



ICOPLAN SERVICE DEFINITION

iCoPlan Implementation Service is a Project Portfolio Management Accelerator based on the Power Platform. This is used to manage all elements of the PPM for customers across the Public Sector. This utilises Power Platform, Power Bi, Power Automate and Co-Pilot, and can be fully configured to meet your needs.

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About iCoTech

iCoTech is a specialist consultancy dedicated to transforming how public-sector and enterprise organisations manage Projects Portfolios, Risk, and Strategic Planning. Established in 2018 and headquartered in Cardiff, iCoTech combines deep PPM expertise with advanced Microsoft Power Platform capabilities to deliver solutions that replace fragmented spreadsheets, siloed systems, and legacy tools with modern, connected, data-driven environments. As a recognised Microsoft partner, the company is trusted to help clients maximise the value of their existing Microsoft licensing through secure, scalable, and compliant technology solutions.

At the core of iCoTech's offering is a suite of platform accelerators — iCoPlan, iCoRisk and iCoView — designed to provide visibility, strengthen governance, and unlock real-time performance insights. These accelerators unify Project Portfolio, and Risk data, enabling organisations to make faster, more informed decisions using consistent, up-to-date information. By simplifying operations and reducing administrative burden, iCoTech empowers teams to focus on strategic delivery while improving transparency, accountability, and measurable public value.

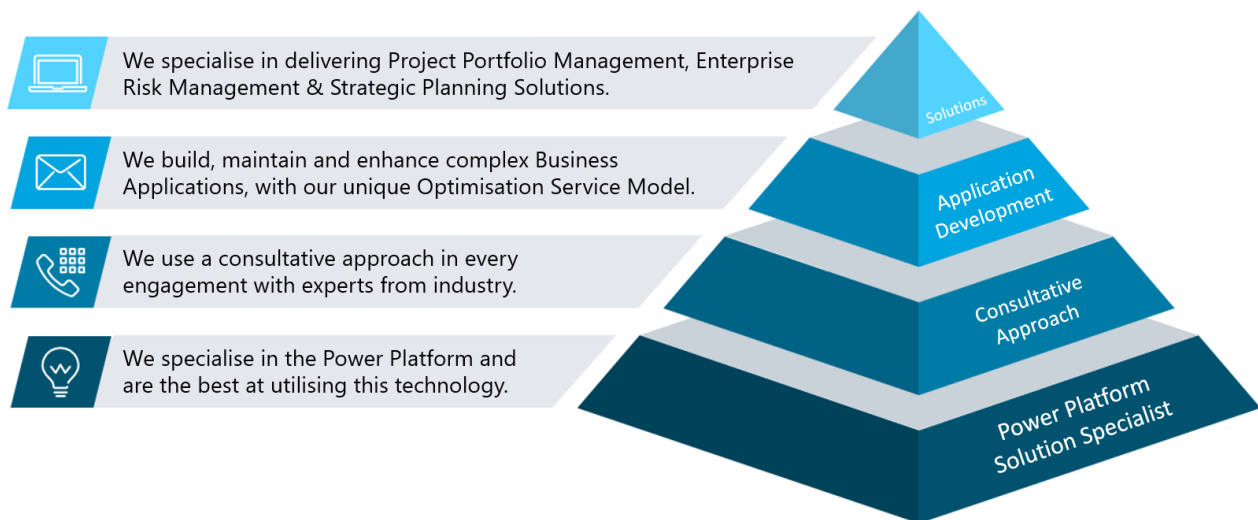
Beyond technology, iCoTech delivers a full consultancy service encompassing discovery engagements, customer waves, optimisation services, and long-term digital transformation support. Their structured delivery methodology developed across multiple stakeholders ensures that every engagement follows a clear, standards-driven approach that scales with organisational complexity. Whether implementing new PPM solutions, running optimisation cycles, or supporting multi-year business change programmes, iCoTech's consultants blend technical knowledge with hands-on PPM experience to accelerate maturity and embed sustainable capability.

iCoTech's mission is to help organisations achieve better outcomes through connected insight, stronger governance, and sustainable delivery. With a rapidly growing team, a clear long-term strategy, and proven success across public-sector environments, iCoTech continues to expand its impact by delivering world-class Power Platform solutions tailored to the unique pressures of councils, NHS bodies, and government organisations. Every solution is designed not for complexity but for measurable impact — driving productivity, improving planning, and enabling leaders to demonstrate tangible benefits to their stakeholders.

We are really proud to have the best customers across the Public Sector utilising our Consulting Services:



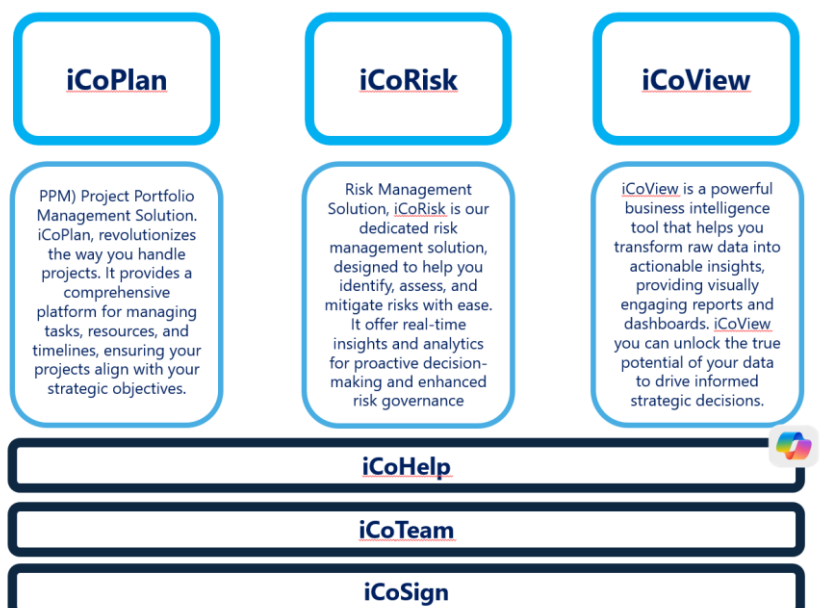
Furthermore, we have a really focused offering:



And utilising our accelerator approach, we implement solutions based on our core accelerators.

iCoTech also have three other Accelerators which are;

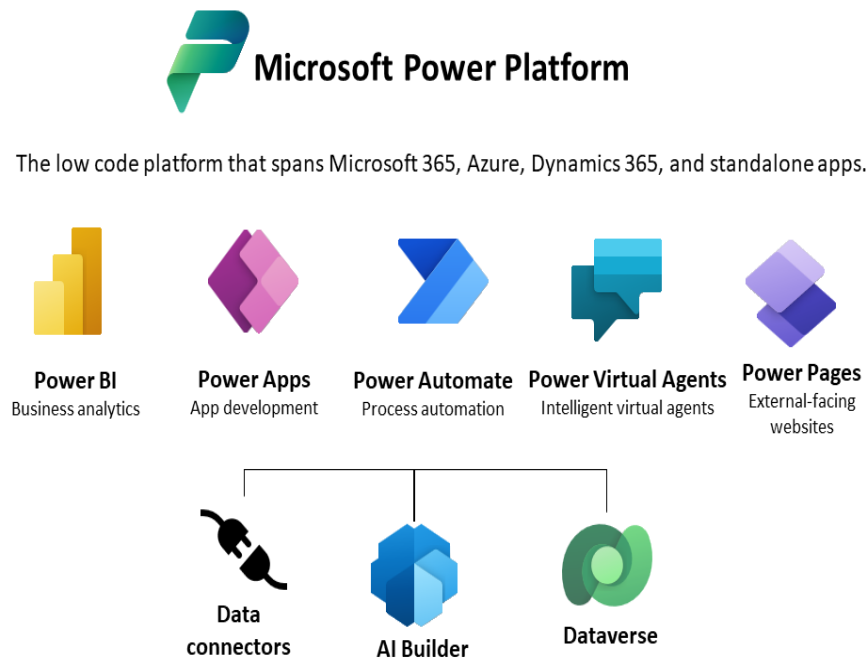
- iCoHelp – Our Copilot Agent Accelerator.
- iCoTeam – Our Resource Management Accelerator.
- iCoSign – Our Procurement Management Accelerator.



About the Power Platform

As iCoPlan has been developed on the Power Platform which is a line of business intelligence, app development, and app connectivity suite of software applications that allows the automating of processes, building of solutions, and analysis of data. It integrates seamlessly with the broader capabilities within Azure, M365 and Dynamics, and can connect to countless 3rd party application and services through data connectors.

The overall Power Platform is summarised below:



The Power Platform is highly beneficial because it dramatically increases productivity and accelerates digital transformation by empowering non-technical users to build solutions themselves. With its low-code/no-code approach, tools like Power Apps and Power Automate reduce reliance on developers and IT backlogs, enabling teams to create applications, automate workflows, and solve business challenges at pace. This democratisation of app development allows organisations to respond faster to operational needs, streamline manual processes, and free up valuable time for higher-value work.

Another major benefit is its ability to unify data and provide deep insights through seamless integration with Microsoft 365, Azure, Dynamics 365, and third-party services. Power BI delivers advanced analytics and visualisation, turning raw data into meaningful insight that supports better decision-making across the organisation. Combined with Dataverse and over 1,000 available connectors, the Power Platform becomes a centralised ecosystem where information flows across systems securely and consistently, ensuring teams work from a single source of truth.

Finally, the Power Platform offers long-term flexibility, governance, and cost efficiency, making it an ideal foundation for scalable, future-ready solutions. It reduces the need for bespoke software development and lowers operational costs by automating routine tasks and simplifying solution delivery. With built-in security, compliance, and governance controls, organisations can innovate safely while maintaining standards. Its scalability ensures it can support both simple departmental apps and enterprise-wide digital programmes, helping businesses continuously iterate and evolve their processes as needs change.

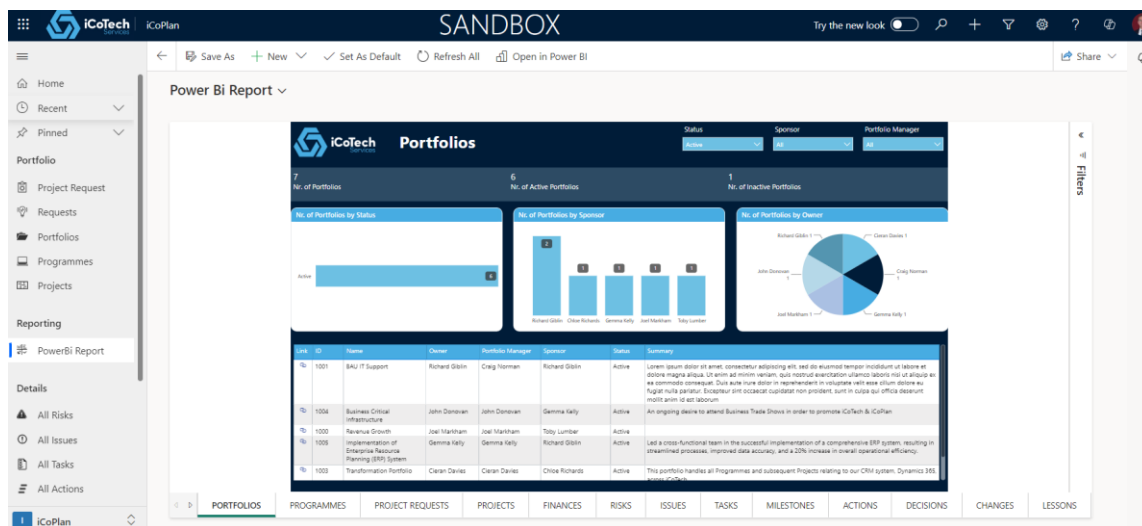
About iCoPlan

iCoPlan is a Project Portfolio Management Accelerator Solution that can help you to Prioritise and manage your Portfolio's, Programme's and Projects all in one place. Our accelerator iCoPlan utilises the Microsoft Project Accelerator and Project for the Web/Planner but has multiple Features that we've added based on our experience in the market.

Understanding that every business has different processes, policies, and objectives, we can configure iCoPlan to meet your specific needs. Whether your projects have different stage gates, or specific fields required for capturing risks against Projects vs Programmes, iCoPlan can be tailored to you. From minor configuration changes to large scale enterprise Portfolio Management solutions in the Power Platform, can all be achieved with iCoTech Services.

In this section we have identified a number of screen shots of our accelerator iCoPlan that we think can show the 'art of the possible', Of course each of these screens can be configured to meet your requirement and this is provided as an example. To be clear this isn't all the functionality that is available in iCoPlan.

Accelerator Main Page



This example shows a Power BI Dashboard as the "Landing Page".

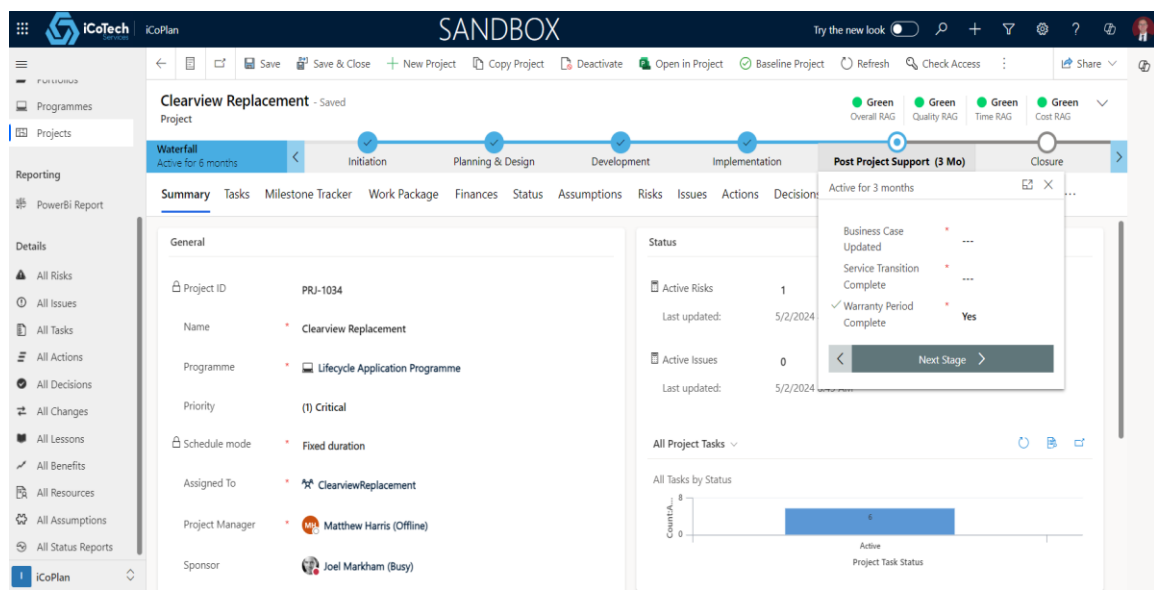
View of all Projects

The screenshot displays the iCoPlan Accelerator Main Page, which is a view of all project requests. The interface includes a sidebar with navigation options like Home, Recent, Pinned, Portfolio, Project Request, Requests, Portfolios, Programmes, Projects, Reporting, and Details. The main content area shows a table titled "All Project Requests" with columns for Name, Status, Request State, Requested By, Sponsor, ROI %, and Prioritisation Score.

Name	Status	Request State	Requested By	Sponsor	ROI %	Prioritisation Score
2nd Floor Refurb	Inactive	(1) New	Richard Giblin	Toby Lumber	-75.00	43.75
Aberdeenshire Council M365 Roll...	Active	(4) Rejected	Toby Lumber	Joel Markham	-57.97	50.00
Case Management Replacement	Inactive	(3) Approved	Alison Davies	Joel Markham	66.67	50.00
Clearview Replacement	Inactive	(3) Approved	Toby Lumber	Joel Markham	-80.00	62.50
Corporate Internet Outage	Inactive	(1) New	Cieran Davies	Jonathan Ray	---	68.75
CRM Upgrade to Dynamics	Inactive	(2) In Review	Jonathan Ray	Chloe Richards	-42.40	37.50
Demo Project Request - Azure Im...	Inactive	(3) Approved	Alison Davies	Joel Markham	-50.00	75.00
Demo Project XY	Inactive	(3) Approved	Alison Davies	Jake Cammack	-90.00	56.25
Demo System Available	Active	(1) New	Joel Markham	Lloyd Davies	-50.00	68.75
Demo X	Inactive	(3) Approved	Jake Cammack	Joel Markham	-50.00	62.50
Digital Dictation	Inactive	(3) Approved	Andrew Smith	Alison Davies	-80.00	50.00

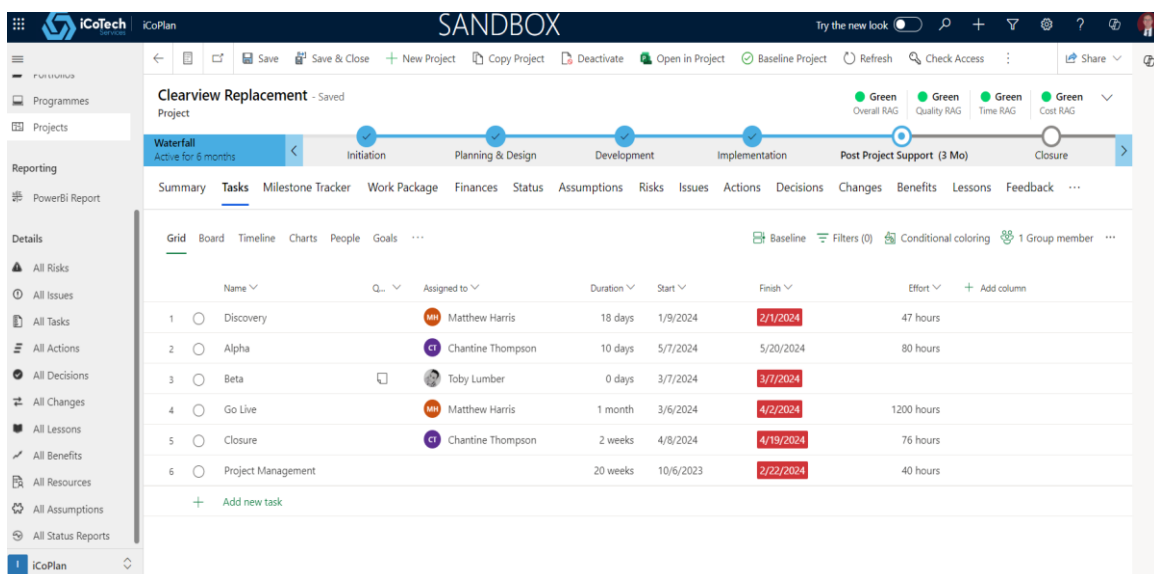
Without the need to use Power BI you can use these views to create live Portfolio View's whereby you can configure your own views as an end user. / Super user.

Project Lifecycles



Being able to track a Project through a Lifecycle with pre-defined Stages and Gate Checklist items. To govern and control how a Project moves through the Lifecycle.

Project for the Web/ Planner Integration



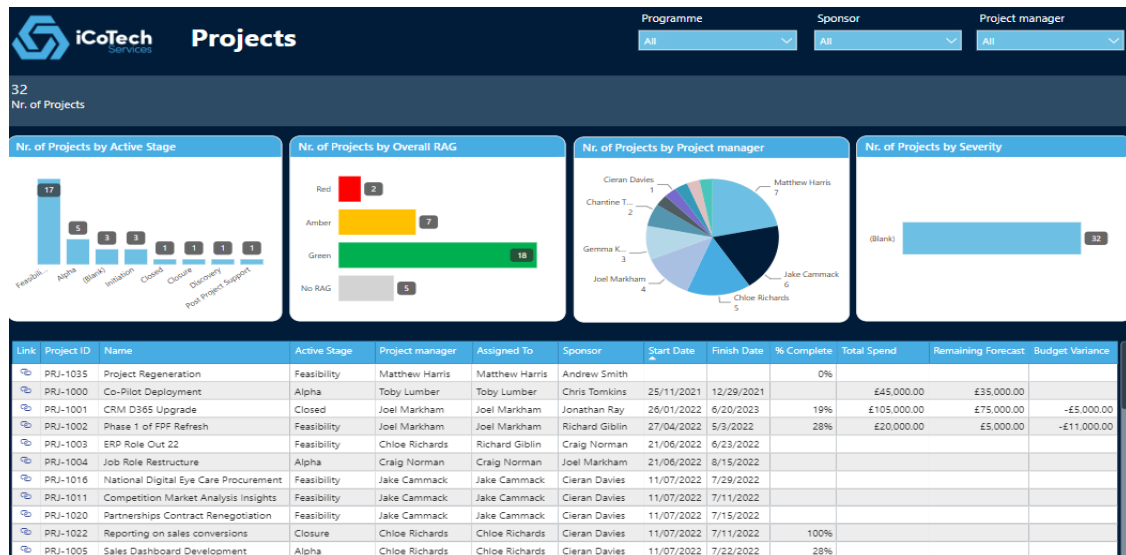
Utilising Planner as the planning engine. Other planning solutions are available upon request.

iCoPlan Reporting

iCoPlan also comes with a number of Power BI Reports that have been pre-defined. These are shown in this section. We will estimate a number of days configuration to make adjustments to these reports to meet the requirements of the customer.

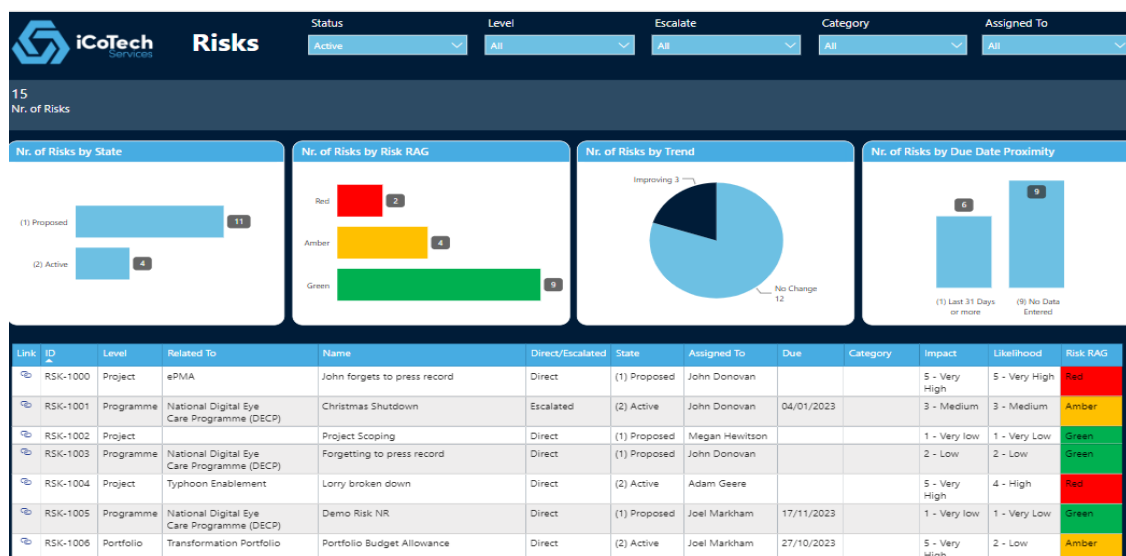
Projects Reporting

The ability to see the stage, RAG, and other information for each Project within iCoPlan. Provides an overview of the whole of iCoPlan, formatted through an item per page, providing visuals to show aggregated information followed by a table of data with links back to the item in Power Apps.



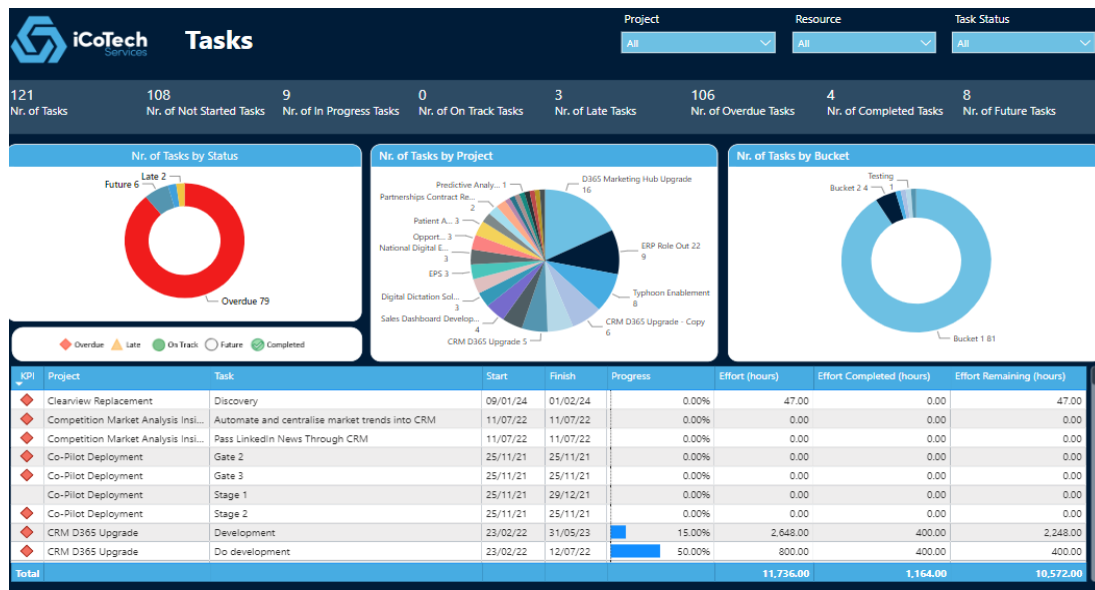
Risks Reporting

The ability to see all Risks associated to Projects, the RAG status, and who they are assigned to.



Task Reporting

The ability to report on all tasks across the Portfolio, their status, and which Project they relate to.



All these reports are fully configurable and can be updated by yourselves or iCoTech upon request.

Optimisation

All of our accelerators have an Optimisation Service that is available to the customer post the implementation of the Solution. This is defined as a separate service on G-Cloud.

Find Out More

Get in touch

To discuss your requirements and understand how we can support your needs contact us:

Email : info@icotechservices.co.uk

Call : +44 (0)333 577 3713

Watch an iCoPlan demonstration [here](#).

Watch our YouTube content [here](#).

Proposal

Once the requirements and needs are understood a formal proposal will be presented that outlines the Approach, Deliverables and Cost.

Procurement and Contract

Purchase order is raised, and contracts are counter signed.

Next Steps:





iCoTech Services

Delivering Value@Pace

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