SmartSuite

Project & Portfolio Management › Strategy & Planning · Datasheet

Project Intake and Approvals

Capture, evaluate, and approve project requests with structured workflows, prioritization, and real-time visibility across your pipeline.

Specification

SKU	PPM-STR-INT
Solution area	Project & Portfolio Management
Works with	Portfolio Management, Program Management, Project Management, Strategy & OKR Management, Resource Management, Project Financial Management
Updated	Sep 26, 2026
Datasheet	v1.0

What it is

Project Intake & Approvals is the process of capturing, evaluating, and approving project requests in a structured and governed way. It enables organizations to ensure that only the most valuable and aligned initiatives are prioritized and executed.

SmartSuite’s Project Intake & Approvals software provides a structured, scalable system to capture, evaluate, and approve project requests across your organization. It enables teams to move from ad hoc project initiation to a governed, transparent intake process aligned with strategic priorities.

With a centralized intake system, all requests are submitted through structured forms, ensuring consistent and complete information.

Core capabilities

Structured Intake Forms

Capture project requests with consistent, standardized data.

Request Evaluation & Scoring

Assess initiatives based on value, impact, and priority.

Approval Workflow Management

Route requests through configurable approval processes.

Pipeline Visibility & Tracking

Monitor all requests from submission through approval.

Strategic Alignment Integration

Link requests to OKRs and strategic initiatives.

Resource & Capacity Consideration

Evaluate feasibility based on available resources.

Financial Impact Assessment

Assess cost and investment requirements for projects.

Cross-Team Collaboration

Enable stakeholders to review and provide input.

Automation & Notifications

Automate routing, approvals, and updates.

The Project Intake Lifecycle

Step 1
Submit Request
Capture project ideas and requests through structured forms.

Step 2
Evaluate & Score
Assess value, impact, and feasibility.

Step 3
Review & Approve
Route through approval workflows and governance.

Step 4
Prioritize & Select
Align approved projects with portfolio priorities.

Step 5
Transition to Execution
Move approved projects into program or project workflows.

Who it is for

Portfolio Manager
Oversees prioritization and selection of initiatives.

Program Manager
Evaluates and coordinates project requests.

Strategy Leader
Aligns initiatives with strategic goals.

Finance Leader
Assesses cost and investment impact.

Operations Leader
Evaluates feasibility and execution readiness.

Executive Leadership
Approves and prioritizes initiatives.

Works with

Portfolio Management
Prioritizes and selects initiatives.

Program Management
Coordinates approved initiatives across teams.

Project Management
Executes approved work.

Strategy & OKR Management
Ensures alignment with business goals.

Resource Management
Evaluates capacity and availability.

Project Financial Management
Tracks costs and investment impact.

Built differently. Project Intake and Approvals runs on the same relational platform as every other SmartSuite product, so its records link to the risks, controls, issues and evidence they affect, and every report reflects the current state rather than a copy.

See it working with your data
Ask your SmartSuite account team for a demo of Project Intake and Approvals configured for your organization, or read the full product entry at smartsuite.com/products/project-intake-and-approvals.

Schedule a demo