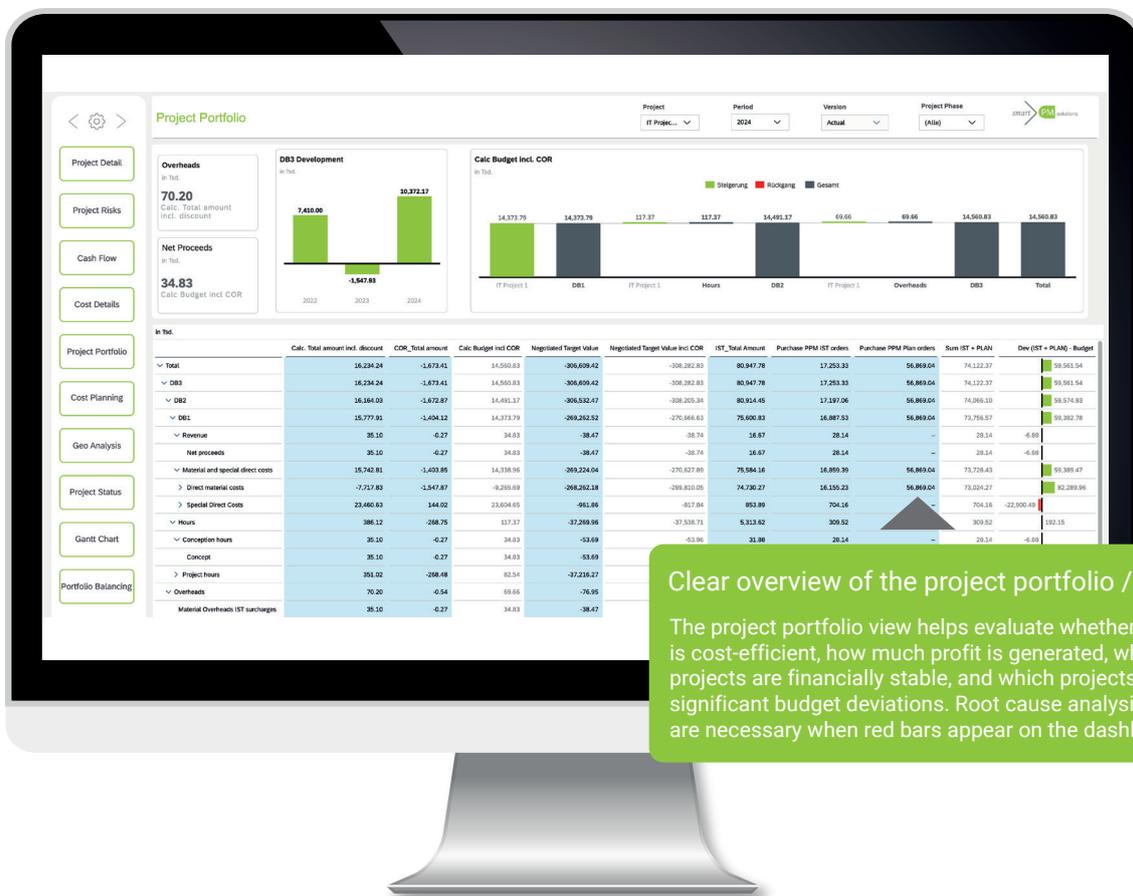
Moreover, the system supports resource planning based on competencies and availabilities. This flexibility is, in our experience, particularly interesting for research companies that want to utilize EU or public funding, as well as for project-based contribution margin calculations. You can find details on the topic of funding project management in the factsheet. [⇒ https://smartpm.solutions/grant-management-and-control](https://smartpm.solutions/grant-management-and-control)

## Efficient project portfolio monitoring in real time

Milestone trend and earned value analyses are established methods for effectively monitoring and optimizing project plans and entire portfolios.

They provide a clear overview of the timeline development of milestones, delays, costs, revenues, and risks. They facilitate the comprehensive management and optimization of strategically relevant projects within the program.

Both methods identify deviations before they become critical, increase transparency, and highlight potential for process optimizations.



Clear overview of the project portfolio / program

The project portfolio view helps evaluate whether a portfolio is cost-efficient, how much profit is generated, whether the projects are financially stable, and which projects show significant budget deviations. Root cause analysis and actions are necessary when red bars appear on the dashboard.

Additionally, project budget caps help realize significant cost savings and ensure proactive portfolio management. This keeps the entire portfolio flexible and adaptable, even in a challenging and rapidly changing market environment.

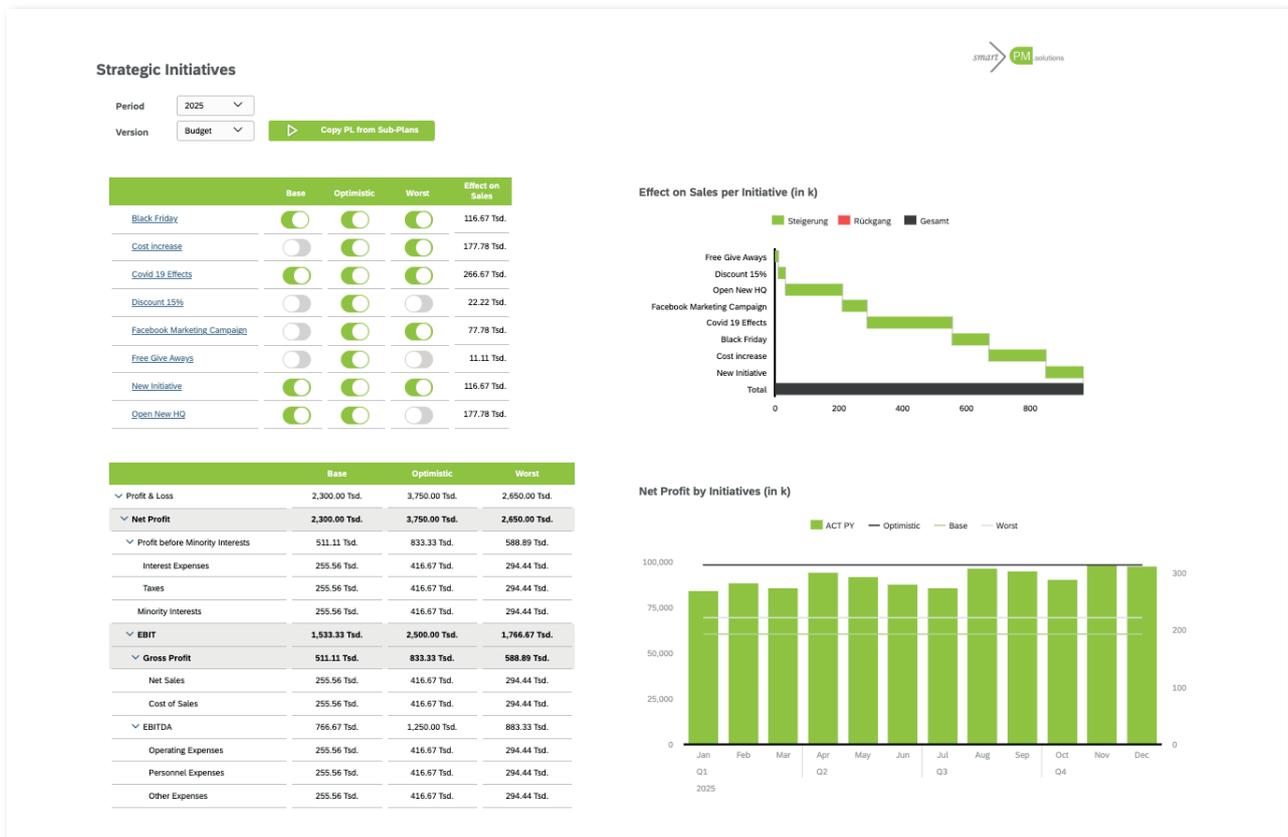
Obligation monitoring provides transparency on open commitments. This creates the necessary visibility and control options to strategically steer your projects.

## Scenario analyses and rolling forecasts support informed project decisions

In a dynamic environment, portfolio managers must continuously monitor projects and portfolios and be able to adapt flexibly. A one-time review - such as only at the beginning or just before the completion of a project - is not sufficient.

Monitoring can accelerate significantly depending on circumstances such as crises or external shocks. In such situations, reporting often occurs on a weekly or even daily basis.

Scenario-based portfolio simulations allow you to predict the impact of changes in one or more projects on the entire portfolio. This is especially useful for strategic decisions like "Make, Buy, or Cancel" or when a quick response to dynamic market changes is needed.



### Simulation of Scenarios

Scenario analysis with best/optimistic/worst-case scenarios and strategic initiatives to achieve corporate objectives: The portfolio manager can analyze various scenarios and evaluate which measures have the most significant positive impact on revenues, costs, or profits. Risks can thus be mitigated effectively.

Rolling forecasts improve cost transparency and enable more accurate predictions. With rolling project cost previews, expected project costs can be better forecasted and managed along key milestones and project phases, such as project start or completion. This holistic approach bridges top-down objectives with operational project execution.

## Efficient Management of Initiatives to Ensure Project Success

Since projects often require resources from various departments, it is essential to identify and address dependencies and resource constraints early on. The portfolio manager acts as a communication hub between project managers, team leaders, decision-makers, and controllers. Setting and tracking project initiatives in response to deviations plays a critical role in ensuring project goals are still achieved.

The smartPM project and program performance management solution incorporates the "Initiative Tracker," which fulfills this function. Seamless integration with communication tools like Microsoft Teams, Planner, or Project significantly simplifies and accelerates collaboration among all stakeholders.

### Initiatives Tracker

Show all Initiatives

**Strategy Initiatives**

Initiatives	Person Responsible	Target	Result / Impact	Priority	Created By	Comment	Budget	Created on	Progress	Expected Cost	Expected sales impact	IST Cost	Teams	Planner
Free Give Aways	Fabian Gerer	Customer acquisition	+200 customers	4.8	Christian Konrad	Budget confirmed	35.000	01.05.2024	80%	35.000	55	25.000		
Discount 15%	Christian Konrad	Revenue increase	Revenue increase by 20%	3	Sonam Sharma	Lowered priority	875.000							
Open New HQ	Sonam Sharma	Enter New Market	Increased sales in Asia	2.8	Christian Konrad	Approved by board	320.000							
Facebook Marketing Campaign	Sonam Sharma	Introduce New Product	Increase market share	3.5	Fabian Gerer	Lowered priority due to entrance of new market	270.000							
Covid 19 Effects	Fabian Gerer	Customer satisfaction	Increased ratings	2.5	Christian Konrad	milestone reached	1.950.000							
Black Friday	Christian Konrad	Revenue increase	Expected to go up by 30%	4.5	Sonam Sharma	Budget confirmed	450.000							
Cost Increase	Sonam Sharma	Enter New Market	Increased sales in Europe	5	Fabian Gerer	According to plan	500.000							
New Initiative	Christian Konrad	Enforce cross & upselling	Increase market share	5	Sonam Sharma	Delayed in order to enable other projects	40.000							

**Set strategic initiatives**

From the perspective of a project manager, this overview provides key information on the goals, responsibilities, progress, and budget of the initiatives.

## Continuous Project Monitoring – The Geo Analysis

The geo-analysis expands traditional project management by adding a spatial perspective, which can be crucial for international projects or those with strong location dependencies. Projects are managed and monitored regionally or globally in real time.

### Geo Analysis

Period: 2024 | Version: Actual

**Projects per Country**

**Investment sum (EUR) per Country**

**Investment sum (EUR) per City District**

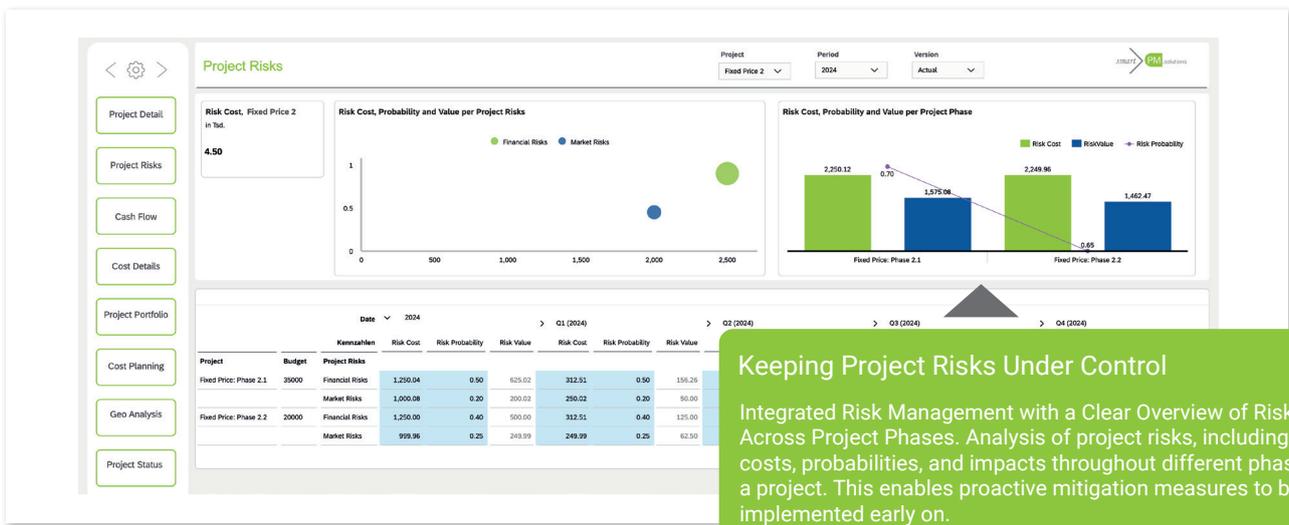
PJ - Project	Massnahmenbeschreibung	Partner	Funding Source
10088-001	ICT Integrated Security Solution Support for UNSOS (9599020146)	Department of Field Support (DPS)	Peacekeeping Operations (DPKO)
10229-008	Provision of shuttle and dispatch services to UNMISS	United Nations Mission in the Republic of South Sudan (UNMISS)	United Nations Mission in the Republic of South Sudan
10229-009	Technical Support for DFS/LS Data Preparation for Umjoja implementation	Department of Field Support (DPS)	Department of Field Support (DPS)
10229-010	Operational Support to setup the Blue-Green Economy Finance Facility (BEFF) in Sri Lanka	United Nations Environment Programme (UNEP)	United Nations Environment Programme (UNEP)
10229-011	Technical Support for Umjoja Support Services – Implementation and Project Management	Department of Field Support (DPS)	Department of Field Support (DPS)
10229-012	Technical Support for DFS/LS for Training Services in support of Umjoja	Department of Field Support (DPS)	Department of Field Support (DPS)
10229-013	Technical Support for IT Service Management, Capacity Planning and Performance Management	Department of Field Support (DPS)	Department of Field Support (DPS)
10229-014	Technical Support for ICT Technical Compliance	Department of Field Support (DPS)	Department of Field Support (DPS)
10838-002	Provision of Technical Project Management Services for the Remodelling of the National Polio and Measles Laboratory in Dhaka.	World Health Organization (WHO)	World Health Organization (WHO)
10846-001	HR Management Services to UN-HABITAT in LCR	United Nations Human Settlements Programme (UN-Habitat)	United Nations Human Settlements Programme (UN-Habitat)
11026-011	Enhancing Capacities of National Police of Ukraine	Canada, Ukraine	Canada, Ukraine
11295-004	Mine Action in Support of MINURSO, AB 2017-2018	United Nations Mine Action Service (UNMAS)	United Nations Mine Action Service (UNMAS)
11295-006	Mine Action in Support of MINUSCA 17-18	United Nations Mine Action Service (UNMAS)	United Nations Mine Action Service (UNMAS)
11300-005	Continuation of MMU for Gaza - Norway 3 (Award ID 00083490)	Executive Office of the Secretary-General	Executive Office of the Secretary-General

**Project Control Dashboard**

With the Project Control Dashboard (by countries, regions, etc.), you can quickly get a graphical or tabular overview of the geographic distribution and investment focuses of your projects. The ROI and total investments per country can be compared.

## System-integrated risk management for projects

Project risks are integrated, recorded, and assessed in the smartPM solution. Risk class, description, probability of occurrence, and responsible parties are defined. Additionally, each risk is assigned a risk value to better assess its significance and urgency.



**Keeping Project Risks Under Control**  
 Integrated Risk Management with a Clear Overview of Risks Across Project Phases. Analysis of project risks, including their costs, probabilities, and impacts throughout different phases of a project. This enables proactive mitigation measures to be implemented early on.

Typical risks include resource shortages (e.g., personnel, machine capacities), financial constraints, schedule delays, or quality issues. These risks are seamlessly integrated into project planning and the project status report to ensure a comprehensive view and control.

## Management Report - Everything at a Glance



**Management Dashboard**  
 The "Overview" management dashboard provides a compact summary of the current project portfolio situation. It visualizes the development of the budget, project prioritization, backlog, as well as detailed information on ongoing and new projects at a glance. This ensures that management decisions are based on solid data. The content of the management reports can be easily customized.

## Integrated cost tracking and documentation of lessons learned

Controlling experts and management benefit from an integrated ex-post project cost control, which allows a detailed analysis of actual project costs compared to the original planned values. This post-calculation provides valuable insights for future projects by identifying deviations and analyzing their causes.



**Project Post-Calculation**

The project post-calculation provides a detailed overview of the financial performance of a project and enables a retrospective evaluation to better manage future projects. The comparison of forecast, rolling forecast, and actual costs shows how accurate the original planning was and whether adjustments were made during the project.

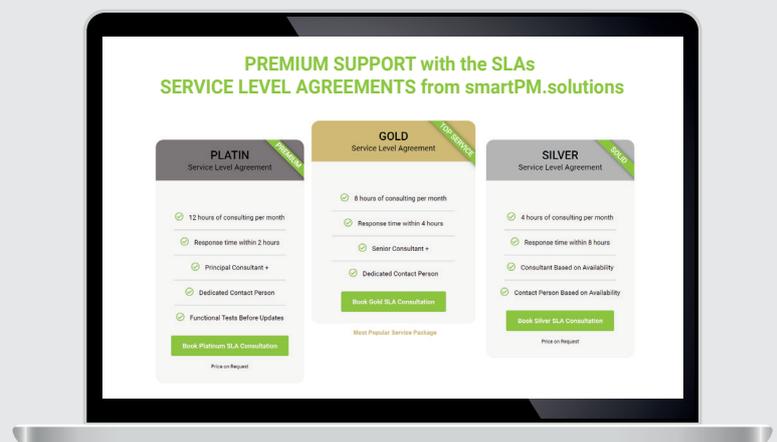
Valuable learnings from completed projects can be systematically documented in project templates. This ensures that past mistakes are not repeated and proven approaches are retained. At the same time, new projects can be strategically categorized and prioritized in the project file.

The intuitive user interface with "mouse-over" explanations, comment functions, and integrated help features makes it easy to use – even for key project participants with less experience in project management. This approach increases efficiency, prevents recurring errors, and optimizes the entire project management process.

## Customer service at the highest level

### Premium support with smartPM Service Level Agreements (SLA)

You are looking for reliable, competent support in both German and English with fast, fixed response times from dedicated contacts. We guarantee this to our customers with the smartPM SLAs - Service Level Agreements.



<https://smartpm.solutions/service-level-agreement>

# 7 Good Reasons to Choose smartPM

Why we are the right partner for your company!



A Single Point of Truth: Seamlessly and automatically integrate all source systems.



Flexible, Excel-like planning technology combined with proven financial and business logic.



Integrated financial planning, analysis, budgeting, forecasting, and reporting – all in one solution.



User-friendly, innovative, and highly customizable solutions powered by artificial intelligence.



smartPM planning models are available for technologies such as IBM, Jedox, Acterys with MS Power BI, SAP SAC, Unit4 FP&A.



A skilled and experienced team with a performance management background; 4.9/5 project satisfaction rating.



Reliable support before, during, and after the project, with a 6.8/7 support satisfaction score.

Topics you might also be interested in...

"With smartPM solutions, List saves €450,000 per year and per project. There's no need to discuss the ROI (Return on Investment) anymore."

Arbi Araks – LIST GC  
Director for Controlling & Finance

**CASE STUDY**

**Three in One: Efficient Project and Program Performance Management, Precise Project Calculation, and Integrated Financial Planning Set New Standards at List GC**

Everything in one streamlined system: data reliability and scenario thinking play an especially important role for project-driven List GC. The integrated planning solution implemented by smartPM.solutions saves the company at least 2.5 full-time equivalents (FTE) – the team now focuses on developing measures and recommendations instead of preparing data in Excel.

Case Study List GC for Download

<https://smartpm.solutions/wp-content/uploads/2022/01/Referenzbericht-List-final-en.pdf>

Expert meeting with solution consultants

< 2025 >

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**Book appointment**

<https://smartpm.solutions/request-live-demo>

