



# A complete picture of org-wide work.







Strategic visibility at the project,  
program, & portfolio levels.




## Complete Picture

# Strategic Visibility





Growing companies need a complete picture of all the work happening across their organization to make confident, data-driven decisions.

**Project Insight** connects project data from every system into one real-time command center across projects, programs, and portfolios for clear visibility into what's on track, at risk, or over capacity.

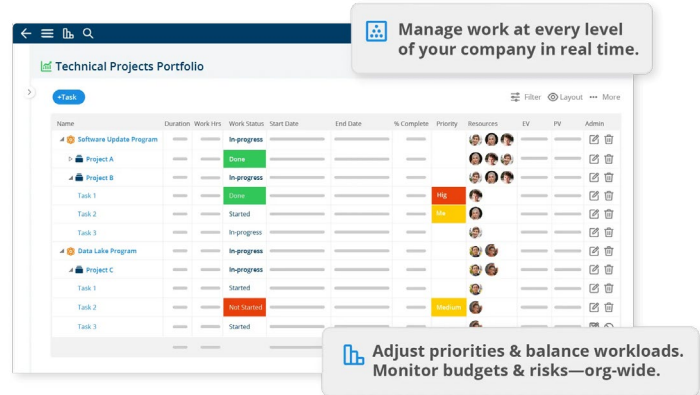
-  Show alignment with strategic goals.
-  Roll-up tasks from the project, program & portfolio level.
-  Prevent burnout with balanced workloads.
-  Drill into financial impacts across projects.

-  Generate cross-level Gantt, RAID log, & Kanban views.
-  Make confidential, AI-assisted decisions about future work.
-  Give your C-suite real-time decision-ready insights.

## Know Instantly

-  Which teams have capacity.
-  Where budgets are running hot or behind schedule.
-  Which initiatives are moving the needle.
-  What risks could impact delivery—before they do.

Project Insight delivers one clear, real-time view of your entire portfolio so you can stop chasing updates and start making confident, future-focused decisions.



Manage work at every level of your company in real time.

Name	Duration	Work Hrs	Work Status	Start Date	End Date	% Complete	Priority	Resources	EV	PV	Admin
Software Update Program			In progress								
Project A			Done								
Project B			In progress								
Task 1			Done				High				
Task 2			Started								
Task 3			In progress								
Data Lake Program			In progress								
Project C			In progress								
Task 1			Started								
Task 2			Not Started				Medium				
Task 3			Started								

Adjust priorities & balance workloads. Monitor budgets & risks—org-wide.

Unified & Reliable Tech Stack

# Integrate with your existing tech stack.

Bidirectionally sync project data across current systems to eliminate silos, streamline workflows, and reduce double-entry for project managers.

Organizations rely on

**20+**

software tools.

Project Insight connects them all in one hub.

Organizations rely on

**+30%**

efficiency gains

after enabling two-way sync.

## Popular Two-Way Integrations

Azure DevOps • Box • DocuSign • Dropbox  
Freshdesk • Gmail • Google Drive • HubSpot  
Jira • MailChimp • Microsoft Project • Teams  
NetSuite • Office 365 • OneDrive • Outlook  
PandaDoc • Power BI • QuickBooks • Replicon  
RSS • Salesforce • ServiceNow • SharePoint  
Slack • Trello • Xero • Zendesk



Reliably sync with tools like Jira, DevOps, Salesforce, ServiceNow, and more so your teams stay aligned wherever they work.

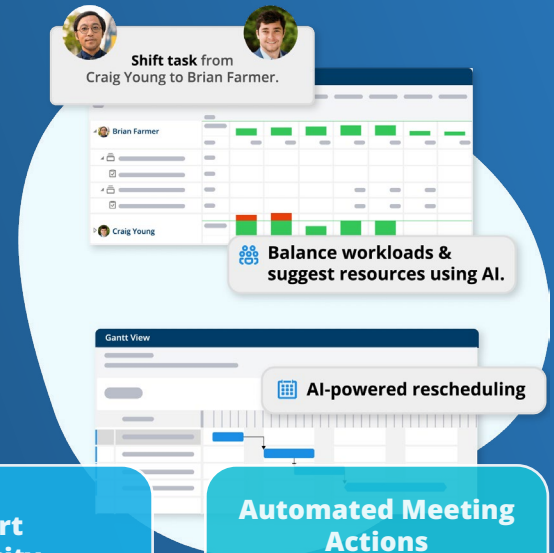
[See ADO and Jira integrations in action.](#)



Powered by AI

# ❖ Strategic Intelligence

Bypass the hype. Project Insight uses practical & innovative AI features to automate meeting follow ups, forecast accurately, suggest resources, and identify risks and other health issues.



## AI Project Planning

Auto-generate project plans or WBS.

## What-If Simulations

Model project scenarios & activate outcomes.

## Smart Capacity

Real-time visibility into team workload.

## Automated Meeting Actions

Real-time visibility  
Capture notes, assign next steps & RAID items.

## Resource Forecasting

Predict upcoming capacity gaps.

## AI Risk & Health

Spot projects trending off track.

## Automated Rescheduling

Auto-generate project plans or WBS.

## Predictive Insights

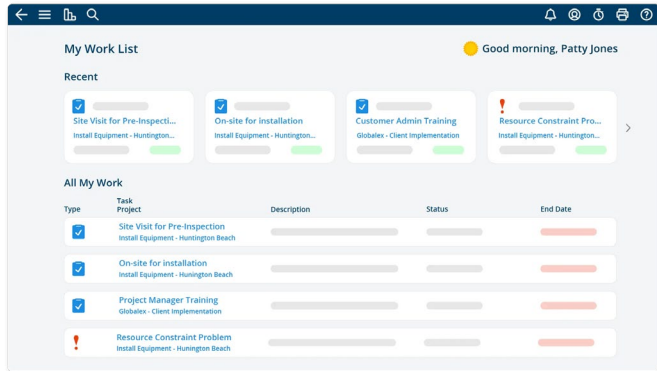
Real-time visibility  
Capture notes, assign next steps & RAID items.

## Clear Team Priorities

# Personalized Task Lists

Present each team member with an individualized task list based on real-time priorities that automatically adjusts.

Most tools show what's on your plate. Project Insight shows what matters most even if plans and strategies change.



## Clear Priorities & Alignment

- 1 Critical work stays front and center
- 2 Align tasks across systems like Jira, DevOps, and more
- 3 Eliminate wasted effort with automated updates
- 4 Balance KPIs, risks, and team capacity across the org.
- 5 Drive faster delivery and better outcomes.

Eliminate confusion and wasted time by clearly showing each person what to tackle next.

Save Project Managers

**7**  
hours

each week manually updating spreadsheets.

Live Command Center

# 20+ Project Views

More data visualizations than any other platform.

Replace spreadsheets for good with live, customizable command center views.

Get a complete picture of work with over 20 real-time visualizations, including Gantt charts, Kanban boards, and portfolio-level dashboards.

Manage dependencies, spot issues, and resolve resource conflicts before they impact progress.



**Gantt • Kanban • Status • Planning • RAID • Assignment  
Appointment • Client-view • Phases • Minutes • Sprint • Invoicing**

C-Suite Clarity

# One-Click Reporting

Immediate insights for executive leadership.

Executives want a complete picture of the work happening across the company at a moment's notice. Can you give that to them in **one-click**?

## Scheduled Reports

Schedule live reports on project status, resources, risks, health, and budget, so your C-suite always has the full picture, and **that reflects well on you**.

## Flawless KPI & Project Tracking

Project leaders are under pressure to show how project work drives organizational goals.

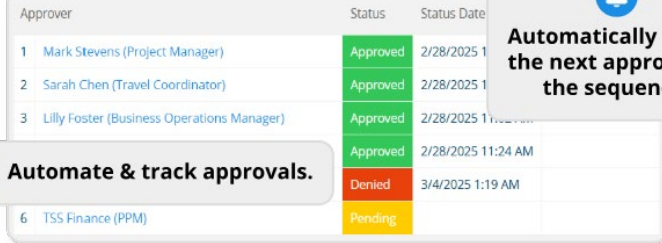
Project Insight surfaces the KPIs and issues that matter most:

- **Budgets:** Planned vs. actual spending across projects
- **Resources:** Who is available, overbooked, or underutilized
- **Priorities:** Which projects take precedence
- **Progress:** Milestones hit, tasks completed, and what's at risk
- **Time:** Logged hours by person, project, or phase
- **Expenses:** Billable and non-billable by client or initiative
- **Health:** Red, yellow, or green portfolio indicators
- **Risks:** Issues flagged early with clear action paths
- **Communications:** What's been shared, approved, or delayed
- **Bottlenecks:** Where work is getting stuck and why

Eliminate Manual Work

# Smart Automation

Most tools only automate simple to-dos, notifications, or one-step flows. Project Insight can automate even the most complex PMO and cross-department workflows.



The screenshot shows an approval workflow table with columns for Approver, Status, and Status Date. A callout box with a bell icon says "Automatically notify the next approver in the sequence." Another callout box with a purple 'n' icon says "Automate & track approvals." The table contains the following data:

Approver	Status	Status Date
1 Mark Stevens (Project Manager)	Approved	2/28/2025 11:24 AM
2 Sarah Chen (Travel Coordinator)	Approved	2/28/2025 11:24 AM
3 Lilly Foster (Business Operations Manager)	Approved	2/28/2025 11:24 AM
	Denied	3/4/2025 1:19 AM
6 TSS Finance (PPM)	Pending	



## Launch Projects Instantly

Preload tasks, dependencies, and resources with templates.



## Auto-Adjust Schedules

Reschedule automatically when timelines or priorities change.



## Route Approvals

Automate workflows for PTO, expenses, and documents, including multi-level approvals.



## Automate Status Updates

Health, risk, and audit logs update in real time.



## Deliver Scheduled Reports

Send live dashboards automatically. No exporting or spreadsheets.

## Free Client Users

# Client Access

Invite external clients to collaborate securely in Project Insight without using a paid seat.

- Client-specific access to dashboards, reports, and updates.
- Clients can submit requests, view status, and log issues.
- Control visibility with permissions and custom views.
- Collaborate on approvals, timelines, and documents.



**Unlimited free client users**



**Custom dashboards**



**Secure, permission-based access**

## Professional Standards

# PMBOK Best Practices

PMI-aligned project management.

Built on PMI's best practices, Project Insight gives project managers a strong foundation and makes structured methods easy to adopt across teams.

### Aligned With:

- PMI performance domains including planning, stakeholder, lifecycle, uncertainty, and measurement
- PMO governance with RAID logs, scorecards, traceability, and delivery metrics
- Agile, waterfall, and hybrid frameworks—no rigid methodology required
- Commonly used by PMP-certified teams

## Financial Workflows

# Order to Cash Workflow

*Align sales, delivery, and finance so work, invoices, and revenue flow automatically.*

**Save 5-10 hours per week and capture 5-15% more billable revenue.**

Convert Salesforce opportunities directly into structured projects with mapped line items and rate cards.

Automate project setup with templates, approvals, and faster kickoffs.

Sync time, expenses, and budgets directly to invoices in QuickBooks Online.

Eliminate manual reconciliation and gain real-time visibility into revenue, margins, and cash flow.



[View Short Demo](#)

## Planning Workflows

# Project Ideation to Execution

*Streamline intake, approvals, and kickoff in one connected workflow.*

**Save 5-10 hours per week and launch approved projects 50% faster.**

Standardize intake with custom forms and routing for review and scoring.

Automate approvals with built-in routing, alerts, and decision tracking.

Launch instantly by converting approved ideas into project plans with templates, scheduling, and resource capacity in place.



[View Short Demo](#)

## Engineering Workflows

# Connect Jira and DevOps to delivery

*Instantly incorporate dev. tools into your projects and time tracking.*

**Save 12-30 hours a month and recover up to \$70K a year in billable time.**

Sync development tasks, stories, and work items directly into your project workspace.

Auto-log time from development activity into timesheets for accurate reporting.

Unify visibility across teams without changing tools.

Forecast capacity and track progress in real time for faster delivery and better alignment.



[View Short Demo](#)

# Trusted by Leading PMOs and Industry Experts.



## FrontRunners by Software Advice

Project Planning, Project Tracking,  
Professional Services Automation,  
Time & Expense



## Category Leaders by GetApp

Professional Services Automation,  
Issue Tracking, Time & Expense,  
Nonprofit PM, Project Portfolio  
Management



## Shortlist Winner by Capterra

Professional Services Automation,  
Time & Expense, Project Portfolio  
Management

## What Customers Say



“We’re saving a 100 hours per month across our team of 7 while eliminating the tedious task of manually cross-checking data between multiple systems.”

– Jacqueline Leshko, CSM, PMP,  
Director - Portfolio Delivery,  
Cal Coast Credit Union

**Linda G.**  
Vice President of Delivery  
Hospital & Healthcare



“My overall experience with Project Insight is excellent. Project Insight has changed the way we manage resources, time, project and programs. They are highly thought of with our C suite.”

**Jackie L.**  
Director, Portfolio  
Delivery, Banking



“Fantastic! We are extremely happy are choice in selecting this tool for our company’s standard PM solution.”



# Ready to see it in action?



Scan or click to  
book a demo.

## Get in touch

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