REACH BEYOND™ TRADITIONAL PORTFOLIO MANAGEMENT

COMPASS-X TOOL SUITE

BY HORIZON 51

CAPABILITY STATEMENT

Strategic Alignment • Program & Project Visibility • Portfolio Management

SUMMARY:

COMPASS-X (Consolidated Objective Monitoring for Portfolio Alignment and Strategy Success) is a powerful AI/ML enabled, multi-echelon (i.e. Board, Executive, staff, and project-level), metrics-driven, portfolio & program management platform that monitors and enhances ROI, financial growth, and mission success. The COMPASS-X tool suite is designed to align corporate strategies with projects, investments, and outcomes and provide integrated, real-time insights. Drawing from NASA experience, it integrates strategic planning, program management, and collaboration tools into one platform. Together with operational assessments, process-optimization, and professional training, COMPASS-X propels your organization to new heights, ensuring every mission is a success and every investment reaches its full potential.

MISSION OBJECTIVE:

The goal of COMPASS-X is to enable leaders to take informed action and achieve mission-critical objectives based on relevant data-driven analysis.

CORE CAPABILITIES:

The COMPASS-X suite includes integrated Tools for:

- Executive oversight
- Program and project status accounting,
- Strategic planning
- Collaboration
- Risk management
- Resource tracking
- 3rd-party (M365) platform integration
- Portfolio Data Management
- Tailorable Policies, Processes, and Procedures
- Effective training and change management strategy

DIFFERENTIATORS:

- Holistic Approach: COMPASS-X covers every layer of enterprise management, from executive decision-making to project delivery, all within one unified platform.
- Real-Time Data: Live dashboards and detailed analytics keep leadership teams informed, enabling proactive decisions and risk management.
- Automated Report and PowerPoint generation: Save time with simple and automated generation of Microsoft PowerPoint, Power BI, and Excel reports for reviews.
- PMO Integration: COMPASS-X's top-down approach taps into existing organizations, processes, and tools allowing monitoring across disconnected teams or Project Management Offices.
- Data-Driven: Ensures innovation is guided by real-time data, predictive analytics, and comprehensive metrics defined by your department, enterprise, or agency.

CORE COMPETENCIES:

- World-Class Processes: Decades of experience in project & portfolio management, mission-critical services, and strategic enterprise planning.
- Industry Practices: All COMPASS-X functionality is compatible with Project Management Institute (PMI) frameworks and is tailorable to accommodate customer needs.
- Strategic Alignment: Utilizes industry-recognized Objectives and Key Results (OKR) methodologies to define and maintain a direct link between strategy and execution, ensuring that all initiatives contribute to organizational objectives.
- NASA-Engineered Design: Infused with over 30 years of combined NASA experience, COMPASS-X is built for mission-critical success, combining innovation with proven methodologies.

TECHNOLOGY:

Our technology leverages existing, secure platforms (Microsoft 365) under your current approved Authorizations to Operate (ATOs), ensuring stability, cybersecurity, and compliance while maximizing existing compliance investments (e.g. FedRAMP, GDPR, HIPAA). This reduces barriers to adoption while maximizing existing investments in licensing, training, cybersecurity, and data governance. Avoid adding technical debt while encouraging the retirement of existing siloed systems.

The base technology stack utilizes these Microsoft* products:

- 365 E3/G3 (Teams and SharePoint)
- Power BI Pro (included with E5/G5) or Premium
- Fabric F64 and/or Power BI Premium
- Power Platform: Power Automate

Optional Tools and integrations may require:

- Project Online / Project for the Web P3/P5
- CoPilot Pro/CoPilot Studio for AI Analysis
- Microsoft Fabric / Purview
- Certified 3rd-party connectors and analysis tools

PAST PERFORMANCE:

- Government Sector: The COMPASS-X Tool suite incorporates NASA Digital Transformation lessons learned, enhanced portfolio management practices, and compliance requirements.

*Any references to Microsoft products and services, including but not limited to Microsoft 365, Power BI, and related platforms, do not imply an endorsement by Microsoft. The integration or use of these products is subject to the client's existing licensing agreements with Microsoft.

Reach Beyond™ Traditional Portfolio Management

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Major Components/Tool Capabilities:

- *Clarity* Tool: Capture the status of any project or activity and view executive dashboards. Group by portfolio, program, project, activity lead, sponsors, strategic drivers, and objectives. Determine the desired key results of each objective and monitor both qualitative and quantitative progress towards goals in real time with simple, graphical views and reports. Designed for executive and senior leadership.



- *Command* Tool: Integrate program and project status from one team or across departments and PMOs. Process-independent and can capture standard or tailored KPIs like cost, schedule, technical, and resource performance. Simplify tasks by automating status reports and dashboards. Designed for portfolio, program, and project managers.



- *Unity* Tool: Automatically create integrated Microsoft Teams and SharePoint sites for project collaboration. Capture metrics and status data while keeping team data private and secure. Designed for project teams.
- *Fusion* Tool: Define and govern portfolio data from across the enterprise. Connect project management tools and automatically update reports using Microsoft Project Online and Project for the Web, eliminating redundant entry. Enable information availability to any analyst with appropriate credentials and access authority. Designed for data analysts and integrators.
- *Catalyst* Tool: Score and rank portfolio options and visualize alignment to drivers and priorities. Facilitate work groups and strategy sessions. Tie funding and investment to decisions desired outcomes. Build the perfect roadmap to ensure that you're investments are aligned with your vision. Designed for enterprise architects and decision makers.



- *Pulse* Tool: Integrate Microsoft Project's resource loading and management capability into your status reports. Identify when key resources or teams are over-allocated or reassigned *before* your strategic goals are impacted. Designed for program and portfolio managers.
- *Resolve* Tool: Enables Risk– and Issue-management capabilities, allowing 5x5 risk classification, ranking, and mitigation across all activities. Monitor issues that arise and prioritize them before they threaten your strategic goals. Designed for program and portfolio managers.

Tools can also be tailored to meet almost any situation, ensuring the success of critical business and mission objectives.

SMALL BUSINESSES ARE THE ♥ OF THE ECONOMY

Horizon 51 provides transformational technology and training solutions. Achieve, succeed, and Reach Beyond with Horizon 51.

HORIZON 51
REACH BEYOND

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