

Guided Investment Management



| **IFS** Copperleaf

Easily and efficiently create and refine candidate investments

Many organizations managing critical infrastructure struggle with the process of consistently developing business cases for investments.

Guided Investment Management (GIM) empowers organizations to quickly input candidate investments into IFS Copperleaf Portfolio™ and collaboratively refine them through their entire lifecycle. Users are walked through the creation of an initial assessment of both investment costs and value, using bespoke, guided interfaces tailored to the organization’s needs. If more than one project alternative exists (e.g., replacement or refurbishment) these options can be easily entered and assessed separately.

Once investments are entered, GIM supports users in their refinement, using the same guided interfaces to allow further additions and edits. This process ensures investments are created and managed with robust and accurate data, creating the foundation for a successful optimization.

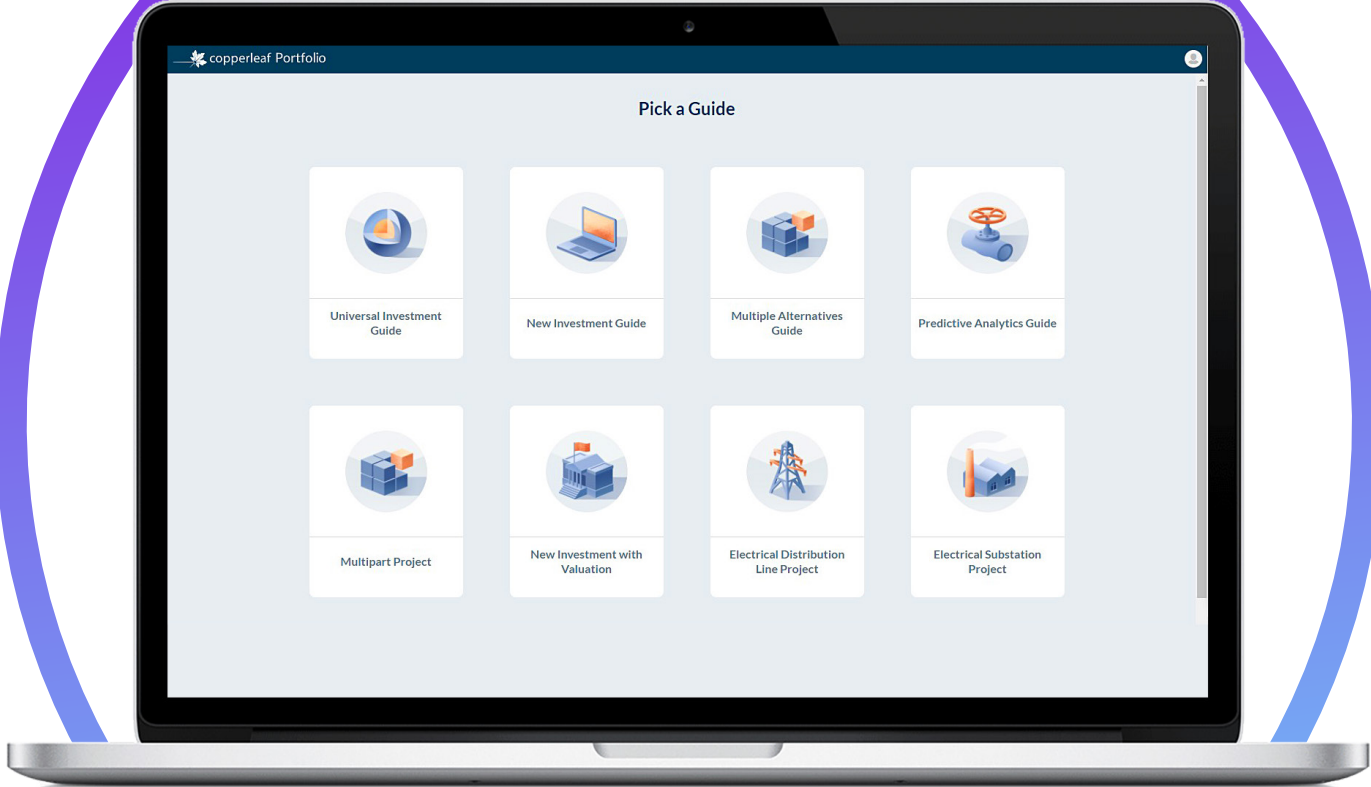
Save time and costs throughout the entire investment lifecycle

Organizations often spend hundreds of hours creating detailed business cases well before a project has even been approved, only for it to get deferred, heavily modified, or cancelled.

GIM enables organizations to quickly create and edit investments through a streamlined and guided process. It can be easily configured to simplify existing investment entry and development processes, thereby increasing efficiency throughout the entire investment lifecycle and reducing training requirements. Automated field entry and conditional field visibility expedite data entry, improving productivity and freeing your capital planners to spend their time on higher-value work.

“This is great—it will make creating an investment much easier.”

Investment Owner
Ameren Illinois



Democratize investment entry and management

GIM is easily deployed across large numbers of staff to crowdsource investment ideas and reduce the burden on the central planning team. Customizable entry guides and configurable data input validation ensures consistent investment entry and development regardless of a person’s familiarity with capital planning. GIM is accessible via tablet or desktop app, empowering mobile teams to enter and edit investments as soon as the need presents itself. GIM empowers your organization to equip capital planning teams with the onsite knowledge of field technicians or maintenance crews.

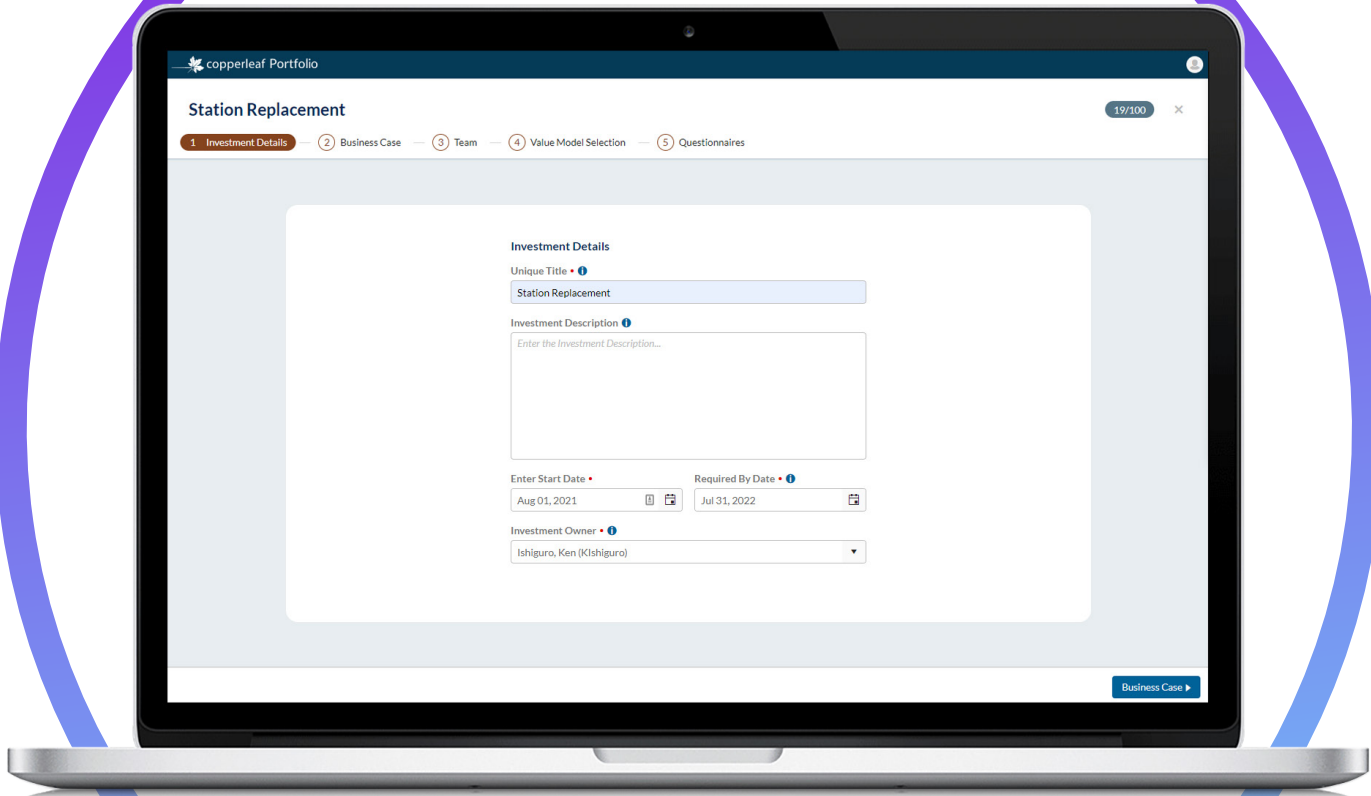
Increase confidence in business cases

GIM supports the creation of high-quality investments through configurable data input validation. Tailored guides are used for different types of work to ensure that the experience is suited to the task at hand. With the robust and validated investments delivered by GIM, organizations can be confident in their data, and therefore, their optimization results.

Get more out of IFS Copperleaf Portfolio

IFS Copperleaf Portfolio helps asset-intensive organizations decide where and when to invest in their businesses to optimize performance and manage risk. With GIM, you can accelerate your ability to build robust business cases through an intuitive and guided process, ensuring the most accurate investment and asset data are used in your estimates. The net result is that investments will require less time to create, review, and approve, and produce better results during optimization.

IFS Copperleaf Portfolio
Streamlines the creation of business cases, improves accuracy, and enables continuous improvement of your business planning processes.



About IFS



IFS is the world's leading provider of Industrial AI and enterprise software for hardcore businesses that service, power, and protect our planet. Our technology enables businesses which manufacture goods, maintain complex assets, and manage service-focused operations to unlock the transformative power of Industrial AI™ to enhance productivity, efficiency, and sustainability.

Within our single platform, our industry specific products are innately connected to a single data model and use embedded digital innovation so that our customers can be their best when it really matters to their customers—at the Moment of Service™.

The industry expertise of our people and of our growing ecosystem, together with a commitment to deliver value at every single step, has made IFS a recognized leader and the most recommended supplier in our sector. Our global team of over 7,000 employees every day live our values of agility, trustworthiness, grit and collaboration in how we support thousands of customers.

Learn more about how our enterprise software solutions can help your business today at ifs.com.

#MomentOfService