



ProjectDNA

Designing Your Future State

DETAILED BROCHURE

The Methodology Suite for Complex Projects.

Methodology, schedule, and money —
connected end-to-end in one suite.
Pre-built libraries by platform. AI-assisted
workshops. Three modules sharing one
project, one team, and one source of truth.

projectdna.app



Complex transformations fail at 50 to 75 percent.

The cause is structural — methodology, schedule, and money run apart.

Industry studies have put ERP and digital transformation project failure / unmet-expectation rates in the 50–75 percent range for over twenty years. The cause is not technology choice. It is that the three layers of project execution — what is being built, when it is being built, and what is being billed — are tracked in three different systems by three different roles, with no shared source.

METHODOLOGY

Hidden scope.

Requirements live in slides and Word documents. Scope shifts week to week with no shared record of what was agreed. Workshops feel improvised. The documentation handed over at the end is not actually usable by your team after go-live.

Average ERP scope creep:
+34% of original budget

SCHEDULE

Invisible activity.

The Microsoft Project file no one updates. Real activity lives in calendar invites and email threads. Resource over-allocation is invisible until consultants start missing sessions or working weekends to catch up.

Average ERP schedule slip:
+22 weeks past go-live

MONEY

Opaque invoices.

Invoices arrive with total hours and a one-line description. No connection back to the Statement of Work. No visibility into who worked on what. Reconciling billed hours to deliverables becomes detective work every month.

Time reconciling each invoice:
4–8 hours per month



Three modules. One source of truth.

The methodology of the project is the spine of the schedule and the receipt for the invoice.

ProjectDNA puts the methodology, the schedule, and the commercial backbone of the engagement on the same database with the same projects and the same teams. The output of each module is the input for the next. Scope is captured once and reused everywhere.

WORKSHOP	SCHEDULER	ADMINISTRATOR
<p>Methodology & Requirements</p> <p>Pre-built process maps, user stories, acceptance criteria. The methodology workspace where requirements get refined with the client.</p>	<p>Planning & Resourcing</p> <p>Drag-and-drop calendar. Activity templates with default attendees from the value-stream matrix. Resource hours rolled up automatically per person, per week.</p>	<p>Commercial Transparency</p> <p>Sales pipeline, statements of work, timesheets, approvals, invoicing. Every billable hour traceable to a methodology activity and a signed SOW.</p>
<p>What it replaces: Slide decks and Word documents</p>	<p>What it replaces: Microsoft Project + status emails</p>	<p>What it replaces: Spreadsheets + QuickBooks</p>

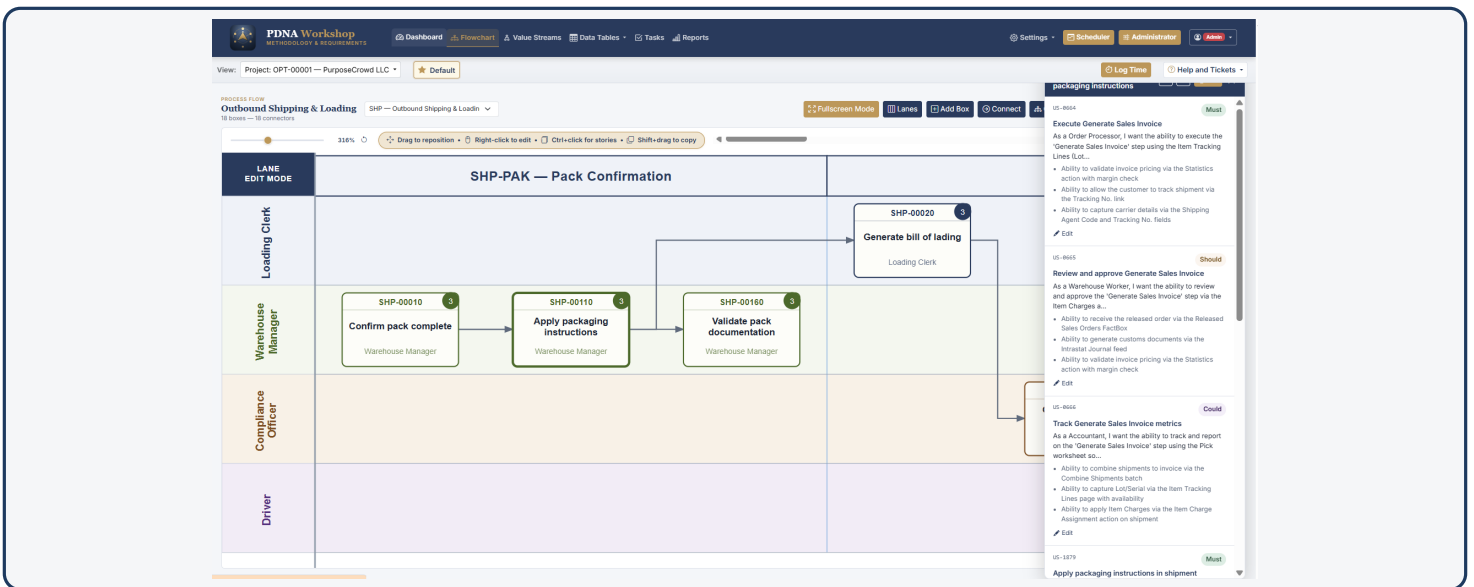
4	140	10,312	31,173
PRE-BUILT LIBRARIES	VALUE STREAMS	USER STORIES	ACCEPTANCE CRITERIA



Project the Flowchart fullscreen. That is the moment.

The client sees their business already mapped. The workshop becomes refinement, not invention.

The methodology library loads at project start — Value Streams pre-mapped, process steps drawn on swim-lane Flowcharts, user stories drafted, acceptance criteria written. The first workshop is not a discovery session. You project the Flowchart fullscreen, walk the client through their future state, drill into the user stories underneath, and refine in their vocabulary. AI takes over the typing. Fit-Gap classification happens on the spot. The library lives on in your system.



Outbound Shipping — process steps on the left; pre-written user stories with AC on the right.

The Flowchart

Fullscreen swim-lane process map. THE projected screen in client sessions.

Value Streams

Pre-mapped business areas with sub-streams and step counts.

User Stories

Pre-written As-a-I-want-So-that. Refine in client vocabulary.

Acceptance Criteria

Given-When-Then. Fit / Gap / Workaround / Out-of-Scope tagged.

AI Hub

Six AI flows — story gen, AC drafting, fit-gap, flowchart authoring.

Project Team

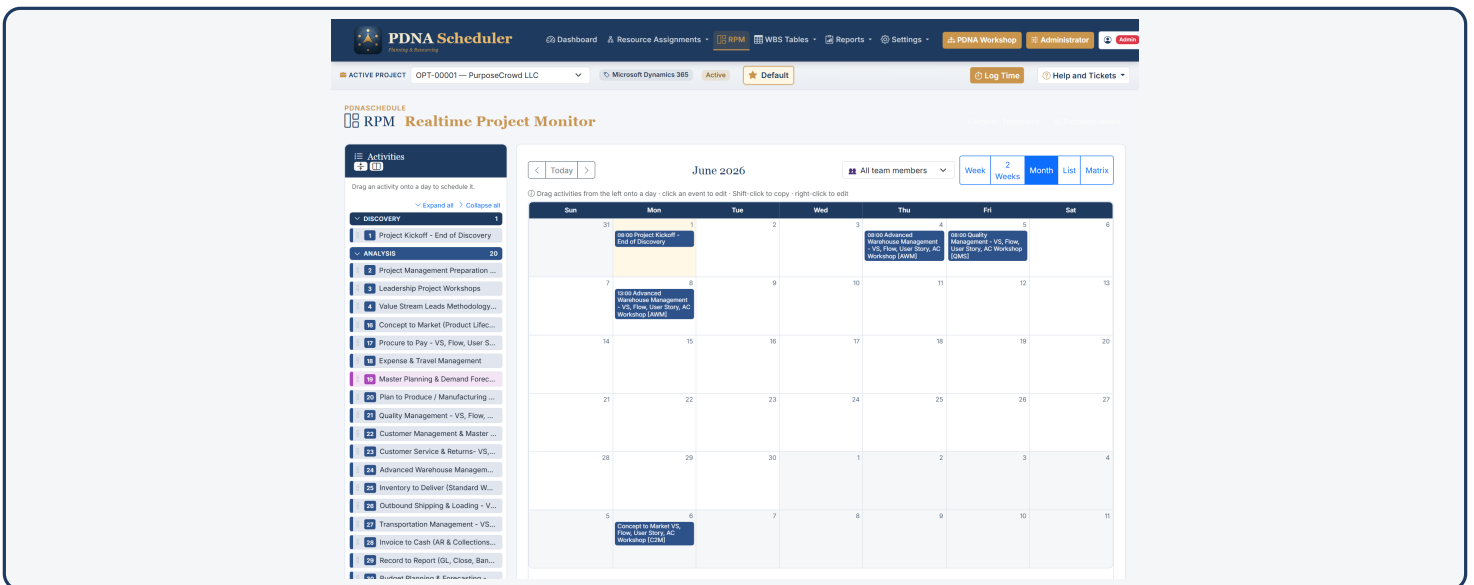
Project Admin, Manager, Lead, Participant. Per-VS access controls.



The whole engagement schedule built in an afternoon.

RPM — the Realtime Project Monitor. The Matrix decides who attends.

Activity templates arrive pre-loaded from the methodology library — each one already knows which Value Stream it covers, how many hours it takes, and which phase it belongs to. You sit down with RPM, drag a Discovery activity onto a calendar day, and the VS Matrix populates the attendees automatically. Resource hours roll up by person and by week. The Gantt timeline shows dependencies and the critical path to go-live. Slip surfaces in the weekly view the day it happens.



RPM — drag an activity from the library onto a calendar day. The event arrives with attendees and hours.

RPM

Realtime Project Monitor. Drag activities onto dates. 5 views.

VS Matrix

People x Value Streams. THE attendance source of truth.

Gantt + Critical Path

Dependencies and the path to go-live, visible end-to-end.

Resource Hours

Per person, per week. Over-allocation surfaces in the rollup.

Activity Templates

Pre-loaded by phase — Discovery, Design, Review, UAT.

Milestones + Tasks

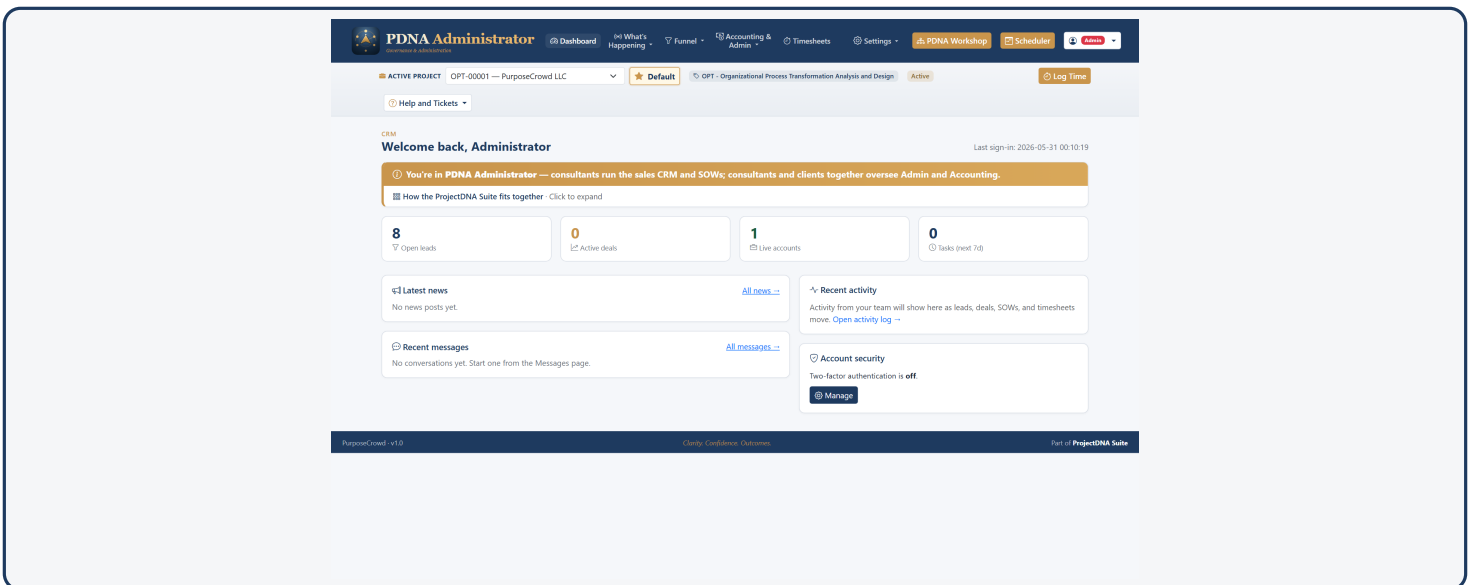
Major dates pinned. Free-form work alongside the methodology.



Sell, deliver, and bill from one place.

CRM, SOWs, PDNA Time, Approvals, Invoicing, Accounts, Audit — one connected workflow.

Inbound leads flow into the sales pipeline. Deals advance through stages — Discovery, Proposal, Negotiation, Won. The SOW pre-fills from the project methodology; every line maps to a real activity. Consultants log time on their phones through PDNA Time — an installable PWA. Project admins approve weekly in the Approvals page. Approved time flows to the invoice clerk panel, grouped by SOW with combine-mode controls. Issued invoices snapshot to the customer account. Every state change is audit-logged. The whole engagement, one system.



Administrator dashboard — funnel, recent activity, account security.

Sales Pipeline (CRM)

Leads, deals, accounts. Routing rules. Forecast.

Statements of Work

Pre-fill from methodology. Snapshot on issue. Contracts.

PDNA Time (phone)

Installable PWA. Tap a chip, pick the activity, done.

Approvals + Rates

Weekly review. Per-project rates flow into invoices.

Invoice Clerk Panel

Approved time by SOW. Combine-mode. Line editor. Snapshot.

Audit + Compliance

Every state change logged. Review takes minutes.



Months of structural work — already done.

Four production methodology libraries, tuned to the ERP platform.

Every engagement starts with a pre-built methodology library matched to your platform. Hundreds of process steps and thousands of requirements load on day one. You are not paying consultants to invent the structure — you are paying them to refine it to your business.

Library	VS	Stories	AC
MS Dynamics 365 F&SCM	34	2,511	7,533
Odoo ERP	34	2,504	7,512
Dynamics 365 CE + Power Platform	34	2,550	7,650
Dynamics 365 Business Central	34	2,391	7,173
PORTFOLIO TOTAL	140	10,312	31,173

INDUSTRY x PLATFORM ROADMAP

Vertical overlays: Healthcare, Financial, Public Sector.

Library roadmap: SAP S/4HANA, NetSuite, Salesforce, Acumatica, Sage Intacct. Each is hand-built by senior consultants who deployed that platform in production.



Three tools were three blind spots.

One suite makes everything traceable.

When the three layers of project execution share one data model, every surprise that used to emerge from misalignment goes away. The team in the workshop IS the team scheduled. The schedule for next month IS the resource forecast. The hours approved this week ARE the lines on next month's invoice. There is no reconciliation work because there is nothing to reconcile.

ONE PROJECT

Same Project record drives methodology depth in Workshop, the calendar in Scheduler, and the SOW in Administrator. Edit it once.

ONE TEAM

Project Admins, Managers, Leads, Participants — defined once on Workshop's Team page, used by every screen in the suite.

ONE TIME ENTRY

Activity templates carry default hours. Time entries link to templates. Templates link to value streams. The chain is visible end-to-end.

ONE INVOICE

Every line on an issued invoice traces back to an approved time entry, a scheduled session, a methodology activity, and a Statement of Work line.

Walk into every project with the methodology already built.