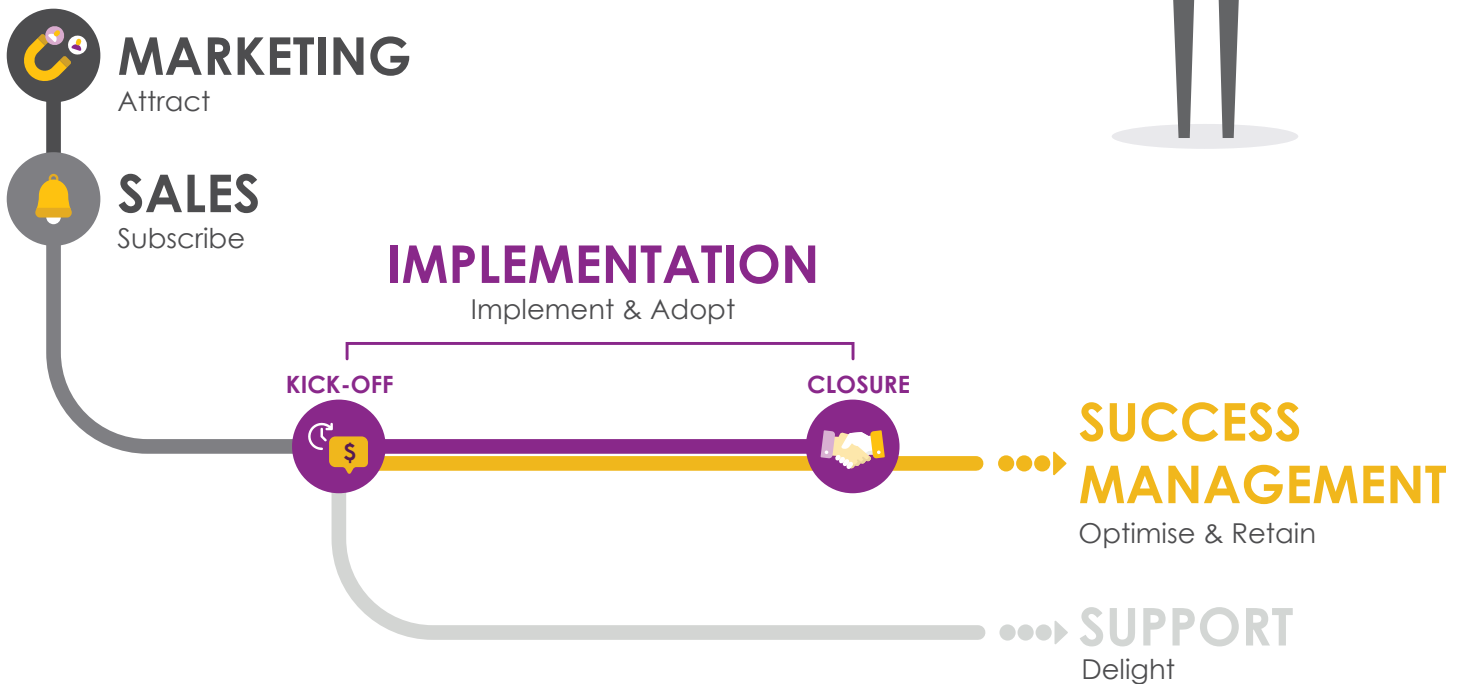




## SUCCESS MANAGER - HOW?

Project Portfolio Office's approach is to partner with our clients to ensure they continuously derive value from the solution which will change with the improvement of the client's organisational project, portfolio, and programme management (PPPM) maturity.

To support this approach, every client is provided a dedicated Success Manager – all included as part of the monthly subscription fee.



"PPO's Success Manager is focused on ensuring that our clients achieve their desired outcomes and receive continuous business value while using our project portfolio management software."

## SUCCESS MANAGER - HOW?

The primary responsibilities include



**Key Contact and Trusted Advisor:** Offering expert guidance and support to help clients achieve their goals. They build strong relationships based on trust and understanding, ensuring that clients receive personalised advice and solutions tailored to their unique needs.



**Regular Engagement:** Maintaining regular reviews (monthly, bi-monthly or quarterly) with clients to ensure they are engaged with the product and utilising its features to their fullest potential. The success manager will also ensure that new functionalities are seamlessly adopted by providing tailored use cases and practical examples that demonstrate the value of these features within the client's specific environment.



**Performance Tracking:** Monitoring usage and success metrics and proactively addressing any concerns. The success manager will assist in benchmarking the client against others in similar industries and operations. By analysing key performance metrics and comparing them with industry peers, the success manager provides valuable insights to help the client identify opportunities for their improvement journey.



**Feedback and Advocacy:** Collecting feedback from customers about their experiences with the product and advocating for customer needs within the company to drive product improvements and enhancements.



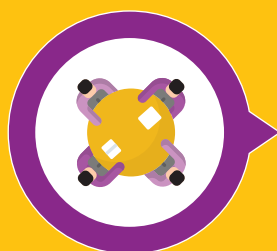
**Consult:** Offer best practice guidance and help on more complex requests submitted via the Support Desk



### Purpose of the Regular Review Meeting

The objective of the regular reviews is to ensure that clients receive maximum value from PPO, aligns the solution to their way of work and maturing their project environments using the software. The PPO Success Manager assists clients to define a clear roadmap to align to the organisation's maturity, create specific action plans and measure progress against the maturity and plans.

Monthly Review Process in a Nutshell



Maintaining regular reviews (monthly, bi-monthly or quarterly)



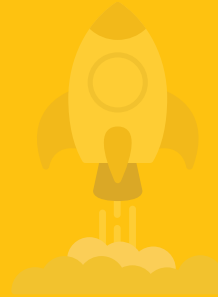
Define a clear roadmap (to align to the organisation's maturity)



Create specific action plans



Measure progress against the maturity & plans

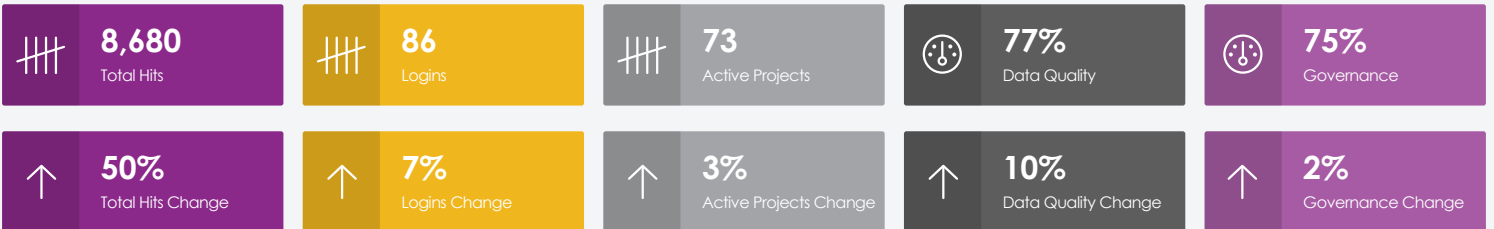


## What are our Success Metrics?

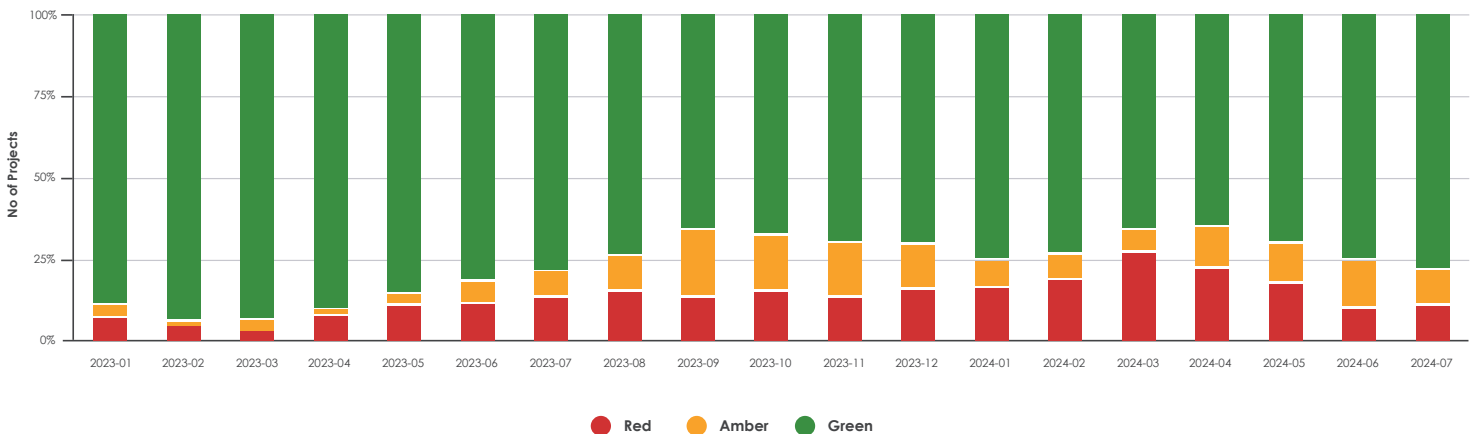
Success metrics are used to evaluate the effectiveness of overall usage and adoption of the solution. Post implementation metrics like User Logins, Total Hits, Average Hits Per User Group are key to track the ongoing usage and adoption, once the implementation project has closed out. Other crucial metrics include Data Completeness and Data Quality. Through this monitoring, we can gain valuable insights into performance and overall portfolio and project health. This enables us to help clients to identify gaps in adoption, see improvement areas and enabling them to make informed decisions for their growth and improvement.

### Monitoring

#### Key Statistics

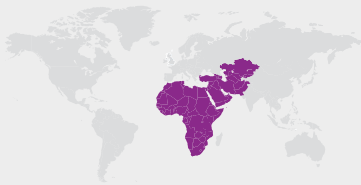


### Project Governance





*You can find us just about  
anywhere in the world*



## AMERICAS, EUROPE AND ASIA

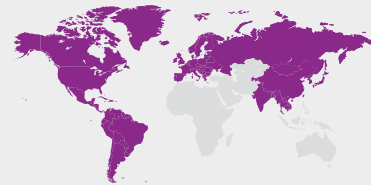
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## AFRICA AND MIDDLE EAST

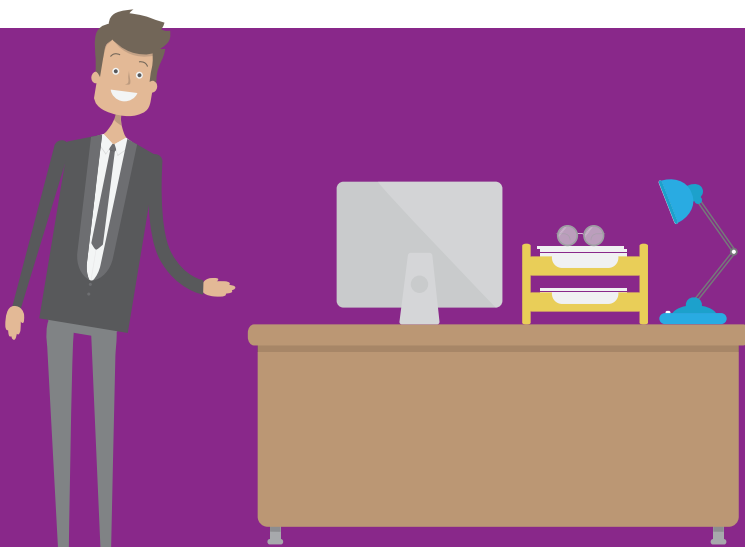
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