

CoreStream Performance Management

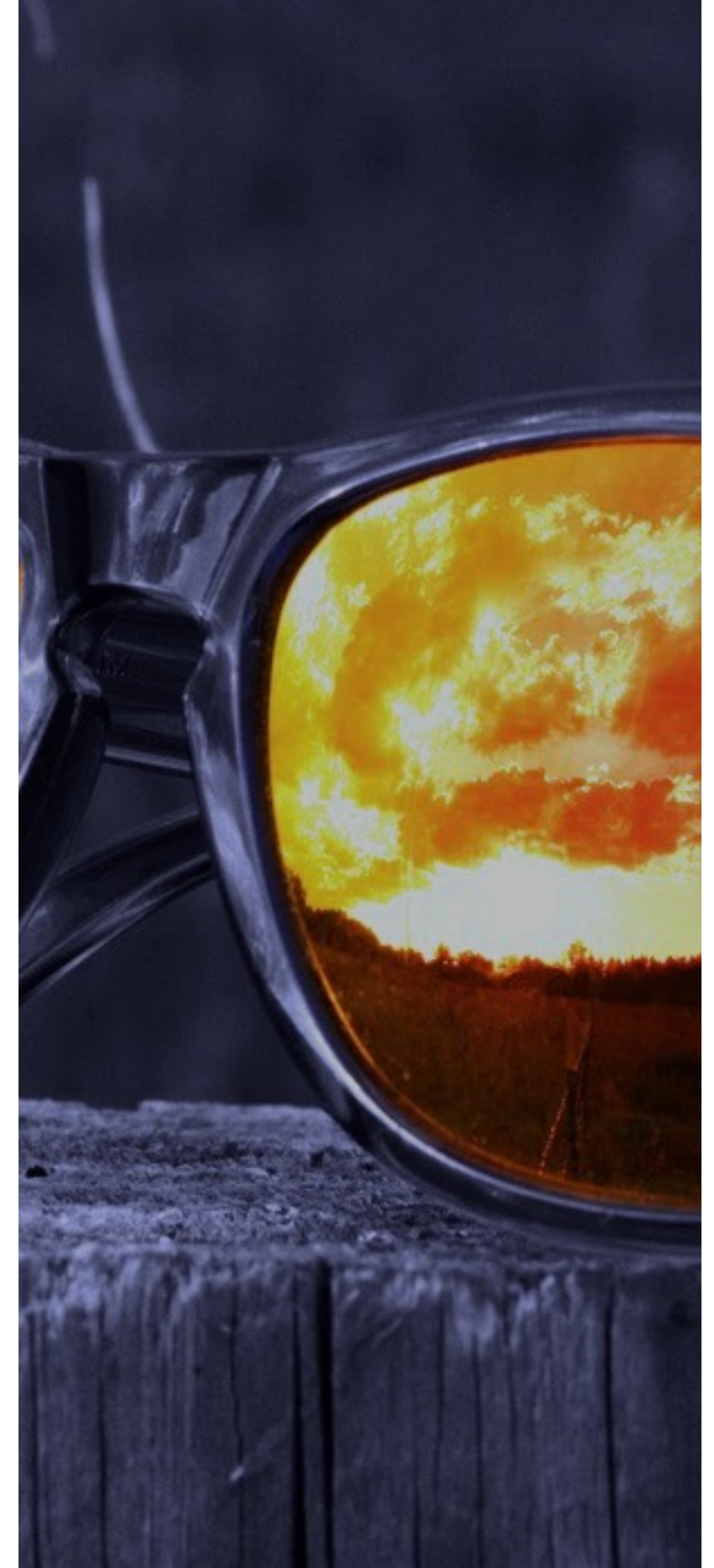
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CORESTREAM

Performance Management

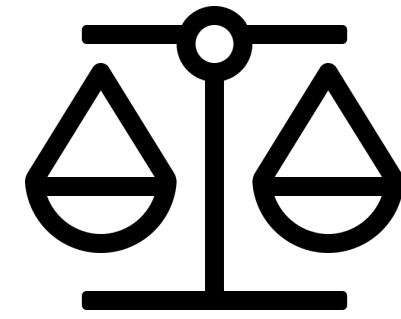
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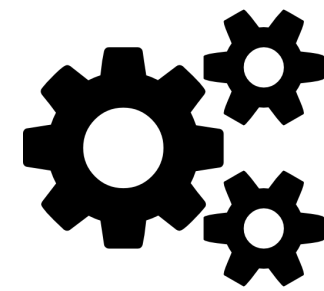


The CoreStream Platform

The power to consolidate and link all your
Governance, Risk and Compliance activity...



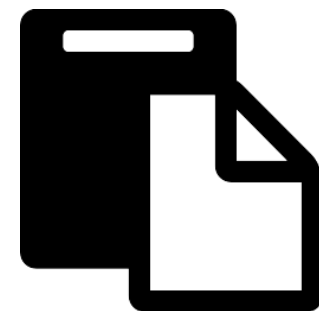
Risk
Management



Controls
Management



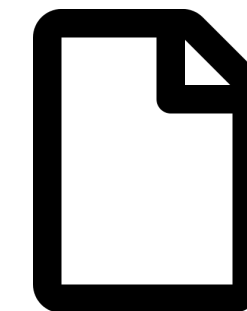
Action
Management



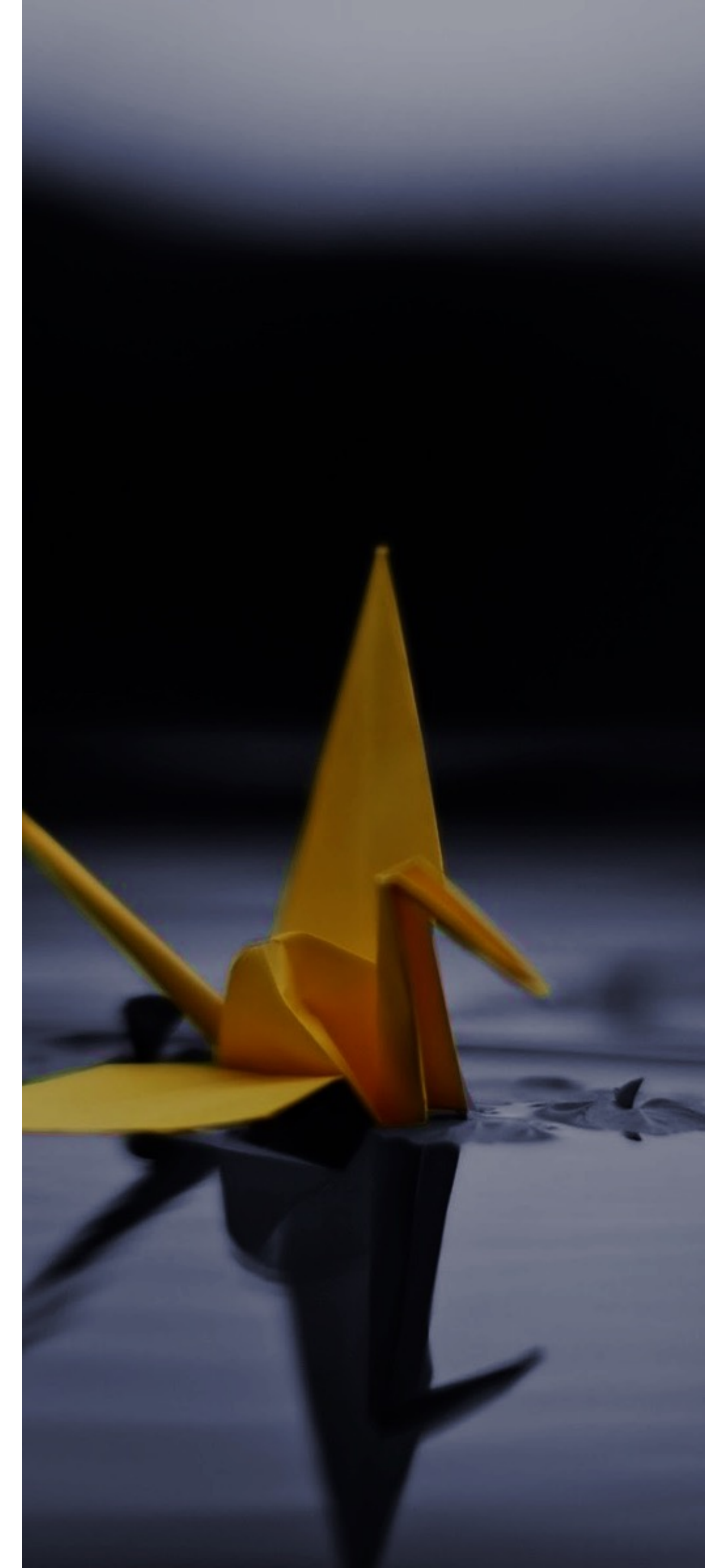
Regulation
Management



Information
Asset
Management



Performance
Management



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CORESTREAM

Performance Management

Intuitive technology for business

1

Intuitive

We believe technology should be intuitive in order to encourage user adoption and improvement outcomes.

2

Flexible

Our platform is flexible and adaptable to ensure that we can meet our customers' unique requirements at a low cost.

3

Quality

We have a relentless focus on quality from pre-sales through to delivery and support.

5

CORESTREAM

Performance Management

Introducing Performance Management

An end to end Performance Management solution to manage reporting of complex portfolios of work. The system eliminates all manual aspects of performance reporting, providing a centralised repository with detailed audit trails, consistent measurement and production-quality reporting. Designed to support UK government *Outcome Delivery Plan* reporting from the ground up, delays, effort and errors associated with manual reporting are a thing of the past.



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CORESTREAM
Performance Management

Performance Management

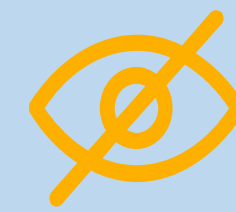
A digital solution to drive consistency and accuracy in your project reporting

The Challenges



Administrative burden

Maintaining a myriad spreadsheets and coordinating manual processes for tracking the status of project-based work.



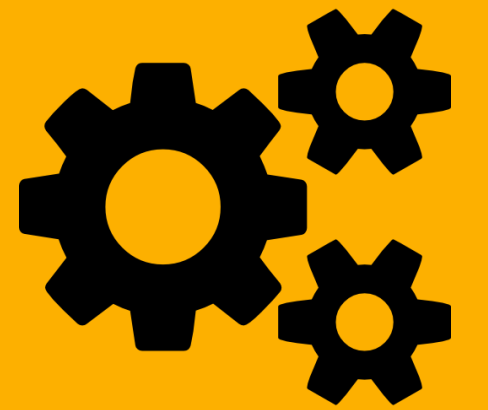
Accountability

Lack of clear ownership and accountability for projects and their constituent parts, across the organisation.



Transparency

Lack of real-time reporting to provide management with insights from a single version of the truth.



The Solution



Establish

Seamlessly document your portfolio structures, link Milestones, KPIs, Dependencies, Risks, Issues and more. Assign owners to ensure accountability.

Execute

Automated workflows and email reminders replace manual chasing of periodic updates and their approval by management.

Report

Real-time monitoring and reporting of all aspects of your projects.

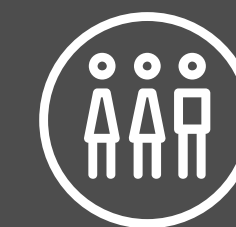
The Benefits



Reduced financial burden



Increased efficiency



Improved accountability



Real-time reporting

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CORESTREAM

Performance Management

Performance Management

A digital solution to drive consistency and accuracy in your project reporting



Multi Level hierarchy to capture Portfolios, Programmes and Projects



Approval workflows with full audit trail



Adaptable to a variety of reporting frameworks and in any industry setting



Assign local ownership and accountability



Publish production-quality reports to drive consistency in reporting across your organisation



Automated email notifications



Real time dashboard for analysis and management reporting

The solution explained

CoreStream Performance Management has been designed to help alleviate the administrative burden of Performance Reporting, allowing management to focus their efforts on value-add activities. It brings together your entire Performance Management framework, enabling consistent monitoring and comparability across your organisation – providing the real-time management information that organisations and stakeholders require. Specifically:

Data Collection



- Establish your project structure on a single platform.
- Assign ownership for updates and approvals.
- Map projects to Milestones, Deliverables, Outcomes, Risks, Issues and other key information such as KPI's.
- Record scores and RAG statuses.

Monitoring and reporting



- Review the overall status of your performance framework through real-time reporting dashboards.
- Drill down into any items that require further attention and filter data according to various criteria.
- Publish fully branded reports with zero reporting lags.

Automate Workflow



- Multi-stage dynamic workflows to facilitate the approval of periodic performance reporting updates.
- Automated email notifications to owners and approvers, notifying them when an action is due or overdue.
- Full audit trails, and the ability to re-publish reports from the previous reporting period.

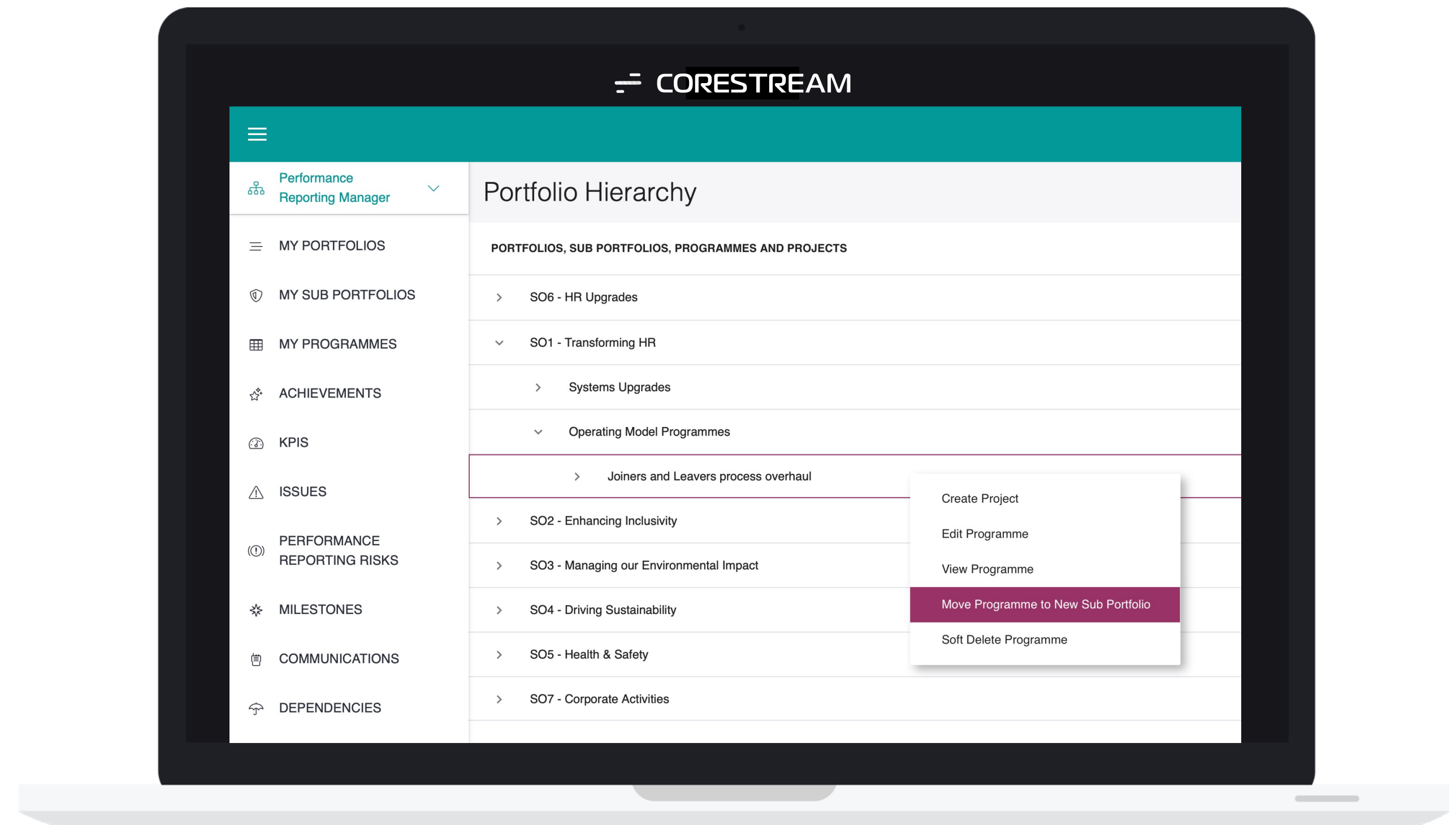
Underpinned by a class-leading technology platform



- Intuitive user interfaces with a clean design and contextual help features to minimise training requirements.
- Real-time dashboards with drill down reporting and flexible filtering options.
- Single Sign On and Active Directory integration to ease the process of gaining access and preserve your control of permissions.

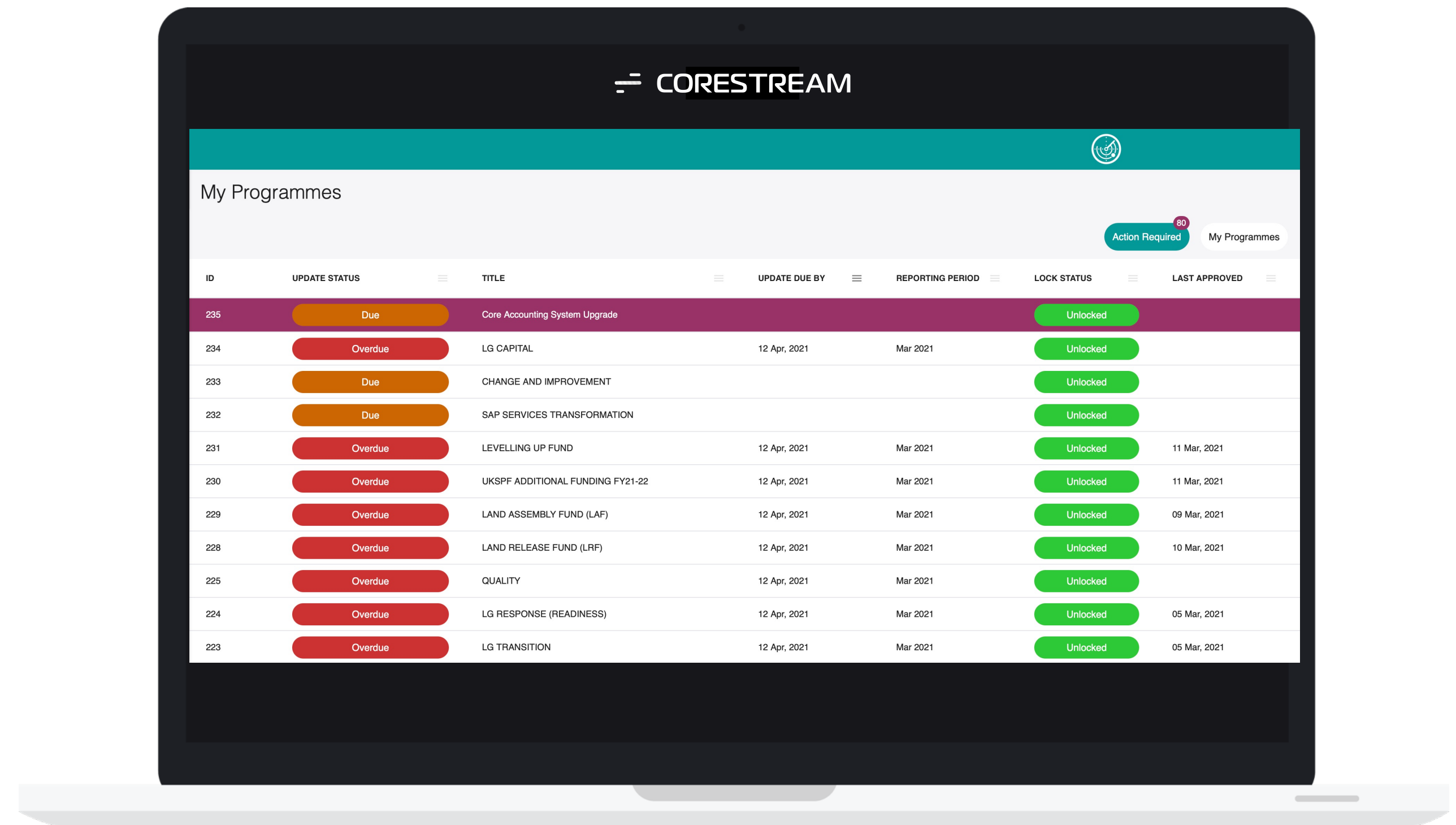
Sample Screenshots: Portfolio Hierarchy

- Central to the Performance Management solution is a sophisticated multi-level portfolio hierarchy where you can manage all aspects of your portfolios of projects, their ownership and their mapping to strategic outcomes.
- Restructuring features are also included, meaning that when your portfolios restructure in reality, changes can be easily mirrored in the system.



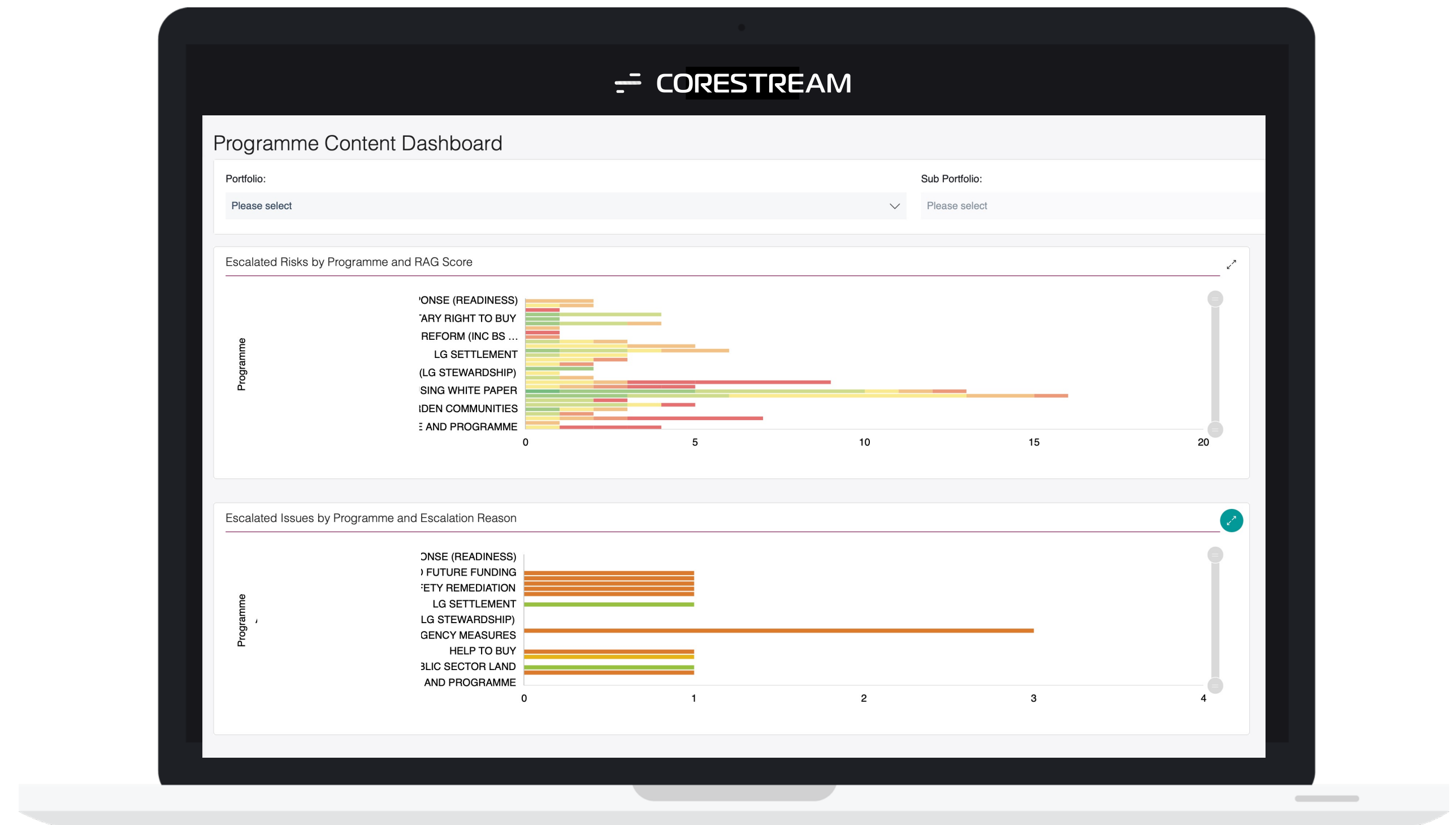
Sample Screenshots: My Programmes

- With full permissions control, users are directed to tasks that they are responsible for.
- Comprehensive workflow features, backed by detailed email notifications facilitate the collection of regular reporting updates, and their subsequent approvals.



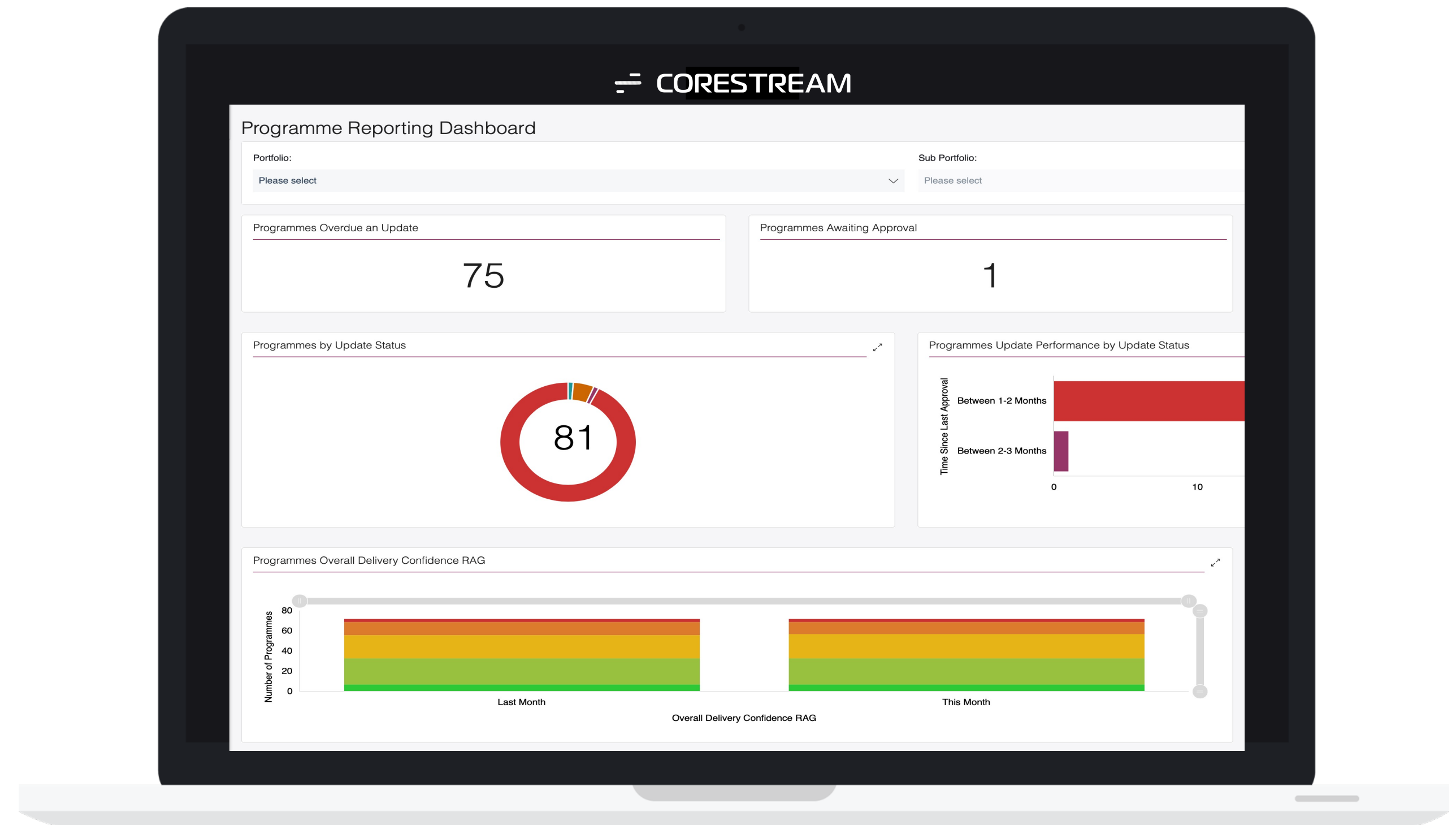
Sample Screenshots: Dashboard Reporting

- Interactive reporting dashboards based on real-time data provide insights into the performance of your projects of work.
- The dashboards also enable customers to easily identify trends and emerging hotspots, to ensure that remedial actions are focused in the right areas.



Sample Screenshots: Dashboard Reporting

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Sample Screenshots: Status Update Forms

- Allow users to manage all aspects of their updates from a single form, adding new linked items such as Milestones, Dependencies, Risks and Issues.
- Enable users to escalate to higher levels in the Portfolio structure to ensure that important items receive the visibility they deserve

Escalate to Portfolio Board *

① Select whether or not you would like this Milestone to show on the report to Portfolio Board.

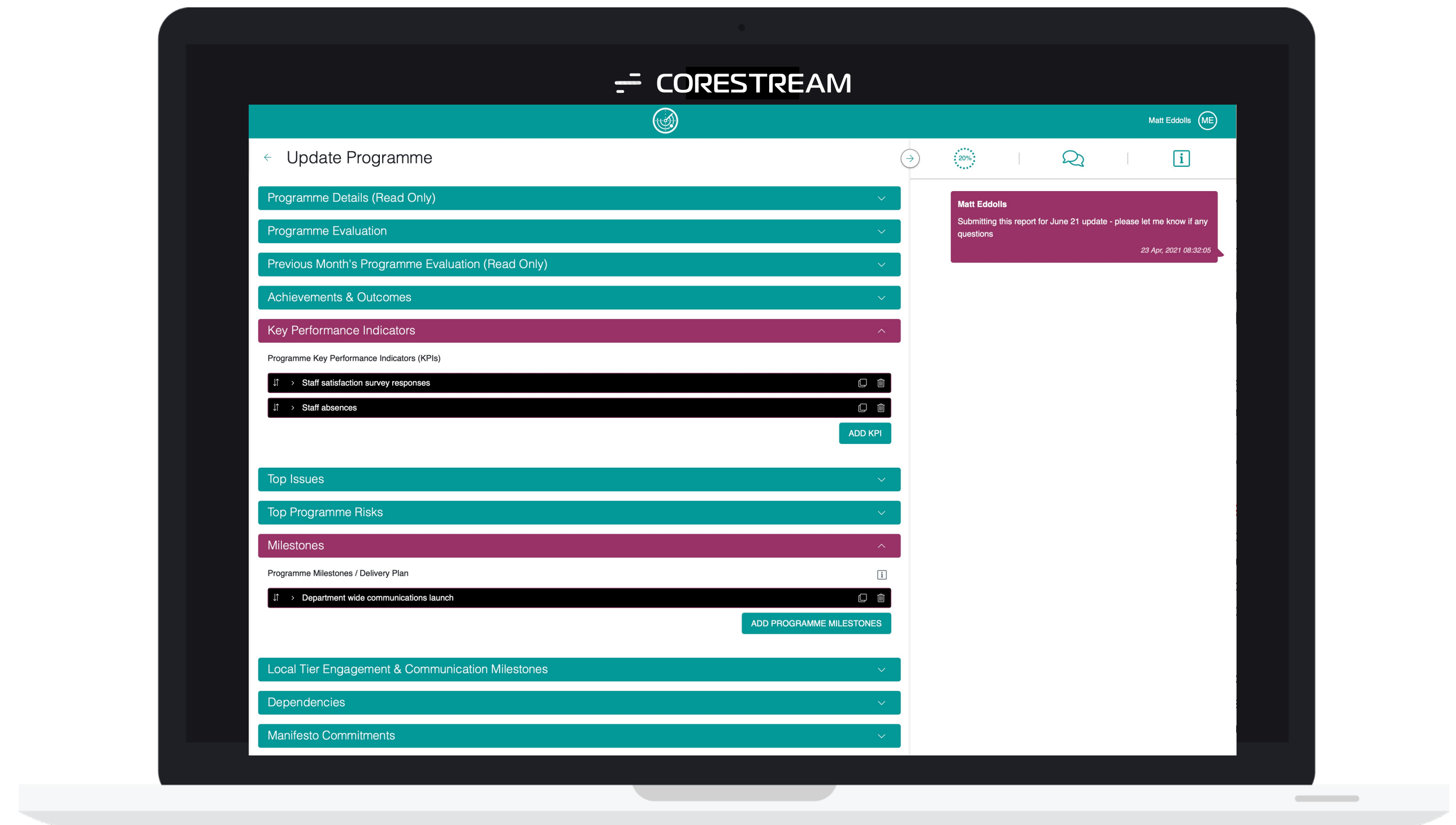
No Yes

Show on Programme Report

① Please note that selecting to escalate to Portfolio Board will set this field to yes upon saving.

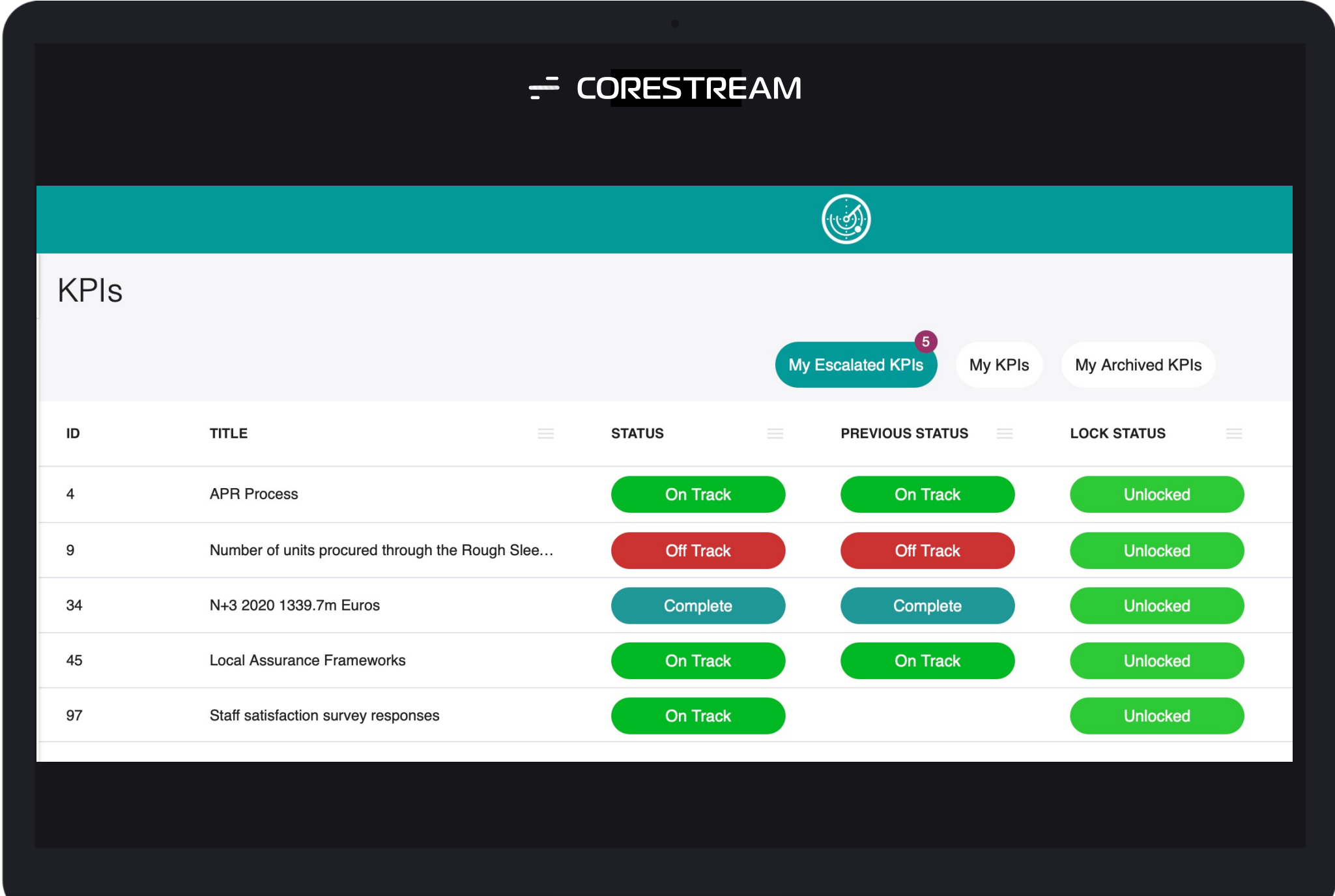
No Yes

ADD PROGRAMME MILESTONES



Sample Screenshots: Drilling into the Detail

- All content linked to projects can be viewed and reported on across the entire portfolio structure.



The screenshot displays the CORESTREAM interface on a laptop. The top navigation bar includes the CORESTREAM logo and a teal header with a circular icon. Below the header, the page title is 'KPIs'. There are three filter tabs: 'My Escalated KPIs' (with a red notification badge showing '5'), 'My KPIs', and 'My Archived KPIs'. The main content is a table with the following columns: ID, TITLE, STATUS, PREVIOUS STATUS, and LOCK STATUS. Each cell in the table contains a rounded button with text indicating the status.

ID	TITLE	STATUS	PREVIOUS STATUS	LOCK STATUS
4	APR Process	On Track	On Track	Unlocked
9	Number of units procured through the Rough Slee...	Off Track	Off Track	Unlocked
34	N+3 2020 1339.7m Euros	Complete	Complete	Unlocked
45	Local Assurance Frameworks	On Track	On Track	Unlocked
97	Staff satisfaction survey responses	On Track		Unlocked

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CORESTREAM

Performance Management

Sample Screenshots: Publish

- Fully branded, ready-to-go, production quality report writing.

SO1 – HR Transformation Portfolio Board Meeting Pack

Overall Portfolio Delivery Confidence	
Current	Last Period
N/A	Amber / Red

Reporting Period: Feb 2021
 Issue Date: 10 Mar, 2021
 Author: Central Portfolio Office
 Version: V1

OFFICIAL SENSITIVE

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Portfolio Board Report for: HR Transformation

Executive Summary

Portfolio Headlines:

This month, this portfolio has seen an improved level of milestone completion, which is broadly attributed to the effect of reduced commuting times by department staff

Overall Portfolio Delivery Confidence	
Current Month:	Previous Month:
N/A	Amber / Red

Programme Delivery Confidence						
	G	A/G	A	A/R	R	Trend
Current Month:	2	6	1	3	2	
Previous Count (19 Mar, 2021):	2	6	1	3	2	

Further Details can be found on page 4

Milestone Status						
	Total	Complete	On Track	At Risk	Delayed	Trend
Current Month:	28	8	16	3	1	
Previous Count (19 Mar, 2021):	28	8	16	3	1	

Further Details can be found on page 9

Escalated Risks and Issues				
	Total	For Decision	For Discussion	To Note
Risks:	14	0	5	9
Issues:	5	0	0	5

Further Details can be found on page 3 (Issues) & 8 (Risks)

OFFICIAL SENSITIVE

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Data Security

CoreStream recognises the importance of data security and is proactive in managing technical and user-based risks...

- All services are fully UK hosted on private cloud infrastructure
- Datacenters conform to Tier 3 TIA standards for redundancy and resilience.
- ISO27001 accreditation for technology development and hosting security.
- All staff DBS checked. Relevant operations staff have UK Government Security Clearance (SC)



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