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## Free Portfolio Management Template

2024 Edition



The following slides discuss the key elements you want to incorporate into a portfolio management application. The elements discussed here are the same ones built into Shibumi's strategic portfolio management software.

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Request a Shibumi demo



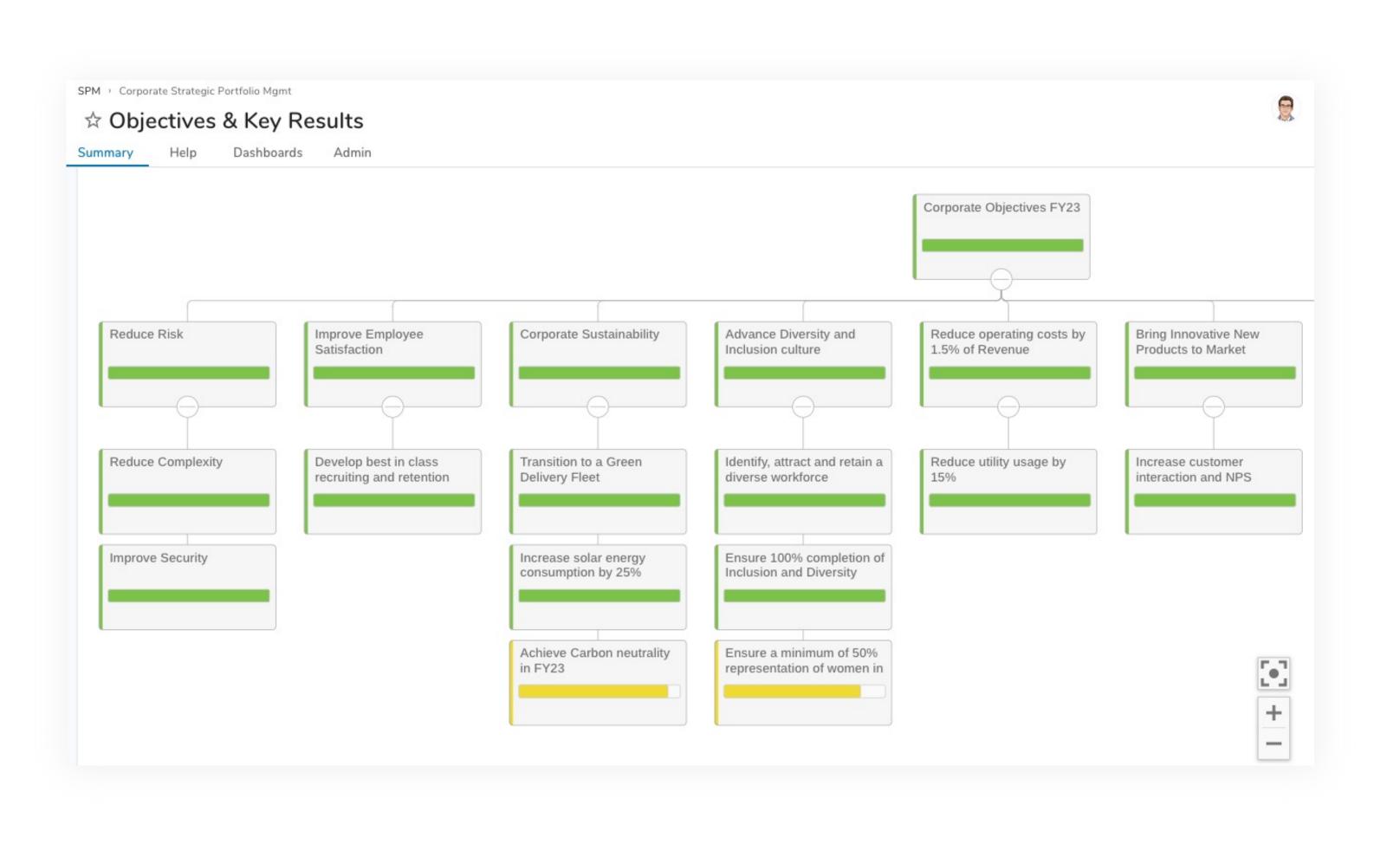


### Define the objectives and key results for the portfolio



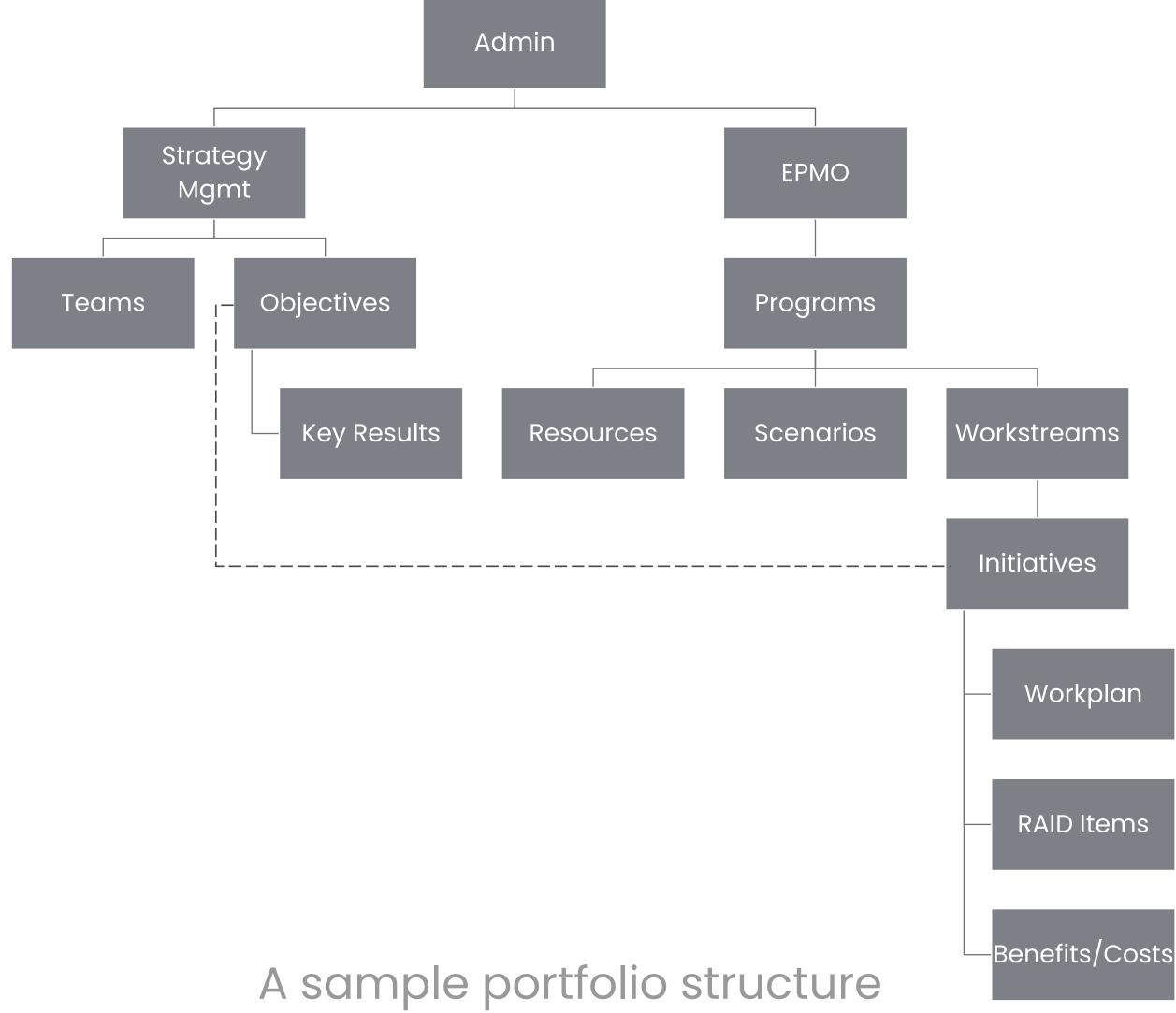
Define the objectives and key results projects and initiatives should contribute to. Consider adding the following details:

- Objectives and sub-objectives
- Red Amber Green status of objectives
- KPIs
- Team ownership



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### Create the desired structure for the portfolio



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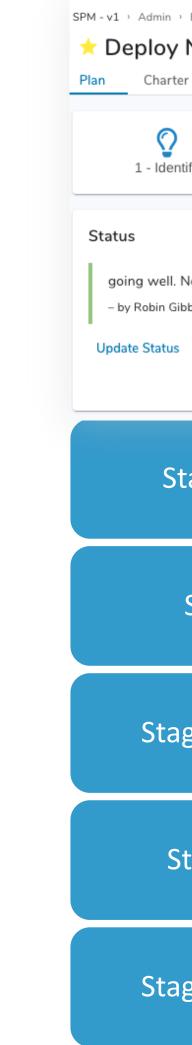


### Create process for governing the portfolio and assign roles



Governance workflow suggestions:

- Set up five stages with four approval gates for governing initiatives in your portfolio.
- Assign roles and people to each gate.
- Specify what information needs to be collected/validated before an initiative can proceed to the next stage.



y New Logistics Technology rter Activities Resources Risks	History Discussions				
entify 2 - Plan	3 - Implement	4 - Realize		5 - Complete	Submit to Gate 2
		Previous Statu	IS		
I. New Update. Update 7/6		Date S	Status	Status Message	Author
Gibb on Jul 8, 2022		Jul 8, 2022	*	going well. New Update. Update 7/6	Robin Gibb
SL		Jul 6, 2022	*	going well. New Update. Update 7/6	e Giraldo Gutierrez
Stage 1 - Identify Stage 2 - Plan				alculate Plan (ta	rget)
age 3 - Implement	<ul><li>Execute</li><li>A mix of</li></ul>	activities plan and a	actua	ls	
Stage 4 - Realize	<ul><li>Monitor</li><li>Update a</li></ul>	over time actuals			
age 5 - Completed	• Business	s as usual			



### Set up an intake form to centrally collect project ideas

Initiative

Name

Description

-- Select --



Set up intake forms with required fields to solicit project ideas for Stage I triage and prioritization. Define the prioritization method and incorporate it into the idea intake form. This information should feed into your portfolio management app.

#### **Risk Assessment**

Level of impact on customer information?

High

Level of impact on regulat

Medium

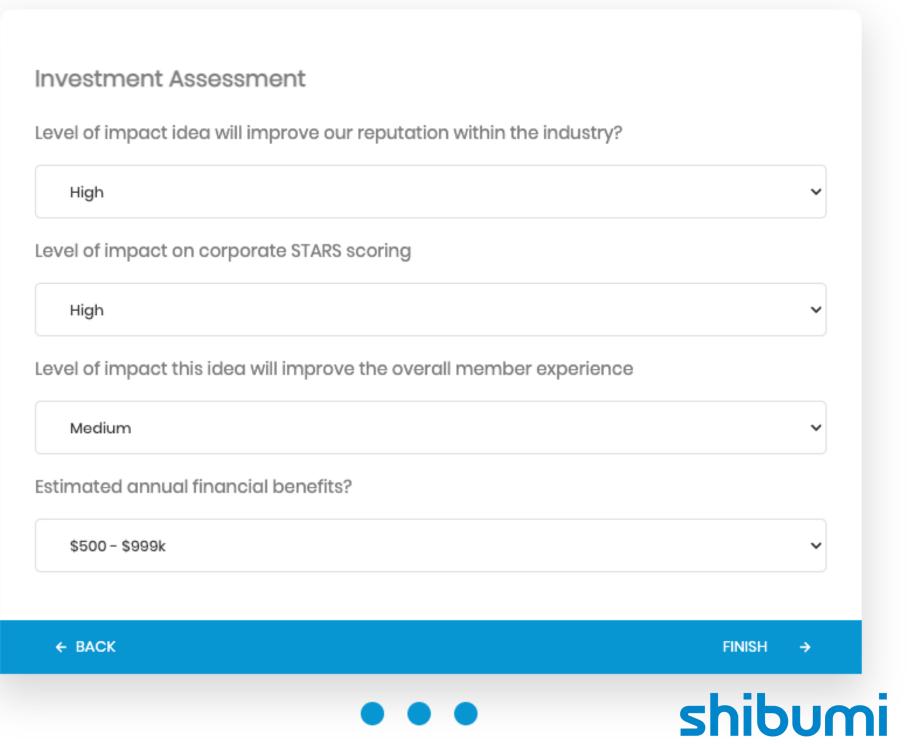
Number of business areas

4 to 5

How many months after ir period)?

7-9 months

← BACK



### Gather business case information needed to rank and assess initiatives



**Business** Case Management

Suggested best practices:

- Ask people to create a charter (stage 1) to describe the high-level objectives of the initiative.
- At the planning stage (stage 2), ask for more detailed information on **benefits** and **cost drivers**. Ask for dates and benefit values to inform in-year and runrate value calculations.
  - Add two dimensions for each driver: Planned and actual. Add additional dimensions (e.g., forecast) if you like.
  - Add additional attributes based on your needs (e.g., P&L/cost categories).

#### ★ Deploy Ne

#### Details

#### Description

Ð	
	Benefit Drive
	Name
	License Savi (Recurring)
	Infrastructure Retirement (
	Efficiency Sa
	Cost Drivers

Name

Maintenand

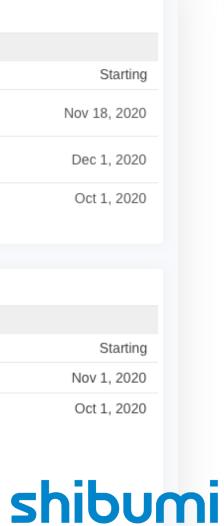
Staff Trainin

	ogistics Techno vities Resources Ri	<b>logy</b> sks History Discussion	s	CG S DS +2
Details		Team	Investment Score	65
Start Date Jan 13, 2022 Description	Due Date Apr 3, 2022	Owner Ken Pellegrino Business Sponsor 	Level of impact idea will improve our reputation w Very High Level of impact this idea will improve the overall m High	Level of impact on corporate STARS scoring Medium Estimated annual financial benefits? \$0 - \$100k
Deploy logistics technolo robotic warehouse syste automation a reality, dro last-mile delivery capabil tracking with tools like R visibility throughout our	ms to make nes to improve lities and better RFID tags improve	Collaborator Barbara Schu	Risk Score Level of impact on customer information? Medium Number of business areas this will impact? 1	<ul> <li>55</li> <li>Level of impact on regulatory or compliance proce</li> <li>Very High</li> <li>How many months after implementation to achiev</li> <li>10-12 months</li> </ul>

ers

	Туре	Recur	Planned		Actual			
			Monthly Benefit	Starting	Monthly Benefit	Star		
Savings from System Retirement g)	Opex Benefit	Recurring	5,000	Dec 1, 2020	6,000	Nov 18, 2		
ture Savings from System nt (Non-Recurring)	Capex Benefit	Non Recurring	50,000	Dec 1, 2020	60,000	Dec 1, 2		
Savings (Recurring)	Opex Benefit	Recurring	20,000	Oct 1, 2020	20,000	Oct 1, 2		

	Туре	Recur	Planned		Actua	l
			Monthly Cost	Starting	Monthly Cost	Star
nce Fees	Opex Cost	Recurring	1,500.00	Nov 1, 2020	1,500.00	Nov 1, 20
ing	Capex Cost	Non Recurring	7,500.00	Oct 1, 2020	7,500.00	Oct 1, 20



### Estimate the resources each initiative will need to succeed



Roles & People

Define roles, individuals, and skills and manage utilization across multiple initiatives. Ensure that the following information is visible:

- Resource over utilization/conflicts
- Effort and duration
- Resource Costs

SPM - v1 > Admin > Enterprise PMO

🕸 Project Mgr

Summary

Detail

Available Resources 2.0

Active Projects Participating In

Name

#### Cluster Decom

IT and Facilities Efficiency Plan

Deploy New Service Management Tool

Energy Efficient Vehicle Transition

Reduce Outside Contractors

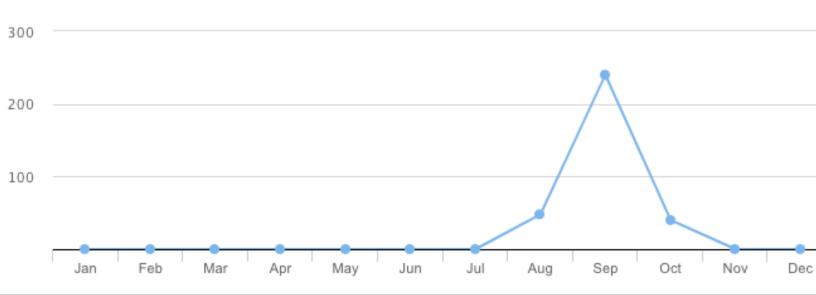
New Marketing Campaign

#### Overage Hours per Month

+

#### Available Starting

Jan 1. 2020

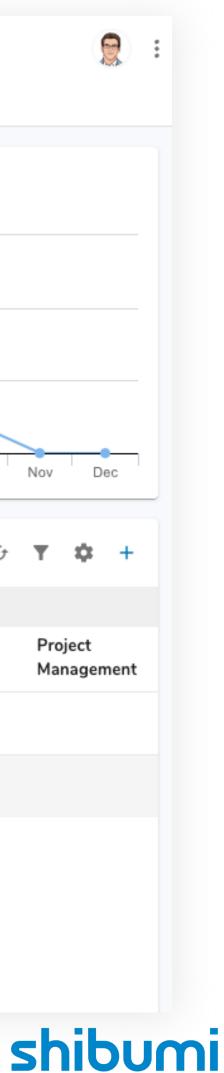


Stage	Start	Due	Hours over
	Date	Date	utilized
4 - Realize	Aug 26, 2022	Oct 7, 2022	320
3 -	Apr 15,	Jun 17,	0
Implement	2022	2022	
3 -	Jul 22,	Oct 14,	328
Implement	2022	2022	
3 -	Aug 23,	Oct 4,	320
Implement	2022	2022	
3 -	Dec 29,	Mar 2,	0
Implement	2021	2022	
4 - Realize	Aug 18, 2022	Oct 6, 2022	328

#### Individuals with this Role

Name	Skills Profile											
	Front End	Back End	Database	DevOps	Business Intelligence	Project Managem						
Lee Nonmi												
Fay Daway												

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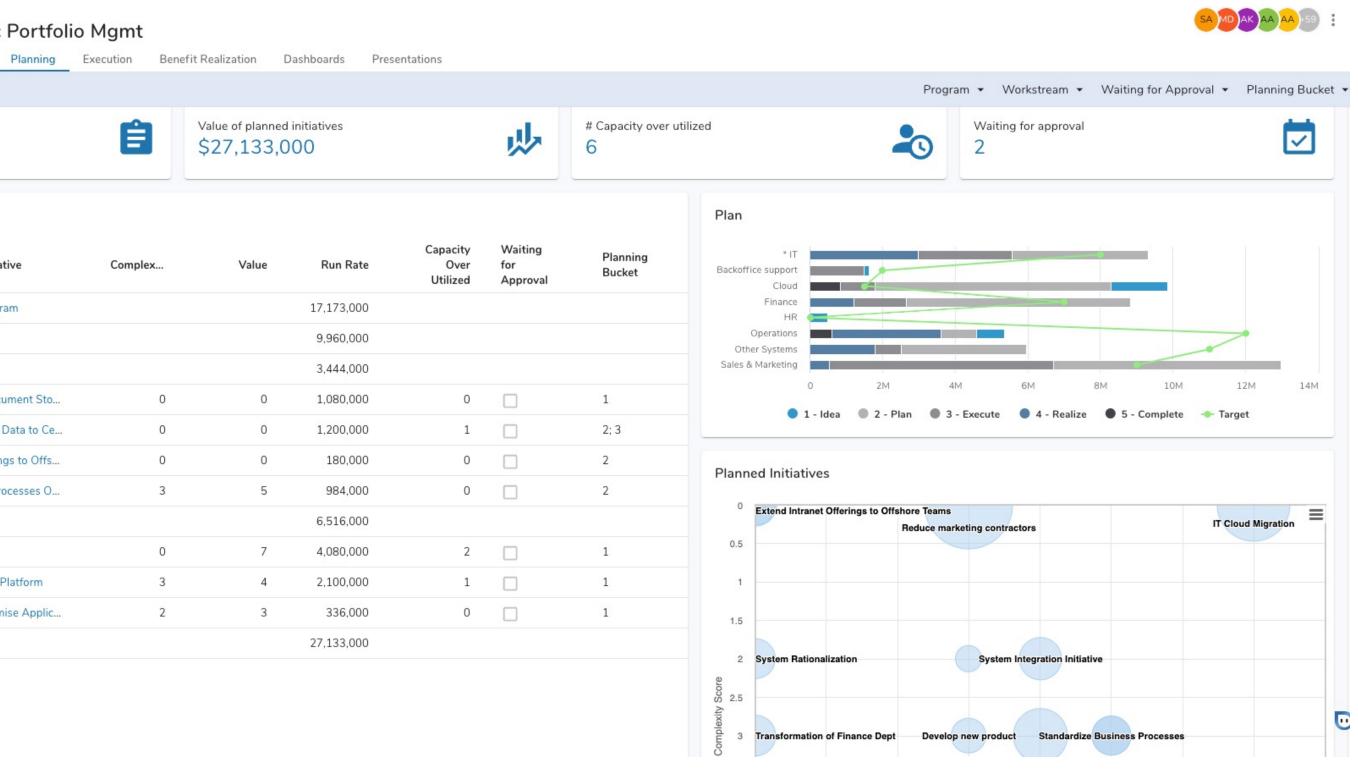
### Prioritize initiatives based on alignment, value and feasibility



Prioritize Compare benefits & costs

Prioritize initiatives and projects based on their alignment to strategic objectives, potential value (financial and non-financial benefits), and feasibility (including costs and resource requirements).

SPM 🖈 Corporate Strategic Portfolio Mgmt Welcome Ideas Outcomes # of planned initiatives 20 Initiatives Program > Workstream > Initiative \* Cost Transformation Program Digital Transformation Other Systems Eliminate Physical Document Sto.. Consolidate Customer Data to Ce.. Extend Intranet Offerings to Offs... Move (All) Business Processes O ... ✓ Cloud IT Cloud Migration Introduce Middleware Platform Retire Legacy On-premise Applic... Total



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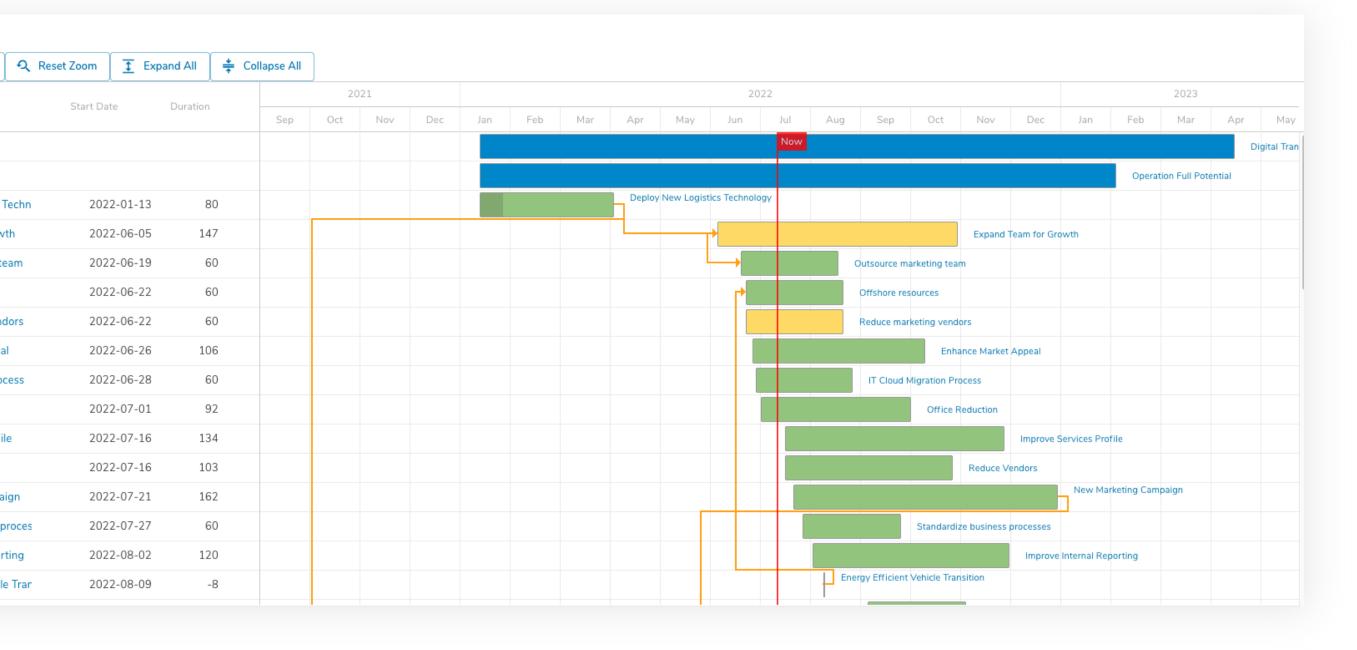


### Build visual roadmaps to enhance planning and execution



As an initiative is heading into the Execution stage, create an interactive Gantt chart to display information about it, including key dependencies between projects/tasks and milestones.

Workplan Gantt								
Q Zoom Out	Q Zoom In							
Pr	roject							
🖃 🛅 Digital Tran	nsformation							
🖃 🗁 Operatio	on Full Potential							
🕒 Deplo	y New Logistics T							
🕒 Expan	d Team for Grow							
🕒 Outso	ource marketing te							
🕒 Offsho	ore resources							
🕒 Reduc	ce marketing vend							
🕒 Enhan	nce Market Appea							
📑 IT Clo	ud Migration Proc							
🕒 Office	Reduction							
📑 Improv	ve Services Profil							
🕒 Reduc	ce Vendors							
🕒 New M	Marketing Campai							
🕒 Stand	ardize business p							
📄 Improv	ve Internal Report							
📄 Energy	y Efficient Vehicle							



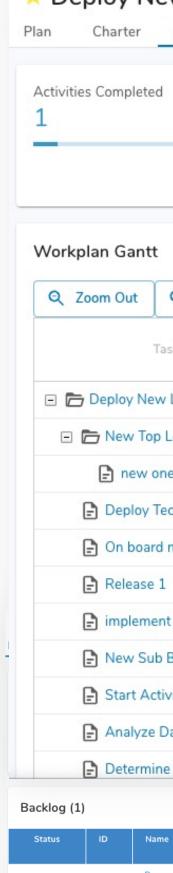


## Track milestones and surface risks



Track more detailed milestones and activities at the project level to ensure smooth execution. Key items to track:

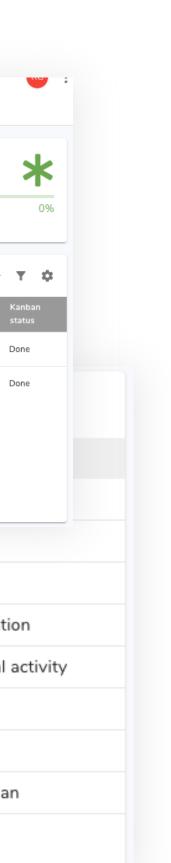
- Milestones and/or activities
- Dependencies
- Red, Amber Green Status
- Planned/target and actual dates
- Key Milestones
- Risks, actions, issues, and decisions.



Backlog (1) WIP (3)							Need o	Need core team discussion (3)						Done (2)						
Status	ID	Name	Due Date	Kanban status	Status	ID	Name	Due Date	Kanban status	Statu	s ID	Nam	me	Completed Date	Kanban status	Status	ID	Name	Completed	Kanl stati
8	42	Research Applicable Technologies	Feb 24, 2022	Backlog		43	Determine Technology Investment	Mar 31, 2022	WIP		78	Stari Activ		<b></b>	Need core team discussion		81	Release 1	Feb 23, 2022	Done
						44	Deploy Technology Infrastructure	Jan 13, 2022	WIP		84	new		<b></b>	Need core team		83	implement a new system	Feb 23, 2022	Don
						45	Analyze Data	Jun 16, 2022	WIP		87	mari Go li		Ħ	discussion Need core team discussion					
	0	Expan	d Team	for Grow	vth		Travel	Restric	tions			0		0		4				
	0	Deploy	/ New L	ogistics	Technolog	y	New R	lisk of S	Supply Cl	nain						20		New Tear	n	
	0	IT Clou	ud Migra	ation Pro	ject		Incom	patible	technolo	gies		*				12		Phased in	nplement	atior
	0	New N	larketin	ig Campa	aign		risk					*		*		9		Minimise	non-digit	al ac
	0	IT Clou	ud Migra	ation Pro	ject		Inadeo	uate st	affing le	vels		٠				25				
	0	IT Clou	ud Migra	ation Pro	ject		Lack o	f resou	rces					*		12				
	0	Deploy	/ New L	ogistics	Technolog	y	Stakeh	older e	ngagem	ent				*		12		Activate A	Auxilary P	lan
	0	Energy	/ Efficie	nt Vehic	le Transitio	n	Resou	rce cha	llenges							16		Add actio	n plan	

#### Deploy New Logistics Technology Activities Resources Risks History Discussions Activities On Target Activities Delayed Activities At Risk **~** := 9 1 9% 82%

Q Zoom In	Reset Zoom	T Ex	pand All	📫 Col	lapse All	]									
ask		~		2021		2022									
ask		Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	
w Logistics Techno	ology									Deploy	New Logisti	cs Technology	Now		
Level Task							•	New Top Lev	el Task						
ne							nev	v one							
echnology Infrast	ructu							Depl	loy Technolog	gy Infrastruc	ture				
d new market								On boa	rd new mark	et					
1									Release	1					
nt a new system									imple	ement a nev	v system				
BT Activity A									New Su	ıb BT Activi	ty A				
tivity									•	Start Ac	tivity				
Data										٠	Analyze [	Data			
ne Technology Inv	estm									•	_	Deter	mine Techn	ology Investr	



### Track benefit realization across all initiatives



Create dashboards to see whether initiatives are delivering their expected benefits. Items to monitor and assess:

- Benefits by stage
- Benefits over time
- Opex/Capex benefits
- Non-financial benefits
- How benefits look by stage
- Benefits changes week-on-week/month-on-month
- The benefit impact due to delayed milestones
- Recurring or One-off benefits and costs to achieve
- ROI/NPV calculations



# Why use specialized portfolio management software like Shibumi?

**Focus on business results** by identifying your metrics for success and tracking them through the full program lifecycle

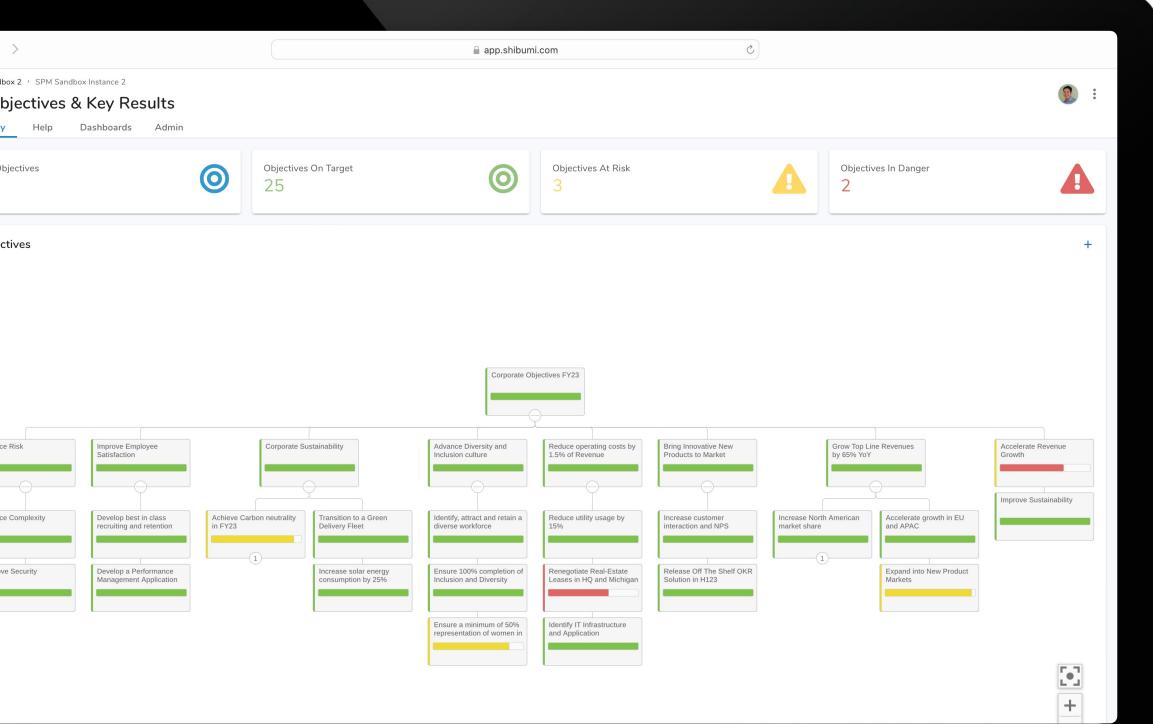
Make better decisions with more timely and accurate data from a single source of truth

**Significantly reduce manual effort** around multilevel tracking, aggregating, and reporting via Excel, PowerPoint, and emails

**Get running faster** with a fully configurable platform that aligns with your unique program requirements in weeks, not months

**Ensure the right people have the right access** with our enterprise-grade security

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### Book a demo





