DemandFlow Project Portfolio Management

DEMANDFLOW®

Demand, prioritisation, plans, gates, change control, resources, finance and an AI PMO on one record set

DATA SHEET

A portfolio is run from a planning tool, a spreadsheet of budgets, a risk register in a document, a resource plan in another spreadsheet and a status report assembled by hand on a Friday. The PMO spends its week reconciling them, and the board gets a picture that was true a fortnight ago.

DemandFlow® keeps the demand, the project, its plan, baselines, milestones, risks, gates, change requests, resources, timesheets, finance and status reports as one set of records, and reads them every night to tell the PMO which projects need attention and why. The money in the project is the same money in the roadmap and the investment plan; the people on the plan are the same people on every other plan.

What it is

Portfolio, programme and project management for regulated utilities and telecom operators: demand intake with triage, assessment and funding decisions; weighted scoring and a funding funnel; what-if scenarios; a waterfall gantt with critical path, baselines and MS Project exchange; programmes with dependency maps and cross-project RAID; stage gates with automated checks; change control routed by spending authority; numbered baselines that drive slip and earned value; resource availability, requests and capacity; timesheets that reconcile into finance; a finance tracker with EVM; benefits realisation; status reports with PMO acceptance; agile backlogs and sprints; and an AI PMO that assesses every delivery project daily.

It sits inside DemandFlow, so a funded demand becomes a project with its roadmap and forecast lines already written, a plan line released from the investment plan becomes a project under its department's portfolio, and a project's spend is the same finance tracker the CFO's dashboard reads.

What a PMO gets

- **Demand decided with headroom in view.** Submitted, triaged, assessed and decided: fund now, fund what fits, next cycle, defer, reject or escalate, with the decision authority and the department's headroom shown first.
- **A plan with the rules of planning.** WBS, four dependency types with lag and lead, critical path and slack, baseline compare, MS Project import and export, and a resource band that shows each person's load across all their projects.
- **Gates with evidence.** Templates per stage with mandatory and weighted items, automated checks against the record, scored results and overrides that need a justification and a second person.
- **Change routed by authority.** Requests climb department, division and business unit limits, auto-approve inside tolerance, snapshot the baseline on approval and move the roadmap and forecast.
- **Slip and earned value from a committed baseline.** Numbered baselines; a PM image never resets slip; SPI, CPI, EAC, ETC, VAC and TCPI on demand.
- **People who are not double-booked.** Unified load from tasks, stories, backlogs and bookings against capacity net of calendars and leave, with conflicts, best-fit requests and a demand heat map.
- **Status reports the PMO accepts.** Weekly or monthly with five RAGs and a narrative pre-drafted by the AI from the health insight; accepted reports set the project RAG and lock.
- **An AI PMO that reads every delivery project daily.** RAG with rationale, a narrative, top risks, recommendations, milestone briefs and a

portfolio heat map, with fixed thresholds you can quote.

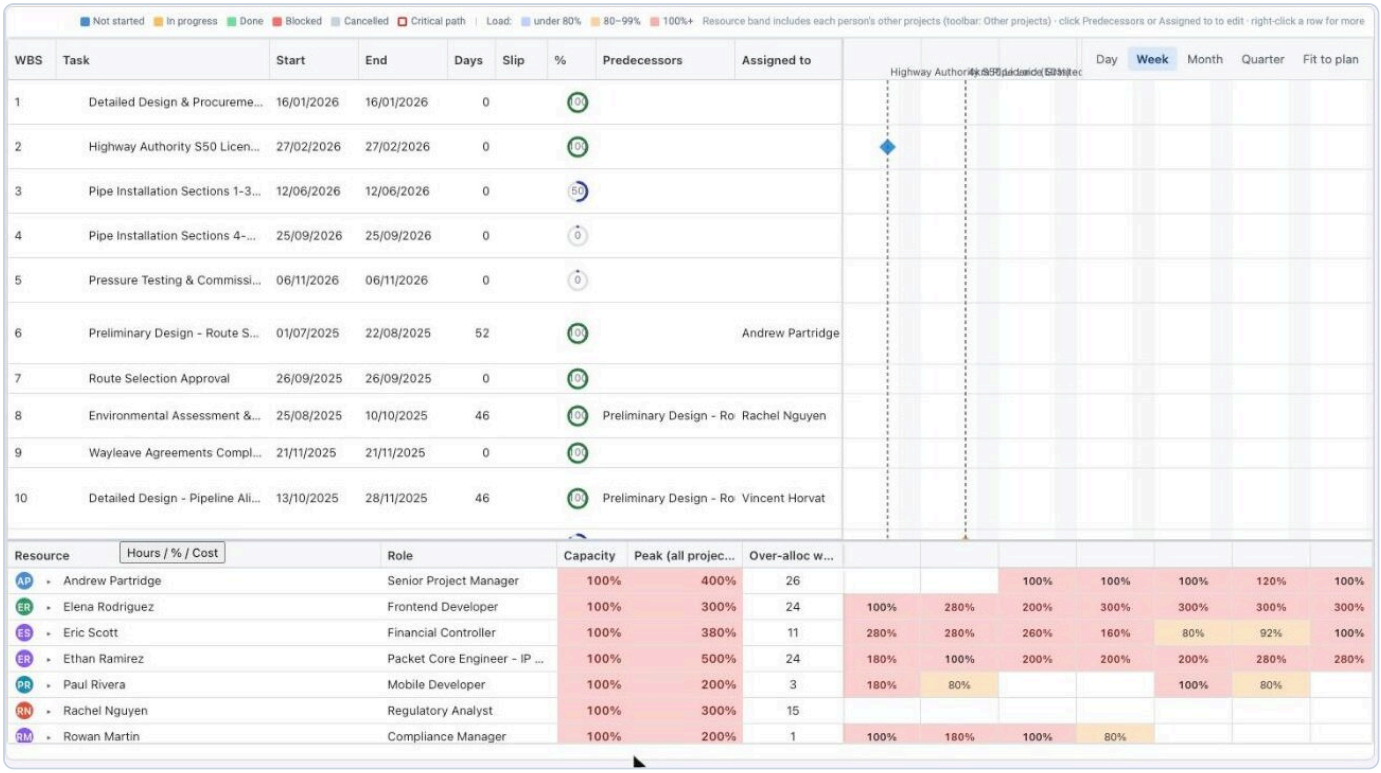


FIGURE 1. A PROJECT'S WATERFALL GANTT: WBS, DATES, DAYS, SLIP, PROGRESS AND PREDECESSORS, WITH THE RESOURCE BAND BENEATH SHOWING EACH PERSON'S CAPACITY, PEAK LOAD AND OVER-ALLOCATED WEEKS ACROSS ALL THEIR PROJECTS

Demand, prioritisation and scenarios

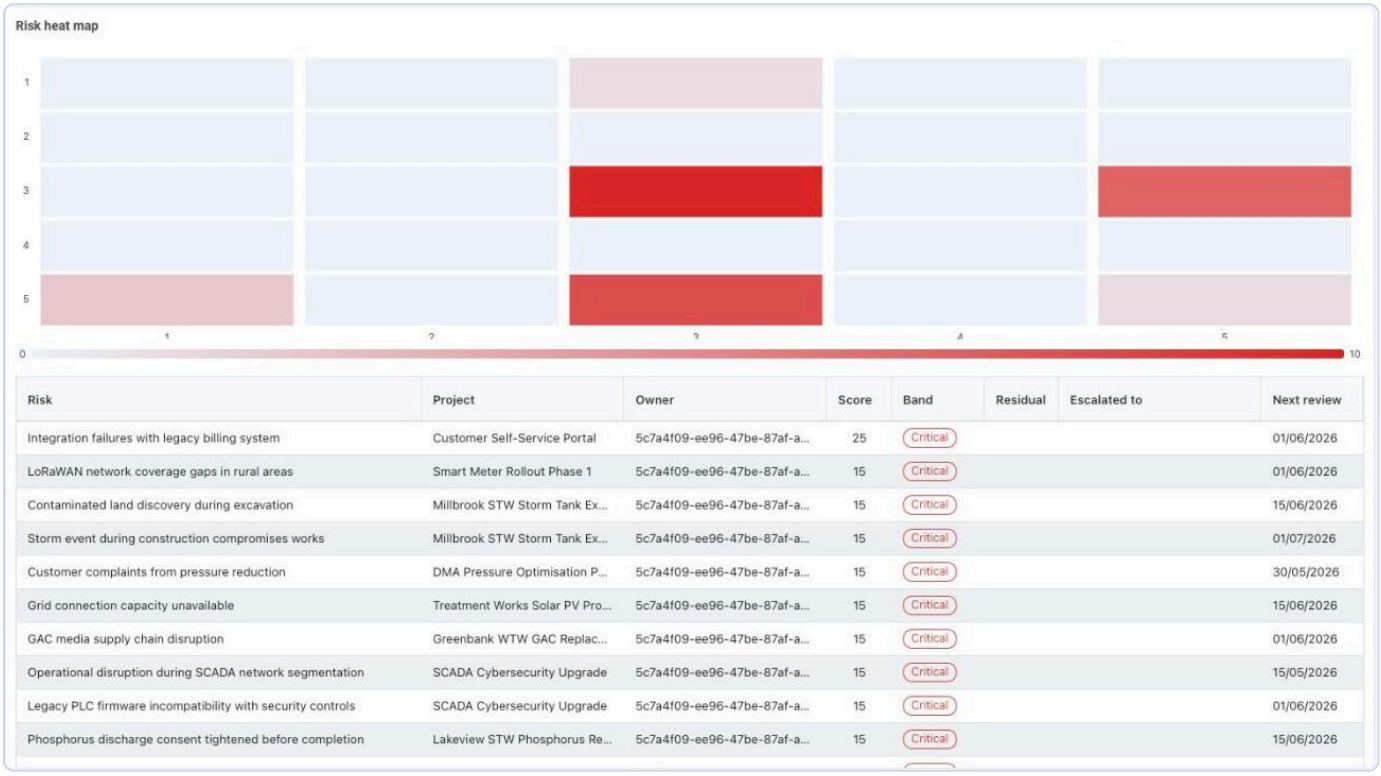
A demand arrives through a front door form or by hand and moves through submitted, triage, assess and decide with a duplicate check and a stamp on every move. Its business case carries NPV, IRR, payback, cost of delay and a reference-class estimate (P50 and P80) drawn from the tenant's own closed projects. At decide, the screen shows who has the authority and how much headroom the department has left. Fund now creates the project under the department's portfolio and writes its roadmap and finance tracker lines; next cycle places a line on the draft investment plan.

A scoring model holds weighted criteria and a pass threshold. Score Projects scores every project in a portfolio in one action and ranks them; the portfolio then shows the ranked list with each criterion's contribution, a strategic by financial quadrant with bubbles sized by budget, a score by earned-value view that tints a highly ranked project whose SPI or CPI is below 0.9, and a funding funnel where dragging a card between fund, defer and decline writes the decision.

Layer	Records
Structure	Portfolios, programmes, projects (about fifty panels), demands and demand lines, teams, governance forums
Plan	Gantt tasks, milestones, project dependencies, numbered baselines, scenarios and scenario lines
Control	Gate templates, items and results; change requests and programme change requests; scoring models and scores; status reports
RAID	Risks, issues, incidents, decisions, actions, meetings, lessons learned
People and time	Allocations and bookings, timesheets, resource requests

Layer	Records
Money and benefits	Finance tracker lines, roadmap lines, budget transfers, earned value history, benefits and measures
AI PMO	Health insights, recommendations, milestone briefs, portfolio snapshots and narratives, closed-project actuals

Scenarios. A scenario holds adjusted dates and budgets on a draggable timeline with budget by fiscal year and peak resource load, without touching the live projects. Two or more compare side by side, and a scenario can be applied as an investment plan proposal.



Risk	Project	Owner	Score	Band	Residual	Escalated to	Next review
Integration failures with legacy billing system	Customer Self-Service Portal	5c7a4f09-ee96-47be-87af-a...	25	Critical			01/06/2026
LoRaWAN network coverage gaps in rural areas	Smart Meter Rollout Phase 1	5c7a4f09-ee96-47be-87af-a...	15	Critical			01/06/2026
Contaminated land discovery during excavation	Millbrook STW Storm Tank Ex...	5c7a4f09-ee96-47be-87af-a...	15	Critical			15/06/2026
Storm event during construction compromises works	Millbrook STW Storm Tank Ex...	5c7a4f09-ee96-47be-87af-a...	15	Critical			01/07/2026
Customer complaints from pressure reduction	DMA Pressure Optimisation P...	5c7a4f09-ee96-47be-87af-a...	15	Critical			30/05/2026
Grid connection capacity unavailable	Treatment Works Solar PV Pro...	5c7a4f09-ee96-47be-87af-a...	15	Critical			15/06/2026
GAC media supply chain disruption	Greenbank WTW GAC Replac...	5c7a4f09-ee96-47be-87af-a...	15	Critical			01/06/2026
Operational disruption during SCADA network segmentation	SCADA Cybersecurity Upgrade	5c7a4f09-ee96-47be-87af-a...	15	Critical			15/05/2026
Legacy PLC firmware incompatibility with security controls	SCADA Cybersecurity Upgrade	5c7a4f09-ee96-47be-87af-a...	15	Critical			01/06/2026
Phosphorus discharge consent tightened before completion	Lakeview STW Phosphorus Re...	5c7a4f09-ee96-47be-87af-a...	15	Critical			15/06/2026

FIGURE 2. A PORTFOLIO'S RISK HEAT MAP: PROBABILITY BY IMPACT ON A FIVE BY FIVE GRID, WITH THE CRITICAL RISKS LISTED BY PROJECT, SCORE, BAND, RESIDUAL SCORE, ESCALATION AND NEXT REVIEW

Plans, programmes, gates and change

Gantt. A tree WBS with drag and resize, finish-to-start, start-to-start, finish-to-finish and start-to-finish predecessors with lag in days (negative for a lead), a critical path toggle with slack per task, baseline compare and save, and MS Project import with preview and export. The resource band shows load as a share of each person's capacity including their other projects (blue under 80 per cent, amber from 80, red at 100 and over), peak and over-allocated weeks, a conflicts view and a skill-aware redistribution of over-allocated tasks. Assigning a task writes the forecast days and cost into

Gates. A template per stage (initiation, planning, execution, closure) with named approvers and override approvers, auto-suggestion criteria, and checklist items that are mandatory or weighted. Automated checks test a field is present, a field value, a related record count or a related field value; manual items sit beside them. Results are pending, passed, failed or overridden with a percentage score and attempt history; an override needs a justification and a second authorised person, never the evaluator. The review shows the project's portfolio score against the model threshold.

open months of the finance tracker; closed and locked months are never touched. Progress is weighted by duration and workload over leaf tasks.

Programmes. Manager, sponsor, dates, priority and risk rating; an editable programme gantt; a dependency map with schedule-violation checks; risk heat map, escalated risks and open issues across projects; milestones; a benefits map; programme gates; and programme change requests that split cost and schedule across child projects manually or pro rata and raise the child requests.

Change control. Standard, normal, emergency or major requests with nine states and nine reason codes record the scope, schedule, cost, resource and quality effect, the schedule delta and new end date, the cost delta and new budget by year and the effort delta by role. Routing climbs department, division and business unit managers by their auto-approve limits and then a governance forum, whose agenda ranks pending items by value with waiting time. Over headroom, the approver can approve, split, escalate or refuse per year; a standard change inside the tenant's tolerance is approved on submit. Approval takes a snapshot of the before state, patches the baseline and moves the roadmap line and forecast. Implementation is recorded separately as successful, partial or failed with a post-implementation review.

Baselines. Snapshots are numbered: version one is the initial baseline, a snapshot tied to a change request is a rebaseline, anything else is a PM image. Slip and earned value are measured against the latest committed baseline, and a PM image never resets slip. Each snapshot holds the schedule and the money by month.

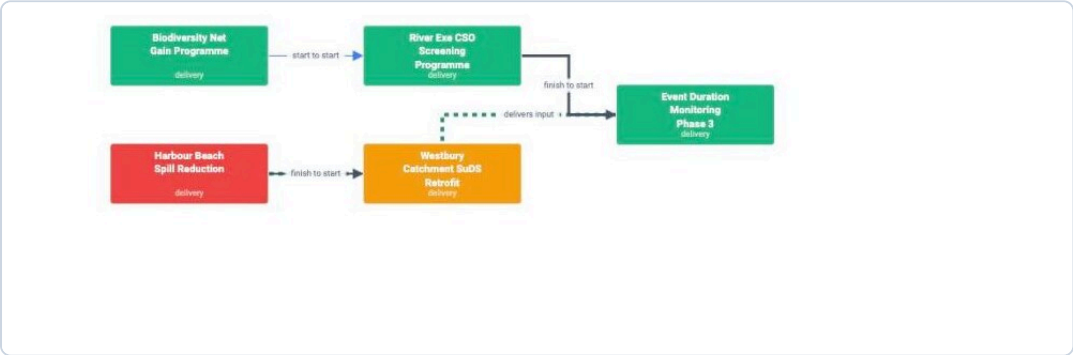


FIGURE 3. A PROGRAMME'S DEPENDENCY MAP: FIVE PROJECTS, FOUR DEPENDENCIES BY TYPE, COLOURED BY RAG

Project Gates

Gate Template	Status	Score	Requested	Approved
Capital Project Initiation Gate	Passed	92	01/03/2025	15/03/2025
Design Approval Gate	Passed	75	01/03/2025	15/03/2025
Construction Readiness Gate	Pending	0	01/03/2025	

FIGURE 4. PROJECT GATES: INITIATION AND DESIGN APPROVAL PASSED WITH THEIR SCORES, CONSTRUCTION READINESS PENDING

RAID, milestones, status and benefits

A risk carries a category, probability, impact, cost, residual score, mitigation, triggers and contingency; a status of open, monitoring, resolved, closed, materialised, accepted or expired; and a source of human or AI predicted. Scores run 1 to 25 in four bands (low to 4,

Status reports are weekly or monthly per portfolio with an overall RAG plus scope, schedule, cost, resource and risk RAGs, a narrative, key risks, key issues and next steps. They move draft, submitted, accepted or returned; only the PMO accepts or returns; an accepted report is

medium to 9, high to 14, critical from 15), with escalation to the programme suggested at 15 and to the portfolio at 20, and a five by five heat map on both. Raise as issue creates the linked issue and marks the risk materialised. Project dependencies are finish to start, start to start, finish to finish, delivers input or shared resource with criticality and lag. Decisions, actions, meetings, lessons and a RACI matrix sit on the project.

Milestones have eight types, a RAG, days variance, acceptance criteria and testing status, approval, payment terms with invoice and payment status, penalties and bonuses, and escalation up to board level.

locked and sets the project's RAG, with RAG trends on the project and the portfolio. The AI pre-drafts the current period's report from the health insight.

Benefits have a category, measure type, baseline, target and actual with variance computed on save, a status from expected to fully or not realised, a review frequency, a KPI link, a realisation curve and a review schedule screen.

Plan integrity scores nine checks out of 100 (roles in team, committed baseline, milestones on time, budget against forecast, risks owned, change requests decided, plan dates, strategic link, status report current) with a portfolio pass, warn and fail matrix refreshed nightly.

Resources, time and money

Load is unified from gantt tasks, support tasks, backlogs and bookings; capacity is the person's percentage reduced by their working calendar, holidays and approved leave. Availability is shown at department, division, business unit and global level with weekly or daily zoom, soft bookings hatched and an Excel export. Bookings move requested, proposed, soft and hard (only hard counts as committed), resource requests find best-fit candidates by skill then free capacity, a capacity and demand heat map runs by department, role, skill or team in weeks or months for committed or committed plus pipeline, and utilisation comes from approved timesheets.

Timesheets are weekly, booked to a project task or story, a vacancy, a deal or operations with time types, approved or rejected with a reason by the line manager, with overtime and cost derived on approval, and reconciled into the finance tracker actuals through a confirmation when the tracker opens.

The finance tracker holds monthly forecast and actuals per line with purchase orders and commitments, capex, opex and working capital, budget transfers with approvers by organisation, a ledger and a cash flow, forecast versions with finance approval and month close, GL actuals import and regulatory periods. Earned value gives BAC, PV, EV, AC, SV, CV, SPI, CPI, EAC, ETC, VAC and TCPI, with planned value from the committed baseline's roadmap phasing, else the schedule, else a straight line, and a history row per period; effort burn is the alternative tracking method.

Agile. A backlog, sprints and a kanban per project; a release dashboard with burndown, velocity, items by sprint, defects by priority and trend and backlog workload; sprint planning with velocity; and Jira board and dashboard panels once OAuth is configured.

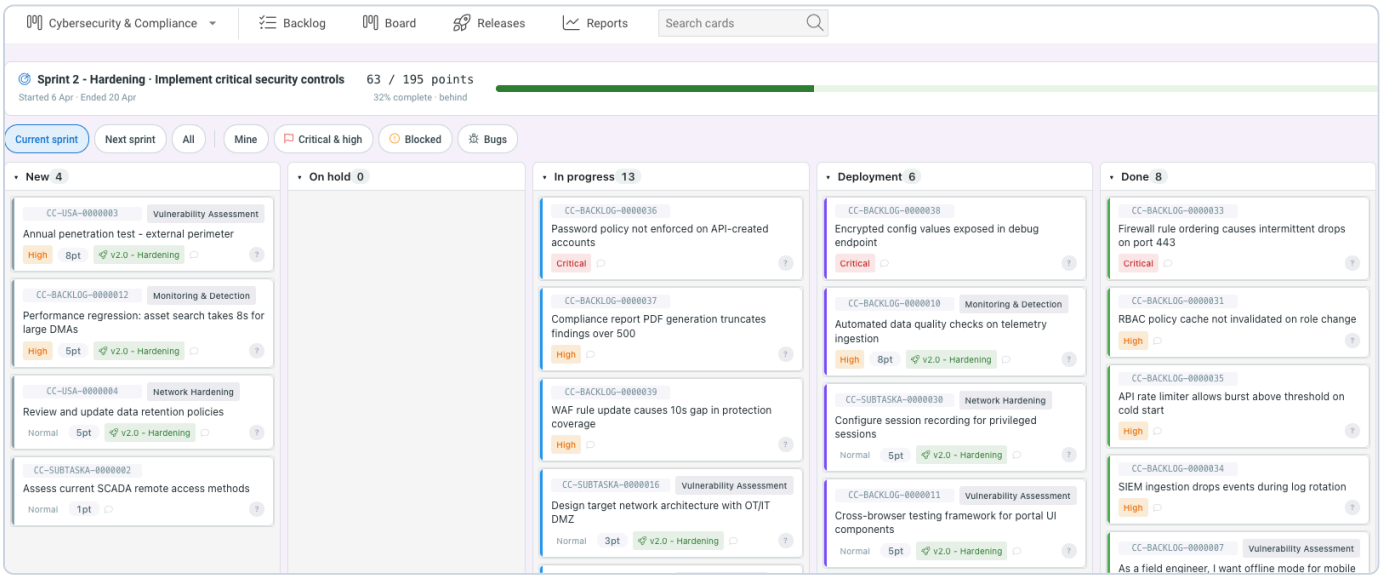


FIGURE 5. A SPRINT BOARD WITH PROGRESS AGAINST COMMITTED POINTS, PRIORITIES, ESTIMATES AND RELEASE TAGS ON EVERY CARD

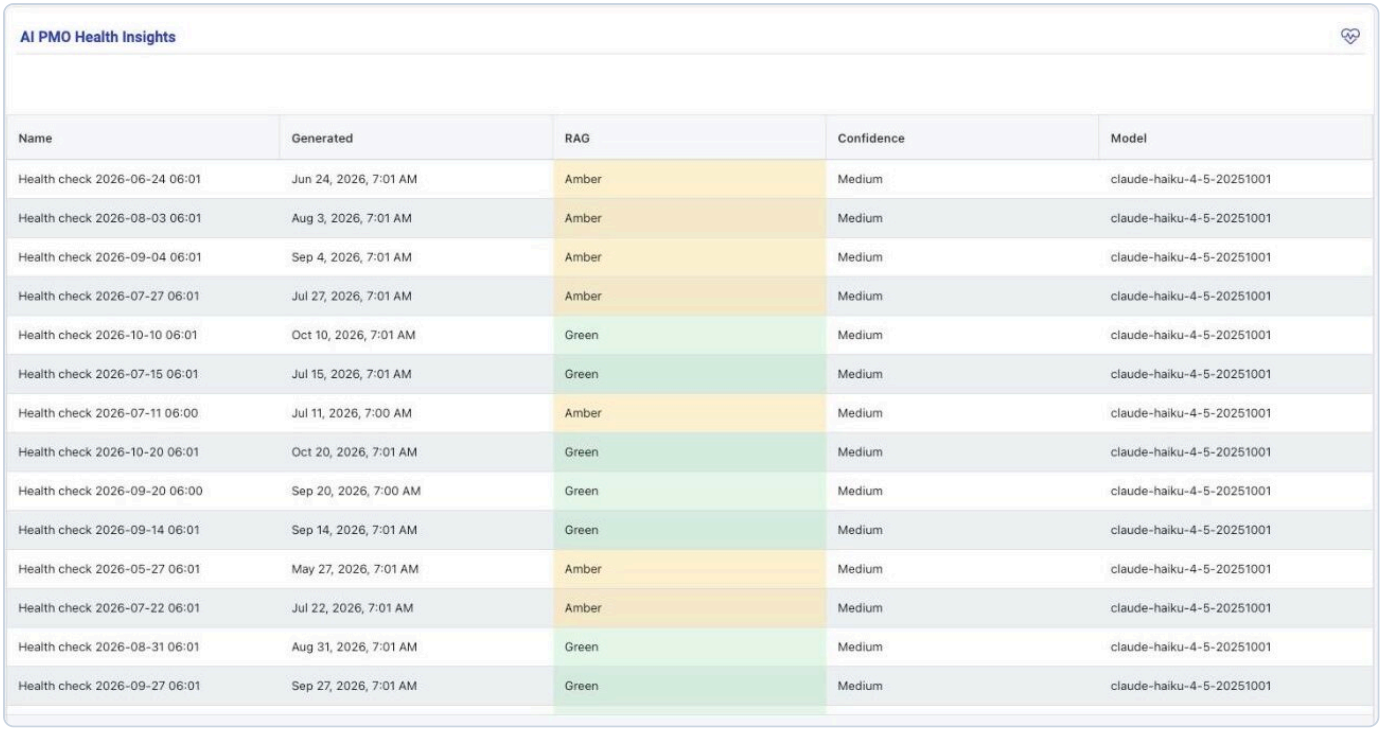
The AI PMO

Where the AI PMO is enabled for a tenant, a daily orchestrator queues every project in delivery. For each it returns a RAG with a rationale, a three to five sentence narrative, up to three top risks, up to five recommendations with priority and category, five dimension RAGs and a confidence level with a note. The thresholds are fixed: red for slip over 14 days, budget variance over 15 per cent, scope growth over 25 per cent or three or more contended people; amber for slip of 7 to 14 days or variance of 5 to 15 per cent. It uses critical path slack and the tenant's own benchmarks, skips the model call when nothing has changed, and can be refreshed on demand up to three times an hour per project.

Daily milestone briefs cover milestones due within 14 days or up to 30 days overdue. A daily portfolio snapshot powers a heat map of schedule slip against budget variance, coloured by RAG and sized by high-severity risks. A portfolio narrative and risk predictions (written as risks with an AI source) run on demand. Closed projects are archived daily as planned-versus-actual records (cost and duration variance, scope growth, rebaselines, risks materialised) that feed the benchmarks and the reference-class estimates. AI analysis strips names before the model sees the data and restores them in the results. An AI finance review covers budget health and runway, forecast accuracy, purchase order coverage, spend profile and vendor concentration.



FIGURE 6. THE AI PMO PORTFOLIO HEAT MAP: SCHEDULE SLIP AGAINST BUDGET VARIANCE, COLOURED BY THE AI RAG AND SIZED BY OPEN HIGH RISKS



AI PMO Health Insights

Name	Generated	RAG	Confidence	Model
Health check 2026-06-24 06:01	Jun 24, 2026, 7:01 AM	Amber	Medium	claude-haiku-4-5-20251001
Health check 2026-08-03 06:01	Aug 3, 2026, 7:01 AM	Amber	Medium	claude-haiku-4-5-20251001
Health check 2026-09-04 06:01	Sep 4, 2026, 7:01 AM	Amber	Medium	claude-haiku-4-5-20251001
Health check 2026-07-27 06:01	Jul 27, 2026, 7:01 AM	Amber	Medium	claude-haiku-4-5-20251001
Health check 2026-10-10 06:01	Oct 10, 2026, 7:01 AM	Green	Medium	claude-haiku-4-5-20251001
Health check 2026-07-15 06:01	Jul 15, 2026, 7:01 AM	Green	Medium	claude-haiku-4-5-20251001
Health check 2026-07-11 06:00	Jul 11, 2026, 7:00 AM	Amber	Medium	claude-haiku-4-5-20251001
Health check 2026-10-20 06:01	Oct 20, 2026, 7:01 AM	Green	Medium	claude-haiku-4-5-20251001
Health check 2026-09-20 06:00	Sep 20, 2026, 7:00 AM	Green	Medium	claude-haiku-4-5-20251001
Health check 2026-09-14 06:01	Sep 14, 2026, 7:01 AM	Green	Medium	claude-haiku-4-5-20251001
Health check 2026-05-27 06:01	May 27, 2026, 7:01 AM	Amber	Medium	claude-haiku-4-5-20251001
Health check 2026-07-22 06:01	Jul 22, 2026, 7:01 AM	Amber	Medium	claude-haiku-4-5-20251001
Health check 2026-08-31 06:01	Aug 31, 2026, 7:01 AM	Green	Medium	claude-haiku-4-5-20251001
Health check 2026-09-27 06:01	Sep 27, 2026, 7:01 AM	Green	Medium	claude-haiku-4-5-20251001

FIGURE 7. A PROJECT'S AI HEALTH HISTORY: 160 DAILY HEALTH CHECKS WITH THEIR RAG, CONFIDENCE AND THE MODEL USED

Summary of specifications

Item	Detail
Demand	Front door or manual; submitted, triage, assess, decide; fund now, fund what fits, next cycle, defer, reject, escalate; duplicate check; authority and headroom shown; NPV, IRR, payback, cost of delay, reference-class P50 and P80
Prioritisation	Weighted scoring models with pass threshold; score a portfolio in one action; ranked list, strategic by financial quadrant, score by EVM (tint below 0.9), funding funnel
Scenarios	Adjusted dates and budgets on a timeline; budget by fiscal year and peak load; compare 2 or more; apply as plan proposal; up to 4 BU scenarios
Gantt	WBS; FS, SS, FF, SF with lag or lead; critical path and slack; baseline compare and save; MS Project import and export; resource band at 80 and 100 per cent; conflicts and redistribution; forecast written to open months only
Programmes	Programme gantt; dependency map with violation checks; cross-project RAID; benefits map; programme gates; programme change requests split manually or pro rata
Gates	Templates per stage; named approvers and override approvers; mandatory or weighted items; automated checks (field present, field value, related count, related field value); pending, passed, failed, overridden with score and attempts; override needs justification and a second person
Change control	Standard, normal, emergency, major; 9 states; 9 reason codes; routing by department, division, BU limits then forum; auto-approve inside tolerance; approve, split, escalate, refuse over headroom; snapshot on approval; implementation result and PIR
Baselines and EVM	Numbered snapshots: initial, rebaseline (CR), PM image; slip against committed baseline; BAC, PV, EV, AC, SV, CV, SPI, CPI, EAC, ETC, VAC, TCPI on demand with history
RAID	Risk score 1 to 25 in 4 bands; escalation at 15 and 20; 5 x 5 heat map; raise as issue; dependency types FS, SS, FF, delivers input, shared resource

Item	Detail
Resources and time	Unified load; capacity net of calendar and leave; department to global availability; bookings requested, proposed, soft, hard; best-fit requests; capacity and demand heat map; weekly timesheets approved by line manager and reconciled into finance
Status and benefits	Weekly or monthly reports with 5 RAGs; PMO accept or return; accepted report locked and sets RAG; AI pre-draft; benefits with baseline, target, actual, variance, curve, review schedule; 9 integrity checks out of 100
AI PMO	Per tenant; delivery projects daily; RAG, rationale, narrative, 3 risks, 5 recommendations, 5 dimension RAGs, confidence; red slip over 14 days, variance over 15 per cent, scope over 25 per cent, 3+ contended people; amber 7 to 14 days, 5 to 15 per cent; 3 refreshes, narratives or predictions per hour; milestone briefs 14 days ahead, 30 overdue; names stripped before the model

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