The Public Sector Buyer's Guide to PPM Solutions

Portfolio, Programme & Project Management for a Changing Landscape

Introduction

Public sector organisations are being asked to do more with less. Central government departments are navigating the most demanding transformation environment in a generation, delivering efficiency savings, demonstrating measurable outcomes, and providing transparent reporting to residents, regulators, and ministers. Meanwhile, many local government organisations are working through reorganisation, and the NHS are still defining the structure of Integrated Care Boards.

Most organisations already have tools. The question is whether those tools are fit for purpose. Word documents, spreadsheets, standalone project management tools, and siloed systems were not designed for portfolio-level governance, programme-wide benefits tracking, or the kind of real-time oversight that modern public sector delivery demands. The gap between what these tools offer and what senior leaders, auditors, and funders actually need is where risk lives.

Choosing the right portfolio, programme and project management (PPM) solution is not simply a technology decision. It is a governance decision. The right platform will provide a single source of truth across all your programmes, give every level of your organisation a personalised view of what matters to them, embed artificial intelligence for meaningful and recommendations, all within a secure UK-hosted environment that meets the compliance requirements your organisation faces every day.

The wrong choice has consequences. Organisations that have selected project management tools that track tasks, but cannot aggregate data across programmes, cannot produce portfolio-level risk views, or ensure strategic alignment frequently find themselves rebuilding their approach within two to three years. By then, the cost is not just the sunk investment in a failed system, it is the missed opportunity of the benefits unrealised, the decisions made without adequate information, and the audit trails that were never built.

AI is no longer optional. A PPM solution without embedded intelligence will require manual analysis of the data it holds, replicating exactly the burden it was intended to remove. Platforms that have bolted AI on as an afterthought, or that position it as a future roadmap item, are not credible partners for organisations that need to demonstrate measurable efficiency today.

This guide is designed to help public sector buyers make informed decisions. It sets out the challenges you face, the criteria that matter, a structured checklist for evaluating solutions, and the questions to ask suppliers, including the questions that will reveal the difference between a genuine PPM platform and a project management tool dressed up with a portfolio label.



Defining PPM in the Public Sector context

It is important to distinguish between simple project management tools and true portfolio, programme and project management (PPM) solutions. Many tools support task management and individual project tracking but fall short when it comes to providing oversight at programme or portfolio level, the level at which public sector organisations are increasingly held to account.

A genuine PPM platform operates across three distinct levels simultaneously:

- **Project**: delivery tracking, risk and issue management, resource assignment, and milestone reporting within a single initiative.
- **Programme**: co-ordination and oversight of interdependencies, shared resources, collective risks, and aggregated benefits across a group of related projects working toward common outcomes.
- **Portfolio**: strategic alignment, prioritisation, investment decisions, and cross-cutting reporting across multiple programmes of change, providing leaders with a single, authoritative view of organisational delivery.

Public sector delivery requires solutions that align with established frameworks such as PRINCE2, Managing Successful Programmes (MSP), supporting compliance with Government Project Delivery's Programme and Project Data Standard, and PMBOK. Critically, any platform must also reflect the requirements of the HM Treasury Green Book, and the Teal Book on project delivery. Accountability, transparency, and audit-readiness must be built in from the start, not retrofitted.

Key Challenges for Public Sector Buyers

- Data spread across multiple systems, including MS Word, Excel, Project, and siloed departmental software, with no single source of truth.
- A lack of real-time oversight across programmes and portfolios, leading to reactive rather than proactive decision-making.
- Increasing pressure from regulators, auditors, and ministers to provide evidence-based, audit-ready reporting.
- Growing demand to demonstrate financial discipline, linking every pound of programme spend to a measurable strategic outcome.
- Resource constraints and the need to achieve significantly more with fewer staff, without increasing the reporting burden on frontline teams.
- Change fatigue and the importance of solutions that support adoption rather than adding complexity to already stretched teams.

PPM adoption challenges in the Public Sector

- **Transparency & Accountability**: Evidence every pound spent, aligned to GovS 002, Green Book, and Teal Book guidance, with audit-ready reporting available at any time.
- **Financial Visibility**: Connect programme spend to outcomes in real time, giving leaders, finance teams, and regulators a clear picture of investment performance across the portfolio.
- **Productivity & Delivery**: Drive collaboration, reduce duplication, and connect strategy to delivery so that every team understands how their work contributes to the whole.
- **Flexibility & Adaptability**: Support agile, waterfall, and hybrid approaches, adapting to policy shifts and organisational restructures without requiring costly reimplementation.
- **Rapid Time-to-Value**: Deploy in weeks, not years, with minimal disruption and visible improvement from the first reporting cycle.
- **Scalability & Security**: Meet DSPT, G-Cloud, ISO 27001, Cyber Essentials, and UK data residency requirements as a baseline, not a premium option.

The HM Treasury five case model

HM Treasury's Green Book requires that all significant public sector investment decisions, including technology procurement, are assessed through the Five Case Model. This framework is not a compliance exercise. It is the structured business case approach that ensures public money is invested wisely, demonstrably, and with proper governance in place.

A PPM solution should actively support the development, evidencing, and monitoring of each case:

Strategic Case
Is there a clear need?
Your PPM solution must demonstrate alignment to strategic objectives at every level, from individual project outputs to national policy priorities. The platform should make this alignment visible in real time, not just at the point of business case approval.

Economic Case
Does it represent best value?
Look for a solution that supports benefits modelling, scenario comparison, and outcome tracking against the economic case, enabling you to demonstrate that the chosen option continues to represent best value as delivery progresses.

Commercial Case
Can it be effectively procured and delivered?
The solution must be available through approved Government procurement routes, such as G-Cloud or TePAS, with transparent pricing, clear contractual terms, and no hidden dependency on consultancy. Public sector procurement teams require evidence of compliant, cost-effective commercial arrangements.

Financial Case
Can the organisation afford it?
A credible PPM solution will integrate with your financial systems to provide real-time budget versus actuals tracking, multi-year spend profiling, and the financial audit trails that internal and external auditors require. The platform itself must also be financially sustainable with no hidden add-ons, scalable licensing, and a total cost of ownership that can be justified to finance teams.

Management Case
Can it be delivered and managed?
This is where many technology investments fail. Look for evidence that the vendor has a structured implementation approach, a robust onboarding and training offer, and long-term support to ensure the solution continues to be managed effectively, even as your team's capacity and skills evolve. The Management Case requires a credible delivery plan, not just product capabilities.

HM Treasury

THE GREEN BOOK
UK GOVERNMENT GUIDANCE ON APPRAISAL

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Buyer's Checklist

What to consider when choosing a PPM Solution

Your core evaluation framework

The following 12 criteria represent the core evaluation framework for any serious PPM procurement. Each section sets out what to look for and why it matters specifically in the public sector context.

1. Security and Data Protection

Security is not a feature, it is a precondition. For any public sector organisation, data protection and compliance requirements must be met before any functional evaluation begins. Your PPM solution must meet the highest standards.

- [ ] Full compliance with GDPR and UK data protection legislation, with documented data processing agreements in place.
- [ ] ISO 27001 certification and Cyber Essentials accreditation as a minimum standard.
- [ ] Data hosted within the UK, with clear contractual commitments.
- [ ] Robust role-based access controls that align with your organisational structure, limiting data access strictly to those with a legitimate need.
- [ ] Full audit logs of system access, data changes, and user activity, available for inspection by internal and external auditors.
- [ ] Regular independent penetration testing and vulnerability assessments, with results available on request.

2. Governance and Compliance

Public sector delivery is high stakes. Every decision carries financial, reputational, and sometimes political consequences. You need a solution that enforces governance, supports structured decision-making, and provides a complete evidence base for audit and assurance.

- [ ] Configurable stage-gates and approval workflows that reflect your end-to-end governance model, including programme boards, investment committees, and senior responsible owner approvals.
- [ ] Complete audit trails capturing all data changes and approvals, detailing what was changed, by whom and when, with no ability to retrospectively alter records.
- [ ] Built-in form templates that replace offline tools, capturing information directly within the platform and eliminating manual processes and inefficiencies that spreadsheets create.
- [ ] Prioritisation, scoring and investment selection tools that provide transparent, evidence-based criteria for portfolio decisions.
- [ ] The ability to evidence compliance for regulators, internal audit, and external auditors, with reports that can be generated on demand or automatically distributed, not assembled manually before each review.

3. Financial Management and Spend Visibility

With public sector finances under sustained pressure, the ability to connect every pound of programme spend to a measurable strategic outcome has never been more important. Financial management must be a core feature of your PPM platform, not an add-on.

- [ ] Real-time visibility of investment and spend across all programmes and portfolios, with a single consolidated view for finance teams and leadership.
- [ ] Budget versus actuals tracking at project, programme, and portfolio level, with forecasting tools that identify financial risk before it materialises.
- [ ] Alignment of 100% of spend to strategic outcomes, ensuring that every investment can be traced to a defined benefit or objective.
- [ ] Integration with existing financial systems, so that data does not need to be duplicated or manually reconciled between platforms.
- [ ] Centralised management of financial benefits and spend to support benefits realisation and financial performance tracking.
- [ ] Interactive financial dashboards, including Power BI integration, that give executives, finance teams, and programme leads the financial picture they need without manual reporting overhead.

4. Portfolio and Programme Visibility

Leaders need genuine oversight across portfolios, programmes and projects to prioritise resources and make difficult trade-offs. True visibility means more than a dashboard, it means the right information for every level of the organisation, updated in real time, without manual effort.

- [ ] A single source of truth that aggregates data across all programmes, eliminating the fragmented, version-controlled spreadsheets that currently undermine confidence in reporting.
- [ ] Personalised dashboards for executives, programme leads, and frontline delivery teams, each presenting the information most relevant to their role, not a one-size-fits-all view that serves no one well.
- [ ] Prioritisation, scoring and selection tools that help leaders make evidenced investment decisions at portfolio level, not just track delivery after decisions have been made.
- [ ] Real-time reporting with drill-down capability from portfolio to programme to project level, enabling senior leaders to interrogate the detail behind headline figures without waiting for the next report cycle.
- [ ] The ability to track delivery and alignment against strategic objectives and priorities, establishing a clear golden thread

5. Collaboration and Engagement

Most public sector programmes involve multiple partners and delivery teams. The solution must support inclusive and secure collaboration, capturing information directly from the people doing the work rather than relying on manual aggregation by management offices.

- [ ] Cloud-based access that works across organisations, devices, and geographies, enabling partners, suppliers, and delivery teams to contribute without needing local installation or additional infrastructure.
- [ ] Secure collaboration with external partners without creating data silos or requiring shared access to systems that contain sensitive programme information.
- [ ] Adaptable access to projects through to specific items such as tasks, milestones, and benefits, ensuring focused visibility and ownership.
- [ ] Embedded forms and status update features that capture information directly from staff and stakeholders within the platform, eliminating the email chains and offline spreadsheets that currently fragment data.
- [ ] Integrated workflows that reduce reliance on email, spreadsheets, and manual chasing, automating routine processes that unnecessarily consume resource capacity.
- [ ] Interoperability with existing systems such as Microsoft 365, SharePoint, and Teams, enhancing what your organisation already uses rather than requiring wholesale replacement.

6. Benefits Tracking and Realisation

Public sector buyers must show value for money. This is a recommendation of the Green Book, the Teal Book, which is in use prominently throughout the public sector. A true PPM platform makes benefits visible, measurable, and trackable from business case to close.

- [ ] A benefits framework that links project outputs to programme outcomes and portfolio-level strategic goals, creating an unbroken chain of evidence from investment to impact.
- [ ] Benefit registers and real-time dashboards showing what has been achieved, what is forecast, and where realisation is at risk, at project, programme, and portfolio level simultaneously.
- [ ] The ability to roll up and report benefits across a portfolio to evidence return on investment for taxpayers, funding bodies, and regulators.
- [ ] Comparisons between financial and non-financial benefit data to provide a complete picture of programme value.
- [ ] Built-in reporting for regulators, funding bodies, and internal governance, generated automatically in the format required, not assembled manually for each review.

7. Resource and Capacity Management

Resources are tight across central government, local government and the NHS. The right solution should help organisations use people and budgets effectively, providing the visibility to make informed decisions about where capacity is needed, where it is being wasted, and how demand can be managed strategically.

- [ ] End-to-end request and allocation management, enabling programme offices to manage resource demand from initial request through to confirmed assignment.
- [ ] Skills matching tools that help managers identify the right people for each role, not just whoever is available, improving both delivery quality and staff utilisation.
- [ ] Portfolio-level resource planning, showing capacity and demand across teams, programmes, and the whole organisation, not just within individual projects.
- [ ] Heatmaps and dashboards that identify over-commitment and underutilisation across teams, enabling proactive intervention before resource constraints become delivery risks.
- [ ] Integration with HR and finance systems to align headcount data and budget information, providing a connected picture that neither system can offer alone.

8. Adaptability and Scalability

Public sector priorities change - policy shifts, machinery of government changes, new funding settlements, and evolving regulatory requirements all require organisations to adapt their portfolios at pace. Your PPM system must change with you, without requiring costly reimplementation every time your needs evolve.

- [ ] A single integrated platform that allows you to start with the modules you need and expand as requirements grow, without moving to a different system or requiring separate tools for different levels of the organisation.
- [ ] Configurable templates for projects, programmes, and portfolios, enabling rapid deployment of new workstreams within your existing governance framework.
- [ ] Flexibility to support waterfall, agile, and hybrid delivery approaches, not imposed as a single methodology.
- [ ] The ability to manage cross-organisational programmes, such as shared services, or multi-departmental transformation initiatives, with appropriate data sharing and governance boundaries in place.
- [ ] Frequent vendor updates that keep pace with policy changes, evolving security requirements, and technological development, without requiring organisations to fund or manage upgrades themselves.

9. Value for Money and Procurement Fit

Procurement is under scrutiny, especially for technology solutions. A platform must be cost-effective, transparent in its pricing, and accessible through approved routes that satisfy your organisation's procurement obligations.

- [ ] G-Cloud listing or equivalent framework agreements that enable compliant procurement without a lengthy tender process.
- [ ] Transparent, all-inclusive pricing with no hidden costs for storage, additional users, or feature modules that are presented as standard but charged as add-ons.
- [ ] Flexible licensing that accommodates cross-agency and partner use, so that collaboration does not incur additional licence costs that make joint programmes financially impractical.
- [ ] Minimal reliance on external consultancy for initial configuration and ongoing customisation, ensuring that total cost of ownership reflects the published price, not a consultancy supplement.
- [ ] Evidence of successful implementations at similar scale and complexity in comparable organisations, with references available from public sector customers.

10. Artificial Intelligence Readiness

AI is no longer optional. Embedded intelligence is what separates a modern PPM platform from a sophisticated database. The question for buyers is not whether AI is on the roadmap, it is what AI can do for your organisation today, and whether it operates within the security and compliance boundaries that public sector organisations require.

- [ ] Predictive analytics that use live project and portfolio data to flag emerging risks, delays, and budget pressures before they escalate, reducing the time between a risk materialising and a leader knowing about it.
- [ ] Natural language queries that allow any user to ask questions of portfolio data in plain English and receive immediate, accurate answers, without technical skills, coding, or specialist support.
- [ ] Smart recommendations based on performance trends and delivery patterns across the portfolio, helping to prioritise attention and resources where they will have most impact.
- [ ] AI-generated summaries, briefings, and progress reports that reduce the administrative burden on programme managers and improve the quality of information reaching senior decision-makers.
- [ ] AI support for assurance and audit preparation, identifying anomalies in data entry, reporting patterns, or programme performance that warrant closer scrutiny.
- [ ] All AI processing takes place within Microsoft Azure Foundry, meeting standards such as ISO 27001 and Cyber Essentials. Your data remains private and is not used to train models or retained after processing.
- [ ] Integration with Power BI, Microsoft 365, and existing analytics tools, enhancing your current investment rather than replacing it.
- [ ] AI features that are live today, in production, and proven in similar public sector environments, not promised for the future.



11. Adoption and Change Management

The best solution in the world is useless if it is not used. Adoption is not a given, it is the result of deliberate design, structured onboarding, and ongoing engagement. Vendors who treat go-live as the end of their commitment are not partners; they are suppliers.

- [ ] User-friendly design that works for both programme management specialists and frontline staff who are not PPM professionals, reducing the training burden and increasing the likelihood of consistent, high-quality data entry.
- [ ] Built-in guidance, templates, and support materials that are available within the platform, not in a separate document library that most users will never find.
- [ ] Training and onboarding tailored for different roles, including executive users who need dashboards without complexity and delivery teams who need simple, fast data entry.
- [ ] Evidence of high adoption rates in similar organisations, with metrics that demonstrate the platform is actually used rather than just installed.
- [ ] A vendor with a proven approach to change management, including the option to outsource platform administration through a managed service, for organisations that lack the internal capacity to manage configuration and updates themselves.

12. Accessibility

A PPM platform that cannot be used by everyone in your organisation is not a platform, it is a barrier. Public sector organisations have both a legal obligation and a moral responsibility to ensure that digital tools are accessible to all users, regardless of disability, impairment, or assistive technology.

Accessibility is not a cosmetic concern or a post-launch checklist item; it is a fundamental procurement requirement.

- [ ] WCAG compliance, with a documented accessibility statement and evidence of independent audit, not a self-assessment completed at launch and never revisited.
- [ ] Compatibility with common assistive technologies, including screen readers such as JAWS and NVDA, voice control tools, and magnification software, so that users with visual or motor impairments can access the full functionality of the platform without workarounds.
- [ ] Complete keyboard navigability throughout the platform, ensuring that every feature, form, and dashboard can be operated without a mouse, a requirement for users with motor disabilities and a practical necessity in many working environments.
- [ ] Sufficient colour contrast ratios, scalable text, and layouts that adapt to user preferences without breaking functionality, supporting users with low vision, colour blindness, and cognitive processing differences.
- [ ] Plain language interfaces and clear, consistent navigation that reduce cognitive load for all users, including those with dyslexia, ADHD, or other conditions that affect information processing.
- [ ] Compliance with the Public Sector Bodies Accessibility Regulations 2018, with a published and maintained accessibility statement that is honest about known issues and sets out a clear remediation timeline.
- [ ] Alignment with the Equality Act 2010, ensuring that the vendor can demonstrate reasonable adjustments have been made and that the platform does not place disabled users at a substantial disadvantage compared to non-disabled colleagues.
- [ ] Regular accessibility testing as part of the product development cycle, not a one-off exercise, so that new features do not introduce regressions and the platform's accessibility standard keeps pace with updates.
- [ ] A vendor that treats accessibility as a live product commitment, with a named point of contact for accessibility issues and a clear process for raising and resolving concerns raised by your users.

Data migration and transition

One of the most common, and entirely reasonable, concerns for buyers considering a new PPM platform is what happens to the data they already hold. Years of project data have real value. The idea of starting again from scratch is both practically disruptive and politically difficult to justify.

The good news is that a credible PPM vendor should not require you to start again. The key questions to ask are how migration is handled, what formats are supported, and how your current work is preserved through the transition.

What a Structured Migration Should Look Like

A modern PPM platform should be able to ingest existing project data from a range of sources such as CSV files, XML exports from tools such as MS Project, and dedicated API connections to bespoke or proprietary platforms. This means that structured data can be brought into the new environment without manual re-entry.

Where AI is embedded in the platform, it can further accelerate and quality-assure the migration process, automatically mapping data from source formats, identifying inconsistencies, and flagging records that need review before they are committed to the live environment. This removes the most time-consuming element of a typical migration and significantly reduces the risk of data quality issues appearing in your first reporting cycle.

All current work in flight at the point of migration, active projects, open risks, assigned resources and pending approvals, should be preserved and visible from day one in the new platform. There should be no gap in your programme record and no requirement for a parallel running period that doubles the administrative burden on your team.

Checklist:
Migration Questions to Ask Your Vendor

- What data formats do you support for migration - XML, CSV, API?
- Can you preserve all active project data at the point of cutover?
- Does your AI capability accelerate or quality-assure the migration process?
- What happens if data quality issues are identified during migration and who is responsible for resolution?





Implementation, onboarding and ongoing support

How a vendor behaves after contract signature is as important as what they promise before it. The implementation experience, quality of training, and availability of ongoing support are the factors that determine whether a PPM platform becomes embedded in your organisation or sits underused on a shelf.

Look for vendors who can demonstrate measurable success within weeks, not months — and who offer a structured, governed implementation process rather than handing you a manual and a login.

What a Responsible Implementation Looks Like

- **Discovery and design:**
  A thorough understanding of your governance model, data structures, reporting requirements, and organisational context, before a single configuration decision is made. This phase should result in a documented design that you have reviewed and approved.
- **Configuration and build:**
  Environment setup aligned to your governance framework, data structures, and reporting needs, including templates for your project and programme types, approval workflows, and dashboard layouts configured for your key audiences.
- **Testing and refinement:**
  A structured period of user testing, feedback, and workflow refinement before go-live, ensuring that what is launched reflects how your organisation actually works, not a generic template.
- **Training and adoption:**
  Role-specific training delivered through a combination of guides, videos, and live workshops, designed for both specialist programme managers and the broader community of users who will contribute data but are not PPM professionals.

Ongoing Services and Partnership

The relationship with your PPM vendor should not end at go-live. The following ongoing services indicate a vendor genuinely committed to your long-term success:

- **Administration as a Service:**
  For organisations that lack internal capacity to manage platform configuration, updates, and optimisation, a fully managed administration service provides expert oversight without overhead. Providing Administration as a Service ensures your platform stays current, your configuration evolves with your needs, and your team has no platform management burden.
- **UK-based helpdesk:**
  Responsive, expert support from people who understand public sector delivery, not an offshore service desk reading from a script.
- **User Group community**:
  Access to a community of peer organisations, sharing approaches, templates, and lessons learned from real public sector programmes. For organisations new to portfolio management, this peer network is often as valuable as the platform itself.
- **Knowledge Hub**:
  A continuously updated library of resources, templates, best practice guides, and worked examples, available within the platform and accessible to all users.
- **Spotlight Sessions:**
  Regular briefings covering new platform features, evolving public sector requirements, and sector-specific PPM topics, keeping your team informed and your platform use current without requiring dedicated continuous professional development investment.
- **Proactive optimisation:**
  Post-launch review, adoption tracking, and workflow refinement to ensure the platform continues to serve your organisation as priorities evolve and usage matures. This is especially important when the agreement is for a multi-year duration, as needs change and the platform must be able to grow with the client's needs.

The best vendors will also scale their support model flexibly, allowing organisations to start with guided support and move to full administration, or vice versa, as their internal capacity changes.

How to buy: Procurement routes

Procuring a PPM solution does not have to be a lengthy, complex exercise. Public sector organisations have access to a range of pre-competed frameworks that enable compliant, fast procurement, in some cases within days rather than months. The right route will depend on your organisation type, contract value, and procurement policy.

G-Cloud - Digital Marketplace

G-Cloud is the Government Commercial Function digital marketplace for cloud-based software and services. Suppliers on G-Cloud have been pre-assessed for security, pricing transparency, and contractual compliance. For public sector buyers, G-Cloud offers the fastest and most straightforward route to procuring a cloud PPM solution.

- Direct award is permitted for contracts, where the requirements have been clearly defined and the supplier has comfortably demonstrated they can be met. No further competition is required once you have identified the right solution on the marketplace.
- All pricing is published transparently on the marketplace, enabling straightforward value for money comparisons.
- G-Cloud contracts use standardised terms developed by the Government Commercial Function, reducing negotiation time and legal overhead.
- The process from marketplace search to signed contract can be completed in a matter of weeks with appropriate internal sign-off.

To buy via G-Cloud: search for your chosen supplier on the Digital Marketplace at digitalmarketplace.service.gov.uk, review their service definition and pricing, and proceed with a direct award supported by a short evaluation note documenting your selection rationale.

TePAS — Technology Products and Associated Services

The Technology Products and Associated Services (TePAS) framework, available through Government Commercial Function, provides a further competed route to technology procurement for public sector organisations. TePAS is appropriate where a mini-competition between framework suppliers is required by internal procurement policy or where the contract value and complexity warrants a more structured selection process.

- Framework agreements provide pre-competed commercial terms, reducing procurement risk and timeline.
- Mini-competitions enable organisations to tailor requirements and receive competitive responses within a structured and compliant process.
- Suitable for organisations whose standing orders or procurement policy require a competition even below Find a Tender Service thresholds.

Direct Procurement

Public sector organisations may contract directly with suppliers outside of frameworks in accordance with the Procurement Act 2023. This is typically undertaken through proportionate below-threshold processes, competitive procurements using the Open or Competitive Flexible Procedure, or where justified, direct award under permitted conditions such as a single capable supplier or urgent requirements. All routes require a clear audit trail, demonstrable value for money, and adherence to enhanced transparency obligations, including the publication of relevant procurement and award notices.

Whichever route you take, ensure your procurement documentation reflects the full evaluation criteria used, including security, data hosting, implementation approach, and total cost of ownership, not just headline licence price. A solution that appears cheaper at procurement stage but requires significant consultancy, additional licences, or costly upgrades over time is not best value.

Recommended Approach

For most public sector organisations, G-Cloud offers the best combination of procurement speed, commercial transparency, and compliance assurance. It is the route most consistent with the Cabinet Office's digital procurement principles and requires the least internal overhead to complete. Where a framework competition is required, TePAS provides a structured and efficient alternative.

How Verto is different

Many solutions in the PPM market began life as project management tools and have grown upward toward portfolio management. Verto was designed from the start for public sector portfolio, programme and project management and the difference is visible in every part of the product.

Built for public sector, not adapted from commercial software

Verto is the only PPM platform designed specifically around the needs of NHS, local government, and central government organisations, with preconfigured templates, governance workflows, and reporting structures that reflect how public sector delivery actually works, not how commercial project management works.

True portfolio management - not project tracking at scale

Verto operates simultaneously across project, programme, and portfolio levels, providing the cross-cutting visibility, interdependency mapping, and strategic alignment tracking that genuine portfolio management requires. Tools that aggregate individual project reports are not PPM platforms.

AI embedded from day one - not promised for the future

Verto Intelligence is live, in production, and deployed across our customer base today. It provides natural language queries, predictive risk alerts, automated dashboards, and smart recommendations — all within your UK-hosted, ISO 27001-certified environment. We do not have an AI roadmap. We have an AI product.

Personalised for every level of the organisation

Every user in Verto sees a view configured for their role, from board-level portfolio summaries to delivery team task lists. Personalisation is not a premium feature; it is how the platform works. One size-fits-all reporting does not serve senior leaders, programme managers, and frontline staff equally well.

Fastest time-to-value in the market

Verto deploys in weeks, not months or years. NHS and local authority templates mean that the configuration work required to reflect your governance model is a refinement exercise, not a build project. You will see ROI improvement from your first reporting cycle.

UK-hosted and security-first

All Verto data is hosted within the UK. We hold ISO 27001 certification and Cyber Essentials accreditation, and we meet DSPT requirements for NHS customers. Security is not an add-on, it is the baseline from which everything else is built.

G-Cloud accredited and transparently priced

Verto is listed on G-Cloud with published, all-inclusive pricing. There are no hidden costs for storage, users, or features that should have been in the standard licence. Procurement is straightforward and compliant.

A genuine partnership model

Verto Administration as a Service, the Verto User Group, Knowledge Hub, and Spotlight Sessions are not bolt-on extras. They reflect our model of long-term partnership with public sector customers, because we know that adoption, not installation, determines whether a PPM investment delivers value.

Trusted by 100+ public sector organisations

Across integrated care boards, NHS trusts, local authorities, combined authorities, and central government departments, Verto has a proven track record at scale in the environments our customers work in.

Common pitfalls to avoid

- **Selecting project or work management software that cannot scale to true programme and portfolio management:**
  Many tools market themselves as PPM solutions while offering only project-level tracking. Test this explicitly: ask vendors to demonstrate portfolio-level governance, cross-programme risk aggregation, and benefits roll-up. If they cannot, you are buying a project tool.
- **Relying on spreadsheets or legacy tools and calling it a system:**
  Excel and MS Project can deliver for individual projects. They cannot provide the real-time oversight, audit trail, or strategic alignment visibility that modern public sector accountability requires. The cost of staying put is not zero.
- **Choosing tools that only work for specialists:**
  If your PPM solution is only usable by trained programme managers, your data will always be incomplete. The most valuable insights come from frontline teams who are closest to delivery, and they need tools that do not require a qualification to use.
- **Accepting solutions that require costly external consultancy to configure:**
  If your supplier's standard response to your requirements is a consultancy engagement, that cost needs to be factored into your total cost of ownership from day one, and you should question why a supposedly configurable platform requires expert intervention every time your needs change.
- **Overlooking AI capability or accepting roadmap promises instead of live features:**
  AI will be as central to programme delivery in the next five years as spreadsheets were in the last generation. A system without embedded AI is already building in obsolescence. Equally, a vendor who positions AI as a future release is not the same as one who has it in production today.
- **Selecting vendors with limited public sector experience or thin references:**
  A vendor who cannot provide specific references from NHS, local government, or central government organisations, at comparable scale to your own, is asking you to take a risk they have not yet earned the right to ask of you. Demand references, and call them.
- **Underestimating the importance of migration and transition planning:**
  A vendor with no structured approach to migrating your existing data is presenting you with a disruption risk they have not accounted for. Expect a clear migration methodology with defined timelines, format support, and accountability for data quality.





Due diligence questions for Vendors

- How does your solution support governance, assurance and audit trails required within the public sector?
- Can you demonstrate benefits realisation tracking across a portfolio, from project output to strategic outcome, not just within individual projects?
- What specific public sector references can you provide, in NHS, local government, or central government, at comparable scale to our organisation?
- How long does a typical implementation take, and what resource commitment will be required from our team?
- What data formats do you support for migration, and how is in-flight work preserved at the point of cutover?
- Do users need additional Microsoft licences or external tools to access full platform functionality?
- How is AI embedded within your platform today and what specifically does it do, in production, for current customers?
- Does your AI process data within a UK-hosted environment, and does it meet ISO 27001 and DSPT requirements?
- What is the total cost of ownership over three to five years, including configuration, training, support, and any future upgrade costs?
- What ongoing services do you provide post go-live and what does your support model look like at 12, 24, and 36 months?
- Are you listed on G-Cloud or another approved framework and what is your recommended procurement route?

RFP Questions for Public Sector PPM Solutions

When issuing an RFP for portfolio, programme and project management solutions, public sector organisations must move beyond basic project tracking requirements. The following questions are designed to expose the difference between tools that manage individual projects and platforms that deliver genuine portfolio governance, strategic oversight, and assurance. Use them to identify which vendors can truly meet your needs.

Strategic Oversight and Alignment

- ✓ How does your system align individual projects to wider programme objectives and portfolio-level strategic goals, in real time, not just at business case stage?
- ✓ Can you provide real-time reporting that shows delivery progress against national policy priorities, such as the NHS Long Term Plan, Spending Review commitments, or local authority transformation goals?
- ✓ How does your solution support prioritisation and investment selection at portfolio level, including scoring, weighting, and scenario modelling?
- ✓ How does the platform manage and monitor strategic KPIs, and help senior management clearly understand which initiatives contribute to agreed priorities as well as those that do not?

Programme and Portfolio Governance

- ✓ How are stage-gates, approvals, and governance workflows applied consistently across programmes and portfolios, and how configurable are these to reflect our specific governance model?
- ✓ How does the system embed standard lifecycles, stages and templates across projects, programmes and portfolios to support consistent, endtoend P3M delivery and governance in one platform?
- ✓ Can your system provide a single, unbroken audit trail across a portfolio, showing every decision, approval, and change, not just within isolated projects?
- ✓ How does your platform evidence compliance with frameworks such as PRINCE2, MSP, Green Book, and Treasury approval requirements?
- ✓ How does your platform support the HM Treasury Five Case Model, from business case development through to benefits realisation tracking?
- ✓ How does the system use parent/child hierarchies to link projects to programmes and portfolios, providing coherent oversight rather than disconnected reporting?

Financial Management

- ✓ How does your system provide visibility of spend across the whole portfolio, not just project-level budgets, and how is this linked to strategic outcomes?
- ✓ How does your platform integrate with enterprise financial systems to eliminate duplication, maintain a single source of truth, and respect the continued use of mandated finance systems?
- ✓ Can your solution generate audit-ready financial reports that meet the requirements of HM Treasury, NAO, and internal audit, automatically, without manual compilation?

Resource and Capacity Management

- ✓ How does your system show resource capacity at portfolio level, identifying conflicts across multiple programmes, not just within single projects?
- ✓ Can the solution provide heatmaps showing over-commitment and under-utilisation across teams and what actions can be taken directly from these views?
- ✓ How does your platform support skills-based resource matching and end-to-end request and allocation management?

Benefits Realisation

- ✓ How does your system track benefits from project outputs to programme outcomes to portfolio-wide objectives, with an unbroken chain of evidence?
- ✓ Can benefits be aggregated and reported at portfolio level to evidence return on investment for taxpayers, ministers, and funding bodies?
- ✓ How does the tool support both financial and non-financial benefit measurement, including social value and citizen impact?

AI and Intelligent Analytics

- ✓ What AI features are live in your platform today, in production, with current customers and what evidence can you provide of their impact?
- ✓ How does your AI identify portfolio-level risks or dependencies that would not be visible at project level?
- ✓ Can users interact with portfolio data in natural language and what is the scope of questions that can be answered this way?
- ✓ Can the AI be grounded with your organisation's governance, terminology and operating context, rather than relying on generic assumptions, to deliver genuinely relevant insights?

Security and Data Protection

- ✓ Where is our data hosted, and what contractual commitments do you provide regarding UK data residency?
- ✓ What certifications do you hold, ISO 27001, Cyber Essentials, DSPT, and when were these last independently audited?
- ✓ How do you handle penetration testing, and can results be made available as part of due diligence?

Why These Questions Matter

Project management tools may handle task tracking, scheduling, and collaboration but they cannot provide portfolio-wide governance, financial visibility, strategic alignment, and embedded AI. These questions are designed to reveal those gaps. Public sector buyers should use them to ensure that shortlisted vendors are capable of delivering not just project execution, but true programme and portfolio management, with the governance, evidence, and auditability that public sector accountability demands.



The Case for Action

The public sector cannot afford to delay.

Transformation, efficiency and transparency are national priorities and the tools available to support them have never been more capable. Organisations that make the right PPM investment now will be better placed to deliver their programmes, demonstrate their value, and adapt to whatever the next spending review, policy shift, or organisational restructure requires.

Doing nothing is not a neutral choice. Every month spent managing programmes through spreadsheets, email chains, and disconnected tools is a month of governance risk, reporting burden, and benefits unrealised. The cost of inaction compounds quietly until it becomes visible, in an adverse audit finding, a programme failure, or a minister asking questions that cannot be answered from the data available.

Artificial intelligence is not a future option. It is a present capability and organisations that build their PPM infrastructure on platforms without embedded intelligence will face retrofit costs and capability gaps that grow more expensive to address with each passing year.

The safest choice is to shortlist vendors that can demonstrate governance, financial visibility, portfolio-wide oversight, collaboration, benefits realisation, and embedded AI capability with a proven public sector track record, a structured implementation approach, and a genuine long-term partnership model.

The question is not whether your organisation needs a modern PPM platform. The question is how long you can afford to wait.





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