

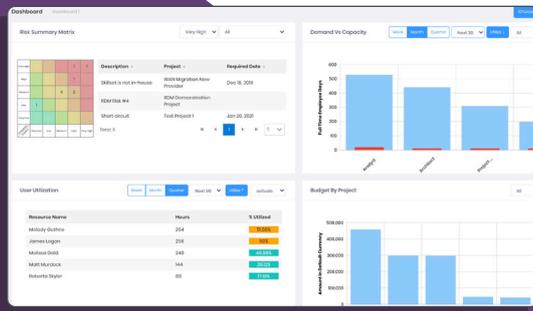
Counterpart Insight™ Work Management Platform

Counterpart Insight™ is a Work Management Platform that unifies your enterprise initiatives resulting in better resource optimisation, work efficiency and real-time collaboration.

Actionable insights

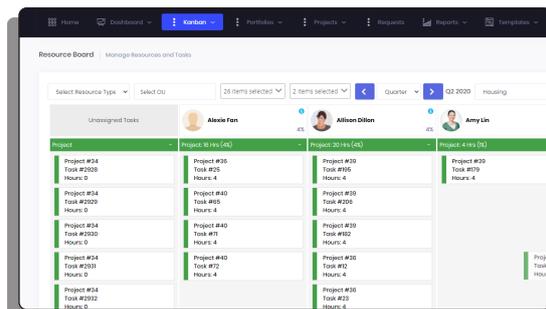
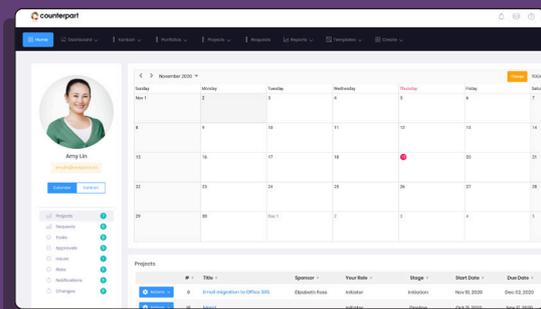
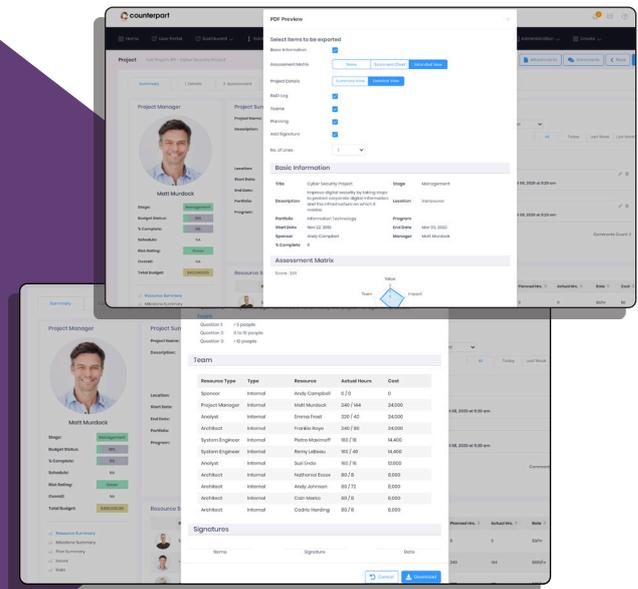
Comprehensive reporting is key to tracking your progress, budget, resources, quality and time. Counterpart Insight™ enables you to track your initiatives with simplified portfolio overviews, delivering real-time insights on financials, resources and schedules.

Share project and portfolio information easily with high-level overviews to show your progress, including in-depth reports presented via role-based dashboards (Executive management, PMO, teams, sponsors, stakeholders and external partners).



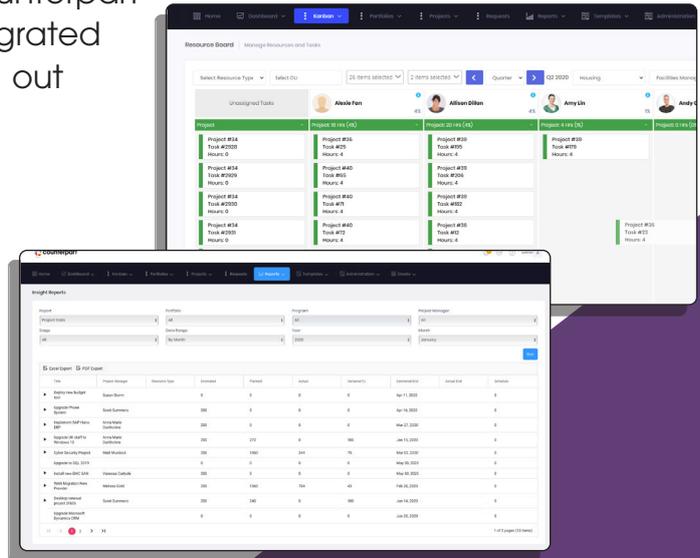
Collaboration made easy

Collaboration within an organisation can be a struggle, especially, now that more of us are working remotely. Counterpart Insight™ enables you to stay on track with clear customisable dashboards that provide real-time updates of all your initiatives. Establish realistic expectations, clarify goals, reward innovation, and celebrate the team's successes publicly!



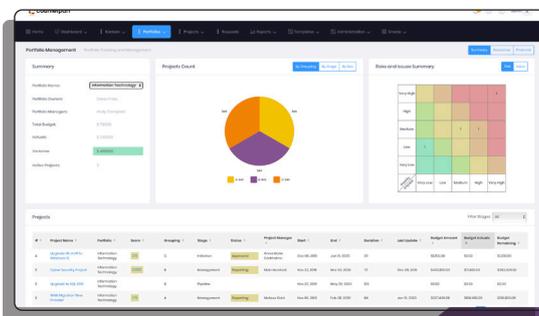
Effective resource management

Managing resources and tasks can be time-consuming at any point in a project. Counterpart Insight™ Resource scheduling tool is integrated with the planning function and will work, out of the box, across multiple projects. The Integrated Team builder function allows you to assign resources to tasks and check availability against individual calendars dynamically at the time of scheduling. Plus, dynamic timesheets allow you to keep track of tasks and update progress.



Project Portfolio Management

See the BIG picture! Insight™ delivers actionable intelligence through key metrics and KPIs across multiple portfolios, programmes and projects in real-time. Make the right strategic decisions and view accurate and relevant information through customisable reports and dashboards.



Efficient time management

Find the right resource at the right time, schedule tasks according to your plan and track your project initiatives from beginning to end. Counterpart Insight™ provides intuitive tools to help you optimise the time spent planning, tracking and reporting on all of your projects, with dynamic Kanban boards, real-time reports and integrated timesheets.

The screenshot shows a 'Resource Planning' table with columns for Resource Type, Code, OU, User Name, Estimate, and months from Jan to May. The table lists several 'Suppliers' with an estimate of 0 for each month.

Resource Type	Code	OU	User Name	Estimate	Jan	Feb	Mar	Apr	May
Suppliers	3005			0	0	0	0	0	0
Suppliers	3005			0	0	0	0	0	0
Suppliers	3005			0	0	0	0	0	0
Suppliers	3005			0	0	0	0	0	0

Simple task management

Find your resources, assign tasks and track progress with clear dashboards or use our intuitive Kanban boards to plan, review and manage current and upcoming tasks across initiatives.



Learn more about how Counterpart Insight™ can help your organisation, contact us on **0330 113 3088**

www.counterpart.com

Key features

Reporting



- Create bespoke KPIs and Metrics
- Executive Dashboards
- Dynamic Risk & Issue reporting
- User configurable widgets
- AI based project progress reporting
- Enhanced Power BI reporting



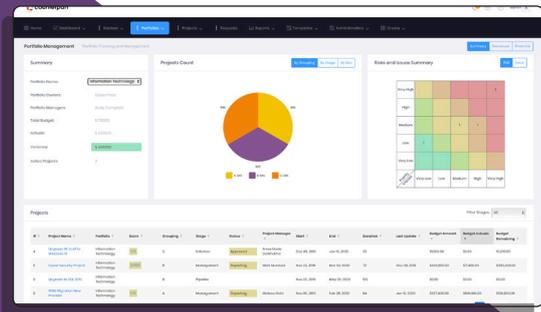
Financial Management

- Budget forecasting across portfolios
- Financial KPIs and Metrics alerts
- Organisation-wide financial reporting
- Multi-currency support & conversion
- Configurable finance dashboards
- Track financials across the organisation



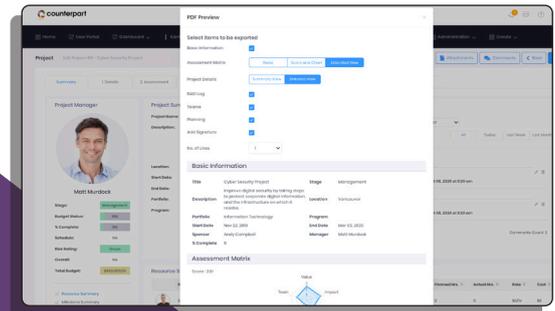
Project & Portfolio Management

- Capture ideas and initiatives
- Configurable project methodologies
- Portfolio budget management
- Visual Kanban planning
- Portfolio pipeline management
- Risk and Issue management
- Program & portfolio viewer
- Pipeline planner
- Thresholds management



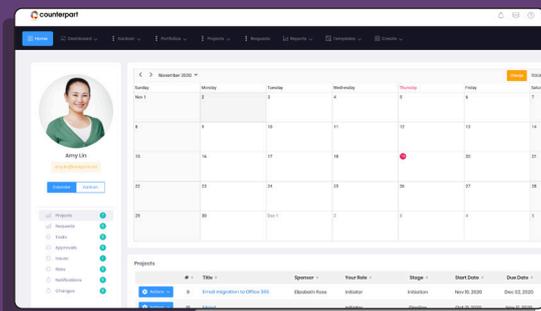
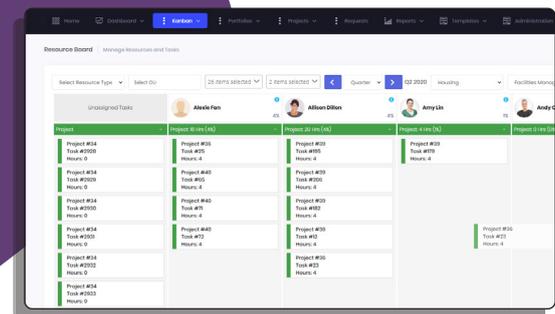
Strategic & Goal Management

- Agile visual planning
- Capture ideas and initiatives
- Risk & Issue tracking
- Align initiatives to strategy
- Create bespoke KPIs and Metrics
- Strategic planning
- Powerful decision matrix



Collaboration

- Real-time collaboration
- Dynamic tasks updates
- Unified document management
- Dynamic resource calendar
- Microsoft Teams integration
- Microsoft 365 integration



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