



The leading provider of P3M solutions for the public sector

## Service Definition G-Cloud 15

## Verto Features

### Verto is the #1 Provider of Portfolio, Programme and Project Solutions

Verto is the solution that centralises your information, simplifies your workflows and supports your path to successful programme delivery. The tools within Verto help to organise everything from simple day-to-day tasks to major projects and programmes right across the organisation.

If you're confused about how to find a solution to the challenges you face, read on to learn how Verto consolidates your project data, activities, team management and more, to provide you with simple processes that handle everything across all your project and programme work.

Verto can be setup by our expert team. Support, including guidance and training, is available to help maintain use so you can work collaboratively with your teams across the business and with other organisations in a secure manner.

#### Key features:

- Cloud based, accessible everywhere
- Microsoft Teams and Office 365 integration
- Fully configurable dashboards and reports
- Project planning frameworks that adapt to your project's evolving needs
- Full RAID capabilities to monitor your project as it progresses
- Resource management designed with people in mind
- Track all costs and benefits as they happen
- Understand lessons from previous projects to continually improve
- Structure programme management and align to your strategic goals
- Kanban Board, Gantt and task management functionality
- Alerts and notifications
- Compatible with finance and HR systems.

## Verto Product Options

We offer Verto in two distinct ways. Pro is fully out-of-the-box with no tailoring while Verto Enterprise combines a configurable platform with people and ongoing support.

- **Verto Enterprise** – Fully configurable portfolio platform with implementation, CSM, maturity assessments, QBRs, and optional Admin-as-a-Service. Designed for complex, multi-portfolio environments.
- **Verto Pro** – Out-of-the-box, industry standard, PPM platform. No need for configuration or customisation. Self-serve onboarding with e-learning and standard support through dedicated Client Portal. Access to full feature set of the core PPM platform.

## Verto Enterprise

Fully configurable portfolio platform with implementation, CSM, maturity assessments, QBRs, and optional Admin-as-a-Service. Designed for complex, multi-portfolio environments.

| Verto Enterprise includes                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |                                                                                                                                                                                                                                                                                                                                                                                                                                           |
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| Core System Functionality                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | Services                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <ul style="list-style-type: none"> <li>• Portfolio, Programme &amp; Project Management</li> <li>• Multi-Stage Set up With Approval Functionality</li> <li>• Full RAID Capture &amp; Tracking</li> <li>• Comprehensive Planning Capability – including Gantt &amp; Kanban</li> <li>• Resource Management</li> <li>• Performance Indicators</li> <li>• Financial Tracking of Costs, Benefits</li> <li>• Action Tracking</li> <li>• Lessons Learned</li> <li>• User-Configurable Dashboards</li> <li>• Reporting Suite</li> <li>• OData Access</li> <li>• Verto Intelligence Assisted Import</li> <li>• Verto Intelligence Partners (defined number of tokens)</li> <li>• Integration with MS365</li> <li>• Timesheets</li> </ul> | <ul style="list-style-type: none"> <li>• Hosting Costs</li> <li>• Maintenance Support</li> <li>• Helpdesk Support</li> <li>• Dedicated Client Success Manager</li> <li>• Dedicated Key Account Manager</li> <li>• System Training</li> <li>• Knowledge Hub Access</li> <li>• Client Success Portal Access</li> <li>• Strategic Objectives</li> <li>• Verto User Group Membership</li> <li>• 2 Days of Report Writing per annum</li> </ul> |

## Verto Pro

Verto Pro is an out-of-the-box, industry standard, PPM platform. No need for configuration or customisation. Self-serve onboarding with e-learning and standard support through dedicated Client Portal. Verto Pro provides access to the full feature set of the core PPM platform.

| Verto Pro Includes                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |                                                                                                                                                                                                                                                                               |
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## Platform Features

### Dashboard Monitoring

Verto's dashboards provide a real-time, aggregated view of all project & programme information, focusing on what matters most to you, be it milestones, risks, costs or anything you're recording in the system. Create and save as many dashboards as you wish and share them with colleagues and stakeholders quickly and simply. Dashboards are interactive at every level and can be fully customised using a huge number of widgets, which can be tailored into several formats (bar charts, line graphs, containers, data tables etc.) to suit your preferences. Filter dashboards on any field, providing full control over the management information you need to focus on at any time.

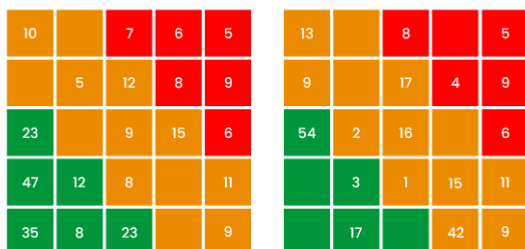
### Planning/Gantt

Project plans and schedules can be created simply and managed easily within the system using Verto's planning feature. Multiple views are available for you to customise how you view and update your plans. Our Gantt capability is embedded within the planning module and provides a visual assessment of project plans. The Gantt view is interactive, allowing elements of the planning module to be amended in this format. An 'offset dates' feature can be used when an entire plan needs to be pushed back or brought forward as required. You can import Microsoft Project Plans into Verto, so you can use your preferred tool whilst supporting your team's collaboration.

### Reporting

Verto boasts powerful reporting functionality at multiple levels that allows for reports to be automated based on any, and all, information within the system. All reports can be exported in multiple formats including Word, Excel, PDF, CSV, TIFF etc. All our reports are run in real-time, ensuring that only the latest information is presented. Take advantage of our subscription service so that your stakeholders receive regular reports straight to their inbox, eliminating the need for them to access the system to run a report. We use tags and filters to 'slice and dice' the data as much as required, to further enhance the reporting capabilities. We also produce specific data extracts for reporting tools such as PowerBI, Tableau and QlikView.

#### All Risks

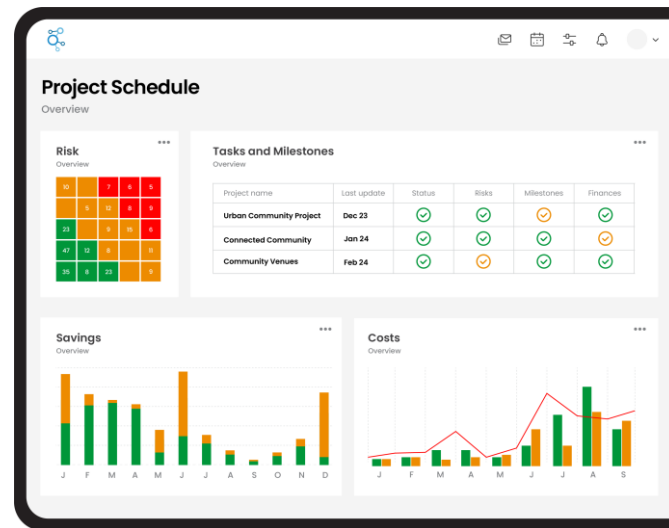


### Risk Management

Configurable and comprehensive Risk and Issue Management functionality can be held against both the Programme, Project or Workspace and aggregated up to Programme and Portfolio level. Owners are assigned to individual risks and issues, along with proximity dates and mitigating actions (amongst many other field options). The fields contained both within these functions and others throughout the system can be tailored to match your organisation's terminology and support existing governance.

### Dependency Management

'VertoSense' is a feature that allows for dependencies to be identified against any two objects in the system. Comprehensive dependency networks can be produced from those connections made, such as identifying a dependency that a risk may have on an associated milestone. These can be selected within the system, which

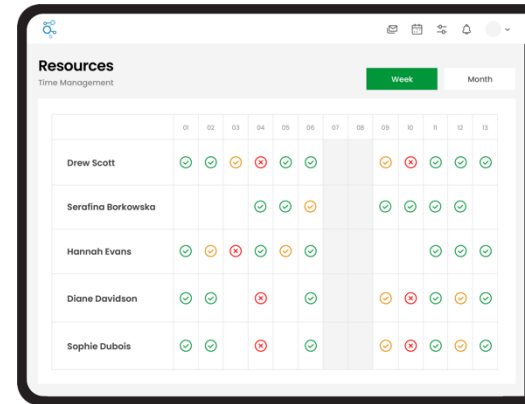


then brings up the fields linked with that dependency. The fields can be amended and updated without having to enter that section, if you, or another user has the correct permissions.

## Resource Management

Our comprehensive resourcing functionality has been designed to ensure you can find the right people for your projects based on availability, skill set and any other criteria you want to use. Verto gives you the ability to search across all resources to see who's available, who's been allocated to which project(s) and when they may be overallocated. Search using any criteria you need, be it job title, team, project role, location, specific skill etc. Verto supports your own views/groupings of the resource pool. You can plan as far ahead as you need to avoid clashes.

The main resourcing page gives you an 'at a glance' view of a person's allocations across an entire year, making it easy to identify issues and resolve them ahead of time. Review each person individually to ensure you have the right person for the job and calculate individual rates, so you can get a true picture of the cost of your project. Used side-by-side with Verto's timesheet module, you'll be able to see the expected and actual costs of all the time spent.



|                    | 01 | 02 | 03 | 04 | 05 | 06 | 07 | 08 | 09 | 10 | 11 | 12 | 13 |
|--------------------|----|----|----|----|----|----|----|----|----|----|----|----|----|
| Drew Scott         | ✓  | ✓  | ✓  | ✓  | ✓  | ✓  |    |    | ○  | ○  | ✓  | ✓  | ✓  |
| Serafina Borkowska |    |    |    | ✓  | ✓  | ✓  |    |    | ✓  | ✓  | ✓  |    |    |
| Hannah Evans       | ✓  | ✓  | ○  | ✓  | ✓  | ✓  |    |    |    |    | ✓  | ✓  | ✓  |
| Diane Davidson     | ✓  | ✓  |    |    | ○  | ✓  |    |    | ○  | ○  | ✓  | ✓  | ✓  |
| Sophie Dubois      | ✓  | ✓  |    |    | ○  | ✓  |    |    | ○  | ○  | ✓  | ✓  | ✓  |



## Verto Intelligence

Verto Intelligence brings AI-powered insight to your portfolio, helping you forecast risks, optimise resources and make confident, evidence-based decisions. See patterns, predict outcomes and act faster, all within the secure Verto platform trusted by 100+ public sector organisations.

- **Verto Intelligence Help** – Based on Verto’s extensive knowledge base, this AI assistant answers questions and provides you with step-by-step instructions on how to, for example, add a risk.
- **Verto Intelligence Risk Assisted Import** – Our new AI-assisted risk import feature allows users to bring existing risk registers straight into Verto – no reformatting required. Different spreadsheets, structures and configurations are automatically understood and mapped, removing manual effort and ensuring accurate, consistent data from day one.
- **Verto Intelligence Data Insights** – Make faster, smarter decisions with Verto’s new AI-powered Data Insights tool. Instantly analyse live project and programme information, uncover trends and surface key risks, enabling clear, confident decision making across your organisation.
- **Verto Intelligence Partners (VIPs)** – We developed AI agents, called VIPs, who have been designed to be experts in finance, risk, project admin and IT. VIPs give you access to a core team of agents who will advise you on the project, where it is, what needs to happen next, and helps you action various steps within the platform. Accessing this team of experts provides excellent training opportunities for new or ‘accidental’ project managers and helps reduce your time spent on administrative tasks. The partner's advice also helps point you in the right direction for the next most important action to take.

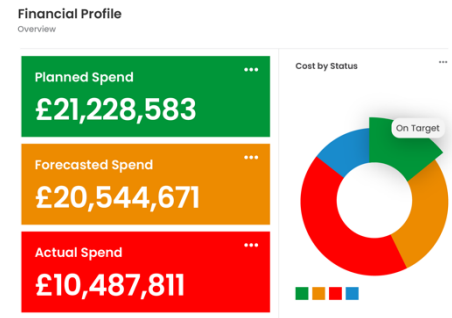
## Timesheet Management

Complete timesheets within Verto to reflect the actual time spent on completing a task. Verto knows which projects an individual user is assigned to and will only show the relevant tasks to ensure quick but accurate time recording. The submissions will then go through an approval before the time is added to the project record.

## Benefit Realisation and Cost Management

Verto records quantitative and qualitative benefits, which are then tracked and reported against at multiple levels via the dashboard, as well as utilising our comprehensive reporting functions.

Verto provides full finance management capabilities, allowing you to track cost profiles over time, providing full transparency on project spend. Financial integrations with systems such as SAP, Oracle, Pegasus, Agresso, can be achieved to ensure Verto remains the central repository for analysis / reporting purposes.



## Integrations

Verto can be integrated with any accessible system. Our integrations are typically tailored to suit the requirements of each client. We have integrated with numerous financial systems (SAP, Agresso, Oracle) as well as numerous identity providers (including Active Directory) and timesheet management systems. Verto can be used fully embedded within Microsoft 365, Teams and Outlook. This allows users to manage projects, end to end, without the need to leave their Office 365 suite of tools or log into another system. The synchronised calendar allows for items such as project tasks, milestones, risks, and issues to be overlaid within the same diary of events and meetings in your own calendar view. Synchronised document storage allows you to continue managing your documents within SharePoint via Verto. Multiple Kanban boards and dashboards can be added to each project directly within the Microsoft tools, extending collaboration opportunities and providing management information at your fingertips.

## Custom Notifications

User-defined automated risk alerts and notifications appropriate to the level of involvement, including approvals, missed dates and other tasks and milestones can be set up through the app and now, within the Verto Bot via your Teams channel.

You are notified of any changes or updates to any field within the system, including risks, and this is applied to every field within a risk, so nominated users are always notified immediately after relevant changes are made. Common notifications are, but aren't limited to, a change to the 'proximity date' or 'current risk rating' of a risk.

## Storage

Unlimited, cloud-based storage is available for each entity (e.g. project, programme, portfolio) to manage documents, and each document store is independently secured, so that only users with the appropriate permissions have access to it.

External links such as a SharePoint archive can be inserted, however Verto also integrates directly with SharePoint, so you can continue using the current storage solution you are familiar with.

## Performance Management

The Verto performance management module can be utilised to measure and report on project performance. Pre-set thresholds can be assigned to a KPI to see if you're achieving the objectives set. Both projects and non-project activities can be assigned to a KPI to support performance analysis against projects. Performance groups/objectives can easily be created to ease the management of multiple KPIs that form part of the same

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objective and compare performance against other organisations or services is also available to track your progress against others.

A performance management report is part of our standard suite of reports however custom reports/plans/graphs can be produced and tailored to suit your organisation's needs. Within the system, a quartile graph is included for each KPI and custom charts/graphs can be produced if required.

## Workflow Configuration

Configuration Verto's workflows can be configured, which allows workspaces and projects to move through a defined set of stages and approvals. Workflows can be set up in multiple ways by different teams and departments across the organisation according to project size and complexity. Customised to incorporate PMO or SMT sign off at any stage. All changes, requests and approvals are recorded providing a complete audit trail.

## Kanban Boards

Our Kanban board functionality allows you to create personal or shared boards. Create lists according to the progress of work containing cards (or tasks), so you can keep on top of each piece of work within a particular project and move them across the lists as you complete them.

Cards hold information such as statuses, due dates, members, custom tags, additional documents and much more. A variety of templates can help you get started, but you can create your own as required.

Every board can be filtered to find specific data. For example, you can easily filter a board to only show cards you are a member of, or with a status of red, that is also due in the next 7 days etc. All board data can be aggregated and summarised within our dynamic dashboard, providing even more opportunities to filter and group cards across multiple boards at once.

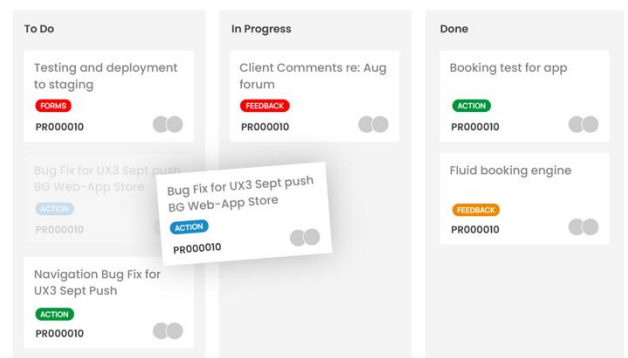
## Feeds

Feeds provides functionality that pulls all tasks, risks, and other information related just to you into one view from the entire Verto site within your organisation. From one click of a button, you can get a true view of your task-load immediately

## Audit Trail

The audit log is automated against every field in the system. Every change you make is recorded and is easily viewable. Changes to fields are also supported by a 'track changes' feature so you can easily see what's changed between versions.

Tasks Management  
Workflow



## Credentials

Our preferred method of authenticating credentials is using Single Sign-On where we delegate the authentication process to the customer's Active Directory. Where this is not possible users can provide username/password with 2 factor authentication.

## Security/Access

Administrators have full control of tailoring each user's access and involvements within the system. Roles can be assigned to users to ensure they have access to the correct system elements. Restrictions can be placed throughout the system so users will only ever see what is relevant to them. For example, administrators can choose to restrict a user's access from a particular stage, or to the reports section of the system if required. Verto can be accessed using browsers on mobile devices.

## External Forms

External forms are used to gather data that is initially generated outside of the system. Examples would be project idea forms, funding applications and company engagement forms.

These submissions can be completed by anyone, they don't need to be a Verto 365 licence holder so, the possibilities are wide-ranging.

Those who complete these external forms will receive an email upon starting a form with a link to give them direct access to pick up where they left off, so they don't have to complete the form in a single sitting. The forms can be configured by your administrators using multiple field options within Verto 365 to suit your organisation's exact requirements.

All the data submitted will be added directly to the Verto 365 database which means there's no need for re-writing and no duplication of effort. It's all reportable and can progress through the normal project stages if needs be.

## Verto Services

We are all aware that implementation of a new system can put a strain on people's time. So, we have created our Service Package to take the stress of buy-in, implementation and utilisation off your shoulders, as we will drive for you.

Our in-house Client Experience team can ensure Verto is adopted quickly to equip your organisation with the necessary tools for improvements in effective project and programme management.

We will understand your strategic goals and work with your existing internal processes, so Verto aligns with, and becomes, embedded in your company's culture, encouraging buy-in at all levels and ensuring a seamless adoption process.

The services we provide lay the foundation for Verto's successful implementation within your organisation. We deliver an onboarding program as standard for all Verto customers with additional modules available at your discretion.

Verto Pro and Verto Enterprise have different service levels due to the implementation of the solutions. Verto Pro is an out-of-the-box solution and needs limited support and services. Whereas Verto Enterprise is a completely customised and configurable solution, with extensive with implementation, CSM, maturity assessments, QBRs, and optional Admin-as-a-Service. Designed for complex, multi-portfolio environments. Verto Pro is an out-of-the-box, industry standard, PPM platform. No need for configuration or customisation. Self-serve onboarding with e-learning and standard support through dedicated Client Portal.

## Verto Enterprise Delivery Manager

Each Verto Enterprise client is assigned a dedicated Client Delivery Manager (CDM). Your CDM will conduct weekly catchups and guide you through focused discovery, gap analysis, and system build sessions, as detailed in your implementation plan.

## Implementation Timeline

A standard Verto Enterprise implementation will take approximately 12 weeks (3 months). At the initial planning session, the CDM will discuss and agree your preferred launch date. This will then be used to populate the project plan in your Verto Test Site.

The project plan consists of 4 phases:

| Phase          | Summary                                                                                                                                                                        |
|----------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Start Up Phase | Kick Off, Discovery Sessions, Planning Session, Gap Analysis and commencement of weekly catchups.                                                                              |
| Build Phase    | Custom Stages and Governance Processes built, Administrator Acceptance Testing (AAT), User Acceptance Testing (UAT), 'Home' dashboard build, standard reporting suite updated. |
| Training Phase | UAT orientation session, System Administrator training package                                                                                                                 |
| Launch Phase   | Go-Live Checklist, Go/No-Go Meeting, Support Handover, Launch Report.                                                                                                          |

**Verto Pro**, our ready to go platform, can be implemented much faster, with dedicated self-service training, learning and support.

## Verto Enterprise Implementation Package

- The implementation package will include:
- Creation of Test and Live environments
- 2 x 1.5-hour Discovery Sessions (Client and Verto Spotlights)
- 1 x 1-hour Planning Session
- Weekly 30 min catch-ups throughout the implementation phase
- Access to a shared Implementation Log to support the system build gap analysis
- Site Build
- Administrator Acceptance Testing (AAT)
- UAT Orientation session for System Administrators
- UAT example script
- Training for Verto Administrators
- Go Live Checklist
- Launch Delivery Report.

## Verto Implementation Administrator Training Package

Every Verto Enterprise client will receive a comprehensive training programme for their Verto Administrators. This programme will provide the knowledge and skills needed to effectively manage your site on a daily basis after go-live, and to provide ongoing support to end users in their everyday use of the system.

The training is split into five separate online modules:

### 1. Site Maintenance

Delegates are introduced to the '4-Step' build process. The objective of this training is to demonstrate how to make future amendments to the site design.

### 2. Governance Report Maintenance

Delegates are reminded of the '4-step' build process and how this can be used to make amendments to governance reports and the approval workflows.

### 3. Permissions

Delegates will learn how to set up user accounts and manage permissions on their site.

### 4. Dynamic Dashboards

Delegates will learn how to make the most of dynamic dashboards in Verto. This includes how to amend and create dashboard templates for your users.

### 5. Train the trainer

This session is delivered to delegates who require a deeper understanding of key Verto features and benefits. It also includes guidance on preparation and best practice training approaches.

## End User Training Package (Optional)

Optional end user training packages are available for purchase, with each session accommodating up to 10 participants. Multiple sessions can be scheduled as required.

## Verto Administration as a Service (VAaaS)

Verto Administration as a Service provides all the administration services needed – so you can focus on what matters. This is available for Verto Enterprise.

### What is VAaaS?

VAaaS shifts essential Verto system admin tasks from your team to our dedicated Verto experts. We handle the complexity so your administrators can focus on delivering results – without the workload, delays, or risk of losing critical skills.

### Why outsource platform administration?

Outsourcing platform administration ensures your system is managed by specialists who work with it day in, day out, bringing depth of experience and best-practice insight that's hard to match internally. Instead of tying up valuable staff time on complex, technical tasks, your team can focus on strategic priorities and user outcomes.

It also removes the risk of skills loss when key people leave, covers gaps from annual leave, and eliminates the cost of continual training. With expert administration in place, you get faster problem resolution, a “right-first-time” approach to configuration, and a platform that evolves with your organisation's needs — without adding headcount.

### What we do for you

- We take care of your ongoing Verto administration, including:
- Manage the day-to day site administration tasks
- Implement changes to your existing site configuration
- Implement enhancements to your existing site setup
- Manage the custom report request process
- Provide a dedicated support portal for VAaaS Administrators.

### Why choose VAaaS?

- **Value** - No need to hire or train extra staff – our experts handle everything
- **Risk Proof** - Full-service coverage – no gaps from staff turnover or annual leave
- **Expert knowledge** - Our expertise enables rapid resolution of user issues
- **Reduced training overhead** - We stay fully trained so you don't have to
- **A Trusted Partnership** - We work as part of your team, we understand your goals, and we work with you to achieve them.

### Included with VAaaS

Dedicated support portal with pre-configured request forms  
VAaaS administrator training package including

- User Permissions
- Dynamic Dashboards
- Verto Features Spotlight
- Train the Trainer
- Understanding VAaaS Support.