



Enterprise PMO, Portfolio Management & Digital Transformation

Professional Services & Corporate Brochure

TOLO Consulting LLC



OVERVIEW

Enterprise PMO, Portfolio Management & Digital Transformation

Professional Services & Corporate Brochure

TOLO Consulting LLC



STRATEGIC LEADERSHIP

Executive-level guidance that aligns strategy, people, processes, and technology to drive results.



PORTFOLIO EXCELLENCE

Improve portfolio visibility, prioritize the right work, and maximize resource capacity.



DIGITAL TRANSFORMATION

Modernize operations with automation, Microsoft technologies, and data-driven decision making.



MEASURABLE OUTCOMES

Deliver stronger governance, improved efficiency, and sustainable organizational growth.



TRUSTED PARTNER

Hands-on engagement from a senior consultant with 15+ years of proven success.



STRATEGY. GOVERNANCE. TECHNOLOGY. RESULTS.

Helping organizations transform strategy into execution.



MEET YOUR CONSULTANT

Every engagement is personally led by **Lois Oler, PMP®, PMI-ACP®, Six Sigma Black Belt**, with more than 15 years of experience leading enterprise PMO, portfolio management, digital transformation, and regulated medical device initiatives. Lois partners directly with clients from strategy through execution. Clients benefit from senior-level expertise on every engagement without being handed off to junior consultants.



Project Management
Professional



Agile Certified
Practitioner



Six Sigma
Black Belt



15+
Years Experience



Executive-Level
Leadership



SENIOR EXPERTISE. STRATEGIC LEADERSHIP. MEASURABLE RESULTS.

Direct access to executive-level expertise from strategy through execution.

EXECUTIVE SUMMARY



TOLO Consulting LLC is a boutique management consulting firm specializing in enterprise Portfolio and Project Management (PPM), PMO transformation, digital modernization, and business process optimization. We partner with organizations to strengthen governance, improve executive visibility, optimize resource capacity, and successfully deliver strategic initiatives.



TOLO Consulting combines deep business expertise with modern Microsoft technologies to help organizations transform how work is planned, governed, executed, and measured. From executive portfolio strategy to enterprise platform implementations, TOLO delivers practical solutions that improve decision-making, increase operational efficiency, and enable sustainable organizational growth.



Whether modernizing an existing PMO, implementing enterprise portfolio management solutions, or improving executive reporting, **TOLO Consulting** provides trusted leadership from strategy through execution.



Executive Visibility

Real-time insight into portfolios, programs, resources, and risks.



Improved Governance

Stronger frameworks, stage gates, and decision-making.



Better Portfolio Decisions

Prioritize the right work that drives strategic business outcomes.



Standardized Processes

Consistent, repeatable processes that increase efficiency and quality.



Resource Optimization

Optimize capacity, allocation, and utilization across the enterprise.



Automated Reporting

Reduce manual work with automated dashboards and executive reporting.



Reduced Manual Effort

Eliminate rework, spreadsheet sprawl, and disconnected data.



Faster Executive Decisions

Timely, accurate data empowers confident decision-making.



Stronger Organizational Maturity

Build PMO maturity and sustainable operating capability.



STRATEGY. GOVERNANCE. TECHNOLOGY. RESULTS.

Measurable outcomes that drive long-term value.

WHY TOLO CONSULTING



Why Choose TOLO Consulting

- Organizations partner with TOLO Consulting because successful transformation requires more than implementing technology—it requires experienced leadership, practical governance, and measurable business outcomes.
- TOLO Consulting brings more than 15 years of experience leading enterprise PMO transformation, portfolio management, digital modernization, and regulatory initiatives across Fortune 500 medical device, biotechnology, pharmaceutical, and manufacturing organizations.
- Every engagement is personally led by a senior consultant, providing clients with direct access to executive-level expertise from strategy through implementation.



Our Approach

TOLO Consulting aligns business strategy, governance, technology, and organizational change to help clients:

- ✓ Strengthen enterprise PMOs
- ✓ Accelerate executive decision-making
- ✓ Improve portfolio visibility
- ✓ Modernize business processes
- ✓ Optimize resource capacity
- ✓ Deliver strategic initiatives successfully
- ✓ Standardize governance
- ✓ Increase organizational maturity

Unlike firms that begin with software configuration, TOLO begins with business objectives—ensuring every technology solution supports long-term organizational success.



TOLO BY THE NUMBERS



15+

YEARS CONSULTING

Providing senior-level leadership and strategy consulting since 2008.



10+

ENTERPRISE PMO / PPM IMPLEMENTATIONS

Successfully designed and delivered enterprise PMO and portfolio solutions.



\$800M+

CAPITAL PROGRAMS LED

Managing complex, strategic investments and enterprise integration initiatives.



GLOBAL PROGRAM LEADERSHIP

Led cross-functional teams and programs across multiple continents.



FORTUNE 500 CLIENT EXPERIENCE

Trusted advisor to leading medical device, pharmaceutical, and biotechnology companies.



FDA | PMA | EU MDR

REGULATED PROGRAMS
Extensive experience in FDA, PMA, EU MDR, ISO 13485, and QMS compliance.



POWER BI EXECUTIVE DASHBOARDS

Designed executive dashboards that drive data-informed decisions.



MICROSOFT SOLUTIONS

PLATFORM EXPERTISE
Expert in Microsoft 365, Power Platform, Teams, SharePoint and OnePlan.



PROCESS EXCELLENCE

DRIVING EFFICIENCY
Applying Lean, Six Sigma and best practices to improve processes and performance.



CERTIFIED EXCELLENCE

PMP® | PMI-ACP® | SSBB
Commitment to continuous improvement and professional excellence.



INDUSTRY EXPERTISE

REGULATED & COMPLEX
Deep expertise in medical device, biotech, pharmaceutical, and manufacturing industries.



SENIOR-LED ENGAGEMENTS

DIRECT ACCESS
Every engagement is led by a senior consultant—never handed off to juniors.



STRATEGY. GOVERNANCE. TECHNOLOGY. RESULTS.

Transforming strategy into measurable business outcomes.

INDUSTRY EXPERTISE

Deep industry knowledge. Proven results. Measurable impact.



MEDICAL DEVICES

Supporting innovation and compliance in a highly regulated environment.

TYPICAL ENGAGEMENTS

- PMO Establishment & Transformation
- FDA, PMA, EU MDR Program Support
- Design Controls & Quality Systems
- Validation, Serialization & Packaging Programs
- Post-Market & Regulatory Reporting



PHARMACEUTICALS

Driving portfolio excellence and operational efficiency across the product lifecycle.

TYPICAL ENGAGEMENTS

- Portfolio Governance & Prioritization
- Program & Project Management
- Regulatory & Compliance Initiatives
- Launch Readiness & Change Management
- Resource Planning & Capacity Management



BIOTECHNOLOGY

Enabling research, development, and commercialization through effective program execution.

TYPICAL ENGAGEMENTS

- R&D Portfolio Management
- Clinical Development Programs
- Validation & Quality Systems
- Collaborative Tools & Process Design
- Cross-Functional Program Leadership



MANUFACTURING

Optimizing operations and delivering transformation across the enterprise.

TYPICAL ENGAGEMENTS

- Digital Transformation Initiatives
- Operational Excellence & Process Improvement
- ERP & System Implementations
- Supply Chain & Demand Management
- Change Management & Adoption



HEALTHCARE

Improving outcomes through better visibility, collaboration, and data-driven decisions.

TYPICAL ENGAGEMENTS

- Enterprise PMO & Governance
- Business Intelligence & Reporting
- Operational Dashboards & Analytics
- Process Automation & Workflow Design
- Strategic Planning & Execution Support



R&D / RESEARCH

Accelerating innovation with strong portfolio management and execution discipline.

TYPICAL ENGAGEMENTS

- Portfolio & Project Management
- Stage Gate & Innovation Governance
- Resource Planning & Utilization
- Technology Roadmapping
- Data Insights & Performance Tracking



Across industries, TOLO Consulting delivers the expertise and leadership organizations need to **transform strategy into measurable results.**



TOLO BY THE NUMBERS

Experience. Expertise. Impact.

Delivering measurable results for industry leaders.



15+

YEARS CONSULTING

Providing executive leadership and strategic consulting since 2009.



10+

ENTERPRISE PMO / PPM IMPLEMENTATIONS

Successfully designed and delivered enterprise PMO and portfolio solutions.



\$800M+

CAPITAL PROGRAMS LED

Managed complex capital investment and systems integration initiatives.



GLOBAL

PROGRAM LEADERSHIP

Led cross-functional teams and programs across multiple countries.



FORTUNE 500

CLIENT EXPERIENCE

Trusted advisor to leading medical device, pharmaceutical and biotechnology companies.



FDA | PMA | EU MDR

REGULATED PROGRAMS

Extensive experience in FDA, PMA, EU MDR, ISO 13485, and QMS compliance.



POWER BI

EXECUTIVE DASHBOARDS

Developed executive reporting and analytics that drive data-informed decisions.



MICROSOFT SOLUTIONS

PLATFORM EXPERTISE

Expert in Microsoft 365, Power Platform, PWA, SharePoint and OnePlan.



PROCESS EXCELLENCE

DRIVING EFFICIENCY

Applying Lean, Six Sigma and best practices to optimize processes and performance.



CERTIFIED EXCELLENCE

PMP® | PMI-ACP® | SSBB

Commitment to continuous improvement and professional excellence.



STRATEGY. GOVERNANCE. TECHNOLOGY. RESULTS.

Transforming strategy into measurable business outcomes.



REPRESENTATIVE EXPERTISE

Deep Expertise. Practical Solutions. Measurable Results.



1. ENTERPRISE PMO LEADERSHIP

Establishing PMOs, governance models, portfolio oversight, operating models, organizational maturity, and executive steering committees.



2. PORTFOLIO & PROGRAM MANAGEMENT

Managing enterprise portfolios, strategic programs, cross-functional initiatives, dependencies, risks, and executive reporting.



3. GOVERNANCE & STAGE GATES

Developing governance frameworks, approval workflows, prioritization models, decision boards, and lifecycle management.



4. RESOURCE CAPACITY PLANNING

Demand management, allocation versus utilization, forecasting, workforce planning, and executive resource reporting.



5. BUSINESS PROCESS IMPROVEMENT

Business process analysis, operating model design, Lean methodologies, process optimization, and organizational efficiency.



6. DIGITAL TRANSFORMATION

Modernizing business operations through process automation, collaboration technologies, cloud platforms, and Microsoft solutions.



7. POWER BI & EXECUTIVE REPORTING

Executive dashboards, KPI scorecards, portfolio reporting, resource analytics, financial reporting, and business intelligence.



8. POWER PLATFORM AUTOMATION

Power Automate, Power Apps, workflow automation, approvals, notifications, and process digitization.



9. SHAREPOINT SOLUTIONS

Document management, collaboration portals, workflow integration, knowledge management, and project workspaces.



10. MICROSOFT 365

Microsoft Teams, SharePoint Online, Project Online, Planner, OneDrive, Power Platform, and enterprise collaboration.



11. FDA / ISO 13485 / EU MDR

Medical device regulations, Design Controls, PMA, Quality Systems, DHF remediation, validation, and compliance initiatives.



12. GLOBAL DEPLOYMENTS

Global PMO transformations, international stakeholder coordination, enterprise rollouts, multi-site implementations, and organizational adoption.



STRATEGY. GOVERNANCE. TECHNOLOGY. RESULTS.

Delivering enterprise transformation and measurable business outcomes.



REPRESENTATIVE ENGAGEMENTS

Proven Leadership. Measurable Impact. Lasting Results.

1	 ENTERPRISE PMO TRANSFORMATION	CHALLENGE  Limited portfolio visibility, inconsistent governance, and fragmented project delivery.	TOLO DELIVERED ✓ PMO governance framework ✓ Standardized project delivery ✓ Executive dashboards ✓ Resource optimization	BUSINESS OUTCOMES  • Improved portfolio visibility • Stronger executive reporting • Standardized delivery • Increased PMO maturity
2	 ENTERPRISE PORTFOLIO MODERNIZATION	CHALLENGE  Manual reporting, limited resource planning, and inconsistent prioritization.	TOLO DELIVERED ✓ Portfolio governance model ✓ Executive dashboards ✓ Capacity planning & forecasting ✓ Portfolio prioritization	BUSINESS OUTCOMES  • Better executive decisions • Improved forecasting accuracy • Resource transparency • Aligned strategic initiatives
3	 GLOBAL DIGITAL TRANSFORMATION	CHALLENGE  Manual processes, siloed systems, and limited digital capabilities.	TOLO DELIVERED ✓ Business process improvement ✓ Automation & workflow design ✓ Microsoft 365 & Power Platform ✓ Executive reporting	BUSINESS OUTCOMES  • Modernized operations • Increased efficiency • Standardized processes • Enhanced collaboration
4	 MEDICAL DEVICE REGULATORY PROGRAMS	CHALLENGE  Complex regulatory requirements, global compliance, and audit readiness.	TOLO DELIVERED ✓ FDA, PMA, EU MDR support ✓ ISO 13485 & Quality Systems ✓ Validation, serialization, packaging ✓ Global compliance leadership	BUSINESS OUTCOMES  • Regulatory readiness • Successful submissions • Audit & inspection readiness • Reduced compliance risk
5	 EXECUTIVE REPORTING & ANALYTICS	CHALLENGE  Manual reporting, delayed insights, and limited KPI visibility.	TOLO DELIVERED ✓ Power BI executive dashboards ✓ Portfolio & resource analytics ✓ Financial & risk reporting ✓ KPI scorecards & metrics	BUSINESS OUTCOMES  • Real-time visibility • Faster decision-making • Improved performance tracking • Executive confidence



TOLO Consulting partners with organizations to solve complex challenges, drive measurable results, and build lasting enterprise capabilities.



CORE CONSULTING SERVICES

End-to-end services that align strategy, people, processes, and technology to drive measurable results.



ENTERPRISE PMO SERVICES

- PMO Assessments
- PMO Design
- Governance Frameworks
- Portfolio Prioritization
- Stage Gate Development
- Executive Steering Committees



PORTFOLIO & PROGRAM MANAGEMENT

- Program Leadership
- Portfolio Management
- Strategic Roadmaps
- Project Recovery
- Resource Planning
- Executive Reporting



DIGITAL TRANSFORMATION

- Business Process Improvement
- Organizational Change Management
- Operating Model Design
- Technology Modernization



BUSINESS INTELLIGENCE

- Executive Dashboards
- KPI Development
- Data Visualization
- Portfolio Analytics



MICROSOFT SOLUTIONS

- Microsoft 365
- SharePoint
- Power BI
- Power Automate
- Power Apps
- Project Online
- OnePlan



STRATEGY. GOVERNANCE. TECHNOLOGY. RESULTS.

Helping organizations transform strategy into execution.



TOLO CONSULTING LLC

Enterprise PMO • Portfolio Management
Business Intelligence • Digital Transformation

BUSINESS CAPABILITIES



Portfolio
Governance



Executive
Reporting



Resource
Management



PMO
Transformation



Process
Automation



Strategic
Delivery

ENABLING TECHNOLOGIES



Microsoft 365



Power BI



Power Automate



SharePoint



Power Apps



Microsoft Teams

OnePlan OnePlan



Project Online



Project Server



Jira



Azure DevOps



SAP



Smartsheet



Excel



SQL / Data Sources

BUSINESS OUTCOMES



Executive
Visibility



Better
Governance



Resource
Optimization



Faster
Decision Making



Process
Standardization



Digital
Transformation



REPRESENTATIVE EXPERIENCE

Trusted by Leading Medical Device, Biotechnology & Pharmaceutical Organizations



Johnson & Johnson



PART OF THE JOHNSON & JOHNSON FAMILY

DePuy Synthes



Olympus



Zimmer Biomet



Integra LifeSciences



Cook Medical



Gilead Sciences



West Pharmaceutical Services



United Therapeutics

SUPPORTING ENTERPRISE INITIATIVES ACROSS THE PRODUCT LIFECYCLE



PMO
Transformation



Portfolio
Management



FDA & Regulatory
Compliance



PMA / 510(k)
Programs



Global Program
Leadership



Digital
Transformation



Business
Intelligence



Microsoft
Solutions



Process
Improvement



Enterprise Leadership. Trusted Partnerships. Proven Results.

Helping organizations transform strategy into measurable business outcomes.





PROJECT MANAGER

BEST FOR

- Project planning
- Schedule management
- Stakeholder communications
- RAID management
- Executive reporting



SENIOR PROJECT MANAGER

BEST FOR

- Large cross-functional initiatives
- Global implementations
- Vendor coordination
- Executive communications



PROGRAM MANAGER

BEST FOR

- Multi-project leadership
- Strategic initiatives
- Dependency management
- Executive reporting
- Change management



PORTFOLIO MANAGER

BEST FOR

- Portfolio governance
- Prioritization & roadmap
- Investment planning
- Capacity planning
- Executive portfolio reviews



PMO LEAD / PMO MANAGER

BEST FOR

- PMO establishment
- Governance & standards
- Methodology development
- Organizational maturity
- PMO operations leadership



BUSINESS PROCESS CONSULTANT

BEST FOR

- Process improvement
- Operating model design
- Lean transformation
- Workflow optimization
- Efficiency & effectiveness



BUSINESS INTELLIGENCE CONSULTANT

BEST FOR

- Power BI dashboards
- KPI development
- Executive reporting
- Data visualization
- Business analytics



DIGITAL TRANSFORMATION CONSULTANT

BEST FOR

- Digital strategy
- Process automation
- Microsoft 365 adoption
- Change management
- Technology modernization



ENTERPRISE IMPLEMENTATION LEAD

BEST FOR

- Enterprise implementations
- Cross-functional leadership
- Stakeholder management
- Risk & issue resolution
- Successful go-live delivery



EXECUTIVE PORTFOLIO ADVISOR

BEST FOR

- Executive advisory
- PMO strategy & design
- Governance optimization
- Portfolio strategy
- Operating model transformation



CORE CONSULTING SERVICES

End-to-end services that align strategy, people, processes, and technology to drive measurable results.



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- Power BI
- Power Automate
- Power Apps
- Project Online
- OnePlan



TYPICAL ENGAGEMENTS

TOLO Consulting partners with organizations needing experienced leadership to solve complex business and technology challenges.

Typical clients include:

- PMO Directors
- Portfolio Managers
- IT Directors
- Business Transformation Leaders
- CIO Organizations
- Product Development
- Research & Development
- Manufacturing Operations
- Quality & Regulatory
- Supply Chain
- Executive Leadership Teams



STRATEGY. GOVERNANCE. TECHNOLOGY. RESULTS.

Helping organizations transform strategy into execution.



Executive
Visibility



Stronger
Governance



Optimized
Resources



Better Decisions



Measurable
Results

CONTACT

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LOCATION

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Enterprise PMO • Portfolio Management • Digital Transformation
Palm Beach, Florida



Project & Portfolio Management



PMO Transformation



Business Intelligence



Microsoft Solutions



Regulated Industry Consulting

“ *Helping organizations transform strategy into execution.* ”



ENTERPRISE PMO
LEADERSHIP



PORTFOLIO
GOVERNANCE



DIGITAL
TRANSFORMATION



BUSINESS
INTELLIGENCE



STRATEGIC PROGRAM
EXECUTION

CLOSING

TOLO Consulting LLC partners with organizations to deliver measurable business outcomes through enterprise PMO leadership, portfolio governance, digital transformation, business intelligence, and strategic program execution. TOLO Consulting's approach combines executive advisory with hands-on delivery to improve visibility, optimize resources, strengthen governance, and accelerate organizational success.

Whether you are modernizing your PMO, implementing enterprise portfolio management, improving executive reporting, or leading strategic transformation initiatives, TOLO Consulting is ready to help your organization achieve measurable business outcomes.

*“ Helping organizations transform
strategy into execution. ”*