Multi-Portfolio Platform Whitepaper

An Overview of Integrated Portfolio Capabilities (HUB)

thinking portfolio®
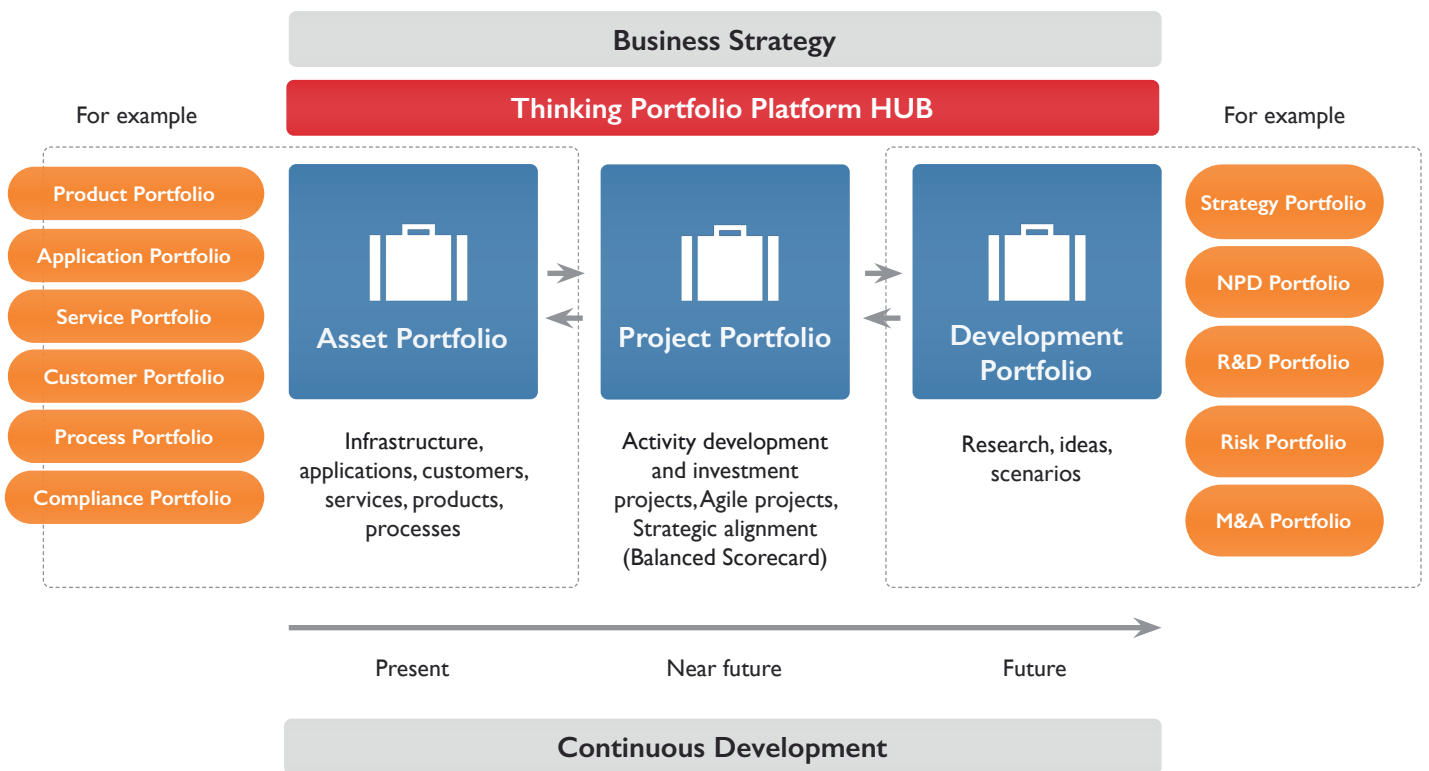
project portfolio

process portfolio

application portfolio

R&D portfolio

key performance portfolio

NPD portfolio

customer portfolio

idea portfolio

risk portfolio

service portfolio

Contents

An Overview of Integrated Portfolio Capabilities (HUB)

Portfolio Platform HUB means utilizing multiple parallel portfolios for management, communication and decision making in your most critical assets and development areas.

Thinking Portfolio platform is used by hundreds of customers, in dozens of various portfolio management positions. The portfolios support each other with interconnected data models. Dependencies on different aspects of management become visible. There are links noted that illustrate possibilities of dependency mapping between portfolios.

Manage risks, resources and quality of your business development efforts comprehensively. Examples of different portfolio management applications and variations of our platform are presented in this document. Please contact us for further details or a demo on detailed functionalities.

Business Strategy

Thinking Portfolio Platform HUB

For example

- Product Portfolio
- Application Portfolio
- Service Portfolio
- Customer Portfolio
- Process Portfolio
- Compliance Portfolio

For example

- Strategy Portfolio
- NPD Portfolio
- R&D Portfolio
- Risk Portfolio
- M&A Portfolio

Asset Portfolio

Infrastructure, applications, customers, services, products, processes

Project Portfolio

Activity development and investment projects, Agile projects, Strategic alignment (Balanced Scorecard)

Development Portfolio

Research, ideas, scenarios

Present — Near future — Future

Continuous Development

The strategic portfolios

Thinking Portfolio®
Integrated Platform (HUB)
— centralised resource planning at the core
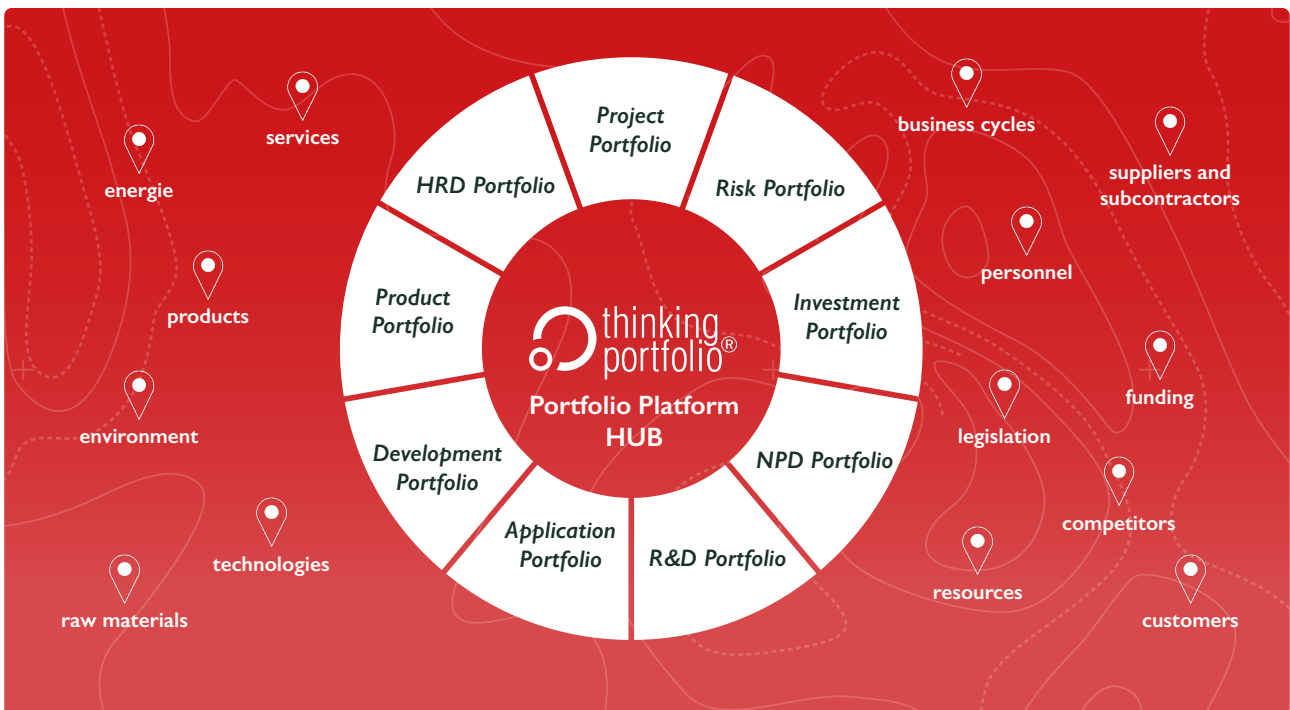
Benefits of Integrated Platform (HUB)

More versatile user management	Enhances the deployment of multiple portfolios	Administrator's user management of different portfolios
• Capability • Load • Resourcing	• Overall resourcing for all portfolios • Creating relationships and dependencies between portfolios • Creating new experimental portfolios and developing further as the operations are maturing	• For a user, an opportunity to supplement their knowledge

Project Portfolio

manage all your ideas, innovations, projects and tasks all-in-one

- ○ Maintain programs, projects and sub-projects that are planned, underway or completed
- ○ Keep and report your projects in one portfolio
- ○ Use as a tool for strategic management. Let your management team focus on portfolio level without falling into details
- ○ Visualize strategy implementation by smart dashboards representing your focus areas, Must-Win-Battles or any other strategy framework

- ○ Prioritize projects by your key value drivers or resources
- ○ Open organizational communication by opening development portfolios to your entire organization
- ○ Simplify and focus project managers' reporting and status checks to one format

Key Functionalities
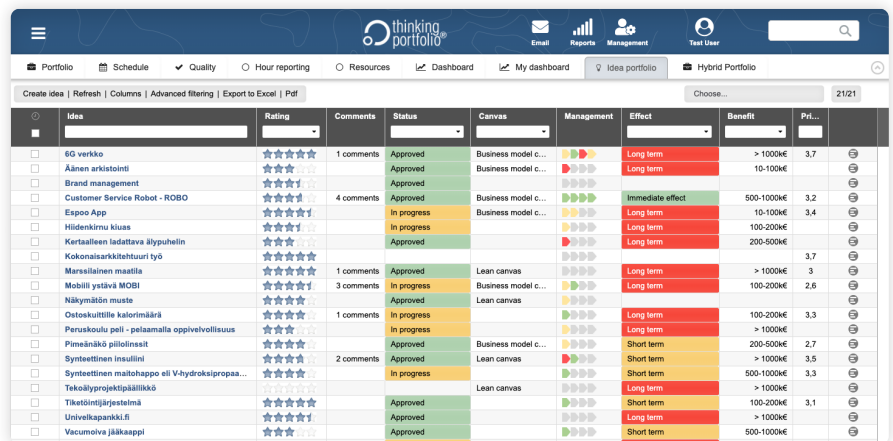
- ○ Portfolio reporting
- ○ Portfolio prioritization and quality management
- ○ Project management and reporting
- ○ Control and steering
- ○ Scheduling, budgeting and forecasting
- ○ Resource allocation & control
- ○ Project strategic positioning and impact management
- ○ Kanban
- ○ Task Management with task hierarchy

Idea Portfolio

managed process for ideation
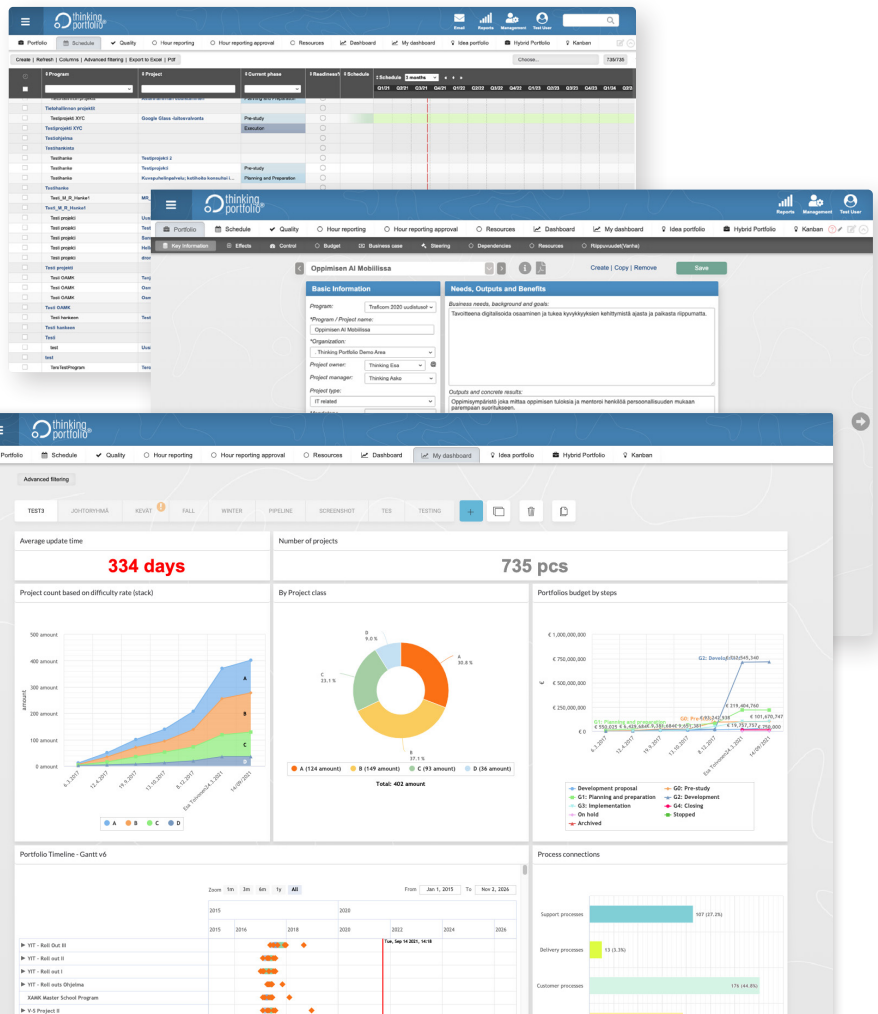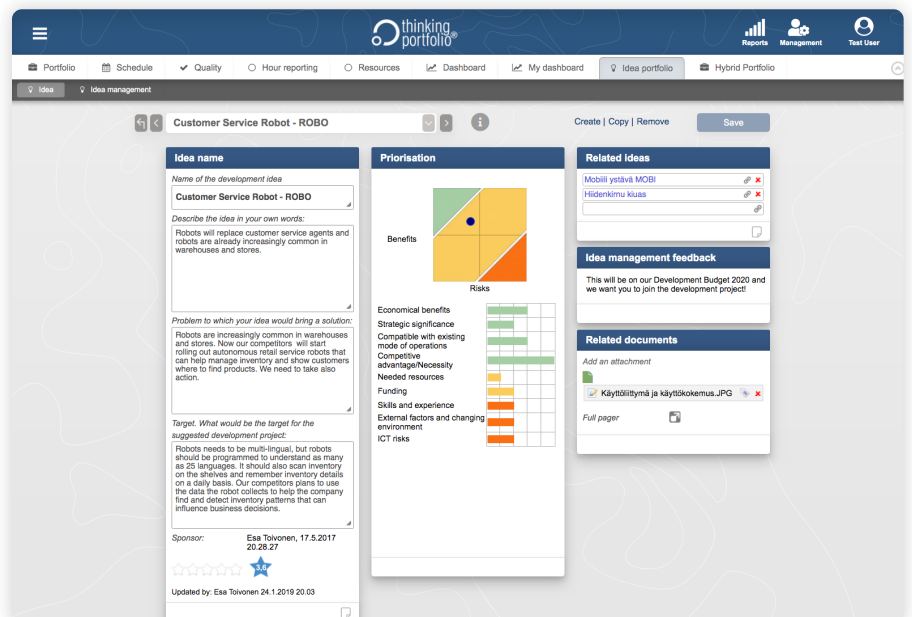
- ○ Incorporate idea management to project portfolio management
- ○ Classify, vote and manage ideas
- ○ Manage idea funnel
- ○ Conduct and lead idea competitions
- ○ Develop idea into project proposal
- ○ Transfer ideas to project portfolio

Key Functionalities

- ○ Evaluation, voting and prioritization of evaluated ideas
- ○ Idea lifecycle support
- ○ Filtering, selecting and sorting ideas with advanced filtering and sorting options
- ○ Process flow to support any required phases or decision points
- ○ Transferring ideas into project proposals by one click!
- ○ Can be integrated as part of your project portfolio or as a separate unit

NPD Portfolio

build your new products from scratch to launch

- ○ Manage fast-moving NPD-process on strategic level, by portfolio level prioritization, resourcing and scheduling
- ○ Facilitate quick decision-making and follow-up
- ○ Maintain an up-to-date view of current development situation
- ○ View initiatives in one place
- ○ Analyze product-market-fit, cannibalization or product sizing
- ○ Evaluate effects on production planning
- ○ Enable shorter product development cycle
- ○ Manage and co-ordinate all stakeholders and networks

Key Functionalities

- ○ Portfolio reporting
- ○ Portfolio prioritization and quality management
- ○ NPD-related key information set-up to support your key parameters
- ○ Product positioning and impact management
- ○ Project management and reporting based on your key needs
- ○ Resource allocation & control
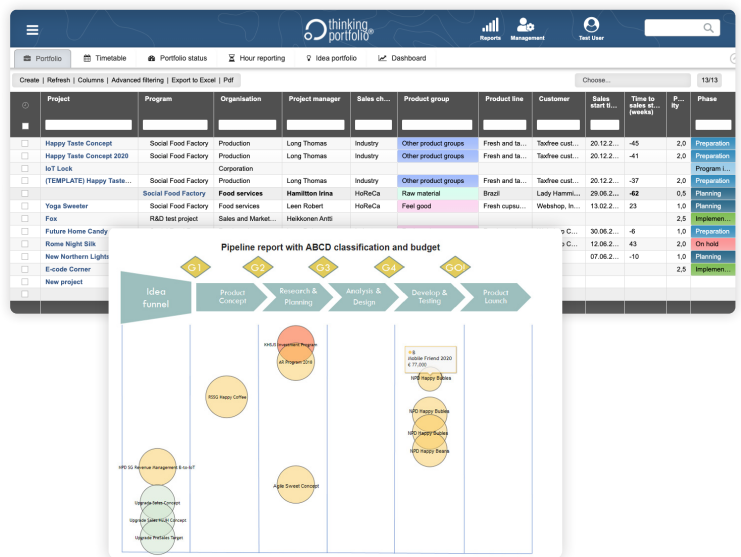
R&D Portfolio

- ○ Manage Research and development (R&D) activities and projects that companies undertake to innovate and introduce new products and services. Manage your first stage in the development process to target resources to the activities that answer to the needs of the future customers.
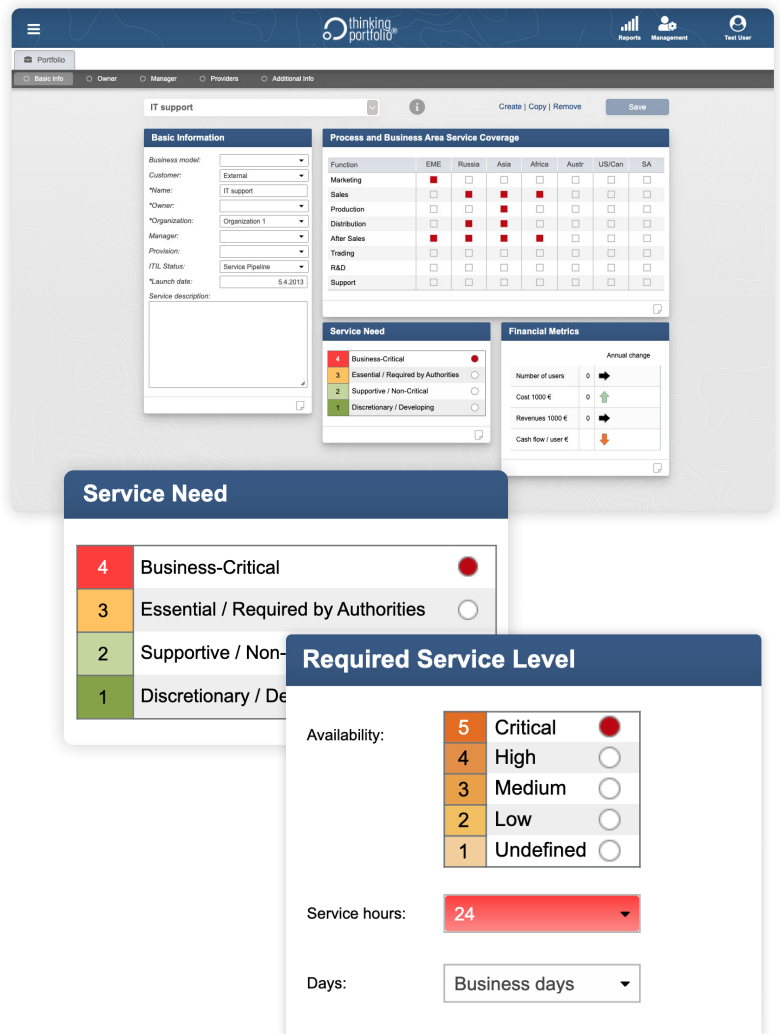
Service Portfolio
nurture your services in a portfolio
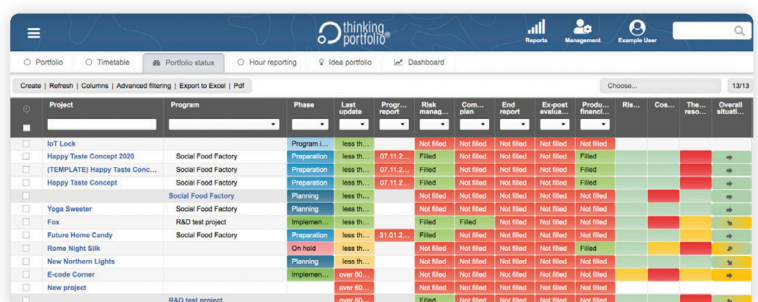
- Crete a unified view and a management routine of services
- Manage decisions and development of services
- Understand, develop and manage service life-cycles
- Ensure that customer expectations and requirements are met
- Manage service-points, quality criteria and service KPI's
- Allow access to service information throughout the organization
- Visualize service dependencies
- Map services against development efforts and projects, even across portfolios (landscape functionality!)

Key Functionalities

- Service life-cycle management
- Service value and quality metrics tracking
- Customer expectations and requirements mapping
- KPI and service management functionalities
- Service backlog, steering functionalities and tasks
- Service cost and resource mapping and management
- Reporting across all data managed on platform
- Link services to projects to gain visibility across dependencies

Capabilities

- Define and confirm that capabilities and resources to serve are always present (Link to HRD-portfolio – human capabilities may be also in HRD portfolio)

Application Portfolio
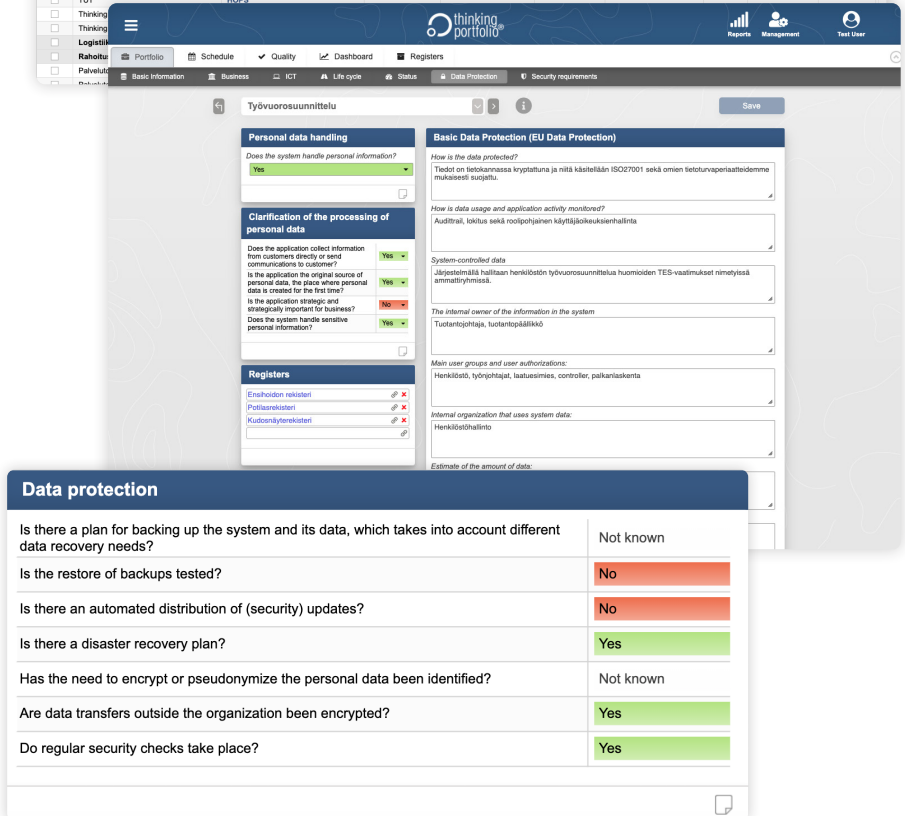## *business perspective of IT systems and services*

- ○ Create a comprehensive view of IT-systems and services from a strategic perspective
- ○ Connect IT-applications to business goals
- ○ Allow access to IT-information throughout the organization

- ○ Visualize application dependencies
- ○ Simplify application lifecycle management
- ○ Map applications against development efforts and projects, even across portfolios (multi-portfolio functionality!)

Key Functionalities

- ○ Lifecycle management
- ○ Quality assurance
- ○ KPI and service management functionalities
- ○ Service backlog, steering functionalities and tasks
- ○ Service cost and resource mapping and management
- ○ Reporting across all data managed on platform eg. life cycle costs across portfolio
- ○ Dependencies to services and projects (Link to Service Portfolio and Project Portfolio, to gain visibility across dependencies)

Process Portfolio

streamline your process management

- ○ Classify and manage process information
- ○ Manage process risks and lifecycle
- ○ Vizualize current and up-coming processes and their dependencies
- ○ Make smart decisions on process improvement based on actual data

- ○ Nurture process improvement culture
- ○ Ensure processes support your Customer Experience targets
- ○ Identify dependencies between projects, applications and processes (Link to Service Portfolio, Application Portfolio and Project Portfolio, to gain visibility across dependencies)

Key Functionalities

- ○ Process hierarchy management and listing
- ○ Detailed process management, tailored to your needs
- ○ Development activity mapping
- ○ Process risk management
- ○ Process Quality assurance
- ○ KPI and service management functionalities
- ○ Steering functionalities, reporting and controls
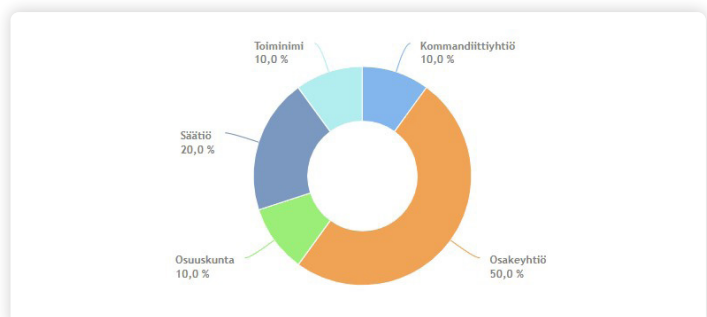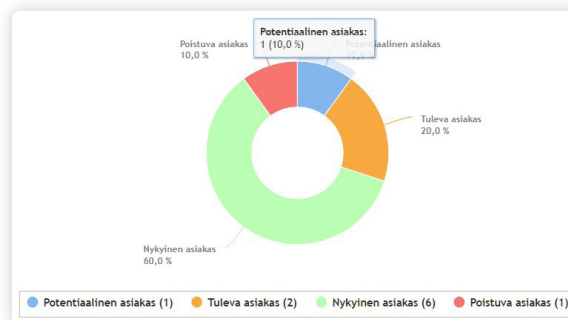
Customer Portfolio

An easy-to-use solution for managing your organization's customer data

- An easy-to-use solution for managing your organization's customer data
- Customer relations road map and life cycle management
- Clear, on-demand reports. Take a benefit from your own dashboards

- A quickly way to share customer data to rest of organization
- Integration with other portfolios (HUB)
- Easy integration with REST API

Key Functionalities

- Management for customer contact information
- Memos and notes of customer meetings
- Customer offers
- Task list and reminders (Kanban)
- Agreements and other documation management
- Services and product representations
- Customer life cycle management
- Integrations from other systems like financial management
- Resurch and schedule planning
- Indentifying new customer potential

Compliance Portfolio

manage your business activities' conformity with law and regulations

- Use the Compliance Portfolio as a tool for operational planning and internal communication
- Report and control legal conformity, observance of the law and applicable regulations
- Report and control compliance with internal rules and principles such as the code of conduct, value management specifications, honesty and integrity

- Evaluate compliance performance
- Follow and visualize compliance status and processes with Kanban
- Organize and report quality management requirements
- Evaluate, categorize, prioritize, monitor and measure resources and tasks
- Create reports within the same tool

Key Functionalities

- Quality assurance
- Compliance status
- KPI functionalities
- Control of changes
- Design and development inputs
- Non-conformity
- Continual improvement
- Customer focus
- Resources
- Postdelivery activities
- Management review
- Internal audits

Risk Portfolio

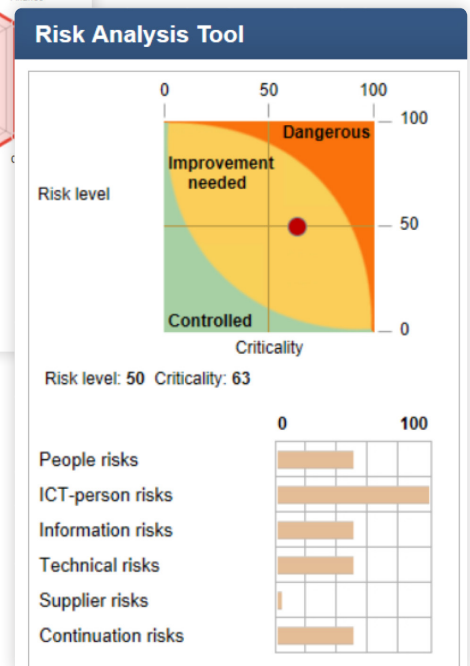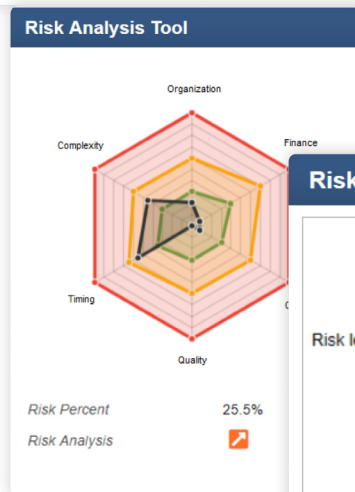*manage overall risk across your organization*
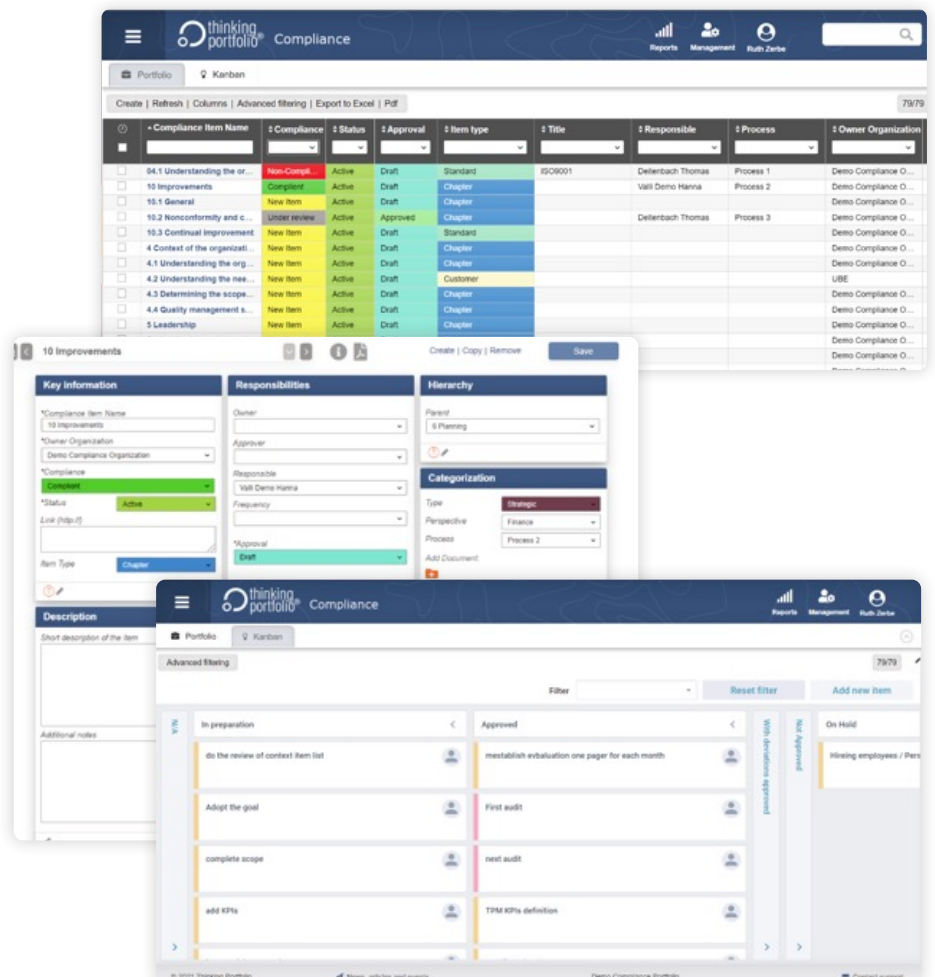
- Keep and manage an up-to-date view of the current risk situation
- Manage risk discovery, risk analysis and mitigating actions
- Make informed decisions with up-to-date risk information.
- Govern and manage audit-trail for officials and auditors
- Manage and control risk management procedures
- Report on risks and mitigating actions

Key Functionalities

- Risk Categorization and life-cycle management
- Impact analysis and reporting
- Rick Management and Governance
- Scheduled Mitigating Actions (Link to Project Portfolio – Projects can be mitigating actions)
- Mitigation management on portfolio level (Link to Compliance Portfolio – Auditing is always risk based and controls may act as mitigation methods etc.)
- Reminders, tasks and reporting cycles

Simple Risk Matrix

Risk Score

		Severe 5	Major 4	Moderate 3	Minor 2	Low 1	No impact 0
Almost Certain	5	25	20	15	10	5	0
Very likely	4	20	16	12	8	4	0
Likely	3	15	12	9	6	3	0
Unlikely	2	10	8	6	4	2	0
Rare	1	5	4	3	2	1	0
No possibility	0	0	0	0	0	0	0

Risk Analysis Tool

Risk Percent	25.5%
Risk Analysis	

Risk Analysis Tool

Risk level: 50 Criticality: 63

- People risks
- ICT-person risks
- Information risks
- Technical risks
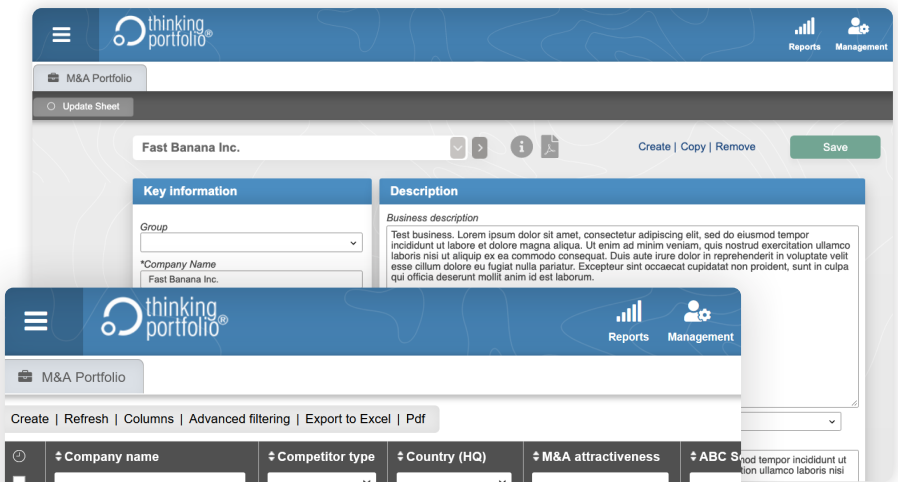- Supplier risks
- Continuation risks

M&A Portfolio

A platform for the strategic management of your M&A, market-, and competitor foresight information

- ○ Report on M&A targets and market information for your stakeholders
- ○ Keep your continuous market and competitor information analysis up to date
- ○ Record and follow numerous M&A targets or other dimensions of market information
- ○ Gain effectiveness, efficiency, quality and security in information and document management
- ○ Make informed decisions and prioritisation based on up-to-date information
- ○ Manage the lifecycle of the M&A targets

Key Functionalities

- ○ Target discovery
- ○ Target analysis
- ○ Actions and integration
- ○ Continuous assessment
- ○ Categorisation
- ○ Feasibility analysis
- ○ Financial analysis
- ○ Reminders and alerts
- ○ Reports
- ○ Target and Action Templates
- ○ Integration to business processes
- ○ Document Templates
- ○ User Interface Based on M&A Target Type
- ○ Collaboration and commenting
- ○ Diary

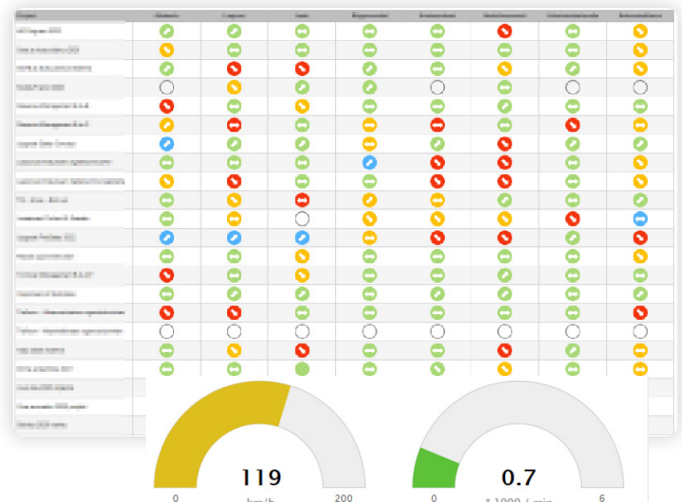# thinking portfolio®

Key Performance Portfolio

Delivering business value with scorecard portfolio and KPI measurement

○ Easy and secure tool to define targets indicators and record results

○ Use strategy mapping to highlight cause-and-effect relationships

○ Identify your critical success factors to ensure the right KPI metrics

○ Up to date measuring with responsibilities and reminders

○ Make informed decisions and prioritisation based on up-to-date KPI information

○ Possibility to record many types of indicators in one place (qualitative, financial, KPI, different units etc.)

○ Reporting platform included and may be parametrised for customer's needs

○ Bring value to your management with a standalone Scorecard portfolio or extend your existing portfolio management with indicator related data model (e.g. align your project portfolio to strategy with KPI definition and measurement)

Key Functionalities

○ Defining KPIs

○ Strategy alignment

○ Responsibilities

○ Measuring unit definition

○ Categorisation and hierarchies

○ Aggregation (when needed and possible)

○ Financial data possibilities

○ Target setting and limits

○ Calculation of derived results (e.g. rates for remuneration)

○ Reminders and alerts

○ Historical data and scheduling

○ Reporting platform

○ Optional: REST API import/export

○ Integration to business processes

○ Collaboration and commenting

Other Portfolio Data Models

Purchase or Supplier Portfolio

- Manage your tendering, purchase or supply chain activities
- Maintain momentum in your public tendering actions
- Balance your risk in tendering
- Keep and up-to-date view of your active tendering commitments
- Manage projects, resources and scheduling
- Report on your tendering activities

Corporate Management Portfolio

- Maintain and manage organizational assets
- Report on individual assets; finances, revenues, resources and other key information
- Cascade reporting to corporate level; corporate assets, weighting, strategic focus, commitments, risks and revenue
- Evaluate management needs, steer and log decisions and activities

Portfolio Hack!

We will experimentally create a new portfolio for you.

In two to three workshops we collect and further define all the needs your portfolio idea includes. With this information we will draft and make a demo. For a few days we focus on building solutions and on Friday we demonstrate the first draft of the possible solution.

What kind of portfolio would you build? Contact us, if you have a fundamental dimension of leadership in mind where portfolio management could be a solution!

Contact

Erik de Kooter

Tel. +31 6 371 73 813
erik.de.kooter@pmoinstitute.com

Tjalling Klaucke

Tel. +31 6 200 88 255
tj.klaucke@pmoinstitute.com

PMO Institute
Julianalaan 55
3761 DC Soest
The Netherlands

Thinking Portfolio Oy
Aleksanterinkatu 48 B
FIN-00100 Helsinki, Finland

thinkingportfolio.com