

## ClearVue-360: The easy way to plan and manage your *entire* project



Increase your **productivity** by using one tool to manage multiple aspects of a project.

Increase your **performance** by following a customizable workflow aligned with PMI's process framework.

Increase your **credibility** with team members and mgt. through improved organization and reporting.

Increase your **knowledge** with a built-in PM Advisor.

Maintain **compatibility** with MS Project, Word, and Excel.

*ClearVue-360* is an easy-to-use and comprehensive desktop tool to help project managers rapidly improve their performance. Designed to address the entire project lifecycle, *ClearVue-360* enables cost-effective professional results on all types of projects.

MS Project is a powerful scheduling tool, but effective management of cross-functional projects requires more than just a Gantt chart, which is why industry best practices advocate a full-lifecycle approach. The challenge for PM's is that the overhead (paperwork) cost of managing the entire lifecycle is often hard to justify, especially for smaller projects.

*ClearVue-360*'s flexible workflow of common PM "templates," intelligent data management, customized reporting, and PM knowledge "*Advisor*" make it easy to create and manage professional project plans for even the smallest projects.

### Situation:

Most desktop project management software is schedule focused, which while important, does not provide a full PM solution. Faced with this deficit, Project Managers typically create their own templates in Word/Excel to cover the many things their scheduling tool doesn't. Examples include, issues, risks, action items, requirements, budget, etc.. These templates are not hard to create, but can become cumbersome to use, maintain, and/or pull valuable information from - all impacting your productivity.

### ClearVue-360 Overview:

*ClearVue-360* is comprised of an integrated suite of *smart* templates organized in a flexible workflow aligned with PMI's process groups: *Initiate, Plan, Execute, Monitor/Control, and Close*.

*ClearVue* keeps everything synchronized - a change in one template automatically updates others as necessary and common PM logic is embedded.

An easy-to-use scheduling template provides the functionality you need for creating your project timeline (Gantt chart) without the complexity.

Customized reports can be generated that pull data from one or more templates.

### Business Value:

*ClearVue-360* is priced comparably to other "scheduling" tools, yet it provides many more benefits.

**Initiate:** Get your project started right. *CV-360* helps you ask the right questions to clearly define the project and get your sponsor, customers, and team members aligned on the business case, project priorities, assumptions, stakeholders, deliverables, requirements, etc..

**Plan:** Easily create simple yet professional project plans that consider schedule, budget, communications, risks, and more.

**Execute:** Track your plan with confidence - schedule/budget variances, open action items, issues, risks, decisions, meeting minutes, changes, etc. are all readily available.

**Close:** Create a quick summary of project performance (final scope/schedule/budget variances), capture lessons learned, and easily archive all data for future reference.

**Report:** Turn data into *information* - easily create project documents and reports to meet your specific needs and export to Word, Excel, PDF, or MS Project compatible formats for distribution.

**Learn:** *CV-360*'s template-driven workflow helps you address the appropriate elements at each stage of the project and its built-in PM "*Advisor*" provides as-needed coaching on the whats, whens, and whys of project management (key terms, definitions, best practices, examples).

**Headache Relief:** *ClearVue-360* takes care of your project *paperwork* so you can focus on the real PM work!

## ClearVue-360: Features and Benefits

### What can you do with *ClearVue-360*?

- Capture project data in one or more of the *CV-360* templates:  
Storing data in "templates" allows you to build on the same data types as your project progresses. For example, there may be very few risks identified during *Initiation*, more identified during *Planning*, and even more identified during *Execution*. Building on the same list of risks brings continuity to the project not to mention the productivity gained through managing all risks in one place.
- Sort data using multiple criteria to view it in different ways.
- Generate reports dynamically:  
*CV-360* stores data in templates and generates reports on demand by pulling requested data from the various templates, which is much more efficient than storing data in reports. i.e. a PowerPoint or Word document, since that makes maintenance very cumbersome.
- Create reports that pull data from a single template or multiple templates:  
Running a *Team Member Status Report* can quickly determine everything that someone has due in, for example, the next 14 days - all tasks, action items, issues, decisions, etc.
- Select which templates to use by customizing your workflow.  
While *CV-360* includes many commonly used templates, some of them may not be applicable to your project and thus can be "turned-off."
- Keep your finger on the pulse of the project through simple dashboard/summary reports.
- Capture meeting minutes while tying action items, issues, risks, and decisions to specific meetings thereby enabling you to manage the project element (i.e. *issues*) via the template and maintaining a history of how and when they came about (the various meetings)

### What don't you have to do with *ClearVue-360*?

- Be an expert on all aspects of project management.
- Spend hours trying to learn a complicated piece of software.
- Use *cut-and-paste* to update multiple separate templates every time one of them changes.
- Worry that you may be missing a critical project element in planning and/or managing the project.
- Sort through old schedules, status reports, and meeting minutes to determine current open action items, issues, risks, etc..
- Keep track of numerous "*unintegrated*" Word or Excel templates for each project.

The following templates and reports are included in *ClearVue-360*:

#### Templates:

- |                         |                                     |
|-------------------------|-------------------------------------|
| 1. Business Case        | 12. Schedule / Gantt Chart          |
| 2. Project Description  | 13. Budget                          |
| 3. Project Priorities   | 14. Risks                           |
| 4. Stakeholders         | 15. Action Items                    |
| 5. Requirements         | 16. Issues                          |
| 6. Out-of-Scope         | 17. Communications                  |
| 7. Deliverables         | 18. Meeting Minutes                 |
| 8. Milestones           | 19. Change Log                      |
| 9. Constraints          | 20. Lessons Learned                 |
| 10. Assumptions         | 21. Historical/Archival Information |
| 11. Questions/Decisions |                                     |

#### Reports:

- |                             |                                   |
|-----------------------------|-----------------------------------|
| 1. Project Charter          | 4. Team Member Status report      |
| 2. Integrated Project Plan  | 5. Dashboard / Summary report     |
| 3. Management Status report | 6. All individual templates above |

Finally, if you're one of the many PM's already using powerful scheduling software, it doesn't have to be abandoned. Just use *ClearVue-360* to manage those items above not covered by your scheduling tool. Of course, if you don't already own scheduling software, *CV-360* includes a basic Gantt chart tool as well.