



# ADVISICON, INC.

“Helping You Build a Project Management Culture”

## Project, Program & Portfolio Management, Consulting & Training Services



Our **MISSION** is to deliver technology, tools and training to maximize impact, productivity and purpose.



# WHO WE ARE

Advisicon is a professional project and portfolio management consulting, training and custom application development company made up of authors, speakers, teachers and practitioners. We have 25+ years of experience serving clients in business, government, and nonprofit organizations globally.



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# MEET OUR GREAT TEAM

Advisicon's success is founded on the diversity of personal and professional skills reflected in our staff.



**TIM RUNCIE**

President



**KEN LOEWEN**

Client Solutions



**LESLIE PFAU**

Marketing



**KEVIN BROUDER**

Products



**JEFF POSTE**

Technical Services



**WALTER CASTILLO**

Latin America Professional  
Services



**ALISON RUNCIE**

Nonprofit & Community  
Outreach



**RICHARD WENTWORTH**

Academy & Training



**TRACI PARSONS**

Operations



**LARLYN FITZPATRICK**

Finance

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# WHAT SETS US APART

Some companies sell software, some companies can help with project management and some only offer technical training.

At Advisicon, we do things differently. *We're not just some company.*

From start to finish  
we offer the whole package.

We come directly to you, sit down with your team, and create a plan to be set in motion to guide your organization through the entire process.

## Our Core Approach:

Knowledge Transfer, Optimization, Sustained Results

No matter the challenge, organization size or industry, our expertise helps turn obstacles into **profitable growth & sustainable results.**

See how we help our customers overcome their challenges and take their processes to the next level.

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# ADVISICON CASE STUDIES

A few of the fine companies we work with.




**Bloomberg**  
BNA



# CREDENTIALS & ACCREDITATIONS

Advisicon is a Gold Project and Portfolio Management (PPM) and Cloud Productivity partner with Microsoft, as well as a Gold partner in Data Analytics, Collaboration and Content, and Small and Midmarket Cloud Solutions. We have the industry certifications that give you the confidence in our expertise.



We are experts in technology that optimizes and reinforces Project, Program and Portfolio Management.

We won't hesitate to recommend NOT jumping to a tool if the culture or maturity level of the organization aren't ready for it.

- We hold top industry certifications that require proving knowledge levels through continued education.
- Advisicon is also used by Microsoft as Partner Technical Sales Professionals - industry experts who serve as subject matter experts in PPM solutions and business needs across North America.
- Advisicon serves on the Partner Advisory Council (PAC) working with Microsoft's product teams on each version of their PPM technologies before they are released.
- Advisicon regularly contributes to the community of practice by writing whitepapers, contributing to blogs and monitoring forums to assist practitioners in the use of the SharePoint & Microsoft PPM solutions.

# PROJECTS OFTEN FALL SHORT OF THEIR POTENTIAL

Do the right projects

untapped potential

43%

of surveyed companies reported high alignment between projects and strategy

current outcomes

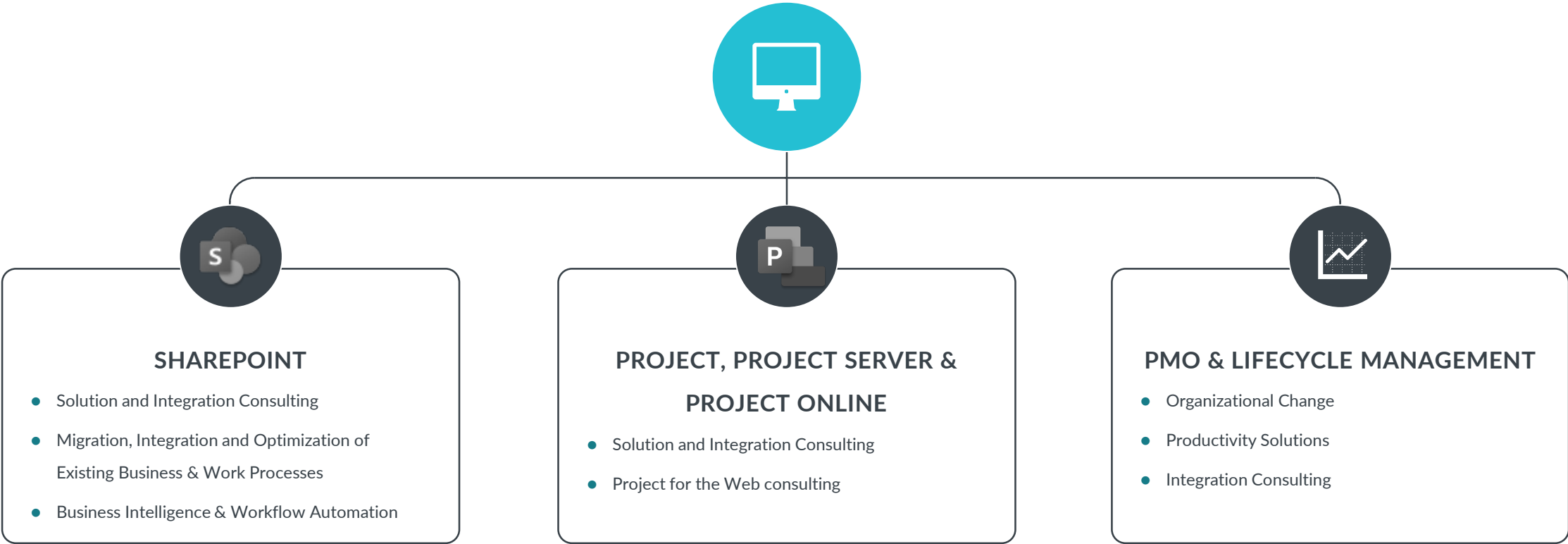
Do the projects right

62%

of projects meet their goals—a number essentially unchanged since 2012

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# CONSULTING & TRAINING SERVICES





# CONSULTING & TRAINING SERVICES



# AUTOMATE YOUR PROCESS

Our technical teams have integrated Project, Project Server/Online with ERP systems and create workflow, automation and dashboards for our customers on a daily basis.



# STREAMLINE COLLABORATION

Be on the leading edge of Modern Workspace implementation and Modern Work Management using Microsoft Cloud technology. Collaborate in real-time without any geographical barriers while automatically streamlining information-sharing!

Office 365 Project

BROWSE

Home EDIT LINKS

## Store Rebranding

Projects  
Approvals  
Tasks  
Resources  
Reports

Newsfeed

What are you working on?

**Royce Haro**  
To Store 9156  
Apr 3  
Cashwrap Redesign Session  
Thursday, April 3, 2014 11:30 AM Eastern Standard Time  
Mall food court  
You haven't responded yet. **RSVP**  
Like • Reply • View Conversation • March 31 at 9:13am

**Luann Leach**  
Thanks for scheduling! I'm at corporate that week, so I'll join on Lync. Jimmy Amaral, can you bring the revised blueprints to this meeting?  
March 31 at 1:23pm • Like • Reply

**Jimmy Amaral**  
Sure thing. Royce Haro, I'll e-mail you the blueprints beforehand, too.  
April 1 at 10:42am • Like • Reply  
Royce Haro likes this.

Write a reply...

**Trent Douchette**  
To Store 9156

Documents

- new upload edit
- Name
- Product Guides
- Promotions
- Sales Tips & Tricks
- Training
- Store Managers (SECURE)
- Inventory Requests
- Store Branding Guidelines
- Logos & Images
- Corporate Contacts
- Store & Regional Contacts

Back to App Store 6:01 PM 75%  
Jumpstart

Total Project Work  
BY LOCATION

Project Work  
BY SPONSOR

Timesheet Categories

Project Professional

File Task Resource Report Project View Format Tell me what you want to do

Network Diagram Resource Usage Resource Sheet Team Planner Other Views

Calendar Other Views

Task Views Resource Views Data

Highlight: Timescale: Zoom Entire Selected Project Tasks Details

Sort Outline Tables Filter: Group by: Data

Timeline

	Mode		Assigned To	Milestone	4th Quarter
1		Identify and contact cust			9/27 11/3
2		Perform competitor analy			
3		Redefine product require			
4		Establish product charact			
5		Develop prototype proce			
6		Produce prototype produ			
7		Conduct internal product			
8		Document patent applica			
9		Conduct marketing/tech			
10		Redesign process (if nece			
11		Develop prototype proces			
12		Modify plan for custom			
13		Produce product for cust			
14		Conduct preliminary mar			
15		Conduct customer evalu			
16		Create Customer Evaluat			
17					
18					
19					
20					
21					

Gantt Chart

Timeline

Iva Pratt  
Available - Video Capable  
2 Participants  
Monday, May 22, 2017

Hi Iva - Can you send me an update on the patent application? I have an executive meeting first thing tomorrow morning.

Sure, it'll be submitted by EOD today.

Fantastic! Thanks.

Last message received on 5/22/2017 at 4:48 PM.

Assigned To Milestone 4th Quarter

	Assigned To	Milestone	4th Quarter
15	Jacqueline Cr	No	9/27 11/3
15	Beth Peters	No	
15	Felix Flora	No	
15	Iva Pratt	No	
15	Iva Pratt	No	
15	Iva Pratt	No	
15	Jeff Leak	No	
16	Beth Peters	No	
16	Jacqueline Cr	Yes	
16	Jacqueline Cr	No	
16	Beth Peters	Yes	
16	Felix Flora	No	

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# THE ADVISICON APPROACH

Industry wide, around 75% of projects are never completed, and over 90% of them run over budget. Let us help you meet your goals.

Today's challenge is not just about meeting a tight deadline or complex project goals. The real challenge is to build a project management culture within your company that can effectively handle each new assignment with cohesive solutions. This is the basis for every service we provide at Advisicon.



01

## KNOWLEDGE TRANSFER

Rather than giving directives, our people can provide formal training courses, as well as work side by side with your staff to provide them with the necessary skills, tools, and confidence they need to be self-sufficient.

02

## OPTIMIZATION

We analyze the needs of the organization and implement a PM structure that is compatible with the overall corporate structure, strategy, and goals.

03

## IMPLEMENTATION

We provide assistance in task-specific services or consulting guidance, in-depth services such as training, support staffing, or process development, or you can elect to have us coordinate the entire PM effort.

04

## RESULTS

We recognize that effective PM is more than just coordinated efforts. Your project must be gauged by appropriate measures and metrics, and ongoing evaluation. The results? Your projects will successfully meet your objectives on time and under budget.

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# LET'S GET TO WORK

Advisicon brings the best results with the least amount of effort.

- ▶ Whether you are looking at training, migration or consulting on how best to build, configure or use the powerful integration of Microsoft and non-Microsoft processes and technologies with SharePoint or O365, we have helped our customers scale, grow and support their business efficiencies through a blend of consulting, training and technical support.
- ▶ We work with our customers to help them use and leverage technology at the right level. This is designed to support the adoption and integration of PM best practices so that our customers get to Analytics and ROI quickly with tools and processes that are sustainable and lasting.
- ▶ Everyone does projects and everyone uses tools, but there are very few who use both well together. That is our sweet spot, where we help our customers avoid unnecessary processes, or work that doesn't meet the end strategic goal.



## CALL US TO GET STARTED!

Contact Advisicon for a  
FREE Q&A session.

We help answer your questions around  
technology and best practices.



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# ADVISICON, INC.

Helping You Build a Project Management Culture  
with Processes, Methodology, Training and Technology.

## Contact us:

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-  [Contact@Advisicon.com](mailto:Contact@Advisicon.com)

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