G-Cloud 15 Service Definition

Kivue Perform®

Project Portfolio Management Platform (PPM Solution)

Lot 2b Software as a Service (SaaS)

Kivue Limited, 33 Kings Road, Reading, RG1 3AR

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1. Introduction

Company Overview

Kivue Limited is an innovative technology company that develops software to support successful delivery of projects and portfolios for customers in the UK and abroad. After 30 years of experience managing complex projects, programmes and portfolios, the Kivue team have lived through the frustrations and challenges of optimising the delivery of project portfolios and Kivue has built a solution that supports high levels of adoption and better financial/ operational performance across business critical portfolios of projects and programmes.

The technical team is based in Reading and they ensure our brand name remains synonymous with innovation and good quality software. Kivue continuously invest in new product development to ensure the customer experience is realised via “best in class” PPM software solution.

Kivue has a portfolio of small, medium and large customers across multiple sectors and countries, where the common challenge is optimising adoption, delivery, predictability and benefit realisation across a portfolio of internal and/or external projects.

Value Proposition

The single biggest challenge for PPM tool providers is adoption. Often as many as 80% of projects are being run by Delivery Leads who aren’t project management trained and getting people from varying levels of project delivery maturity to adopt a PPM product when it is rolled out is a massive challenge. There are many examples of PPM tools that have been procured based on a robust set of requirements but when it comes to implementation, the maturity of the organisation is not aligned with the complexity of the modules and therefore adoption is low which means you don’t get a portfolio ‘picture’ emerging.

If you are running a portfolio of projects then you will probably be used to the excessive time, effort and resource it takes to roll up valuable project, programme and portfolio insights to an appropriate level with consistent quality. These insights are critical to support good quality and effective governance. It also supports avoiding the all too typical project delays, overspend, slower or no realisation of the forecasted benefits and achieving deadlines on high profile milestones.

A sample of typical challenges that Kivue Perform addresses is as follows:

- **Rapid Cross Organisation Adoption:** the simplicity and intuitive design for the user enables highest levels of adoption from day 1 - irrespective of project maturity.

- **Minimising project management time on inputs:** Kivue Perform is designed to deliver outputs based on a 5 - 15 minute input once per reporting cycle.

- **Single Platform for all Projects**: Presenting all projects through a single platform whether they are technology, transformation, Agile, Waterfall, hybrid or BAU.

- **Effective Leadership:** portfolio insights need to highlight escalations, risks, and issues so that Sponsors and key stakeholders engage their leadership capability when it is needed.

- **Leadership Frustration:** people in leadership positions get frustrated because they crave:
    - **Visibility & Transparency** of the portfolio in a format and level of detail they can digest including concise updates, transparency of history and key escalations;
    - **Easy (one click) Access** to the key insights via their mobile devices;
    - **Customised Visibility:** with bespoke project reports, style, format and level of detail based on their individual characteristics and needs;

- **PMOs spend excessive time**, energy and resource:

- **Formatting, reformatting** and collating slide packs for governance meetings;

- **Producing portfolio, programme and project report…** that often don't get read!

- **PowerPoint and Excel Overload:** with different formats and templates stored in different and often in file locations that aren't easily accessible.

- **Cost & Benefit Control:** better control over cost, prioritisation, and benefit realisation.

- **Add-On to an Existing PPM Tool:** which isn't realising anticipated outcomes and value.

Kivue Perform is designed to optimise the performance of the portfolio without over complicating the solution so that anyone can adopt Perform (trained project manager or not!).

What the Service Provides

Kivue Perform is an intuitive cloud based (SaaS) portfolio management and reporting solution designed for anyone to work with and deliver instant access to concise, visual and engaging project and programme insights that drive improved portfolio performance.

Kivue offers 3 variations of Perform as follows:

1. **Perform Professional**: This an excellent starting package which is pre-configured for managing portfolios and focuses on high levels of adoption via simple user interfaces and modules. Perform Professional is ideal for project delivery communities which are lower maturity and need a lower cost but rapid and high impact solution.

2. **Perform Enterprise**: Powerful portfolio management and reporting with strong portfolio functionality and a lot of scope for localisation, configuration and bespoke reports to suit the portfolio management strategy and specific requirements. Excellent for taking the organisation through the next step in the project maturity evolution journey.

3. **Perform Enterprise Plus:** Offers full functionality with all modules, top levels of service and security, bespoke portfolio reporting for multiple portfolios and delivery lifecycles. Access to the Kivue library of APi's for integration with other systems and access to enhanced portfolio consulting and support.

Kivue offer Perform as either a standalone PPM solution to optimise portfolio performance or Perform can be integrated with an existing enterprise PPM tool as an intuitive, engaging and executive ready front end to drive transparency with instant access via mobile devices to concise, visual and engaging project, programme and portfolio insights.

Kivue Ltd also offer a range of outcome focussed PMO managed services which are delivered using a combination of Perform's ability to simplify PMO tasks with Kivue's portfolio and PMO delivery expertise. Using this combination Kivue can offer extremely compelling commercial solutions with an absolute focus on delivering valuable outcomes for the business. PMO services can range from full outsource of the PMO to providing managed services for specific elements of the PMO.

Social Value

Both Kivue as a company and Perform as a product offer a range of solutions which contribute to enhancing Social Value. These include:

- **Working from Home**: Perform is a perfect platform for operating project portfolios either fully or partly working from home. This has been a significant benefit since early 2020.

- **Climate Change**: Perform enables project portfolios to be run in a completely paper free environment with auto generated online slide packs and online access to portfolio insights. Perform also enables companies to run their sustainability programmes and projects through Perform and generate both real time visibility of performance and transparency of benefit release on sustainability programmes and projects.

- **Electric Car Scheme:** Kivue have put in place a scheme for employees that incentivises them to lease and use Electric vehicles.

- **Equality**: Perform can be used by anyone, irrespective of race, creed, ethnicity, colour or ability. Perform can also track the performance and benefit release on companies' ED & I projects. Kivue as an employer has a strong ED&I approach and we pride ourselves on our diversity.

- **ISO14001 accredited**: Kivue is ISO 14001 accredited for environmental management and has a robust programme of activities to support an ongoing focus on Kivue's environmentally friendly agenda.

- **Mental and Physical Health and First Aid:** Kivue have designated first aiders in the team, and also have a dedicated mental health first aider. We monitor the health and mental health of our team and are equipped to step in where necessary and appropriate. Our ability to manage certain health or mental health issues internally, takes away from the workload on the NHS.

- **Perform for the NHS:** Kivue are working with the NHS closely. The NHS are utilising Kivue Perform to improve visibility, decision making and governance, in order to achieve more successful project implementation across the NHS, and therefore help achieve NHS ambitions for the future.

Overview of the G-Cloud Service

Kivue Perform is a PPM tool designed to optimise successful portfolio delivery and caters for the people delivering projects with varying levels of project maturity and experience, this makes 100% input realistic and therefore enables valuable portfolio roll-up. Kivue Perform has a number of modules including the following:

Input Modules
Project Prioritisation Module
Gate Management & Tracking
Weekly Report (Incl. Agile)
Monthly Report (incl. Agile)
Portfolio Reporting
Risk, Issue and Action Register
Resource management
Portfolio Dependencies
High Level Planner
Programme Information
Programme Status
Logs (Change, Dependencies, Decisions, Lessons Learned etc.)

Output Modules
Portfolio Dashboard Resources
Portfolio Reporting
PDF with export
Mobile App
Portfolio on a Page
Tabbed Report Dashboard
Managed Dashboards (build your own dashboards)
Agile Activity Tracking
Finance Overview
Milestone Timeline
Benefits Tracker
Portfolio Roll Up
- Portfolio Timeline
- Agile & Waterfall Stages Risks & Issues
- Logs (Change, Dependencies, Decisions, Lessons Learned etc.)
- Project Strips
- PMO Tools (bespoke PDF reports etc.)
- Governance Pre-Read Clipboard

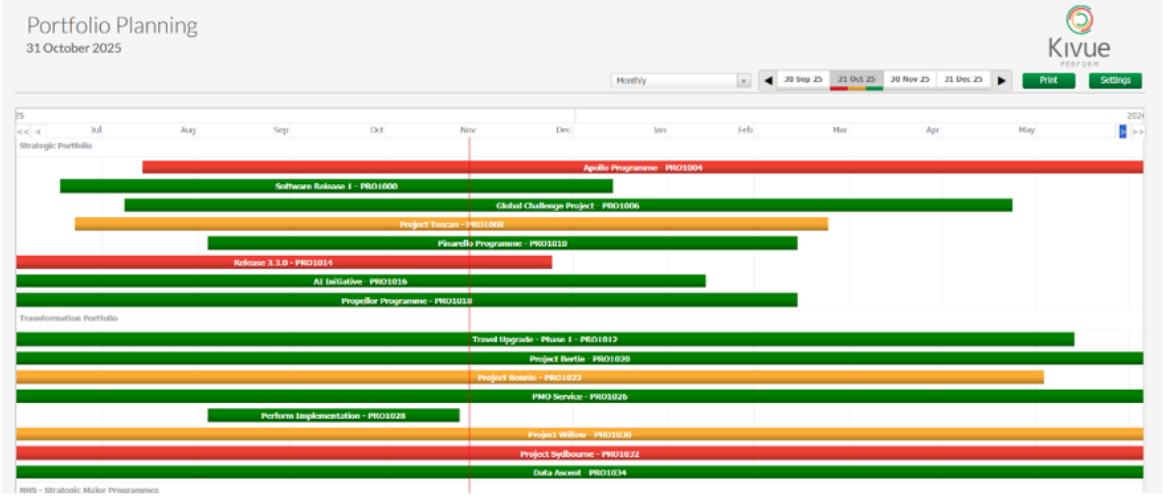
My Perform
- Bespoke project following
- Bespoke meeting management

Data Export

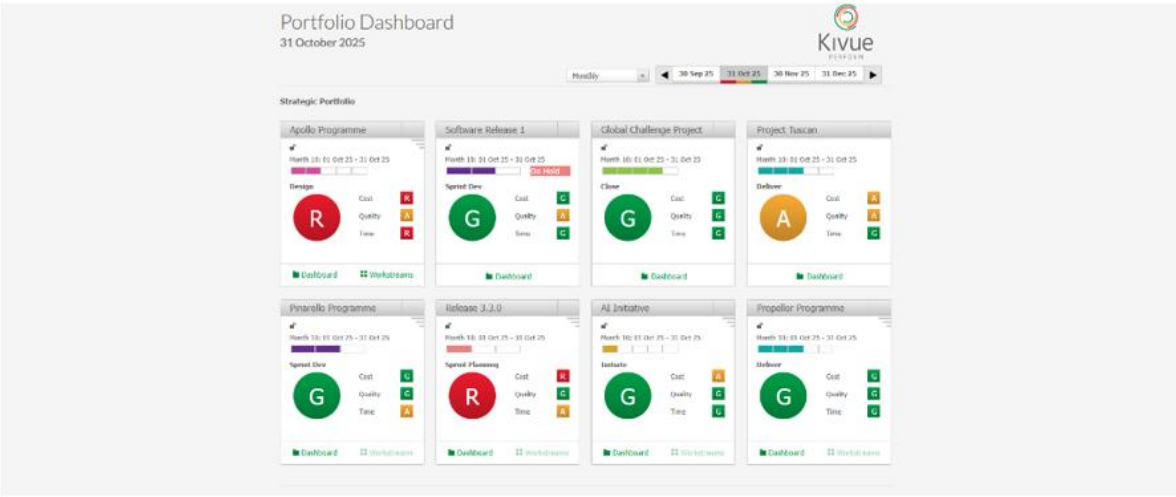
Below are some example portfolio, programme and project dashboard outputs and input modules:

Portfolio Dashboards

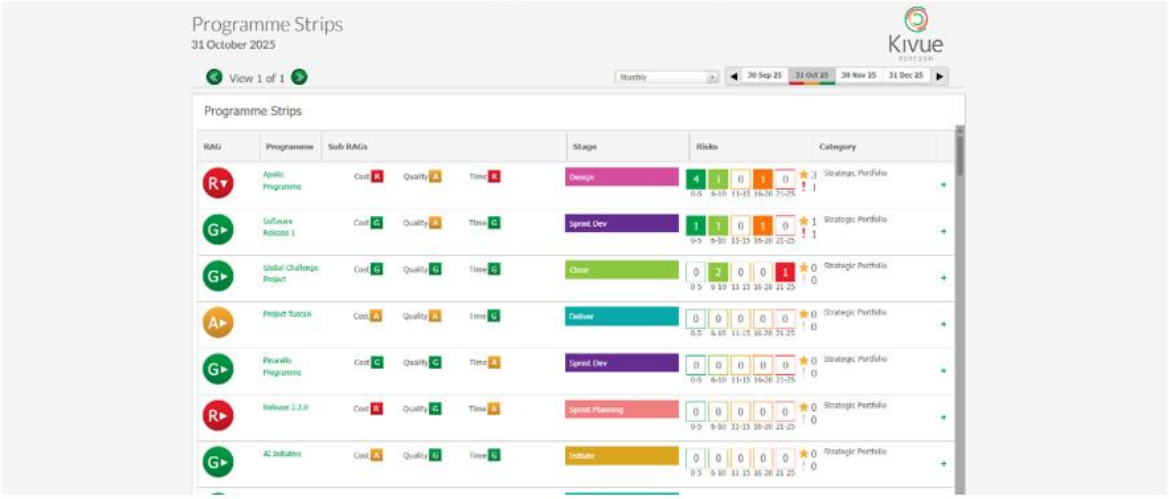
Portfolio Timeline



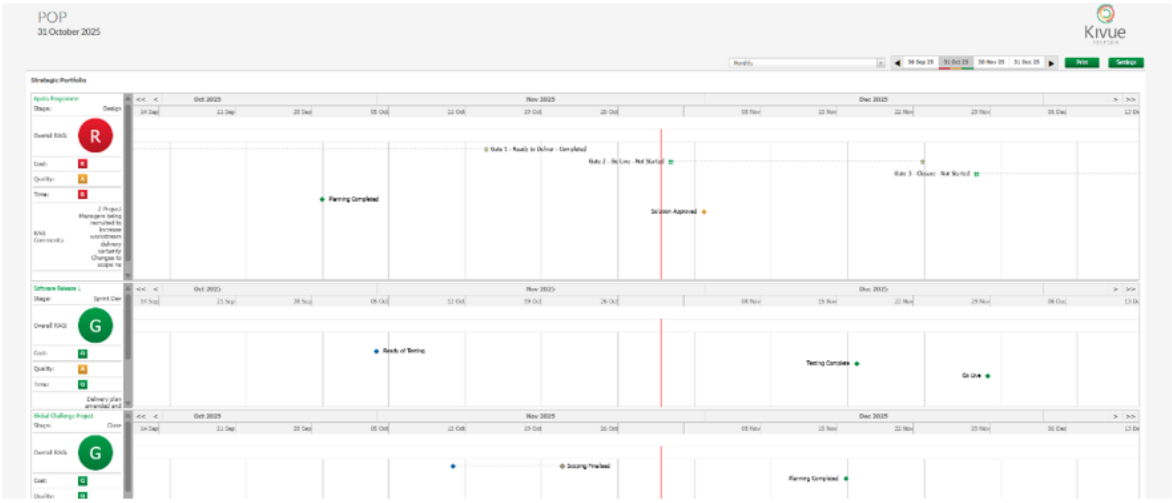
Portfolio Dashboard



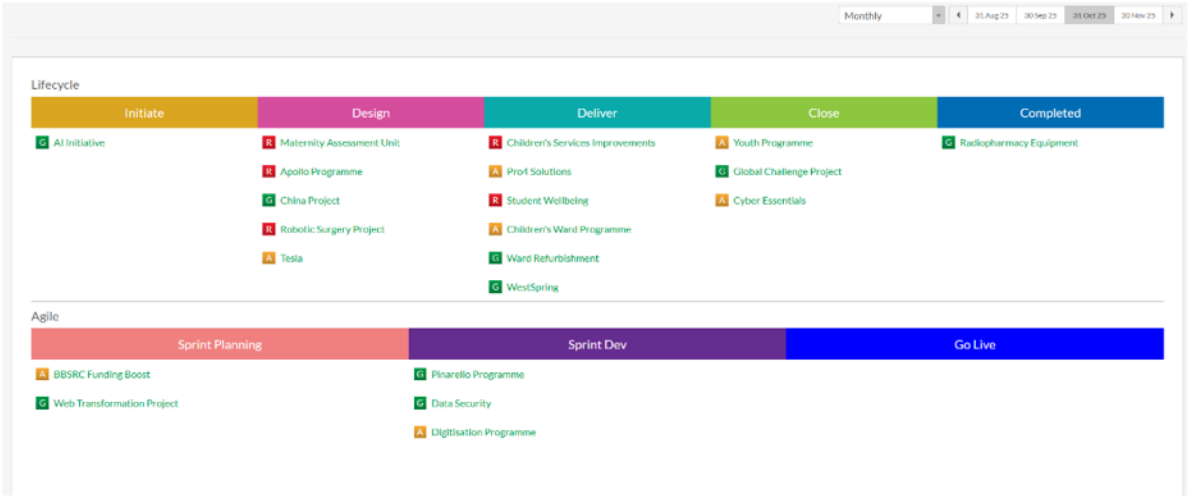
Programme Strips



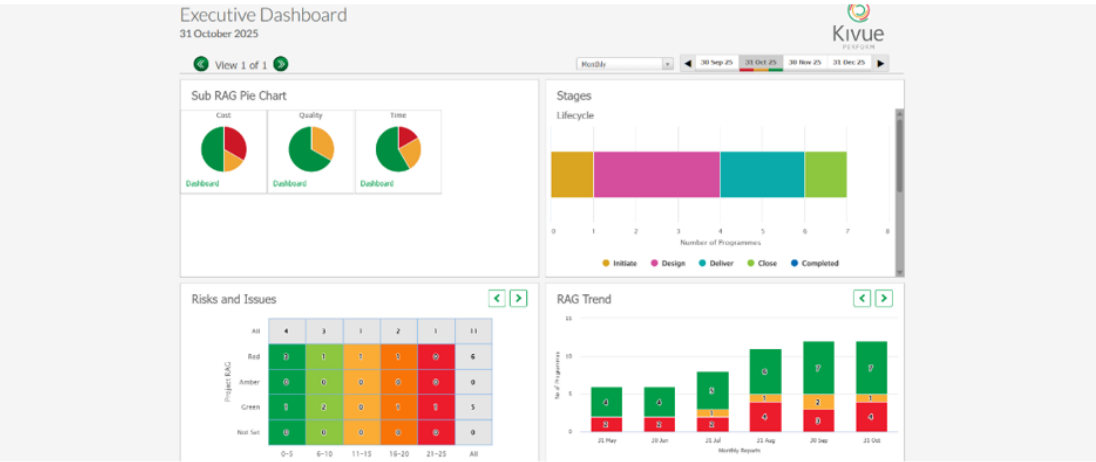
Portfolio Roadmap



Stages Dashboard

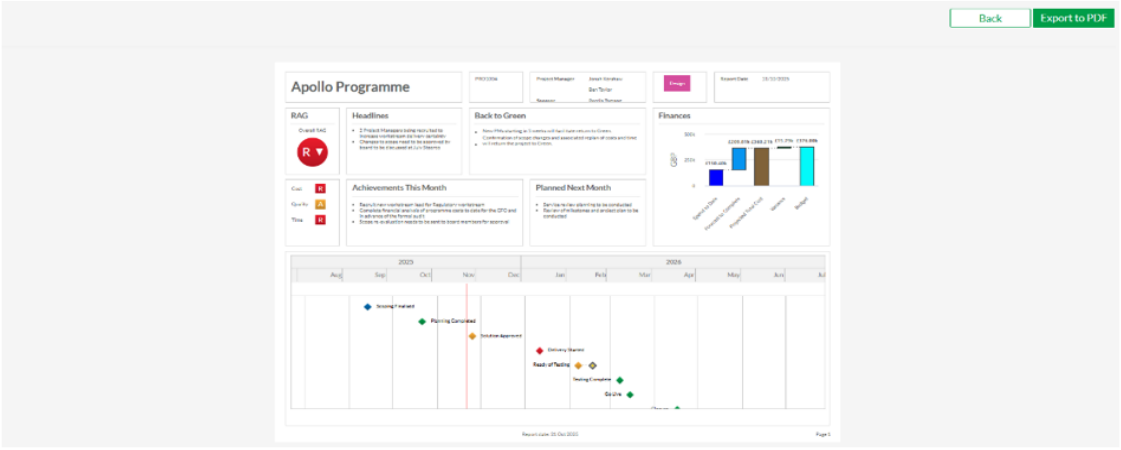


Portfolio Overview

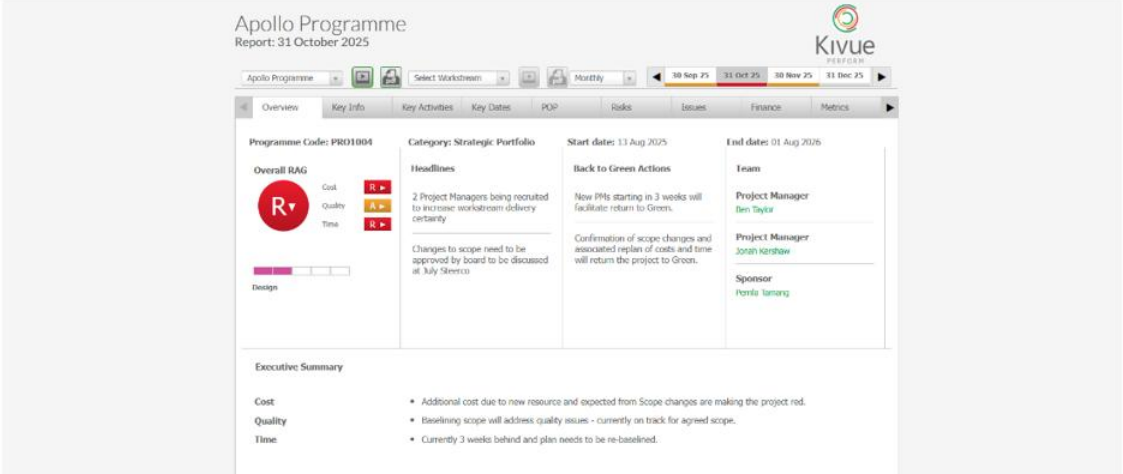


Programme Dashboards

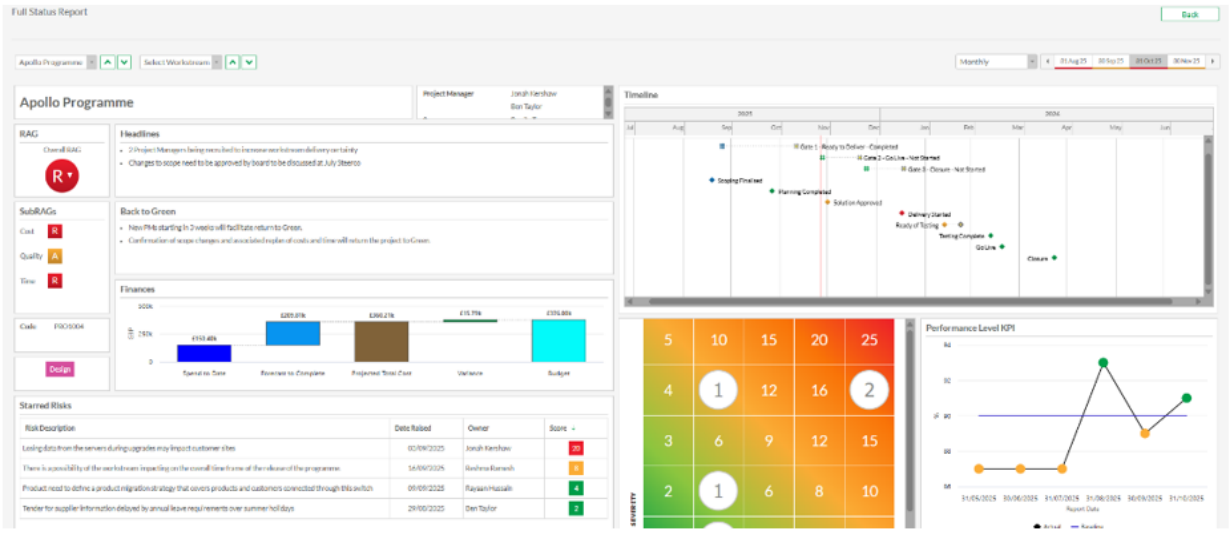
PDF Report



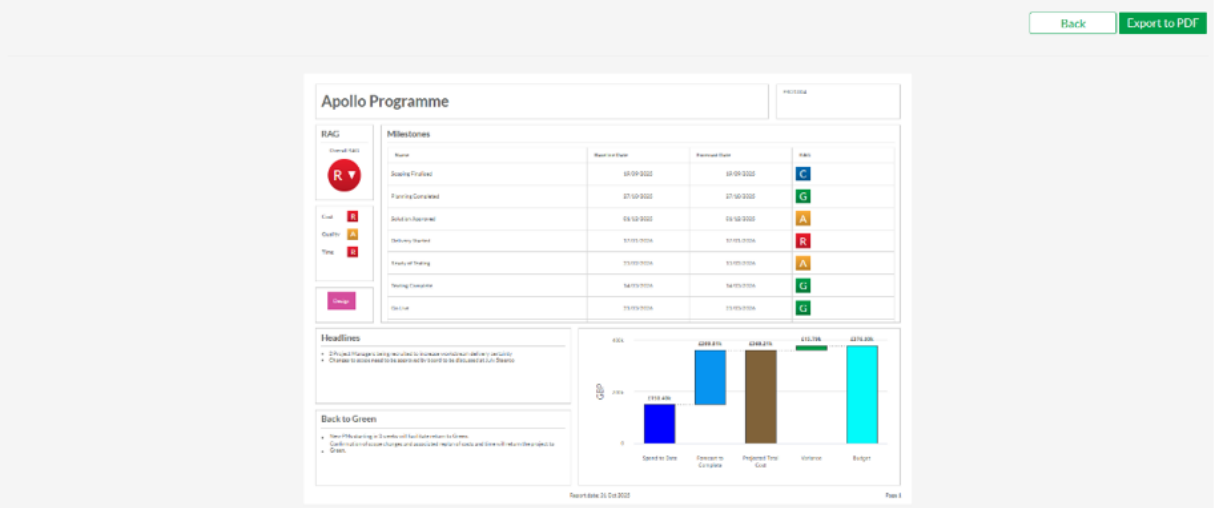
Tabbed Dashboard



Configurable Slide View

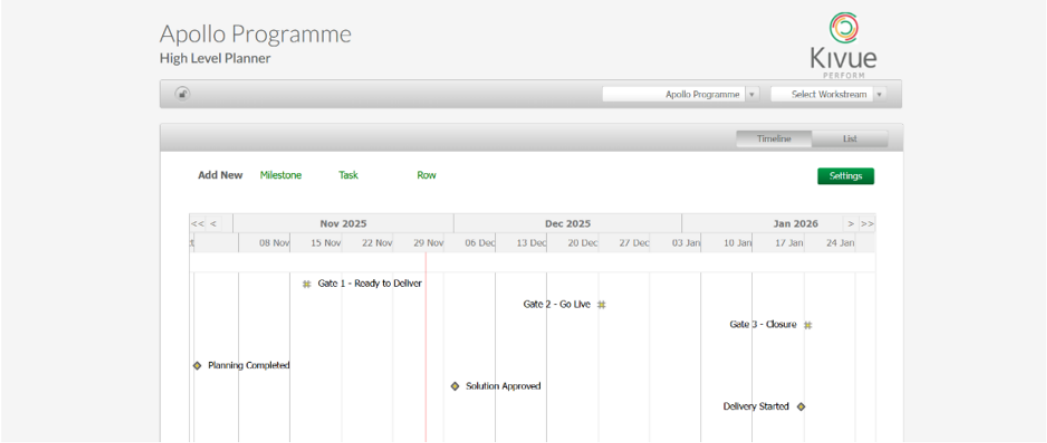


Customised PDF Report

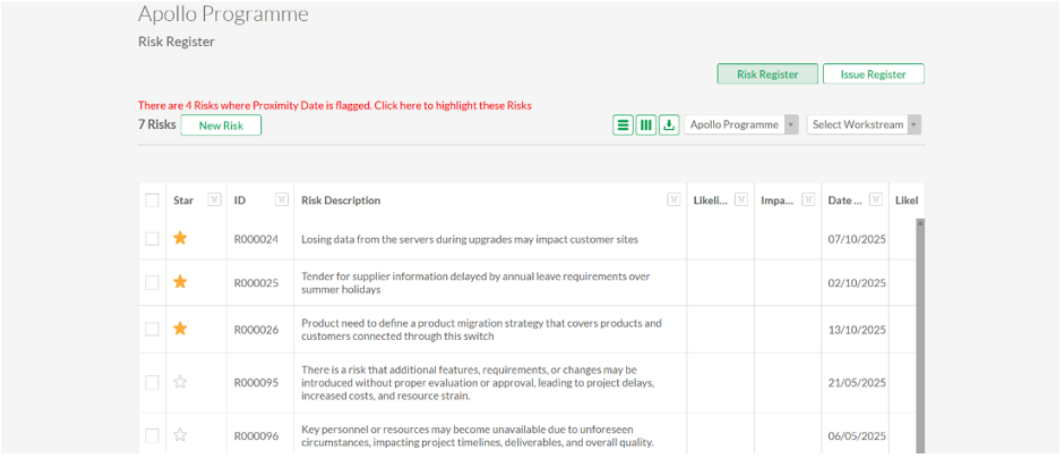


Input Pages

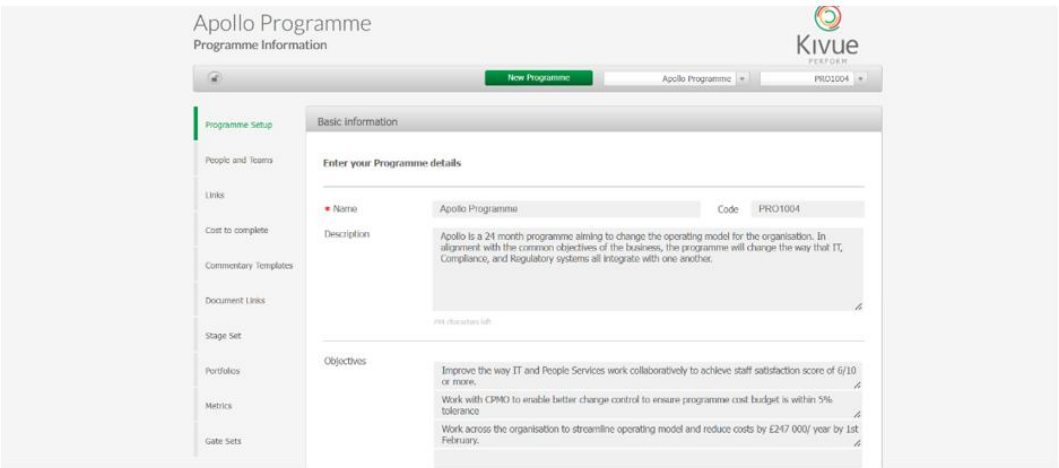
High Level Planner



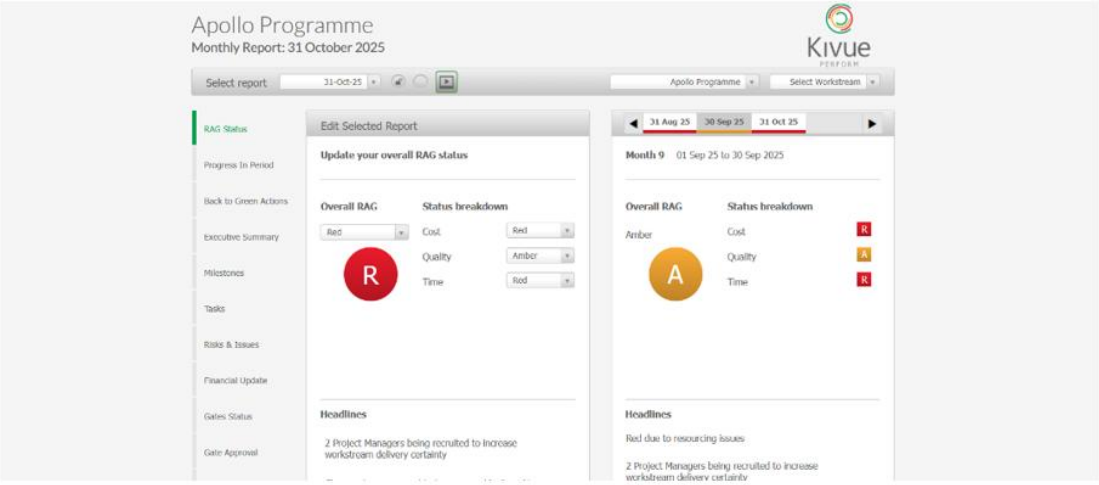
Risk, Action & Issue register



Programme Information



Weekly/Monthly Report



Kivue Perform can be rolled out and start delivering value within days, it is intuitive for anyone to use and delivers engaging visual outputs that delight senior executives and support improved delivery of critical projects and programmes. Kivue Perform is permanently releasing new functionality and is developed adopting the following principles:

Perform For the PMO

Transition PMO 'Admin' Time to Higher Value Activities: Direct data input by the project teams with automated output formats saves PMO hours of data formatting and reformatting allowing PMO resources to focus on more valuable assurance and quality activities rather than data processing and admin;

Consistent Automated Reports: The PMO can set up Perform reports and other outputs which are automated with instant production of project reports, portfolio performance packs, board packs and meeting slides for steerco's and other governance forums;

Project Prioritisation: Perform has a built in project prioritisation module for logging all concepts/ ideas and creating a Vision card (high level business case) with structured and configurable questions to be considered to assure leadership decide on the most efficient use of their Change budget.

Customised Portfolio Insights: The ability to produce customised reports and escalations instantly providing insights that stimulate sponsor and stakeholder engagement and drive accelerated and better decision making and delivery;

Optimised Portfolio Resourcing: Identification and mitigation of resource bottlenecks smoothing the forward delivery plan and proactively removing blockages saving time and cost;

PMO Credibility: Perform is a compelling, innovative and engaging shop window for the PMO representing a well organised, innovative and professional function which focusses on PMO outcomes rather than mechanics;

Data Quality Accountability: visibility of the data drives accountability on project managers to

ensure data is always up to date and good quality saving PMO chasing time!

Perform for People Leading Delivery

Intuitive Data Input for All: An intuitive and simple input structure enables a reduction of report completion time to 5 - 15 minutes per week or month freeing more time to focus on delivery;

Engaging Escalations: The ability to share important project escalations in an instant, direct from Perform, facilitates fast decisions, accelerates delivery and reduces delays and the project cost burn rate;

Resource Management: Use resource capacity vs demand portfolio planning to generate greater confidence and increased ability to produce lower risk plans with increased delivery certainty;

Solve the Spreadsheet & Slide 'Industry': Replace the need for PM's to produce project update PowerPoint slides by utilising automated Perform projector views saving time preparing for meetings and driving more effective agendas;

Central Repository: Perform provides a central repository for all logs and information saving time maintaining multiple data sources of spreadsheets etc. All data retained as future asset for the business.

Perform for Stakeholders and the Wider Business

Portfolio Optimisation: Perform enables phasing of projects around business priorities, to fit with available delivery capacity and business change absorption capability. Reduces wastage and underutilised resources.

Kivue Mobile App: enabling real time and easy access to portfolio and project insights on the mobile device, wherever you are in the world and following the projects you are most interested in.

Accelerated Benefits: An optimised portfolio allowing acceleration and maximisation of project benefits profile.

Concise & Visual: Concise and visual portfolio views customised to stakeholder interests providing confidence and stronger stakeholder engagement in the portfolio and increasing confidence in project, portfolio and PMO teams.

Engaging Escalations: Concise and articulate escalations and alerts expediting decisions, accelerating delivery and reducing admin overhead

Business Impact Management: Ability to assess the wider business impact on the portfolio delivery. e.g. Risk trends analysis. Optimises the wider business and ensures they effectively support the portfolio ultimately saving time and cost.

Kivue has a portfolio of small, medium and large customers across multiple sectors and countries, where the common challenge is optimising delivery, predictability and benefit realisation across a portfolio of internal and/or external projects. Below is a sample of Kivue Perform and PMO managed services customers:

Southampton University, Middlesex University, Government of Jersey, Virgin Media O2, Virgin Atlantic, Carnival, JT Global, IPF, Centrica, DHL, London City Airport, JFSC, CAA, Transunion, Premium Credit, Bentley, Jersey Water, LGC, Megger Engineering, IAG Cargo, Freshwave, Aon Tyche, Barchester Healthcare, Essex Cares, Bauer Media, British Medical Journal, IFGL, MBNL, Ricoh.

Associated Services

One of Kivue Perform's core strengths is that it is highly intuitive and designed for all people in a business to be able to use without difficulty. As a result, Perform is quick and low cost to implement and we have a range of other support packages as follows:

Kivue Implementation Support Packages

When you buy an instance of Perform, we will discuss an appropriate level of implementation package to support your needs. Typically, our implementation packages include:

- Perform success criteria working session (define a set of good outcomes to aim for over some defined phases)
- Instance build System configuration
- Existing portfolio upload User training
- Super User training Viewer training

Kivue Ongoing Support

Once implemented, Kivue Perform is supported by our Customer Support team who are based in Reading. The support team are Perform experts and specifically specialise in handling issues, working with our clients to make sure they get the most out of Perform and providing ongoing training and support as Perform evolves.

PMO Managed Services

Kivue have 30 years of experience on the coal face delivering portfolios, programmes, projects and PMOs. We use this experience coupled with the capabilities of Perform and a highly pragmatic approach to provide a range of high value and lean but effective PMO managed services where the focus is on delivering valuable outcomes rather than mechanics.

Integration Solutions

Using a combination of options to integrate with other systems including an existing enterprise PPM tool, we will work with your technical team to explore the best technical solution for integration and then build the solution and maintain it for you.

Single Sign On

Kivue offers the option of providing Single Sign On (SSO) with Perform as a solution for increased security and easier access to the system and creating an extra level of control over 3rd parties accessing your Perform instance without permission.

2. Data Protection

Information Assurance

Kivue Limited is ISO 27001:2022 certified.

The Data Centre which hosts the Kivue Perform Application has a fully externally certified Information Security Management System against ISO27001:2022. This includes a fully audited Information Security Management System (ISMS) with certified Policies. In addition, the Data Centre has also certified Business Continuity Management under ISO 22301:2012 and IT Service Management certified as complying with ISO/IEC 20001-1:2011.

User Access to the application is via https secure browser connection only and requires a login process. Passwords are one way hashed. Client data will be stored on dedicated SQL databases specific to the customer on virtual servers. Kivue staff only require access to the database for running upgrade scripts which is all performed in a secure environment.

The application is hosted on a secure web server via an https connection. This server sits behind a firewall pair that block all traffic except the permitted services. Users accessing the system need to use a secure password to gain access. The password rules such as use of numbers, special characters, minimum length, reuse, etc. can be set by each customer. The SQL database is hosted on a separate secure server. The two services are interconnected via a separate VLAN providing isolation at both Layer 2 and Layer 3.

All data transmitted between sites is sent via an IPSEC VPN with 256-bit encryption.

Data Back-Up and Restoration

A set of separate measures have been implemented to support the data integrity and disaster recovery planning.

At the database level the databases undergo differential backups at regular intervals during the day and full backups once a day to a local disk.

All the servers and their associated disks are encrypted and backed up daily to a separate UK based backup centre. All data is encrypted before transmission and storing at the backup centre. These daily off-site backups contain copies of: the live database, it's local backup and the differential copies taken during the day. The backup sets are rotated on a daily, weekly and monthly basis. These measures are designed to support recovery from local equipment failure where the overall datacentre is still operational. In the event that the datacentre is still operational the first approach will be to fault find and restore service on the normal configuration.

In the event of a major incident at the datacentre where it is concluded the centre will not be available for a significant period of time the Disaster Recovery Procedure (DRP) will be invoked. To support the DRP the data is continuously encrypted and replicated to a second secure UK based datacentre. Standby servers and networking equipment are reserved and configured at this site for immediate activation in the event of a disaster. This is designed to support a Recovery Time Objective (RTO) of 4 hours, after the disaster has been declared and recovery invoked and Recovery Point Objective (RPO) of 2 hours.

Business continuity statement/plan

The Business Continuity Plan (BCP) is an internal operational document that is regularly monitored and updated to reflect our on-going business needs.

It sets out potential scenarios that could impact the smooth operation of the Pro4 Solutions Ltd and Kivue Ltd business and details plans for dealing with such emergencies.

The aim of having this document in place is to ensure that in the unlikely event of an emergency situation, the Pro4 Solutions Ltd and Kivue Ltd businesses will be prepared to manage the situation and minimise any disruption to the normal operation of the business.

The plan is tested annually and covers a wide range of risk scenarios, a more detailed plan can be provided to buyer on request.

Privacy by Design

Kivue adhere to the requirements of the GDPR. It is a condition of the contract that no personal data is stored on Kivue Perform, with the exception of Name and business email for the purposes of logging onto the system. Kivue Ltd have no access to the data except with explicit request and permission of the client.

3. Using the service

Ordering and Invoicing

The client should email gcloud@kivue.co.uk expressing their interest in Kivue Perform. We will then call to have a discussion about requirements, an online demonstration, or to arrange a visit to discuss what is required and demonstrate the product in person. Once we have agreed what licenses and services are required to start with, Kivue will prepare a Licence proposal setting out Kivue's understanding of the clients requirement with clear pricing..

Availability of Trial Service

Kivue is rapid to roll out and can generate valuable outputs within days. This enables Kivue to offer a set of really compelling steps to enable our customers to really evaluate Perform before making a longer term commercial commitment.

Kivue offers a 3 step approach to maximise your confidence in Perform's suitability to realise the intended benefits in your portfolio environment:

Step 1: Demo (no cost)
We will provide a full demonstration of the system relating the demonstration to the challenges you face and the success criteria you have established you want to achieve.

Step 2: Free Trial (no cost)
We will sign an NDA and then work with you over a 5 – 10 day period to create your own instance of Perform and load up some of your portfolio so that you both get a chance to see how intuitive the system is, look at Perform with your own data so you can explore how it will work in your environment and take it to your management team to explore the value they feel the outputs will bring them.

Step 3: Paid Proof of Value/ Pilot
In order to put Perform through its paces in your operational environment, you will be able to run a 3 month pilot using as much functionality as you can to evaluate Perform's suitability to achieve your success criteria and only then take on a full contract. You will be able to get your executive team accessing portfolio and project information via their mobile devices, develop your own reports, run meetings off Perform and use all the outputs and inputs to assure Perform will deliver value in your environment.

On-Boarding, Off-Boarding, Service Migration, Scope etc.

On Boarding
Kivue differentiates from other PPM providers with the level of support provided to assure the successful implementation and embedding of Kivue Perform. Subject to the organisation's levels of maturity and project capability, Kivue have defined highly efficient and flexible implementation approaches to make sure Kivue customers are on boarded with the highest levels of adoption and high impact at pace, typically first outputs within 20 days.

Kivue offer 3 levels of implementation package which vary in scope and cost subject to the size and complexity of the Perform roll out and the amount of support the client would like to help the roll out and embedding of Perform across the organisation. We work with our clients to discuss and

agree which of the implementation packages are most suited to their environment.

Once an order is placed, Kivue build the client specific Perform instance and a Configuration session to agree the required set up. In the larger implementation package, a Portfolio Management Consultant helps to shape the use of Perform and ensure the set-up is optimised for the target organisation. Project and User data is loaded into Perform and then the client, supported by the Kivue team, tests and validated the configuration.

Perform is simple to adjust configuration and we always find our clients learn more about their requirements and best ways of using Perform as their journey progresses, so our advice is to approach configuration as an iterative process and there is no need to spend excessive time at the start getting everything in a state that you believe to be perfect at that point in time.

Once Perform is ready to go, we will train the Users or internal trainers and support the first report to be completed. Some of our implementation packages provide on-going embedding support to improve the quality of reporting and use of Perform over a set of reporting cycles.

With most implementations, we find the speed of the roll out is dictated by the speed the client wishes to implement the solution. With Perform, it is possible to go from order to 1st report in less than 1 week... However, most implementation take between 3-6 weeks, depending on the size and complexity.

Service Migration and Other Implementation Support
Kivue would be very happy to support specific requirements around the migration of data from other systems that exist within the organisation (including existing PPM platforms) and can work to import projects, reports, user and other key information into Perform. This service is available in addition to the standard implementation packages and is priced on application.

Kivue also provide wider PMO and portfolio optimisation support which are based on the specific needs and opportunities of the client and are defined, scoped and costed based on those specific needs.

Off-Boarding
For clients that decide to finish using Perform, we work with the client's team to agree what data is required to be exported from the Perform instances for safe keeping. The Kivue support team will then help the client export the data and close down the instance. Kivue can hold a backup of the data for an agreed period after the Perform instance is closed down and then this data will be destroyed in line with our data retention policy.

Training

Kivue provide a full and robust training capability using experts in the use and management of the Perform system. The Kivue team will provide the training either via 'Train the Trainer' approach or by doing the training using our own team of experts. Kivue will either deliver training on site or via online platforms to support staff based in disparate locations.

Kivue Perform is extremely intuitive and is not hard to learn but during the initial period of mobilisation of and familiarisation with Perform, Kivue provide access to the Customer Support team as required and will also run 'Drop In' clinics to enable users to ask any questions and explore how to get the best out of the platform.

Implementation Plan

The initial implementation of Perform to actively generate value can be extremely quick (within days). This is crucial because it will have immediate and high visibility impact across the organisation which is extremely important for driving positive momentum for a high level of engagement with Perform. In order to successfully embed Perform into the heartbeat of the portfolio delivery, the Kivue team will work with you to develop a clear, practical and manageable implementation plan which outlines a clear set of milestones to initiate, mobilise and then embed Perform into the organisation.
This will typically include:

- Instance creation
- Configuration
- Data load (existing portfolio)
- Super User, user and Viewer training
- User guides etc.
- Engagement plan

A detailed implementation plan can be provided to the buyer on request

Service Management

Large parts of our system can be customised to match customer requirements. The majority is applied during the configuration and implementation phase of the instance; however, our systems are continuously optimised as customers' business requirements evolve and new functionality is released. This is achieved through regular customer communication via checkpoints, service reviews, optimisation sessions etc.

Maintenance which requires service downtime is scheduled out of business hours and communicated to customers in advance to minimise impact. This is required for latest releases of system functionality, bug fixes, application of Microsoft patches etc. These are all applied internally and on UAT sites for testing before being applied to production sites.

Wherever possible, new, and improved functionality is developed to replace any features which need to be deprecated.

Service Constraints

Perform will be available throughout Normal Service Hours, defined as 0800 to 1800 (UK Time), Monday to Friday, excluding UK (English) Public Holidays, and excluding any periods of unavailability agreed in advance between Kivue and the customer. Outside of these hours Perform can generally be expected to be available 24 hours per day, 365 days per year, again with the exception of any regular or agreed Scheduled Outages.

Service Levels

Normal Service Hours
Perform will be available throughout Normal Service Hours, defined as 0800 to 1800 (UK Time), Monday to Friday, excluding UK (English) Public Holidays, and excluding any periods of unavailability agreed in advance between Kivue and the customer. Outside of these hours Perform can generally be expected to be available 24 hours per day, 365 days per year, again with the exception of any

regular or agreed Scheduled Outages.

Scheduled Outages
Periodically, the service may need to be suspended to perform platform upgrades, release new versions of Perform, or other maintenance activities. These activities are undertaken at our sole discretion and will generally be performed outside Normal Service Hours to avoid inconvenience to the customer.

Such periods of unavailability for Scheduled Outages outside Normal Service Hours will not exceed a total of 3 hours per month and will be communicated to the customer in advance. Any exceptional requirement that requires the service to be unavailable outside Normal Service Hours for a duration that exceeds this level will be discussed and agreed with the customer in advance, as would any requirement to make the service unavailable within Normal Service Hours.

Categorisation and Incident Response Targets
Faults and other support contacts will be responded to as quickly as possible.

Categorisation	Description	Initial Response*	Target Fix*
Priority 1: Critical	The entire service is unavailable or unusable. All users are affected.	Within 1 hour of ticket being registered	RTO target** 2 hours from initial response; permanent fix as soon as possible
Priority 2: High	An error or fault is preventing the use of important features within the system, and/or multiple users are significantly affected.	Within 1 hour of ticket being registered	RTO target** 4 hours from initial response; permanent fix as soon as possible
Priority 3: Minor	There is an error, but it can be worked around in the short term, or may be otherwise limited in impact.	Within 8 hours of ticket being registered	Resolved in next upgrade (scheduled or bug fix)
Priority 4: Cosmetic	A fault has been observed that should be corrected, but it does not materially affect use of the service.	Within 8 hours of ticket being registered	No commitment – candidate for next scheduled release.
General Query	A request for advice, clarification, consultant or additional services not specifically related to a fault or incident	Within 8 hours of ticket being registered	n/a

**Hours / durations relate to time during Normal Service Hours and for issues raised during Normal Service Hours.*

***RTO Target = "Return to Operation Target" – i.e. the timescale to make the service useable after an incident. Does not necessarily mean that a full permanent fix has been applied.*

Outage and Maintenance Management

The Hosting Environment in the Data Centre consists of the following:

8 Virtual machines hosted in Microsoft Azure UK South Region. Azure firewall Standard (Zone redundant) configured to accept traffic only from Cloudflare Web Application Firewall.

Disaster recovery via Azure Site recovery (UK West)

Datacentre compliance details can be found here: https://learn.microsoft.com/en-us/azure/compliance/

Disaster recovery is specified and setup to meet a Recovery Time Objective (RTO) of 4 hours after a disaster has been declared and Recovery Point Objective (RPO) of 2 hours.

Financial Recompense Model for not Meeting Service Levels

As our currently availability is 99+%, we do not currently offer this. However, we could consider offering it should the need arise.

4. Provision of the service

Customer Responsibilities

Pay for any extensions or additions to the Software outside of the Order;

Only operate the Software on one of the web browsers approved by us (and notified to you from time to time) and shall promptly install such browsers as we recommend from time to time for the purposes of (amongst other things) assuring browser security and suitability;

Keep all user login passwords confidential;

Not use the Software to store Personal Data (as defined in the General Data Protection regulations EU 2016/79 or successor legislation) or personally identifiable information.

We may issue Maintenance Releases with new functionality and features which may require You train users in their use from release notes We will provide You. If it is not possible for You to undertake this training, if You wish to delay implementation of the Maintenance Release or you are not able to install the browser we recommend, You must notify us immediately of the reason for this. We will only provide support for the latest Maintenance Release and (in our discretion) the one immediately prior to that.

Adhere to the terms of our EULA

Technical Requirements and Client-Side Requirements

The client should have internet / network connectivity, with firewalls set to allow access to our https URL. Access is via a web browser, currently supported are Internet Explorer 11 and above, Firefox, and Microsoft Edge.

Outcomes/Deliverables

There are a number of key outcomes that effective use of Perform will realise for our customers as follows:

Rapid and high impact with the executive team: Within days of initiation the executive team will have full visibility of their projects and portfolios on their mobile devices, excellent for the credibility and perception of value from the PMO.

Improved portfolio prioritisation: Perform will enable better prioritisation discussion and visibility of portfolio congestion and prioritisation options based on benefit, alignment with strategic objectives, operational impact, complexity etc.

An evolution of the project delivery maturity of the organisation: Use of Perform is extremely intuitive and user friendly so everyone can adopt Perform with ease. This means the whole organisation can engage in adopting new levels of maturity around project delivery, governance, new methodologies like Agile, risk and issue management and many more disciplines.

Improved portfolio and project decision making and control: by giving transparency that enables better management and control of cost, quality and timescales.

Accelerated and more certain benefit release: Perform enables better visibility, accountability and collaboration generating more effective governance and decision making that makes benefit realisation more certain and accelerated.

Development life cycle of the solution

All the Application Design, Development and Support for Kivue Perform is provided in the UK from the Kivue offices in Reading. The Data Centre is located in a dedicated datacentre at a different geographical location in Reading several miles from the development centre, all the physical platforms, backups, data transmission are all in the UK.

The Design team is primarily focused on new releases and updates to the system.

Kivue adopt an Agile methodology for the development of the software with the following stages from concept to live:

1. Roadmap
2. Planning
3. Development
4. Testing
5. Completed

After-sales Account Management

Kivue place a high level of priority on supporting existing customers with a high quality after sales service. Our theory is that happy customers tend to stick with us which is in everyone's best interest. As a customer of Kivue you will have access to our customer support team to both resolve issues and help get the best value out of your instance of Perform.

More complex queries and requirements will be referred to our Head of Customer Solutions who will work together with you and your team to explore solutions to specific requirements and act as the bridge between our technical and development team and the customer requirement.

There is a Release of new Perform functionality approximately every 8-10 weeks and our customer support team will be there to support each Release by walking through the changes, supporting with Release notes and scheduling the upgrade at an appropriate time to fit in with specific customer needs.

Kivue perceive the relationship with customers as a partnership where the goal is to work together to realise the success criteria defined by the customer and explore options to optimise the value realised from the partnership.

Termination Process

The contract will be for a fixed period, if an extension is not agreed then the service will be terminated. Upon request we can send a CD copy of the SQL database that has stored the client data. Any printouts or other reports should be output or printed by the client before the expiry of the current licence.

5. Our experience

Case Studies

Case Study 1: Government Organisation

Context & Background:
This is a public sector organisation, charged with delivering a complex transformation portfolio for public benefit. The organisation is evolving from a position of low-level maturity, changes in leadership and a heavily siloed culture.

The Challenge:
The challenge was how to work with Kivue and use Perform to extract concise insights which the organisation's leadership can digest whilst enabling genuine value across the organisation.

The Approach:
The answer was to adopt a step-by-step approach focused on getting the basics right first. "Our primary principle was to keep it simple, roll out in phases and establish some level of visibility that added value as quickly as possible (within weeks), in doing so, we could demonstrate the immediate benefits associated with visibility, encourage buy-in and sponsorship and therefore generate momentum – both amongst Executives and amongst departmental champions."

The Outcomes:
The person leading the transformation portfolio quoted the outcomes as follows: "Perform is a great tool. Before we implemented it, we examined the market carefully. I couldn't find anything that matches its ability to give Executives the specific information they want, on-demand and tailored to their programmes. It's great at pulling in the data that a specific sponsor or steering group needs to see and presenting it in a simple, succinct report to highlight red flags and aid relevant discussion and decision making."

Case Study 2: Southampton University

Context & Background:
The University of Southampton is a research-led, founding member of the prestigious Russell Group. It is ranked amongst the top 100 universities globally and the top 20 in the UK. The university has defined a 10-year strategic vision and transformation portfolio, designed to secure the University's future as a world-class leader in higher education.

The Challenge:
In order to support effective delivery of the transformation portfolio, the leadership of the university has demanded a transparent and targeted project portfolio, supported by an effective governance structure. Many of the staff charged with project delivery are operational or academic experts but lack formal project management training.

The Approach:
A key component of effective delivery has been the implementation of a consistent portfolio life cycle, facilitating project work and informing executive decision making. "Rupert (Rupert Taylor, Co-Founder, Kivue), was already working with our board members to build understanding and buy-in around what it means to sponsor a portfolio of change projects," says Helen. "That engagement led us to discover Kivue's PPM dashboard reporting tool, Perform. Perform has been key in enabling us to implement a new, portfolio-wide PPM framework, and to establish the right resources and

templates to achieve value-adding visibility." Initially piloted for 9 months, in tandem with Rupert's strategic work with the executive board, Perform has now become established as the PPM reporting tool of choice for the foreseeable future.

The Outcomes:
According to Helen. "A key feature of Perform has been its capacity to promote meaningful PMO/executive engagement. The most significant impact has been the ability to provide on-demand information at the dashboard level – and to ensure that it's the kind of information that an executive is really interested in. It has eliminated information siloes, promoted the CPO's value and accountability to the board and facilitated the board's engagement in their sponsorship duties. During our executive meetings, sponsors use their dashboards to explain the status of their projects, address any red flags, and so on. It gives them ownership of their projects."

It's also helpful that the system is intuitive and simple to use, Helen adds. "Our executives appreciate being able to independently access key information about the portfolio; the result of implementing Perform is that they are more empowered. Our sponsors feel that there's clearer and more transparent information available to them. We have yet to delve into the full capacity of the financial and benefits related functions, but I can see us potentially moving in that direction in the future. In terms of both Perform, the tool and Kivue, the company, we wouldn't have been able to get this far without their support."

Case Study 3: Vertiv EMEA

Context & Background:
Within Vertiv's global structure, which employs 19,700 employees and generates $4.3bn revenue, the company's EMEA operations comprise a regional turnover of $1bn across 40+ entities in 16 countries. In 2018, following an independent benchmark review, a Business Case was agreed to consolidate Vertiv's EMEA Finance activity. A primary aim was to reduce the cost-of-finance ratio by approximately one third, as well as improving service, performance and control. The central strategy was to transition 85-90% of in-country finance functions to a new, fully managed FSSC in Cluj, Romania.

The Challenge:
"We faced two main challenges in delivering this Transformation programme," Emer explains. "The first was a lack of standardised structure in processes and reporting, from previous projects in the company. Historically, Office applications had been used on a freeform basis, making it difficult to achieve consistent visibility over workflows, requirements, requests, escalations and the like. This, in turn, limited our executive capacity to steer the programme. By the beginning of 2019, it was clear that we needed to adapt our approach. We had two options: recruit another project manager or seek an external PMO Service resource.

The decision was therefore made to enhance our interim team with a Kivue PMO managed service solution, underpinned by the Kivue Perform portfolio performance management platform.

The Approach:
The transformation involved a complex portfolio of deliverables, including transitioning approximately 200 roles out of country and into the new FSSC, setting up a new region-wide finance organisation, restructuring inconsistent activities into defined Target Operating Models, and setting up a Financial Planning & Analysis programme for the FSSC. In particular, Kivue input their PPM expertise to support the effective programme governance required to steer the Transformation strategy. According to Emer, Kivue's thirty years of managing complex projects and portfolios added

significant value to the process.

Underpinning the implementation of a new governance model has been Kivue Perform. We were already working on a new process and reporting framework so, as soon as Kivue came on board, we were able to join up our thinking and start solving the challenges. Kivue helped us configure Perform so that we only concentrate on the key, relevant information. There is a discipline-of-use required to maximise its impact and that has demanded a cultural shift by our people. But my team adopted it quickly and it makes us more effective.

The Outcomes:
"Perform has facilitated the governance and steering processes we have introduced," says Emer. "It gives us a consistent framework to gather the required information: timelines, risks, milestones, escalations and so on. By its nature, Perform makes you focus on what you really need to run a programme.

We have delivered the financial Business Case with no significant budgetary variance. We have established a strong PMO leadership and governance model and maintained a focus on consistent and agreed targets.

A major enabler for the governance framework was the cultural shift to a more logical meeting structure. We moved from an 'everyone attends everything' scenario to a more efficient approach, with a pyramidical structure up through European steering committees and a global steering committee feeding to the US. This has equipped our executive sponsors to support the programme, but it has also offset the cost of the PMO Service by reducing the amount of time business leaders spent in meetings, in a clearly measurable way. So, we have achieved a PMO model that's not only strategically effective, it's also self-funding in this case!"

In conclusion, according to Emer, Kivue's support of Vertiv EMEA's Financial Transformation constitutes a robust and replicable model. "Most of our interim team will step away from the programme soon," he says, "but a follow-on finance project is in the pipeline and we're already looking at using Kivue to PMO that activity, with Perform retained as the tool of choice. Currently, I see no reason to use anything other than Perform and I'm an advocate of Kivue's PMO Service model. The combination works so much better than other PMOs that I've seen, and I've seen quite a few!"

A selection of Kivue Customers:



Perform and PMOaaS Clients

Contact Details

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