PROJECT INSIGHT
Strategic PPM Software

Connect your data. Trust your reports.

Build the complete project data backbone PMOs need for trustworthy reporting, forecasting, decision-making, and AI analysis.

Download a copy:

The Disconnected Data Problem

Your project data lives in places outside your project plan.

Project information is often scattered across people, spreadsheets, project tools, business systems, and conversations.



No single system has the complete picture.

How connected is your project data?

When leadership asks these questions, how easily can your team give them a current, reliable answer?

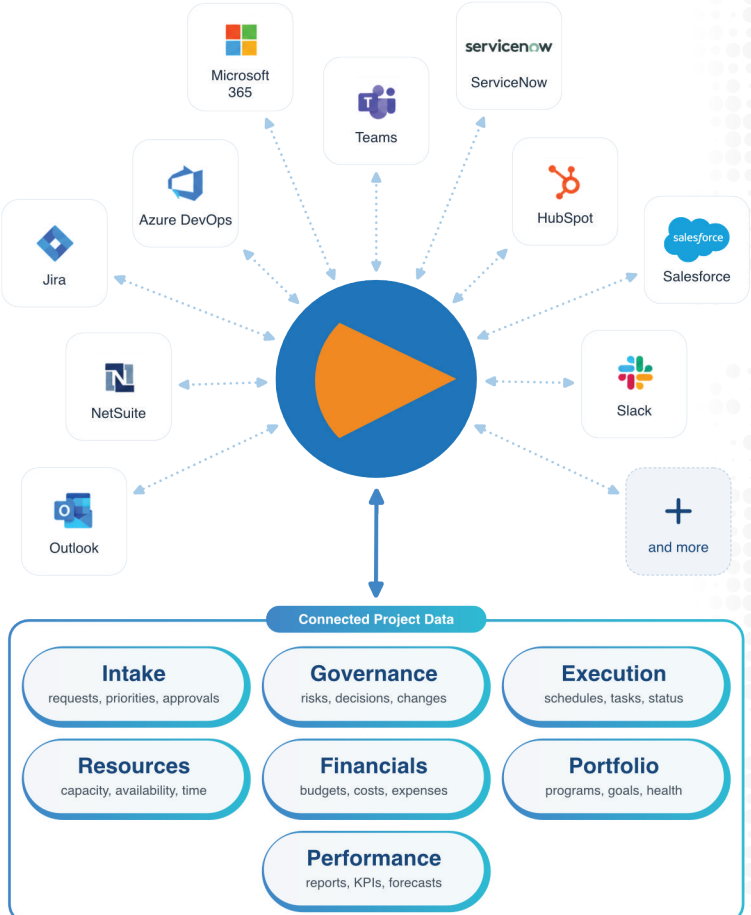
Executive question	Project data required	Ready?
Do we have the right people and enough capacity?	**Resource and Capacity Backbone** Demand, skills, availability, assignments and schedules	☐
Can we afford the work?	**Financial Backbone** Budgets, rates, time, expenses, forecasts and revenue	☐
Which work should we approve?	**Intake and Prioritization Backbone** Business cases, scores, goals, capacity and financial requirements	☐
Can we deliver what we committed to?	**Execution and Work Management Backbone** Plans, tasks, dependencies, progress, risks and issues	☐
Are decisions properly managed?	**Governance and Approval Backbone** Approvals, rationale, changes, actions and audit history	☐
Are we investing in the right work?	**Portfolio and Strategic Alignment Backbone** Goals, priorities, health, investment mix and outcomes	☐
Are projects delivering what we expected?	**Performance and Reporting Backbone** Status, KPIs, actuals, forecasts and portfolio rollups	☐

A reliable answer is only possible when every required data point is captured, current, and connected.

Strategic PPM

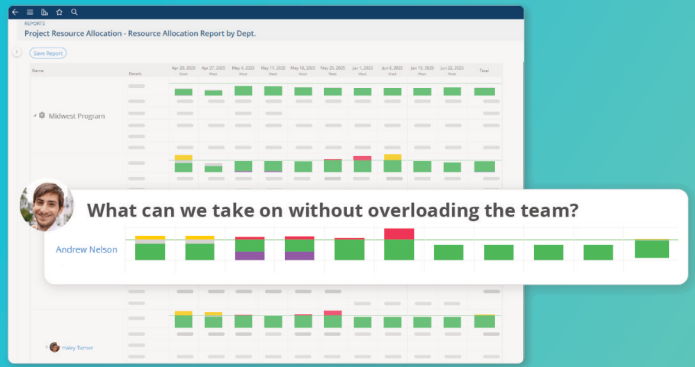
Connect the data from all your systems in one command center

- Manage work from the top down or bottom up
- Connect strategy, funding, capacity and execution
- Roll up work from across projects and systems
- See portfolio health, risks and priorities
- Drill down from executive views to project details
- Configure programs and portfolios around your organization



Resource and Capacity Backbone

Do we have the right people and enough capacity?



Connect schedules, roles, skills, availability, assignments, allocations, time and future demand.

Connect resource data:

- **HRIS**
  People, roles and skills
- **PTO and calendars**
  Leave and availability
- **Work management**
  Assignments, schedules and demand
- **Time systems**
  Actual effort

Balance capacity and demand
See workloads, availability and future needs.

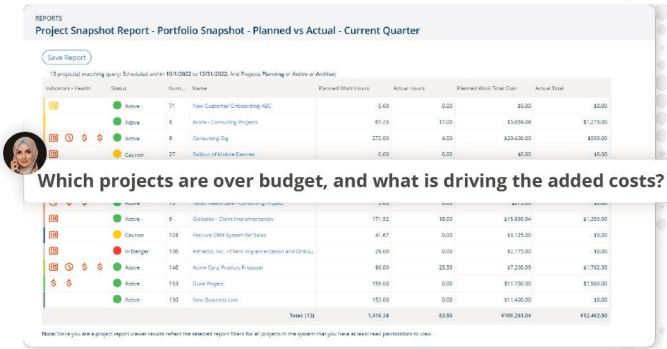
Staff the right people
Match roles and skills to project work.

Know your options
Test staffing and timing scenarios before committing.

Financial Backbone

Can we afford the work and are projects financially on track?

Connect budgets, labor rates, planned costs, actual time, expenses, forecasts, billing and revenue.



Connect financial data:

- **ERP and accounting**
  Budgets, invoices and revenue
- **Payroll and HRIS**
  Labor rates and costs
- **Time and expense systems**
  Actual hours and expenses
- **Work management**
  Planned effort and project costs

Build realistic budgets

Plan labor, rates, expenses and other costs.

See plan versus actual

Connect actual time & expenses to project financials.

Know your financial exposure

Forecast final costs across projects and portfolios.

Planning and Execution Backbone

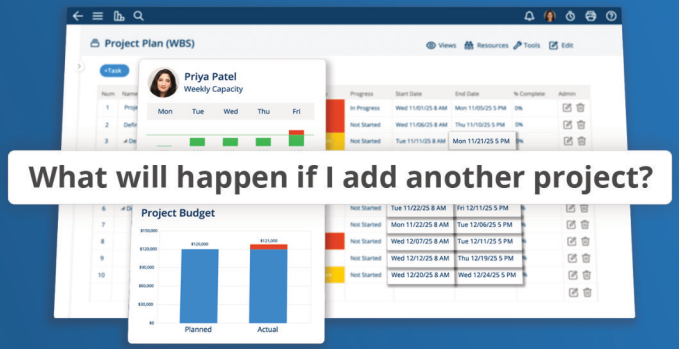
Can we deliver the work we committed to?

Connect plans, tasks, milestones, assignments, dependencies, dates, progress, risks and issues.

Connect planning and execution data:

- **Project and work management**
  Tasks, milestones, assignments and progress
- **Development systems**
  Backlogs, sprints and issues
- **Calendars and HRIS**
  Availability and leave
- **Time systems**
  Actual effort and completion data

Connect progress, dependencies and schedules so your delivery forecasts stay reliable.



Standardize project delivery

Use templates with proven phases, tasks and dependencies.

Keep plans realistic

Automatically adjust schedules as work and availability change.

Support every work style

Manage agile, waterfall and hybrid work in one system.

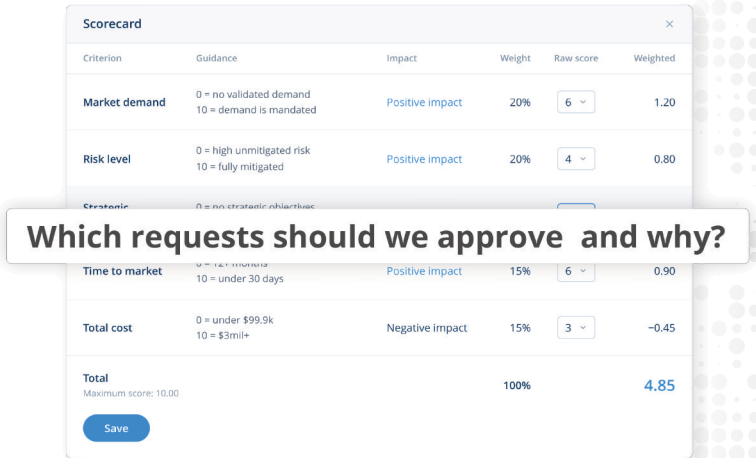
Intake and Governance Backbone

Choose the right work and preserve why it was approved.

Connect requests, business cases, scores, priorities, capacity, costs, approvals and rationale.

Connect the complete decision record:

- Requests and business cases
- Priorities and scores
- Capacity and costs
- Approvals and rationale



Which requests should we approve and why?

Choose the right work

Preserve how decisions were made

Portfolio Visibility and Strategy

Are we investing in the right work to achieve our goals?

Connect goals, priorities, investments, programs, projects, resources, financials, risks and outcomes.

Connect portfolio and strategy data:

- **Strategy and planning systems**
  Goals, priorities and expected outcomes
- **Financial systems**
  Budgets, costs and investments
- **Project and work systems**
  Schedules, progress and risks
- **Resource systems**
  Capacity, skills and demand



Which projects are falling behind, and what is causing the delays?

Connect strategy to execution
Link goals & outcomes to programs and projects.

See the complete portfolio
Roll up schedules, resources, financials, risks & performance.

Prioritize investments
Compare initiatives using scores, health & what-if scenarios.

Popular Capabilities

Track the project data other systems leave behind.

Core project and portfolio management

- Projects, tasks, dependencies and milestones
- Programs, portfolios and cross-project views
- Gantt, Kanban, waterfall and agile views

Resource and capacity management

- Capacity planning across projects and teams
- Skill-based resource assignments
- Workload balancing and availability forecasting

Budgeting and financial management

- Project budgets and planned-versus-actual costs
- Financial forecasting across projects and portfolios
- Cost tracking by task, resource or deliverable

Time and expense tracking

- Timesheets with approval workflows
- Billable and non-billable tracking
- Expense reporting with receipt attachments

Intake and request management

- Customizable project request forms
- Automated routing and approvals
- Approved-request conversion into projects

Strategic alignment and prioritization

- Projects linked to strategic goals and outcomes
- Scoring and ranking by value and urgency
- Capacity and budget scenario planning

Reporting and analytics

- Customizable dashboards and reports
- Executive, portfolio and project reporting
- Schedule, financial, risk and performance analysis

Risk, issue and change management

- Central RAID logs
- Mitigation, ownership and escalation tracking
- Change requests with impact analysis and approvals

Connect the capabilities. Connect the data. See the complete picture.

Workflow automation

- Automated task assignments and status changes
- Conditional triggers and recurring work
- Dynamic schedule adjustments

Collaboration and communication

- Project discussions and comments
- Automated notifications and reminders
- External stakeholder and client access

Document management and knowledge base

- Document storage and version control
- Metadata, search and tagging
- Files linked to tasks, risks and changes

OKRs and KPI tracking

- Objectives and key results
- Target-versus-actual progress
- Executive scorecards and benefits tracking

Security, compliance and permissions

- Role-based permissions and granular access
- Single sign-on and SCIM provisioning
- Audit trails and compliance support

AI and advanced features

- AI project planning and scheduling
- AI workload balancing and resource suggestions
- AI forecasting, meeting actions and portfolio insights

Integrations

- Jira, Azure DevOps and ServiceNow
- Salesforce, HubSpot and accounting systems
- Microsoft 365, Google Workspace, Slack and Teams

Add-ons and specialized modules

- What-If Simulations
- Field service tracking with GPS
- Mobile access, APIs and webhooks

Integrations

Keep project data connected across your systems.

Bidirectional integrations keep updates flowing between Project Insight and the systems your teams already use. Reduce duplicate entry and get a complete picture of work org-wide.

Popular Integrations

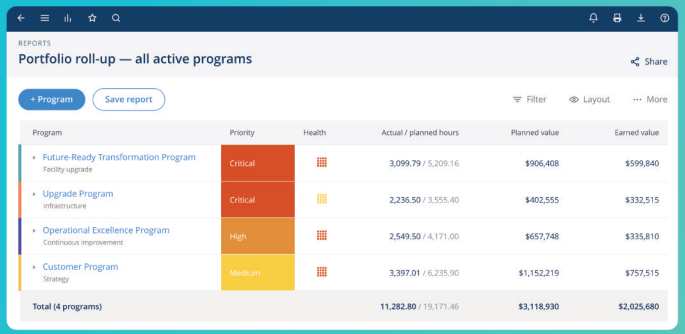
Azure DevOps • Box • DocuSign
Dropbox • Freshdesk • Gmail • Google Drive
HubSpot • Jira • Mailchimp • Microsoft Project
Microsoft Teams • Microsoft 365 • NetSuite
OneDrive • Outlook • PandaDoc • Power BI
QuickBooks • Replicon • RSS • Salesforce
ServiceNow • SharePoint • Slack • Trello
Xero • Zendesk



Reporting and AI Analysis

Connect your data. Trust your reports.

Once the right project data is captured, structured and connected, your PMO can use it for trustworthy reporting, scheduled updates, customized analysis and reliable AI answers.



Reporting

Turn current project data into:

- Project overviews and executive status reports
- Planned-versus-actual hours and costs
- Resource and project allocation reports
- Custom charts, reports and dashboards
- Project-to-portfolio rollups
- Scheduled reports and PDF, Word or Excel

AI analysis

Ask questions across your portfolio:

- Which projects are at risk and why?
- Where will capacity fall short?
- What is driving budget variance?
- Which initiatives are falling behind?
- What decisions or actions are still outstanding?

Secure MCP and APIs connect approved AI tools to permission-aware Project Insight data.

What customers say



> Project Insight gives us **visibility across all our projects** and programs so we can prioritize effectively and help executives make strategic decisions.

– **Francis Solomon Knox**
Senior Director of Portfolio Management
Breakthrough T1D



> We're **saving 100 hours per month** and eliminating the tedious task of manually cross-checking data between systems.

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



> Project Insight is **incredibly receptive and flexible** to our business needs. That level of support is rare.

– **Jess Faro-Steinberg**
PMO Analyst
Applied Visions

Software Advice FRONT RUNNERS 2026

GetApp BEST FUNCTIONALITY & FEATURES

Capterra SHORTLIST 2026

PROJECT INSIGHT

Connect your project data for trustworthy reporting and confident executive decisions.

Project Insight creates the connected project data backbone your PMO needs for reliable reporting, forecasting, executive decisions and AI analysis.

See Project Insight in action. Scan to book a demo.

projectinsight.com

sales@projectinsight.com

949-476-6499

You can't report on data you're not tracking. Neither can AI.

PROJECT INSIGHT

Strategic PPM Software

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