

# ARE YOU STILL MANAGING YOUR **PORTFOLIO WITH SPREADSHEETS?**



WHITEPAPER <<

# “Just do it in Excel”

— every company somewhere  
down the road



## Are you still managing your portfolio with spreadsheets?

**“Just do it in Excel” — ever heard that before?**

Most likely, if you continue to use Excel spreadsheets to manage projects and do not see compelling reasons for the change, you are not alone. Starting to plan projects in Excel is often the first step to professionalize project management in general. It quickly gives you an overview over all (running) projects and you can sort them as needed. However, the management of the growing complexity of projects and portfolios is soon leading to a death by spreadsheet.

But how to start driving a professional and efficient project portfolio management without the need of excel sheets? In the following pages you'll get to know the value of PPM and you'll see an easy way with no financial risks – no product risks – and no methodical risks to bring your business forward.

*Mario Reismüller*

Mario Reismüller  
Managing Director

# Get help to be able to solve common PPM/PMO challenges

## Do any of these sound familiar to you?

- No centralized place to request projects
- No visibility of all the work that is going on
- No visibility on all the projects in the portfolio
- Projects that run over budget
- Data integrity issues
- Lack of visibility to key milestones and performance
- Poor communication of project status and performance
- People don't know how to initiate new projects
- Long delays and missed deadlines

## How modern PPM solutions solve these problems

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 Data from spreadsheets and isolated tools are static and often out-of-date by the time the information is reported to senior management. This is why businesses are increasingly turning to modern PPM solutions to overcome these challenges. With the right PPM platform in place, portfolio managers can accelerate timelines across the board thanks to increased visibility and real-time scheduling tools.

This insight helps reduce costs considerably, giving portfolio managers clarity into spending — as well as which projects are valuable, and which are lesser priorities.

PPM solutions also help organizations make better investment decisions. It creates an environment that leads to predictable and repeatable project success. This can be ensured by using best practices, principles and proven methodologies during the project life cycle by establishing a PMO and using the PPM solution to guide through the process.



No financial risks  
No product risks  
No methodical risks  
— that's really a smart start.

## Capture SmartStart



## Start your PPM journey with Capture SmartStart

### LET'S START SMART!

**Fast, sustainable & without risk – step by step to an extended project portfolio management with Capture SmartStart.**

We know that Project Portfolio Management is a long-term journey and want to especially help you (but not only) with the most critical part of every journey: The Start. Our Methodology enables to start small and extend step by step – true to the motto „walk before you run“. The benefit of our pre-configured solution is that what you see is what you get.

The Capture SmartStart combines generic processes and best practices which guarantees an easy start and comprises assessments, implementation, training, and ongoing support the whole project time. But even after the first step, we're on your side as a partner to step by step enhance your solution.

Our service makes it possible that your organization as well as the chosen solution is ready-to-use within a few weeks. As we realize your SmartStart at a fixed price, there won't be any surprises from the beginning.

**Benefit from our experts many years of know-how and expertise, preconfigured processes from best practices, agile implementation methods and subdued support services – independent where you currently are on the PPM journey.**

## Summary of our solution

### Capture SmartStart at a glance:

- Methodology to start small and extend step by step – walk before you run
- Pre-configured solution – what you see is what you get
- Combines generic processes and best practices
- Comprises assessments, implementation, training, and ongoing support
- Ready-to-use in a few weeks
- Realization at a fixed price

### Your sustainable solution for starting quick and enhancing step by step

- ready to run, pre-configured processes
- use Capture's pre-configured StarterPack and get started quick
- benefit from sustainable support services
- enhance your solution step by step
- No financial risks – No product risks – No methodical risks

### Capture SmartStart includes:

- Guidance through a Capture PPM expert
- Assessments
- Set up of solution & starter package
- Configuration of most important processes (based on assessments)
- Key-User & Administration Training
- Ongoing Support

### Optional Services

(according to Package)

- Additional Trainings
- Additional configurations
- Extended support services
- Enhancements
- Continuous Upgrades



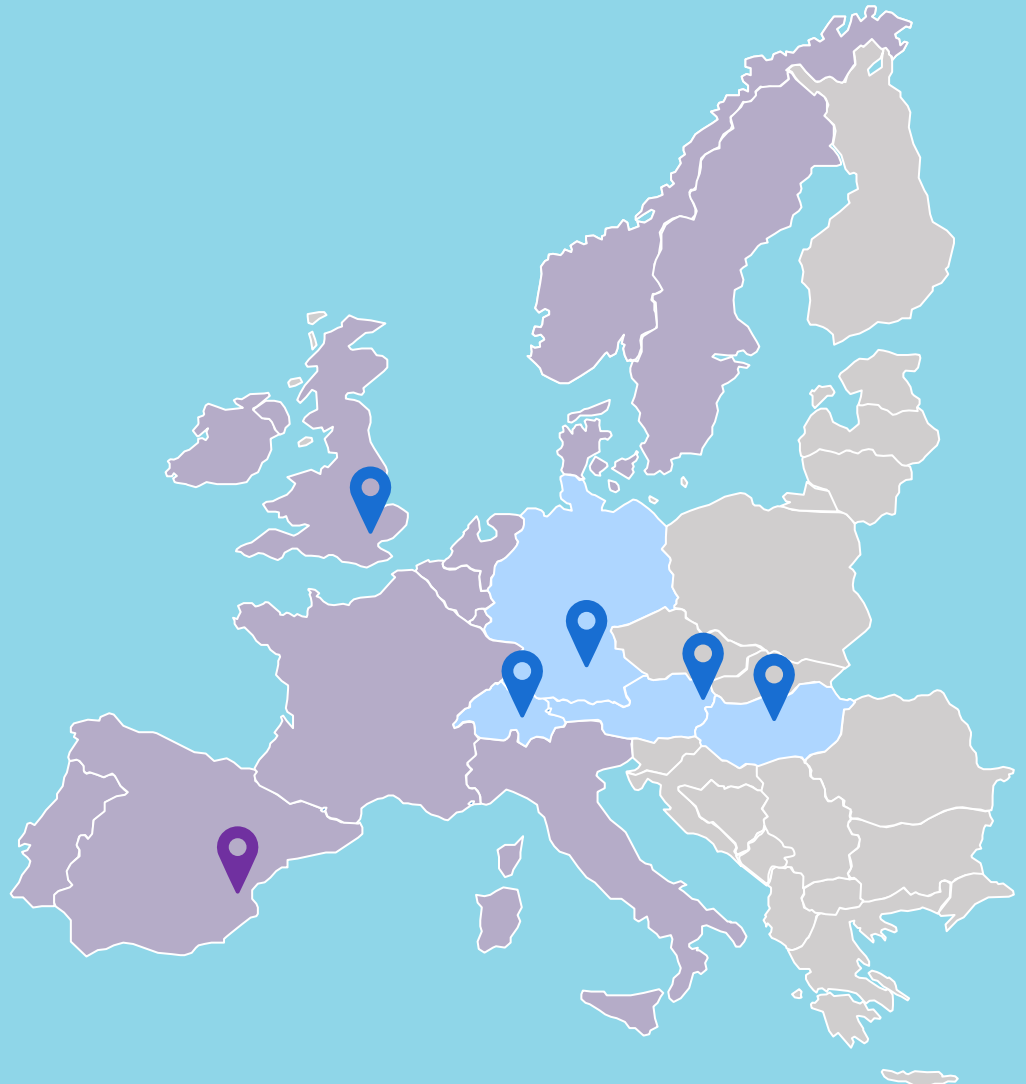
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Jump start your PPM processes with our experts, pre-configured processes from best practice, proven implementation methodology and sustainable support services – no matter where you are on your PPM journey.

# Let's start smart today!

## About Capture

For more than a decade Capture PPM has specialized in helping companies and organizations to improve their project and portfolio performance by providing and implementing best-of-breed software solutions and methodologies. We are supporting our customers and partners to navigate through today's world of speed and agility in project portfolio management. Our goal is to help organizations to manage their projects much more effectively by pioneering new approaches, thus mastering the demands of our digital future.



# Capture Europe

Big enough to matter, small enough to care

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