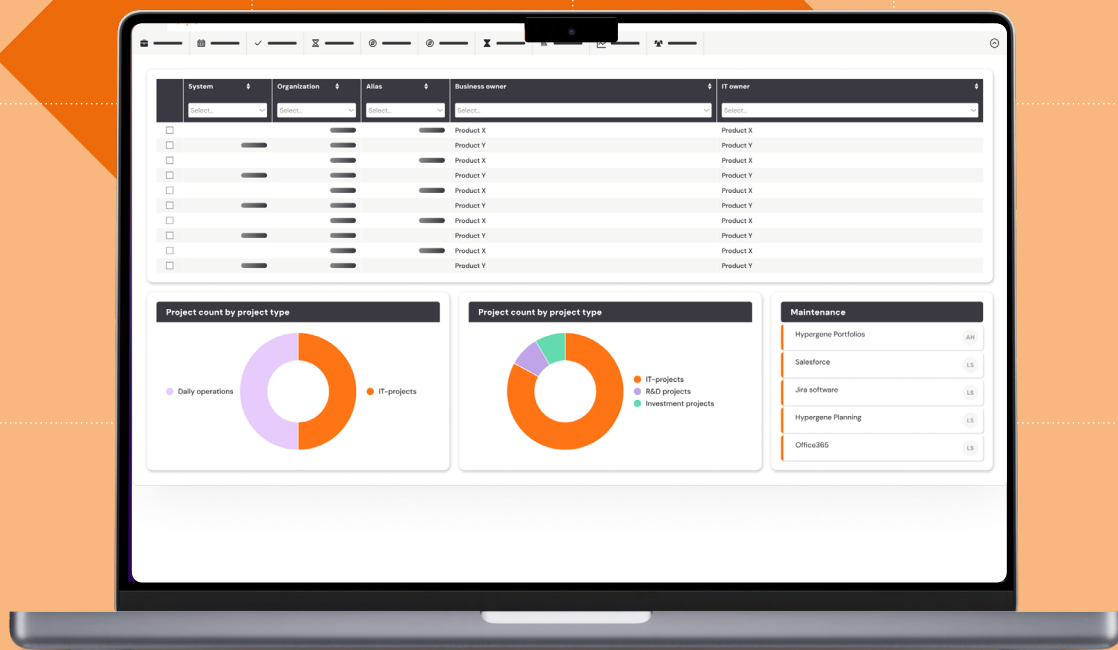




AI Wizard

*A Smart and Secure AI Solution
for Portfolio Management*



AI Wizard

Imagine everything you do in Hypergene Portfolios – only faster. With our built-in AI, you can speed up data searches, generate summaries, detect risks, and uncover insights you might have missed. And this is just the beginning.

AI Wizard is more than a smart assistant – it's a secure and customizable solution designed to support your portfolio processes in a controlled way. It connects directly to your portfolio data, respects all existing access rights, and is always implemented together with you, based on your organization's needs and security requirements.

How Can AI Help Me?

We know that AI can feel a bit overwhelming. That's why we've made it simple and safe to get started – with three powerful tools built into Hypergene Portfolios:

- **AI Search** – find what you need, instantly
- **AI Summary** – turn complex content into clear takeaways
- **AI Chat** – ask your questions in plain language

Here are some tasks our AI can help you with:

- Deviation detection and management
- Identify interesting trends and recurring patterns
- Reach better situation awareness
- Summarize lessons learned
- Find synergies across the organization
- Remove overlapping actions
- Risk detection
- Strategic alignment and prioritization
- Leverage insights from previous projects
- Identify opportunities for collaboration across departments
- Ensure projects align with strategic priorities

How Do I Use It?

Interacting with AI might feel unfamiliar at first – but once you try, it quickly becomes a valuable daily assistant. Read on to find some examples of questions, or “prompts”, that you can write to our AI to get the information you need.

Portfolio Performance

- Which projects are currently off-track regarding scope, schedule, or budget, and why?
- Are there any projects with consistent delays or cost overruns? What trends can we identify?

Risk and Issue Management

- Which projects are at the highest risk of failure, and what can we do to turn them around?
- Are there any dependencies between projects that could create company-wide risks?

Strategic Alignment

- Which projects contribute the most to our strategic objectives, and are they adequately prioritized?
- Are there projects in the portfolio that no longer align with our updated strategy?

Forecasting and Scenario Planning

- How are current trends in project performance likely to impact future project outcomes?
- What scenarios should we plan to prepare for external changes?

AI can also support scenario planning by suggesting alternative approaches based on historical data, identifying portfolio-wide risks before they escalate, and highlighting strategic gaps that might otherwise go unnoticed.

The Implementation Process

We will never force AI features on any of our customers. Our AI solution is implemented on a case-by-case basis, through a collaborative process between our dedicated team and the customer.

During the planning phase, we work with you to define exactly which data fields and content from your portfolio’s data model will be used by the AI. Sensitive or restricted data can be excluded from processing entirely, ensuring full compliance with your organization’s security and privacy policies.

The AI solution always respects existing access rights within the portfolio. Only users with permission to view certain data can include it in their AI queries.

In addition to these safeguards, end-users have granular control over what information is shared with the AI for each use case. They can select specific data to include and must always review and, if necessary, edit the AI's response before it is saved to the database.

Data Privacy and Security

Hypergene Portfolio AI Wizard is based on the Microsoft Azure OpenAI language model and is located within the EU/EEA region. Each customer gets a dedicated, isolated AI instance created specifically for their organization.

This way, we can ensure that the customer's data is not used for further training of the language model and that data is not transferred between customers. Queries sent to the AI and its responses are logged in the customer's database. These logs are used for error correction, detecting malicious use, and further development.

Our entire team is trained in secure AI implementation, with data protection and compliance as top priorities. We design every deployment to meet strict requirements around GDPR, ISO 27001, and other relevant security standards.

AI in Action – What It Can Do

Here are just a few examples of how organizations use AI Wizard today:

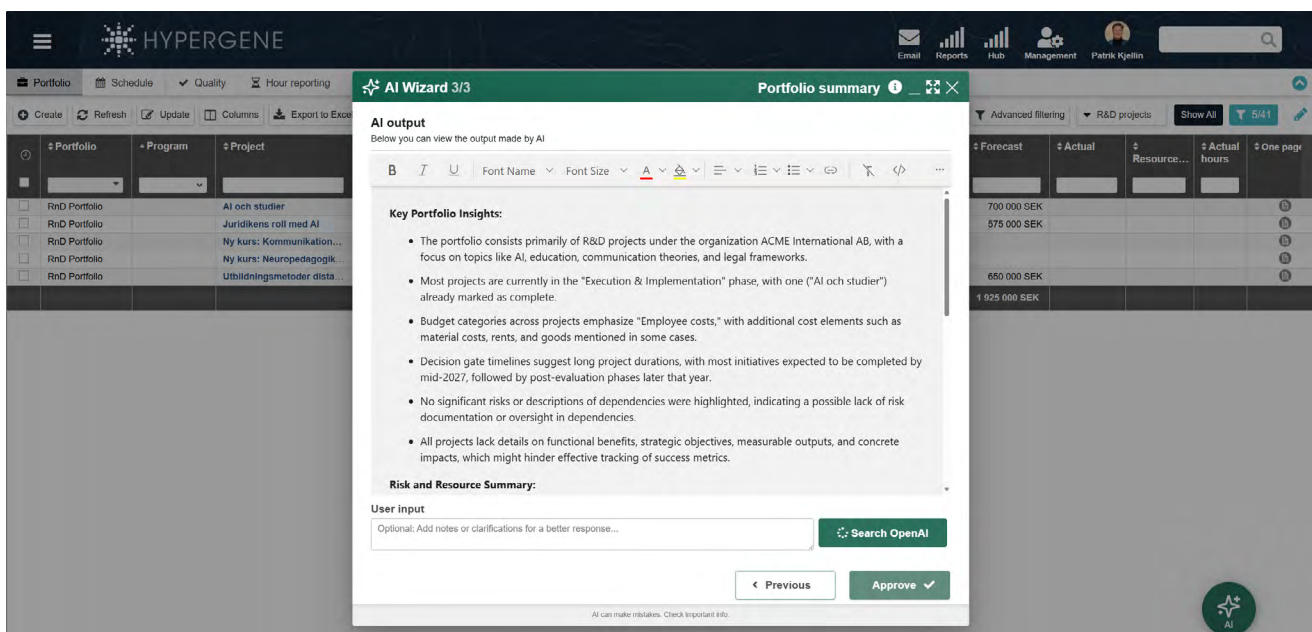
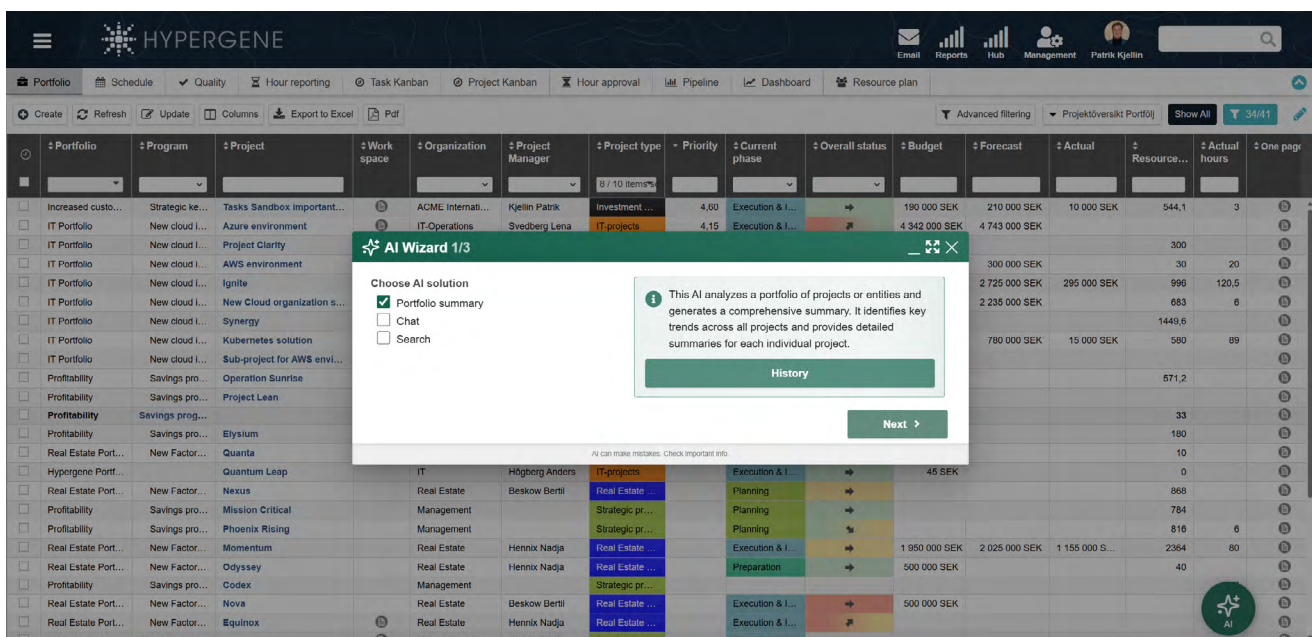
- Detect anomalies and early warning signs across projects or portfolios
- Identify recurring risks and their root causes
- Recommend tailored mitigation actions based on historical outcomes
- Spot duplicated initiatives and propose consolidation opportunities
- Analyze portfolio alignment with strategic objectives
- Support prioritization by scoring projects based on impact and risk
- Enable interactive conversations with your portfolio data via AI Chat
- Automatically suggest next steps, create tasks, and flag milestones

First Steps

Here's how the UI will look once you have implemented AI into your portfolio. If you want more examples of how the AI Wizard works, don't hesitate to ask!

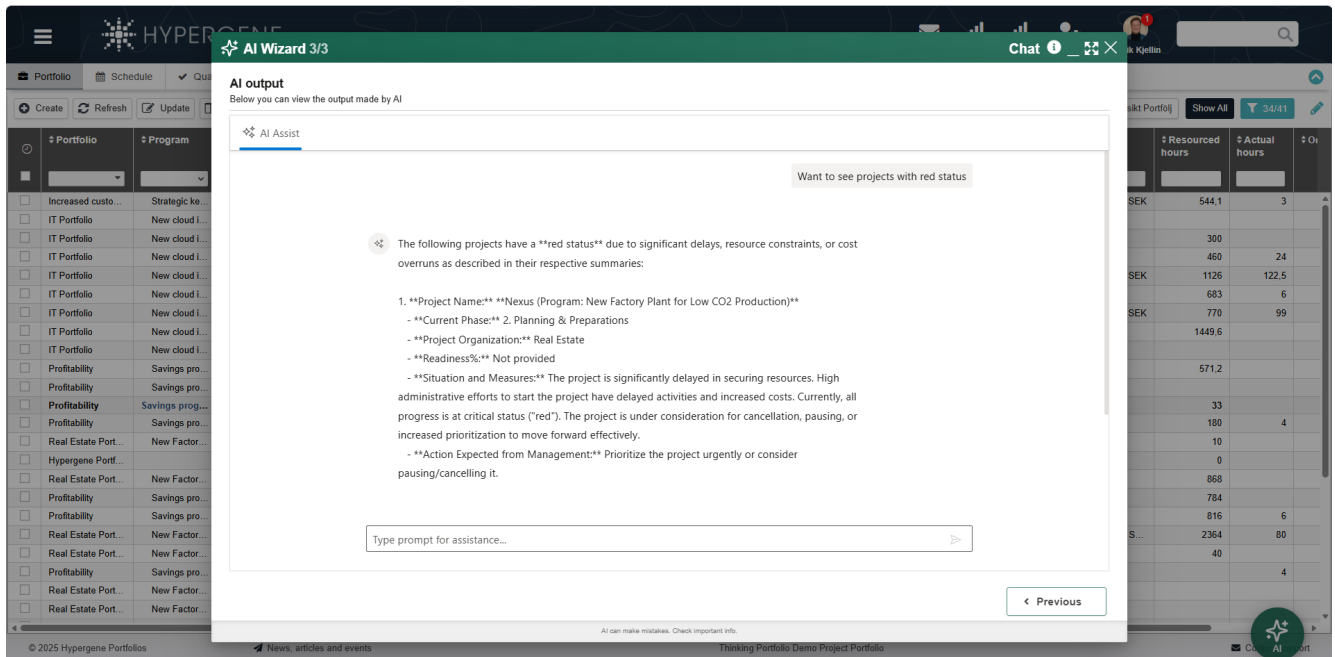
AI Summary

- Launch the AI Wizard from the bubble icon, then select Summary
- Pick which data to include or exclude, and type in your prompt
- Your AI summary is ready! You can always add more instructions to get exactly the information you need.



AI Chat

- Launch the AI Wizard from the bubble icon, then select Chat
- Head into the chat window and start interacting with the AI!
- You can even predefine standard questions to make it easier for users to start conversations.



To sum up

AI Wizard turns complex portfolio data into actionable insights — securely, intelligently, and on your terms. By combining powerful automation with full control over data access, governance, and strategic alignment, it helps you work faster, see risks earlier, and make better decisions.

Whether you're optimizing resources, forecasting scenarios, or ensuring that every initiative supports your strategy, AI Wizard becomes more than a tool — it's a trusted partner that helps you navigate complexity with confidence.



Hypergene Portfolios

Founded in Finland in 2001, Hypergene Portfolios (former Thinking Portfolio) today supports enterprise and public sector organizations across the globe. Our modular and powerful platform is used for managing projects, strategy, risks, IT systems, sustainability initiatives, and so much more.

With over 500,000 users globally, and an NPS score of 65, Hypergene Portfolios is trusted by customers who value the platform's ease of use, configurability, and commitment to long-term success. We help organizations align strategy with execution, improve governance, deliver measurable outcomes – and make better decisions.

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