



# Multi-Portfolio Platform Whitepaper

*An Overview of Integrated Portfolio Capabilities (HUB)*



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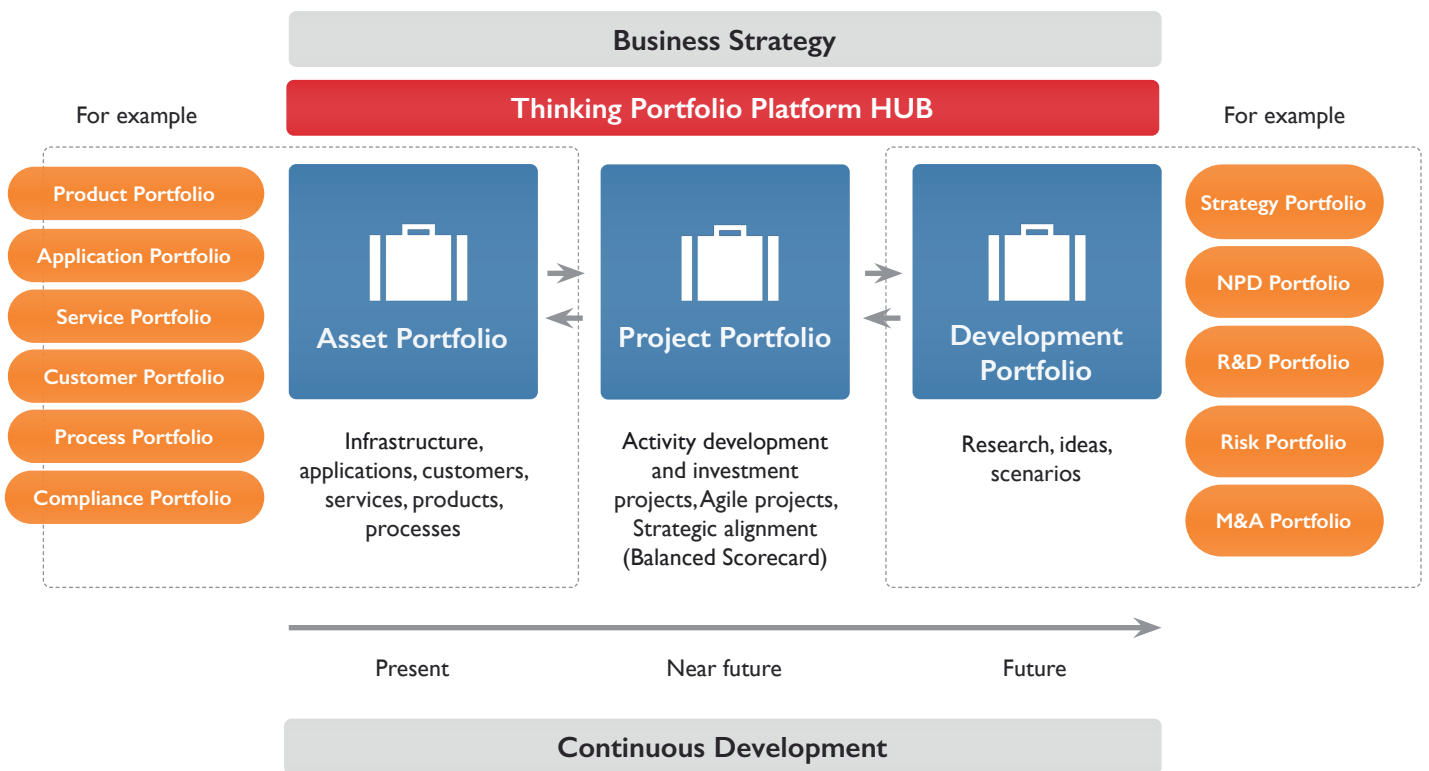
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# An Overview of Integrated Portfolio Capabilities (HUB)

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.

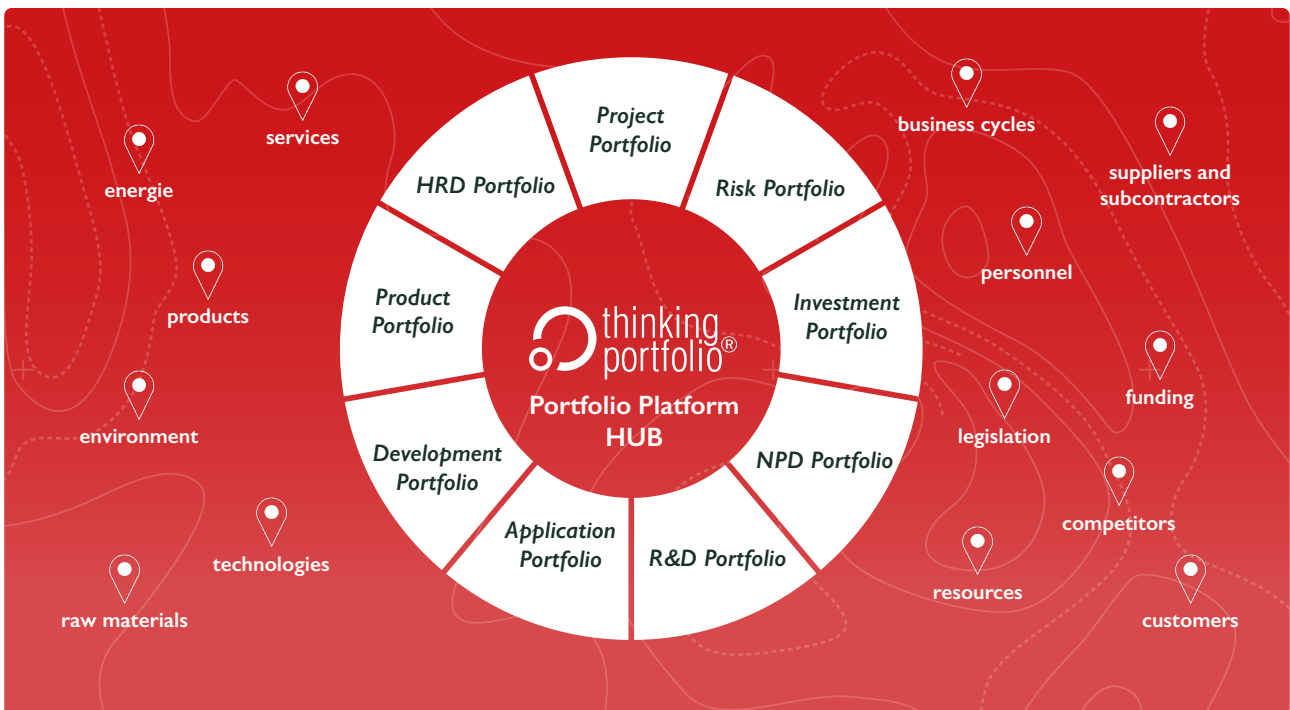
Manage risks, resources and quality of your business development efforts comprehensively. Examples of different portfolio management applications and variations of our platform are presented in this document. Please contact us for further details or a demo on detailed functionalities.



*The strategic portfolios*

# Thinking Portfolio® Integrated Platform (HUB)

– centralised resource planning at the core



## Benefits of Integrated Platform (HUB)

### More versatile user management

- Capability
- Load
- Resourcing

### Enhances the deployment of multiple portfolios

- Overall resourcing for all portfolios
- Creating relationships and dependencies between portfolios
- Creating new experimental portfolios and developing further as the operations are maturing

### Administrator's user management of different portfolios

- For a user, an opportunity to supplement their knowledge



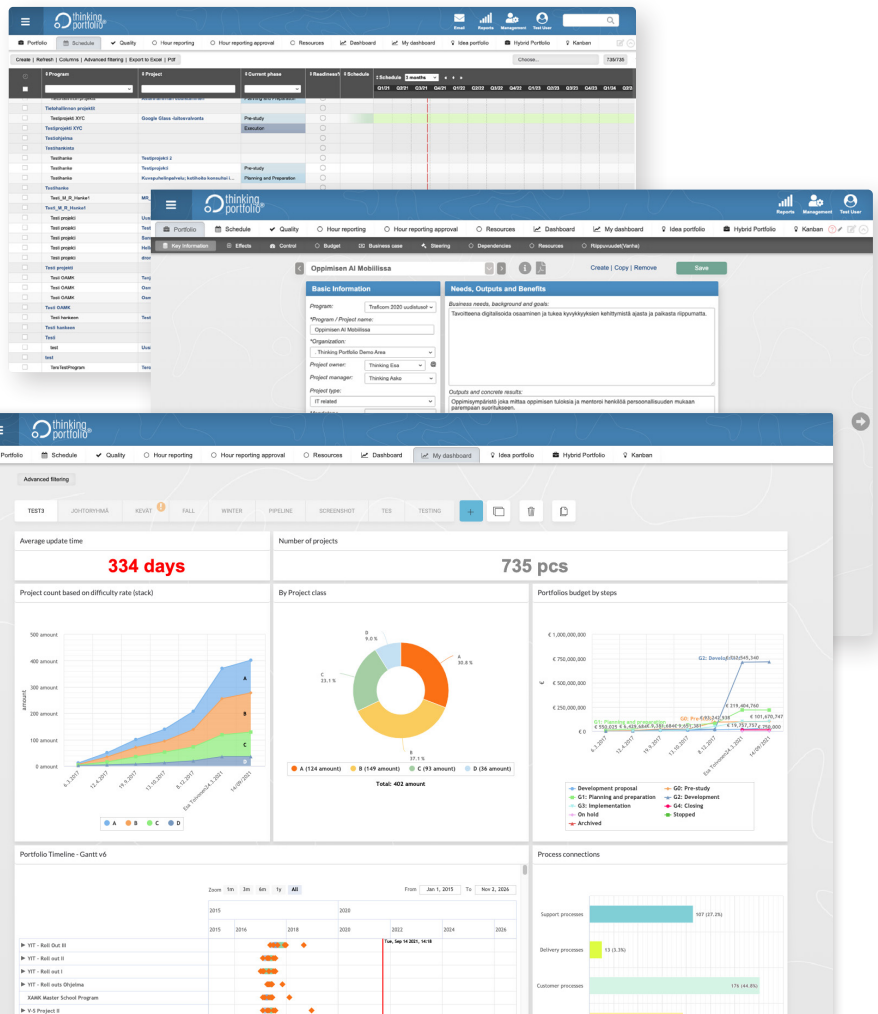
# Project Portfolio

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

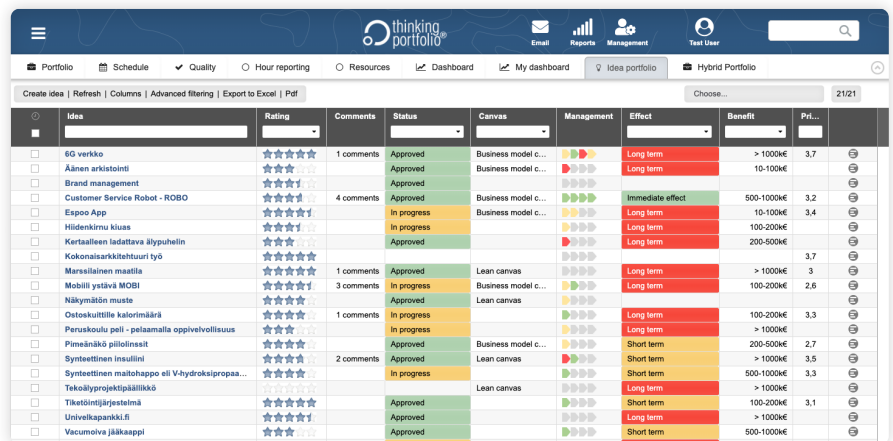
- Portfolio reporting
- Portfolio prioritization and quality management
- Project management and reporting
- Control and steering
- Scheduling, budgeting and forecasting
- Resource allocation & control
- Project strategic positioning and impact management
- Kanban
- Task Management with task hierarchy



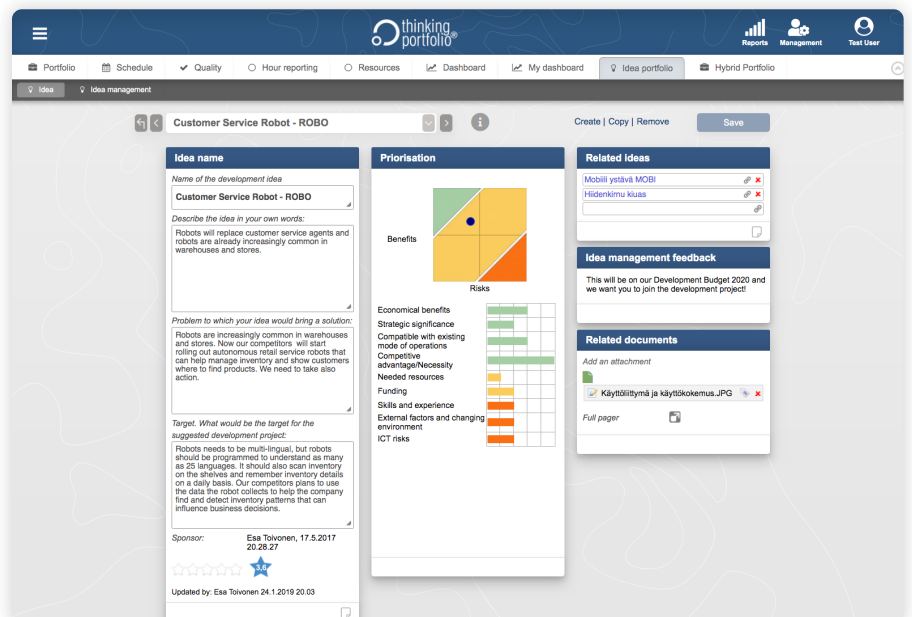
- Incorporate idea management to project portfolio management
- Classify, vote and manage ideas
- Manage idea funnel
- Conduct and lead idea competitions
- Develop idea into project proposal
- Transfer ideas to project portfolio

## 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



Idea	Rating	Comments	Status	Canvas	Management	Effect	Benefit	Pri...
EG verkko	★★★★★	1 comments	Approved	Business model c...	Approved	Long term	> 1000€	3.7
Äänen arkistointi	★★★★★		Approved	Business model c...	Approved	Long term	10-100€	
Brand management	★★★★★		Approved					
Customer Service Robot - ROBO	★★★★★	4 comments	Approved	Business model c...	In progress	Immediate effect	500-1000€	3.2
Espoo App	★★★★★		In progress	Business model c...	In progress	Long term	10-100€	3.4
Hiidenkirnu kuus	★★★★★		In progress		In progress	Long term	100-200€	
Kertaalleen ladattava älypuhelin	★★★★★		Approved			Long term	200-500€	
Kokonaisarkkitehtuuri työ	★★★★★							3.7
Marsilainen maattila	★★★★★	1 comments	Approved	Lean canvas		Long term	> 1000€	3
Mobiili ystävä MOBI	★★★★★	3 comments	In progress	Business model c...		Long term	100-200€	2.6
Näköyhteisö muisti	★★★★★		Approved	Lean canvas				
Ostoskulttuurin kalenttimäkäri	★★★★★		In progress			Long term	100-200€	3.3
Peruskoulu peiti - pelaaanalla oppivelvollisuus	★★★★★	1 comments	In progress			Long term	> 100€	
Pimeäkö pöllöineist	★★★★★		Approved	Business model c...		Short term	200-500€	2.7
Synteettinen insuliini	★★★★★		Approved	Lean canvas		Short term	> 100€	3.5
Synteettinen maltohapo eli V-hydroksioprop...	★★★★★	2 comments	In progress			Short term	500-1000€	3.3
Tietokonejärjestelmä	★★★★★		Approved	Lean canvas		Long term	> 100€	
Urivelkapankki.fi	★★★★★		Approved			Long term	> 100€	3.1
Vacuumoiva jääkaappi	★★★★★		Approved			Short term	500-1000€	



**Idea name**  
Name of the development idea  
Customer Service Robot - ROBO

**Description**  
Describe the idea in your own words:  
Robots will replace customer service agents and robots are already increasingly common in warehouses and stores.

**Problem to which your idea would bring a solution:**  
Robots are increasingly common in warehouses and stores. New our competitors will start rolling out autonomous retail service robots that can help manage inventory and show customers where to find products. We need to take also action.

**Target. What would be the target for the suggested development project:**  
Robots needs to be multi-lingual, but robots should be programmed to understand as many as 25 languages. It should also scan inventory on the shelves and remember inventory details on a daily basis. Our competitors plans to use the data the robot collects to help the company find and collect inventory systems that can influence business decisions.

**Sponsor:** Esa Toivonen, 17.5.2017 20:28:27

**Prioritization**  
Benefits vs Risks matrix showing a blue dot in the high-benefit, low-risk quadrant.

**Related ideas**  
Mobiili ystävä MOBI  
Hiidenkirnu kuus

**Idea management feedback**  
This will be on our Development Budget 2020 and we want you to join the development project!

**Related documents**  
Add an attachment  
Käytötyö ja käyttökokemus.JPG



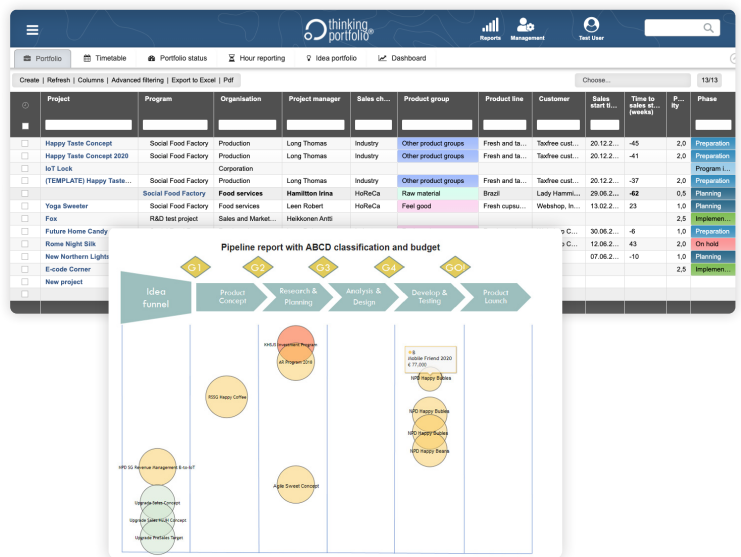
# NPD Portfolio

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

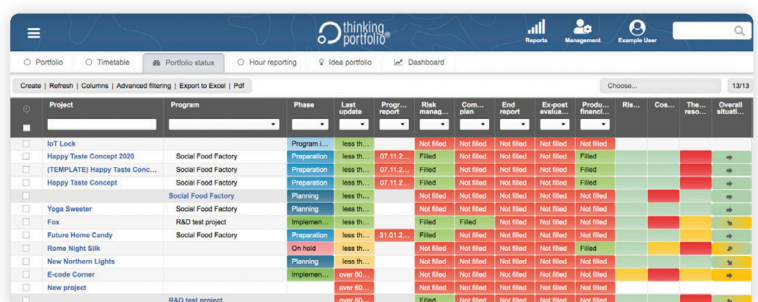
## Key Functionalities

- 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.





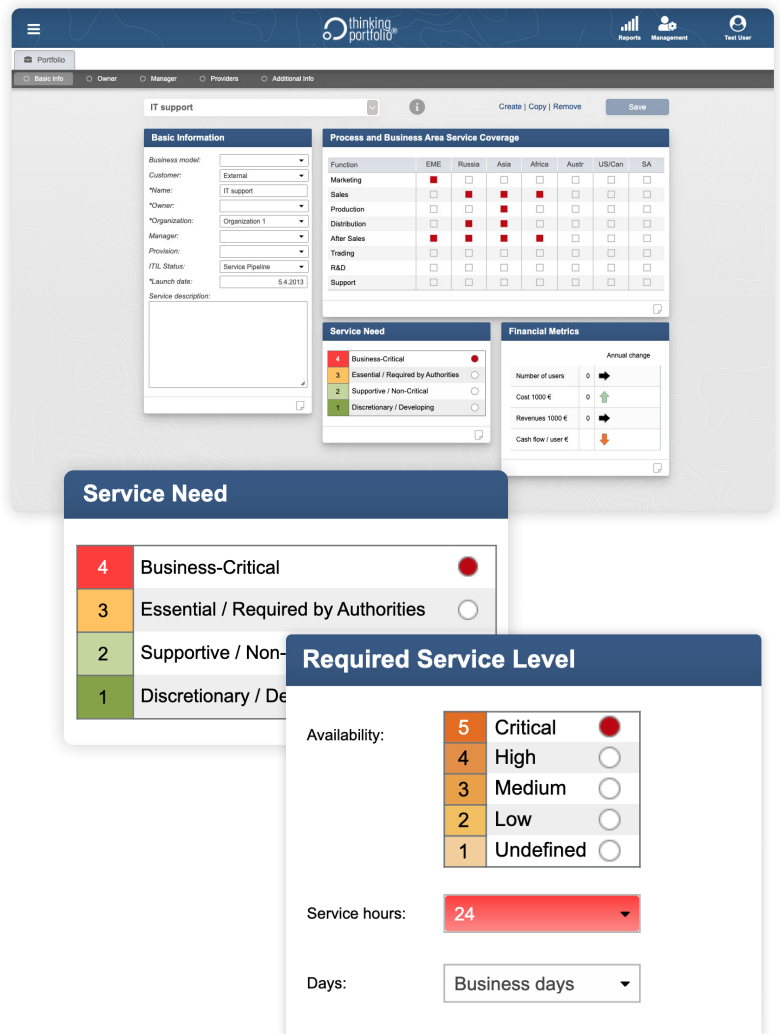
- Create a unified view and a management routine of services
- Manage decisions and development of services
- Understand, develop and manage service life-cycles
- Ensure that customer expectations and requirements are met
- Manage service-points, quality criteria and service KPI's
- Allow access to service 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)



The screenshot displays the 'IT support' configuration page in the Thinking Portfolio application. It includes several key sections:

- Basic Information:** Fields for Business model, Customer, Name, Owner, Organization, Manager, Provision, I/T/L Status, and Launch date.
- Process and Business Area Service Coverage:** A grid showing service coverage across various functions (Marketing, Sales, Production, Distribution, After Sales, Trading, R&D, Support) and business areas (EME, Russia, Asia, Africa, Austr, US/Can, SA).
- Service Need:** A dropdown menu with levels: 4 Business-Critical (selected), 3 Essential / Required by Authorities, 2 Supportive / Non-Critical, and 1 Discretionary / Developing.
- Financial Metrics:** Fields for Number of users, Cost 1000 €, Revenues 1000 €, and Cash flow / user €.

Below the main interface, two detailed views are shown:

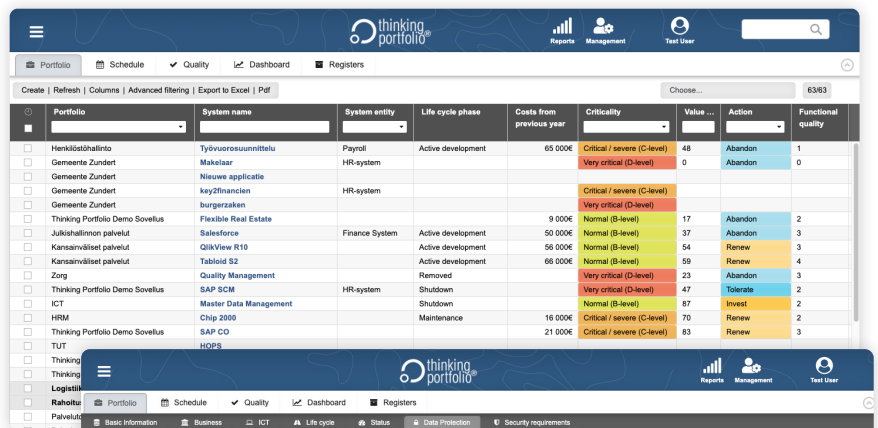
- Service Need:** A list of levels: 4 Business-Critical (red), 3 Essential / Required by Authorities (orange), 2 Supportive / Non-Critical (green), and 1 Discretionary / Developing (light green).
- Required Service Level:** A configuration panel for 'Availability' with levels: 5 Critical (red), 4 High (orange), 3 Medium (yellow), 2 Low (light yellow), and 1 Undefined (white). It also includes 'Service hours' (set to 24) and 'Days' (set to Business days).



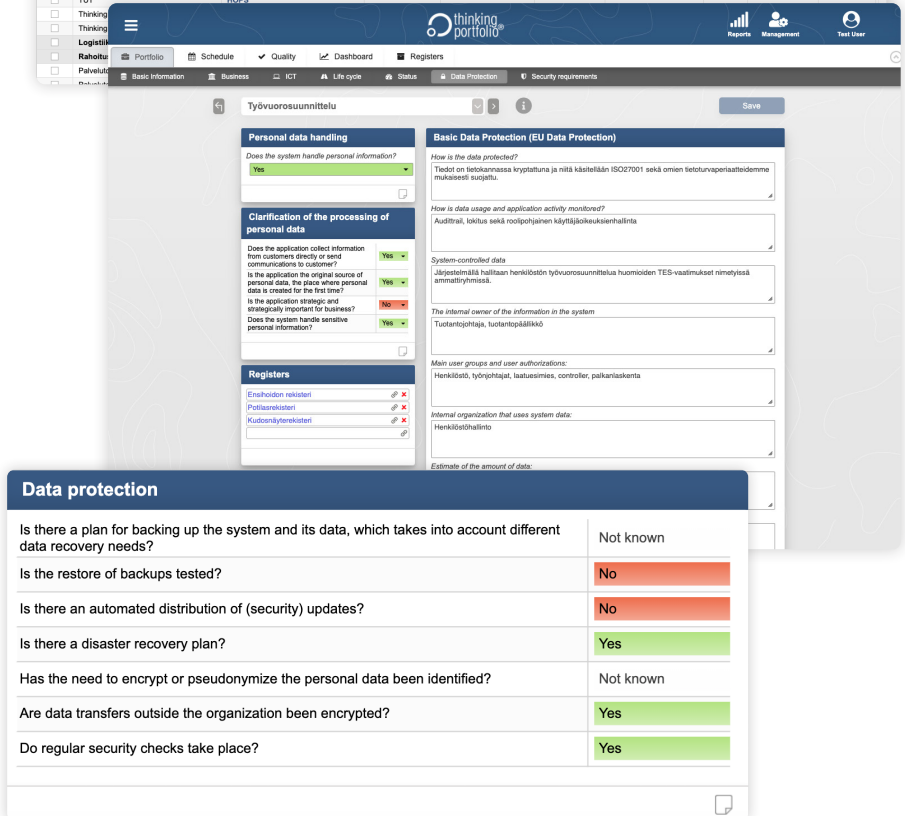
- Create a comprehensive view of IT-systems and services from a strategic perspective
- Connect IT-applications to business goals
- Allow access to IT-information throughout the organization
- Visualize application dependencies
- Simplify application lifecycle management
- Map applications against development 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)



Portfolio	System name	System entity	Life cycle phase	Costs from previous year	Criticality	Value	Action	Functional quality	
	Henkilöstöhallinto	Työvuorosuunnittelu	Payroll	Active development	65 000€	Critical / severe (C-level)	48	Abandon	1
	Gemeente Zundert	Makelaar	HR-system			Very critical (D-level)	0	Abandon	0
	Gemeente Zundert	Nieuwe applicatie				Critical / severe (C-level)			
	Gemeente Zundert	keyZfinancien	HR-system			Very critical (D-level)			
	Gemeente Zundert	burgerzaken				Normal (B-level)	17	Abandon	2
	Thinking Portfolio Demo Sovellus	Flexible Real Estate		9 000€	Normal (B-level)	37	Abandon	3	
	Julkishallinnon palvelut	Salesforce	Finance System	Active development	50 000€	Normal (B-level)	54	Renew	3
	Kansainväliset palvelut	QlikView R10		Active development	58 000€	Normal (B-level)	23	Abandon	3
	Kansainväliset palvelut	Tableoid S2		Active development	68 000€	Normal (B-level)	59	Renew	4
	Zorg	Quality Management		Removed		Very critical (D-level)	23	Abandon	3
	Thinking Portfolio Demo Sovellus	SAP SCM	HR-system	Shutdown		Very critical (D-level)	47	Tolerate	2
	ICT	Master Data Management		Shutdown		Normal (B-level)	87	Invest	2
	HRM	Chip 2000		Maintenance	18 000€	Critical / severe (C-level)	70	Renew	2
	Thinking Portfolio Demo Sovellus	SAP CO			21 000€	Critical / severe (C-level)	83	Renew	3
	TUT	HOPS							



**Data protection**

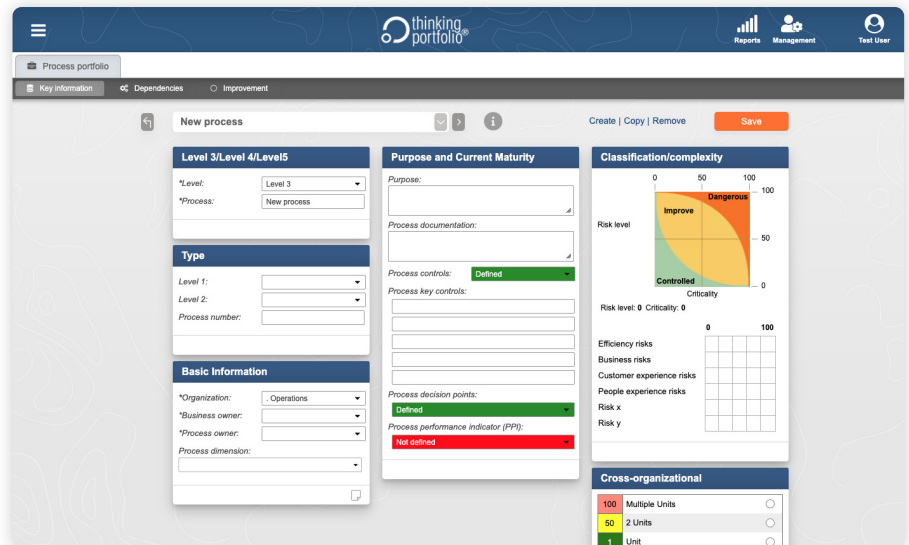
- Is there a plan for backing up the system and its data, which takes into account different data recovery needs? Not known
- Is the restore of backups tested? No
- Is there an automated distribution of (security) updates? No
- Is there a disaster recovery plan? Yes
- Has the need to encrypt or pseudonymize the personal data been identified? Not known
- Are data transfers outside the organization been encrypted? Yes
- Do regular security checks take place? Yes

- Classify and manage process information
- Manage process risks and lifecycle
- Visualize 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



Process improvement log						
Stage: <span style="background-color: #90EE90;">Active</span>						
Log						
Task	Start	End	Responsible	Status	Description	
1	Select Date 15.11.2019	x Select Date 14.11.2019	x	Work in progress		✖
2	Select Date 15.11.2019	x Select Date 23.11.2019	x	Not started		✖
3	Select Date	Select Date 23.11.2019	x	Started		✖
4	Select Date 22.11.2019	x Select Date 21.11.2019	x	Started		✖
5	Select Date	Select Date		Work in progress		✖



# Customer Portfolio

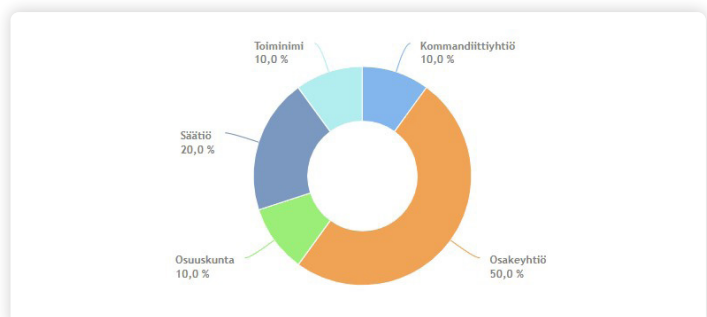
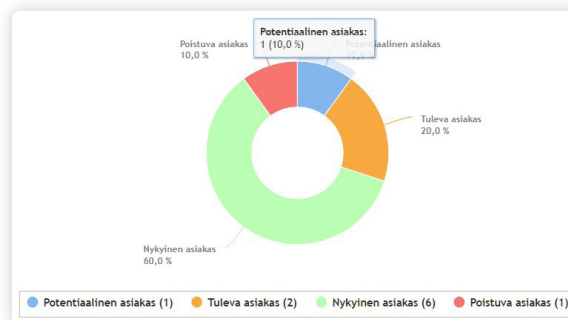
An easy-to-use solution for managing your organization's customer data

- 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
- Resourch and schedule planning
- Identifying new customer potential

Virallinen nimi	Asiakkuuden tila	Tuotannon aloitus	Yritysmuoto	Asiakassegmentti	Omistajayksikkö
Creative campus	Poistuva asiakas	1.9.2016	Osuuskunta	Pienirytykset	Thinking Portfolio Oy
Leipomo Miinan maukkaat	Nykyinen asiakas	2.1.2020	Kommandittiyhtiö	Keskisuuret	Thinking Portfolio Oy
Kulttuurisaatio Nallen kartano	Nykyinen asiakas	26.10.2020	Saatio	Suuryritykset	Thinking Portfolio Oy
Anna ja Toivo Niemisen saatio	Nykyinen asiakas	3.5.2021	Saatio	Suuryritykset	Thinking Portfolio Oy
Forest Management Oy	Nykyinen asiakas	4.10.2021	Osakeyhtiö	Keskisuuret	Thinking Portfolio Oy
M&A Consulting Oy	Nykyinen asiakas	25.10.2018	Osakeyhtiö	Keskisuuret	Thinking Portfolio Oy
Machinery Group Oy	Nykyinen asiakas	26.10.2020	Osakeyhtiö	Suuryritykset	Thinking Portfolio Oy
Ossin sovellusapu	Tuleva asiakas	7.12.2021	Toiminimi	Pienirytykset	Thinking Portfolio Oy
Quickdata Oy	Tuleva asiakas	13.12.2021	Osakeyhtiö	Suuryritykset	Thinking Portfolio Oy
Figures Oy	Potentiaalinen asiakas		Osakeyhtiö	Keskisuuret	Thinking Portfolio Oy





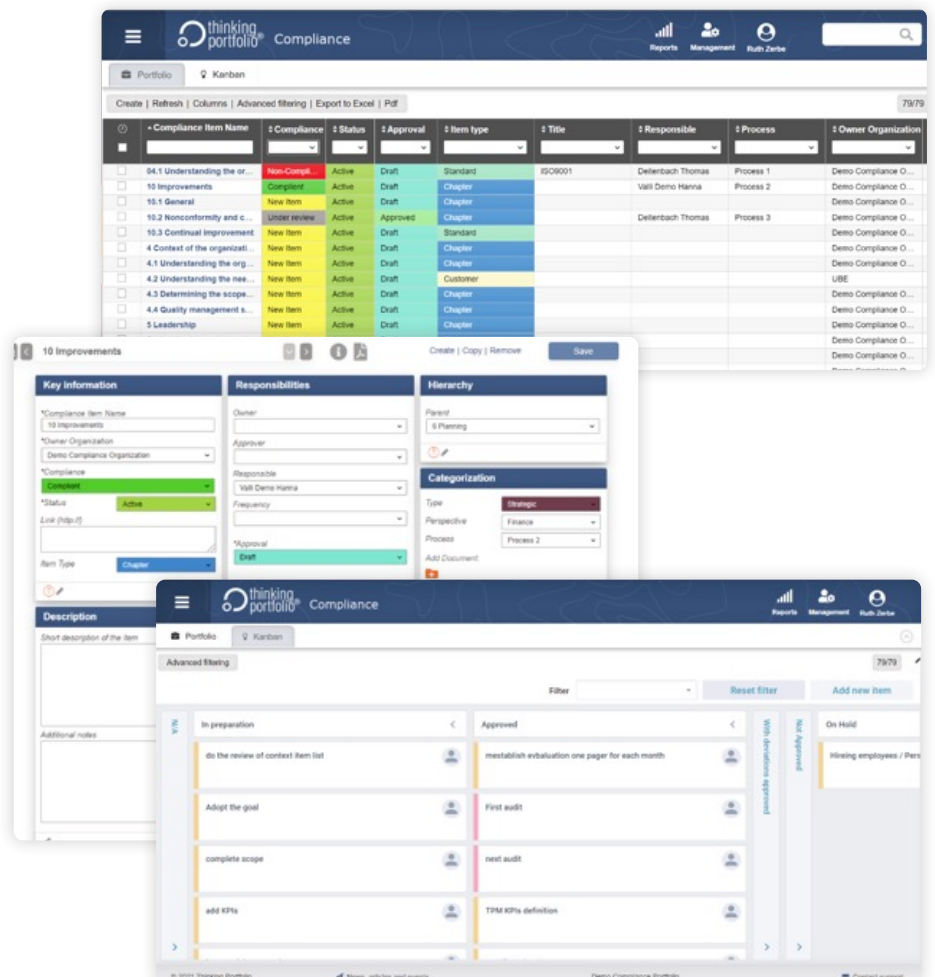
# Compliance Portfolio

*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



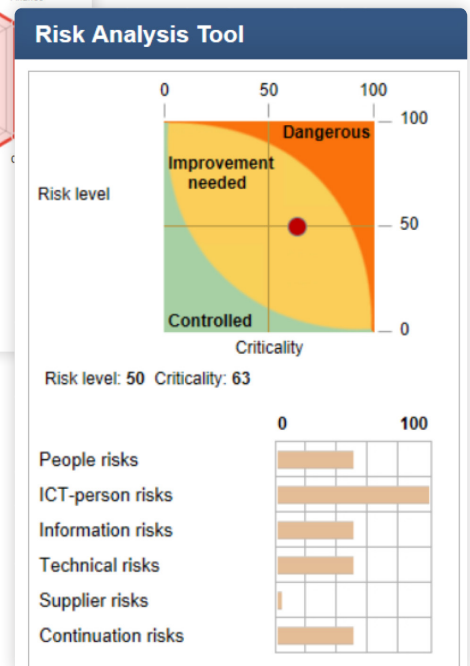
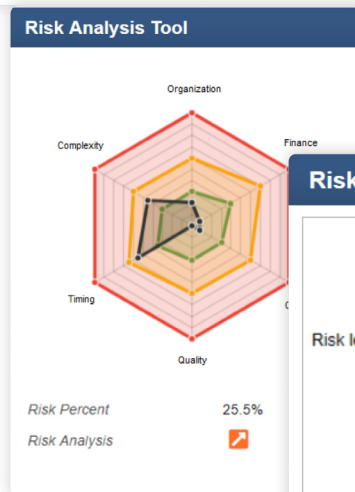
- Keep and manage an up-to-date view of the current risk situation
- Manage risk discovery, risk analysis and mitigating actions
- Make informed decisions with up-to-date risk information.
- Govern and manage audit-trail for officials and auditors
- Manage and control risk management procedures
- Report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

## Key Functionalities

- Risk Categorization and life-cycle management
- Impact analysis and reporting
- Risk 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	Major	Moderate	Minor	Low	No impact
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





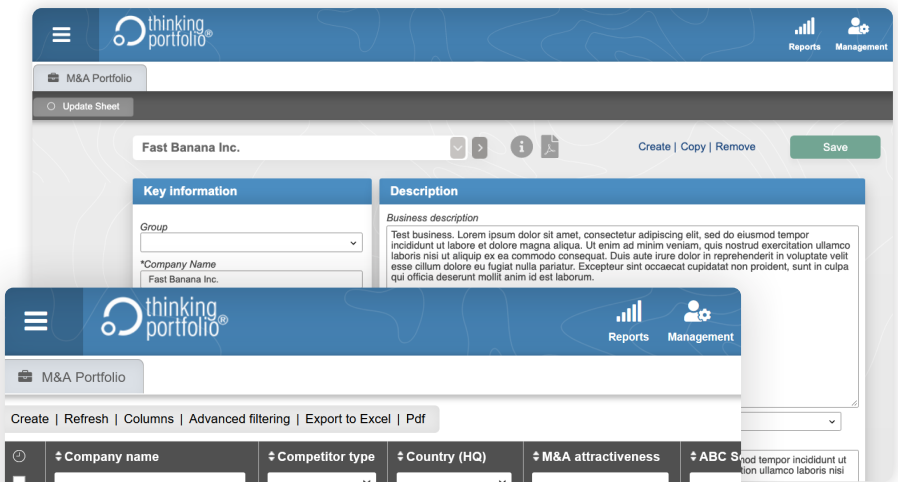
# M&A Portfolio

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



Company name	Competitor type	Country (HQ)	M&A attractiveness	ABC Score
Cheshire County Hygiene Services	Vertical Expansion...	Finland	1,0	B
Beauty Box	Other companies t...	Sweden	3,5	C+
Baby Swim	Strategic alliances	Austria	3,0	C
Yoga Baby	Global Competitors	Germany	2,7	B
Fast Banana Inc.	Vertical Expansion...	United Kingdom	3,0	B



**Map left, Table right**

Company table with logos and grouped by country

Name	HQ	Competitor Type	Revenue ME	M&A Attr.
Fast Banana Inc.	UK	Vertical Expansion...	90	3,0
Yoga Baby	Germany	Global Competitors		2,7
Baby Swim	Austria	Strategic alliances		3,0
Beauty Box	Sweden	Other companies t...		3,5
Cheshire County Hygiene Services	Finland	Vertical Expansion...		2,7





# Key Performance Portfolio

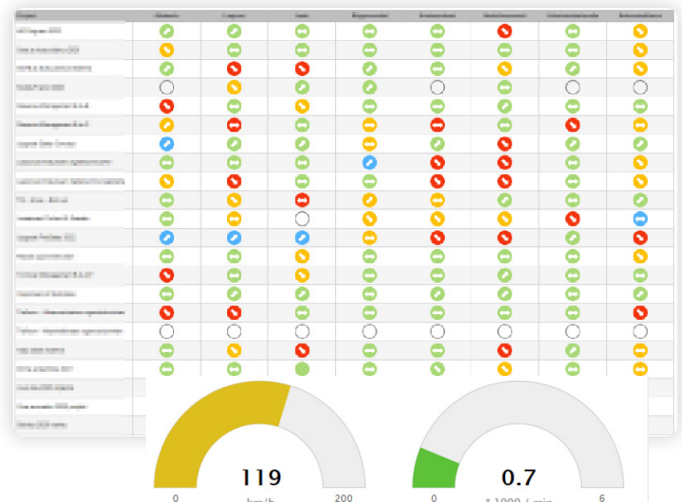
*Delivering business value with scorecard portfolio and KPI measurement*

- 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

Projekti	Projektin vastuuhenkilö	ASO2	Raportointitapa	Organisaatio	Näytetty väliaika	Reportointi	Typus	Budjetti
Investment Patna 2018	Mik-Rajala Pasiina	A	30 päivää	Patna	Suunnittelu ja valmistelu	0	0	476 250 €
Investment Patna 2018	Investment Patna Finland & Sweden	C	30 päivää	Patna	Käyttöönotto	0	0	682 000 €
Investment Patna 2018	Revenue Patna Management B to B	B	30 päivää	Patna	Käyttöönotto	0	0	476 250 €
Investment Patna 2018	Upgrade Patna Sales Concept	D	30 päivää	Patna	Käyttöönotto	0	0	305 000 €
Investment Program 2018	Revenue Management B to B	B	30 päivää	Thinking Portfolio Demo Area	Suunnittelu ja valmistelu	0	0	496 250 €
Investment Program 2018	Upgrade Patna Sales 2018	Thinking Esä	30 päivää	Thinking Portfolio Demo Area	Käyttöönotto	0	0	476 250 €
Investment Program 2018	Upgrade Sales Concept	D	30 päivää	Thinking Portfolio Demo Area	Käyttöönotto	0	0	305 000 €
Investment Program 2019	Project 12	Thinking Esä	30 päivää	Thinking Portfolio Demo Area	Suunnittelu ja valmistelu	0	0	512 000 €
Investment Program 2019	Project 12	Thinking Esä	30 päivää	Thinking Portfolio Demo Area	Käyttöönotto	0	0	305 000 €
Rollouts Ohjelma	Roll out Finland (Star)	Thinking Esä	30 päivää	Thinking Portfolio Demo Area	Siirtäminen	0	0	102 000 €
Rollouts Ohjelma	Roll out Finland II (Star)	Thinking Asto	A	Thinking Portfolio Demo Area	Toteutus	0	0	354 000 €
Rollouts Ohjelma	Roll out Norway Oslo (Demo)	Thinking Asto	A	Thinking Portfolio Demo Area	Siirtäminen	0	0	235 000 €
Rollouts Ohjelma	Roll Out Norway Oslo II (Demo)	Thinking Asto	A	Thinking Portfolio Demo Area	Käyttöönotto	0	0	235 000 €
SOTE ja alueautotus Ohjelma	Opinnoista digitaaliseen malliin	Thinking Esä	14 päivää	Thinking Portfolio Demo Area	Käyttöönotto	0	0	365 000 €
SOTE ja alueautotus Ohjelma	Opinnoista digitaaliseen malliin	Thinking Esä	14 päivää	Thinking Portfolio Demo Area	Siirtäminen	0	0	77 000 €
SOTE ja alueautotus Ohjelma	Revenue Management B to C	Thinking Esä	30 päivää	Thinking Portfolio Demo Area	Käyttöönotto	0	0	305 000 €
SOTE ja alueautotus Ohjelma	Revenue Management B to C	Thinking Esä	30 päivää	Thinking Portfolio Demo Area	Käyttöönotto	0	0	455 000 €
SOTE ja alueautotus Ohjelma	Sote ja alueautotus 2018	Thinking Esä	30 päivää	Thinking Portfolio Demo Area	Suunnittelu ja valmistelu	0	0	11 000 000 €
								1 438 750 €
								17 708 000 €





# 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 an 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



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