



ICOVIEW 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.

CONTACT

iCoTech Services

+44 (0)333 577 3713

info@icotechservices.co.uk

www.icotechservices.co.uk



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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.

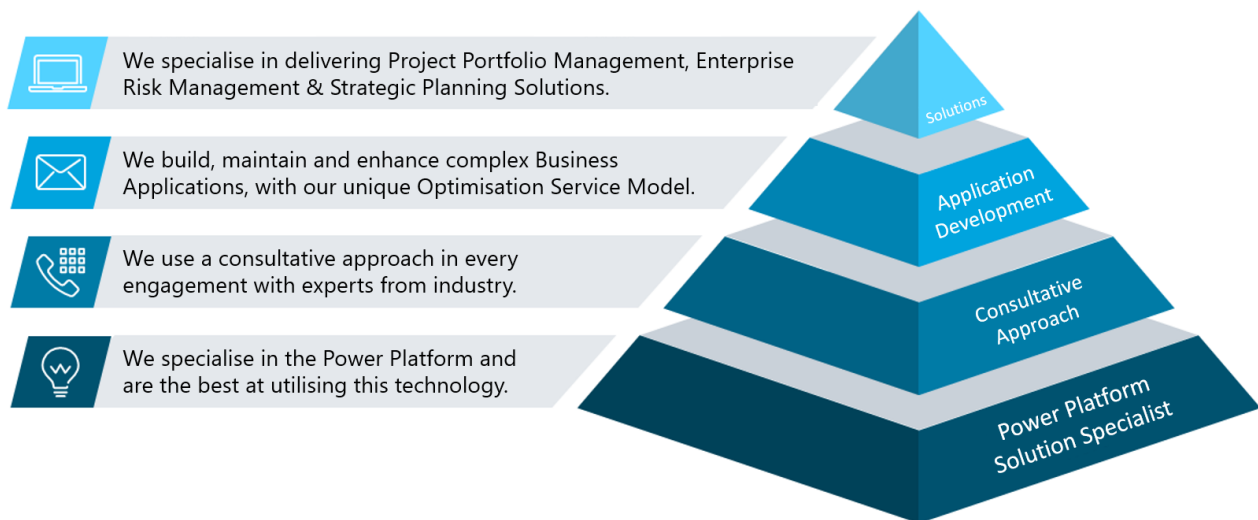
Beyond technology, iCoTech delivers a full consultancy service encompassing discovery engagements, customer waves, optimisation services, and long-term digital transformation support. Their structured delivery methodology developed across multiple stakeholders ensures that every engagement follows a 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:



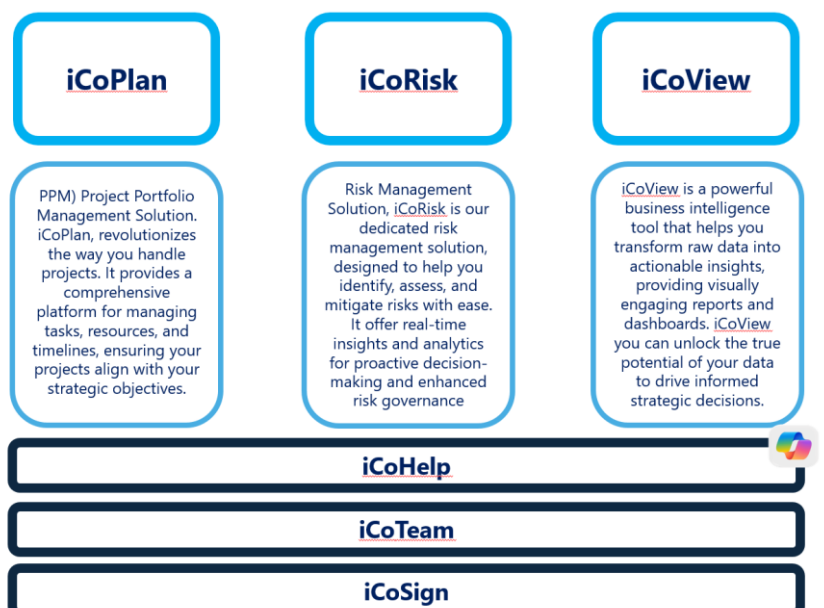
Furthermore, we have a really focused offering:



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

iCoTech also have three other Accelerators which are;

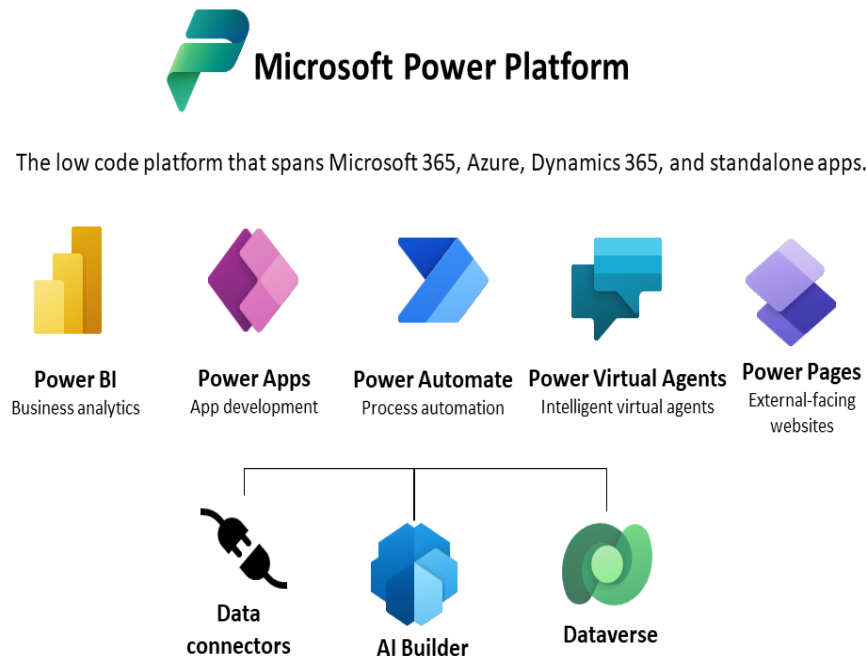
- iCoHelp – Our Copilot Agent Accelerator.
- iCoTeam – Our Resource Management Accelerator.
- iCoSign – Our Procurement Management Accelerator.



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 iCoView

iCoView is iCoTech's Strategic Planning Accelerator, designed to replace fragmented spreadsheets and manual processes with a single, unified system for defining, tracking, and evidencing progress against strategic plans. Built on the Microsoft Power Platform, it enables organisations to manage business objectives, measures, ownership and status in one place significantly reducing administrative effort and improving the accuracy and timeliness of strategic information. Its purpose is to give organisations a governed, dependable system that transforms strategic planning from a static document exercise into a dynamic, evidence-based process.

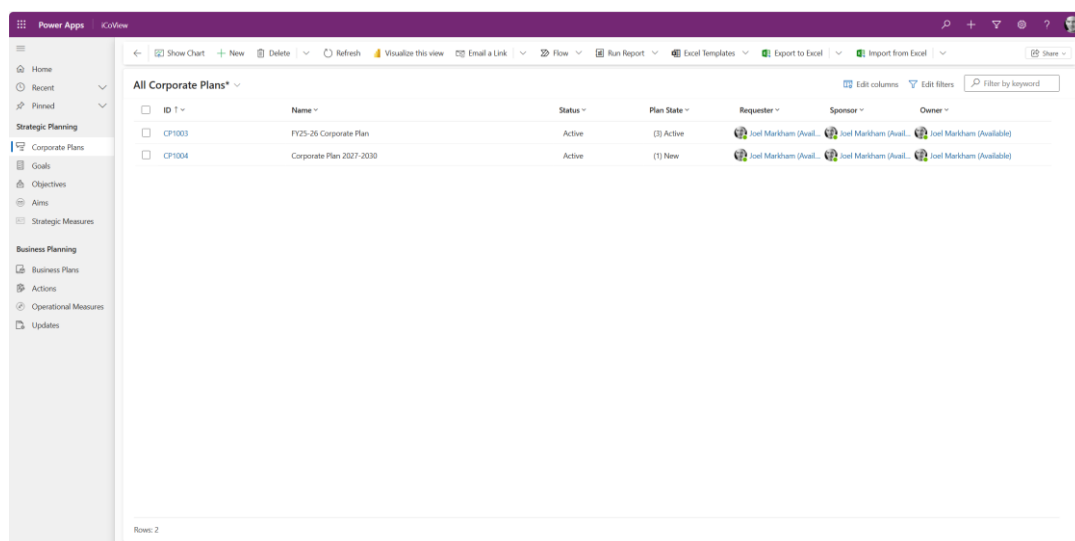
At its core, iCoView provides real-time visibility and clear oversight for senior leaders, making it easier to monitor progress, identify bottlenecks, and ensure accountability. The platform centralises strategic information goals, objectives, actions, measures, and updates so leadership teams can quickly understand performance against priorities and make informed decisions. This transparency replaces disconnected Excel and PowerPoint files with a connected approach that allows organisations to track strategic execution at every level, from corporate plans down to service-level actions.

iCoView also acts as a powerful business intelligence engine, transforming raw organisational data into actionable insights through visually engaging dashboards and reports. Leveraging Power BI, Power Automate, and Copilot capabilities, it enables teams to automate routine administration, generate insightful reports on demand, and create consistent, real-time views of performance. This ensures strategic planning and performance management are supported by accurate, up-to-date data unlocking the potential for more informed, evidence-based decision-making across the organisation.

Because iCoView is built on the Power Platform, it is highly configurable and integrates seamlessly with wider Microsoft technologies and third-party systems. Organisations can tailor the solution to unique processes, modify fields and stage gates, and expand functionality as strategic maturity grows. Its flexibility, combined with iCoTech's consultative delivery model, ensures the platform evolves alongside organisational needs—whether supporting strategic plan management, linking priorities across multiple directorates, or enabling future enhancements such as deeper analytics, automation, or cross-platform alignment with iCoPlan and iCoRisk.

Main View

Being able to see all corporate strategic Plans in one place, and organising them by year or order:



ID	Name	Status	Plan State	Requester	Sponsor	Owner
CP1003	FY25-26 Corporate Plan	Active	(3) Active	Joel Markham (Avail...)	Joel Markham (Avail...)	Joel Markham (Available)
CP1004	Corporate Plan 2027-2030	Active	(1) New	Joel Markham (Avail...)	Joel Markham (Avail...)	Joel Markham (Available)

Goals View

Being able to track the Goals within the Corporate Plan, linking these together so that whole council Goals are visible in one place;

ID	Name	Status	Corporate Plan	Owner	Details
CP001	Reduce Welsh Language	Active	CP1003	Matthew Harris (Offline)	Increase Welsh Language
CP002	Enhance Community En...	Active	CP1003	Joel Markham (Available)	Foster stronger relationships between the council and residents.
CP003	Improve Public Transpor...	Active	CP1003	Joel Markham (Available)	Ensure reliable and inclusive transport options for all.
CP004	Achieve Net Zero Carbo...	Active	CP1003	Joel Markham (Available)	Reduce the council's carbon footprint and promote sustainability.
CP005	Support Local Businesses	Active	CP1003	Joel Markham (Available)	Stimulate economic growth and resilience.

There are a number of other functions within the iCoView Accelerator, but the core features are as follows:

1. Strategic Planning Structure & Navigation

- Corporate Plan, Goals, Objectives, Aims, Measures, Business Plan, Actions, and Updates all held in a single system.
- Dedicated navigation menus including Corporate Strategy, Business Planning, Actions, Performance Measures, and Reporting.
- Record-level navigation with tabs such as Plan Information, Goal Information, Objective Information, Measure Information, Notes, Timeline, and Reporting Details (Power BI).

2. Business Intelligence & Reporting

- Built-in Power BI reporting dashboards for clear visibility of strategic performance.
- Dynamic, real-time reporting with the ability to track progress at every level of the strategic hierarchy.
- Ability to extract and generate reports automatically, dramatically reducing manual effort.

3. Data Management & Configuration

- Fully configurable architecture including strategic levels, stage gates, custom fields, and governance rules.
- Secure Microsoft 365 integration, including Azure, M365, Dynamics, and 1000+ connectors. [
- Centralised data model supporting objectives, measures, targets, actions, updates, and audit history.

- Admin Settings menu (PPM Admin Only): Parameters, Templates, Users, Teams/Permissions, and Reference Tables.

4. Performance & Measure Tracking

- Ability to record measures, targets, performance updates, status ratings, and timelines.
- Supports national survey data, complaints, compliments, and other contextual performance indicators (for certain councils).
- Capability to track historical performance data over time and roll up data to directorate/corporate levels.

5. Automation & Workflow

- Power Automate integration for streamlined automated processes.
- Optionally enhanced by Microsoft Copilot for future automated narrative generation and insights.

6. Collaboration & Governance

- Embedded within Microsoft Teams for collaborative work on plans and updates.
- Role-based security, permissions, and group-based access structure.
- Audit history for strategic plans, business plans, actions, and measures (admin-only access).

7. Scalability & Integration with iCoTech Ecosystem

- Designed to integrate with other accelerators:
 - **iCoPlan** (PPM) for delivery data
 - **iCoRisk** for corporate risk alignment
 - **iCoHelp** for support processes

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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