



# Transforming Strategy into Impact with Uppwise Edalio

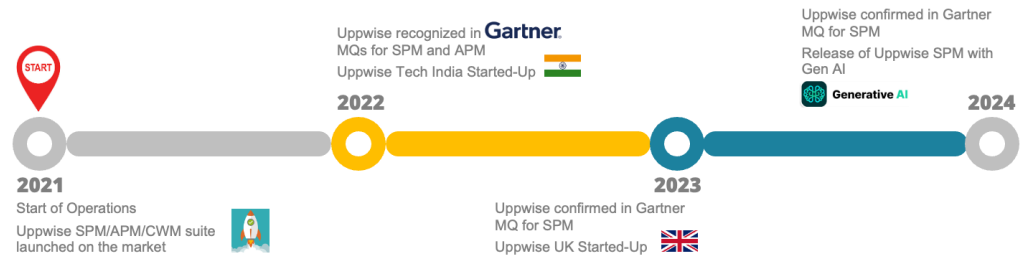
Bridging the Gap Between Vision and Execution

June 2025

# Who we are

## Company Bio

Operating from 2021, Uppwise is an Italian company specialized in the design, development, and delivery of Cloud Software Solutions for Strategic Portfolio Management (SPM) and Adaptive Project Management & Reporting (APMR).



Our operations are supported by offices in Italy (Monza and Cagliari) and India (New Delhi) with distribution, implementation and support channels worldwide.

## Vision

To be the forefront innovator in Strategic Portfolio Management, Uppwise envisions a future where organizations seamlessly execute and evolve their strategic initiatives. We aspire to redefine the landscape of strategic decision-making through our cutting-edge SPM cloud solutions, becoming the preferred choice for businesses seeking unparalleled insights and control over their portfolios.

## Gartner® 2024 Magic Quadrant for SPM

Value of Uppwise proposition has been also recognized by Gartner which included Uppwise as a niche player in 2021, 2022, 2023 and 2024 “Magic Quadrant for Strategic Portfolio Management”.



## Company Operations

Our operations are supported by offices in Italy (Monza and Cagliari), UK (London) and India (New Delhi) with distribution, implementation and support channels worldwide.

Globally we employ 33 people.



# Context Overview & Challenges

## Market Trends

Today's business environment is evolving at an unprecedented pace due to factors such as technological advancements, changes in consumer behavior, and competitive dynamics.

Markets face uncertainties, including economic fluctuations, regulatory changes, and unforeseen global events, impacting business strategies and operations.

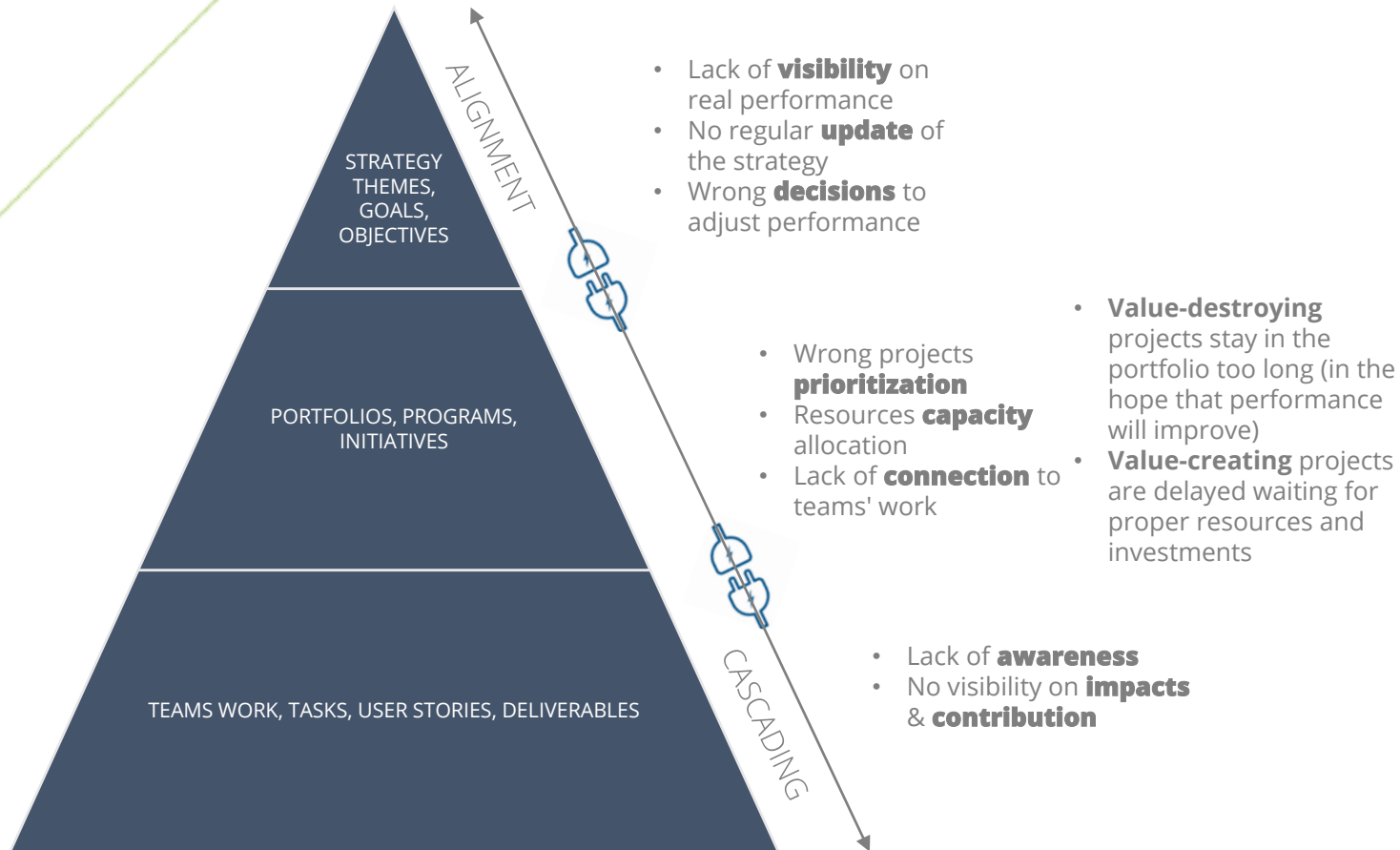
## Challenges

- Lack of alignment between strategy and execution
- Limited strategic adaptability resulting in difficulty adapting quickly to change and loss of competitiveness
- Failure to ensure investments remain aligned with evolving business strategies and market conditions
- Allocation of critical resources and investments to initiatives that are not delivering the expected benefits and no longer contributing to the organization's strategic intent
- Lack of effective decision making, resource allocation, and overall success in achieving organizational goals
- Insufficient value and performance measurement



# The Challenge

## Why Organizations Struggle with Strategy Execution



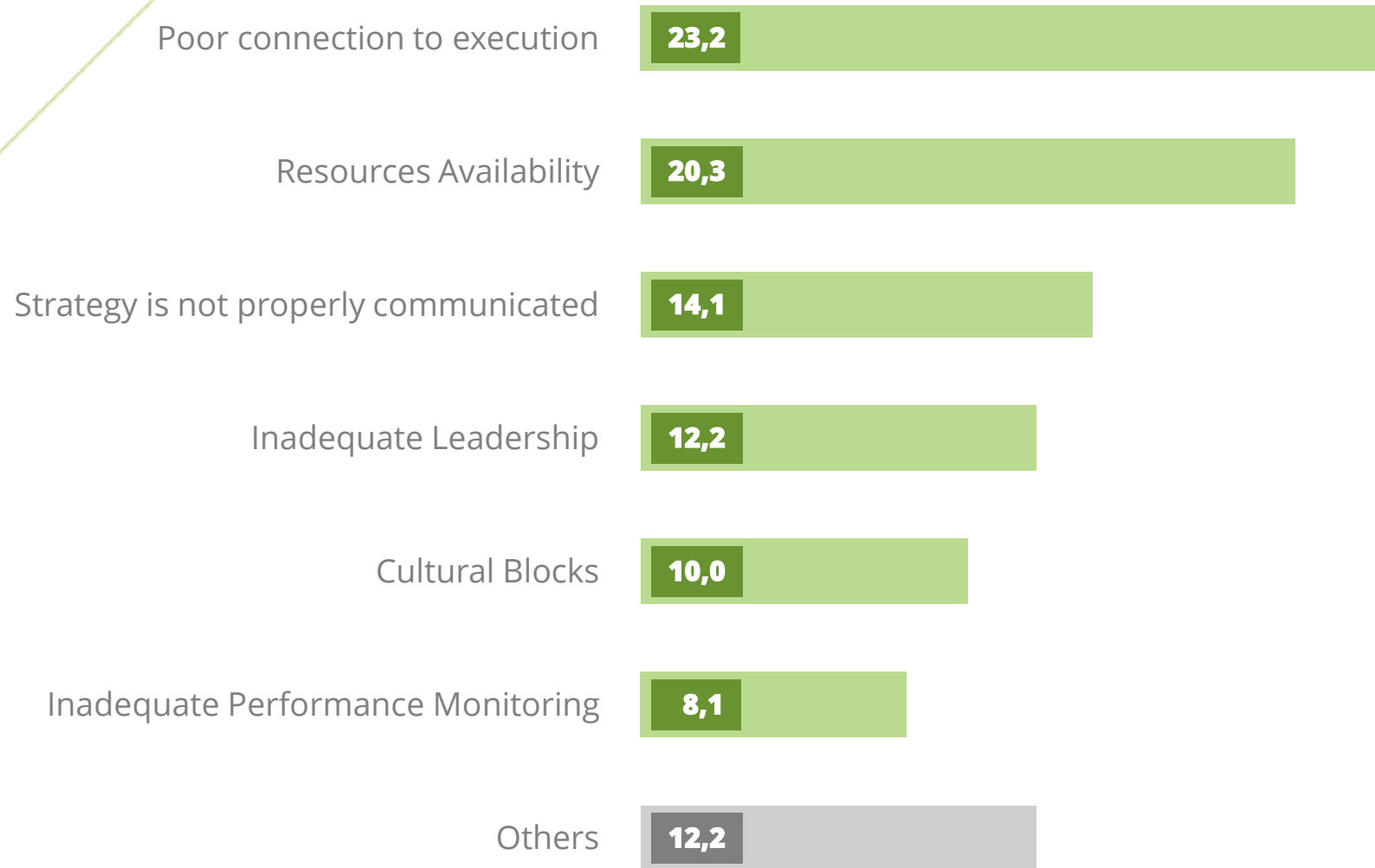
## Gartner

Many organizations pursue **investments** in their portfolios that **do not deliver recognized business value** and strategic outcomes. Much of **this can be attributable to a lack of alignment between** their enterprise strategies and portfolio management capabilities

Organizations that increase their strategic portfolio management capabilities also **increase their ability to rapidly launch and deliver new digital initiatives** and navigate through challenging disruptions.



# Bottlenecks to Strategy performance

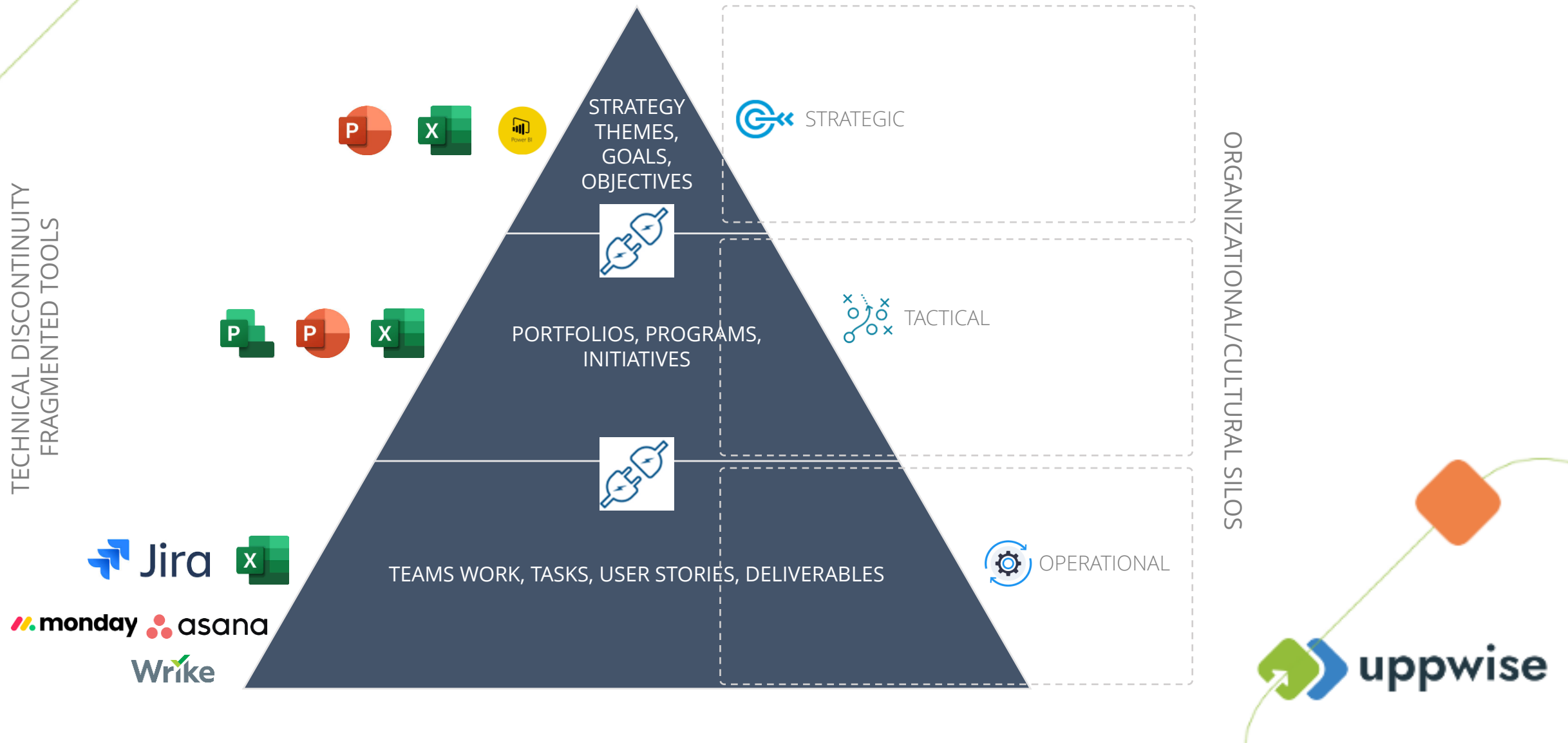


37%

AVERAGE STRATEGY  
PERFORMANCE LOSS

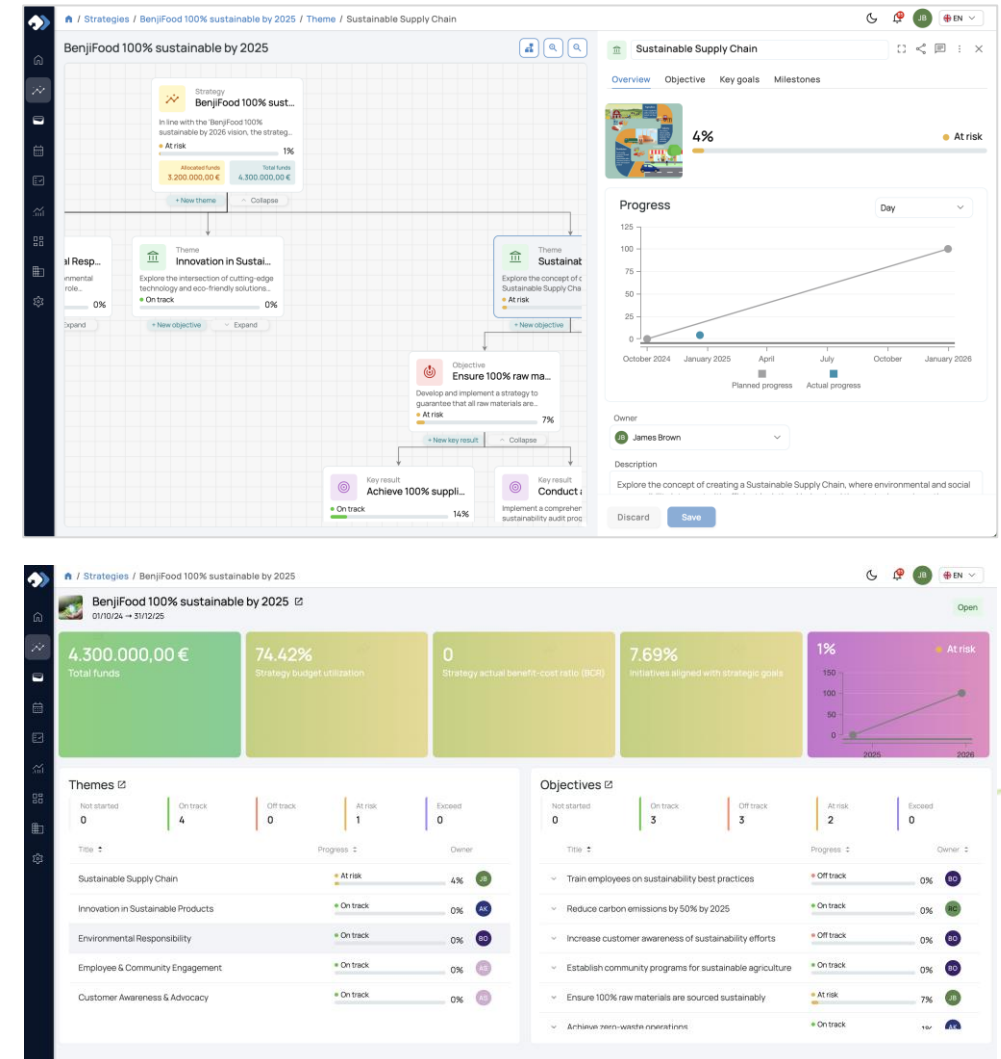


# Disruptions of Strategy to execution alignment



# The Solution: Uppwise Edalion

- Transforms Corporate Strategy into actionable elements such as Strategic Themes, Key Goals, Objectives, and Key Results, enabling effective monitoring of strategic intent execution.
- Enhances financial resource allocation through Value Stream Funding for maximum impact.
- Aligns portfolios and projects directly with strategic objectives to ensure coherence and focus.
- Prioritizes initiatives based on their contribution to Value Streams and alignment with strategic KPIs.
- Facilitates continuous KPI monitoring to evaluate execution outcomes and measure success.
- Provides real-time strategy execution monitoring to detect and address deviations from original objectives promptly.



# Introducing the SPM – Strategic Portfolio Management

- SPM is a set of business capabilities, processes and supporting technologies for continuously creating portfolios of strategic options that focus an organization's finite resources to execute enterprise-wide business strategy.
- The critical attributes of effective SPM are strategic alignment, value-driven decision making and ongoing portfolio flexibility.
- The life cycle makes SPM executable by stakeholders in an organization.
- The SPM life cycle expects disruptions, regardless of source, and establishes a state of preparedness.
- The framework relates strategic elements and activities to guide an effective response and adaptation that produce better outcomes.



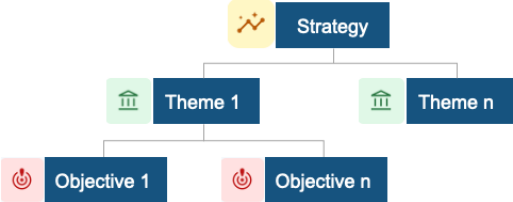
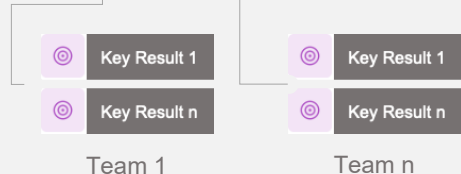
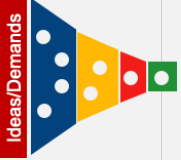
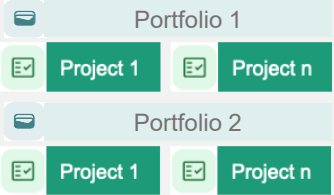

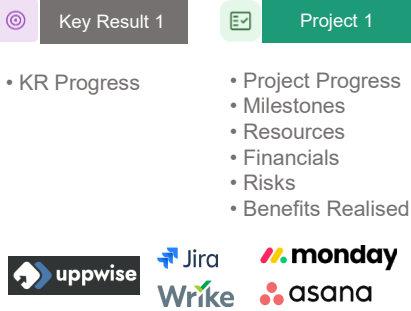





**SPM activities:** ■ Monitor outcome expectations ■ Produce results that generate value ■ Direct portfolio investment ■ Strategic alignment anchors





# Uppwise SPM lifecycle explained



	EXPECTATIONS SETTING	STRATEGY DEFINITION	IDEATION & DEMAND	PORTFOLIO COMPOSITION & PROJECTS PLANNING	EXECUTION MONITORING	KPIs MONITORING & BENEFITS REALIZATION
What we want to achieve	 KPI 1  KPI 2					
Which is the strategy to reach there						
What we need to realize to full-fill the strategy						
How the strategy is being executed						
What we are currently achieving						  KPI 1   KPI 2 

# Service Model

## Delivery Model

Most of our Customers deployments are SaaS on a “ Single Instance-Multi Tenant” architecture. For some of them, due to specific contractual requirements, we run on dedicated instances.

Few Customers are still on premise, but the new sales are all SaaS.

## Cloud Services (>99.9 % network Up-Time)

Cloud services are provided through Microsoft Azure datacenter based in North Europe, Central Europe and US

Our cloud architecture is designed to grant built-in high availability, disaster recovery and scalability

## Certifications

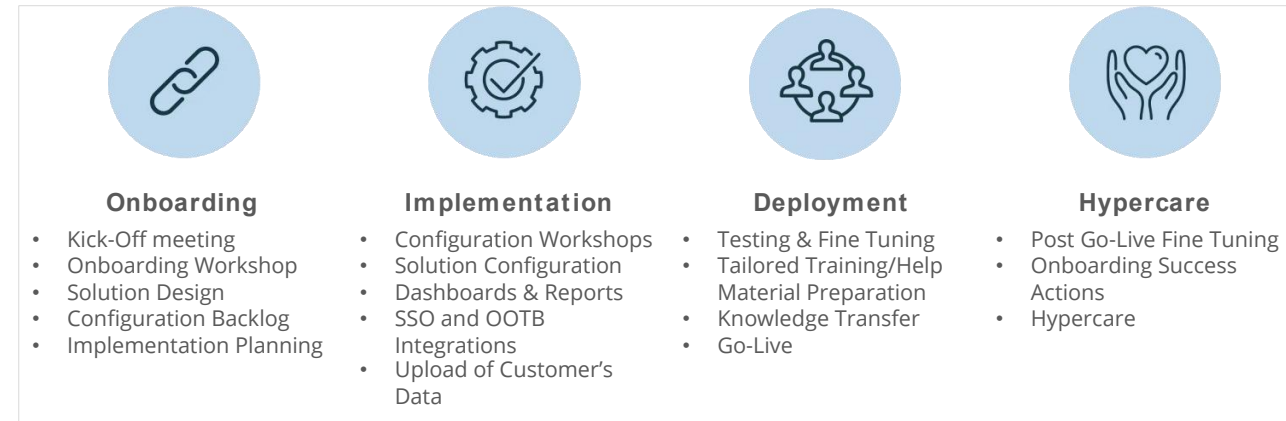
Uppwise is certified **ISO/IEC 27001:2013** with extended controls based on **ISO/IEC 27017:2015** and **ISO/IEC 27018:2019**



# On-Boarding & Implementation Services

- To maximize the value of Uppwise software for customers, our value proposition includes professional services for the implementation and post-implementation phases of our solutions.
- These services are managed by a dedicated team of experts with a strong PPM knowledge gained serving our clients on a global scale.
- Our team guides clients through their implementation journey from initial design and mapping of their processes, configuration, and validation of their solution to the personalized deployment plan. During implementation we apply Agile principles to focus on engaging client users to optimize the solution to their needs
- Services are provided following a standard delivery framework named “WisePath”, designed to accelerate the implementation and adoption of Uppwise in any organization by leveraging a pre-configured onboarding process.
- WisePath goal-based approach will help clients achieve tangible results in just a few weeks and that too at a fixed price, and is created in such a way, that it will be transient to the size of the implementation in the organization.

## WisePath for Uppwise Deployment



# From Vision to Execution: Edalio Strategy Structure

## **Strategic Themes:**

- Broad focus areas that define your organization's vision (e.g., innovation, operational efficiency, customer centricity).
- The foundation for aligning portfolios and projects.

## **Value Stream Funding:**

- Allocate budgets to Value Streams supporting Strategic Themes.
- Ensures investments are focused on delivering maximum value.

## **Portfolio and Project Alignment:**

- Connect projects to Strategic Objectives
- Prioritize initiatives based on contribution to Value Streams.
- Use real-time data to reassess and reallocate resources dynamically and, ultimately, re-balance Portfolios and re-align the Strategy

## **KPI Monitoring:**

- Measure success with defined KPIs tied to Strategic Themes.
- Enable course corrections through continuous performance tracking.



# Strategy & Execution

Strategy is what we plan to progress & grow, execution is what gets us there

Great strategy can't produce great results without great execution

