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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.
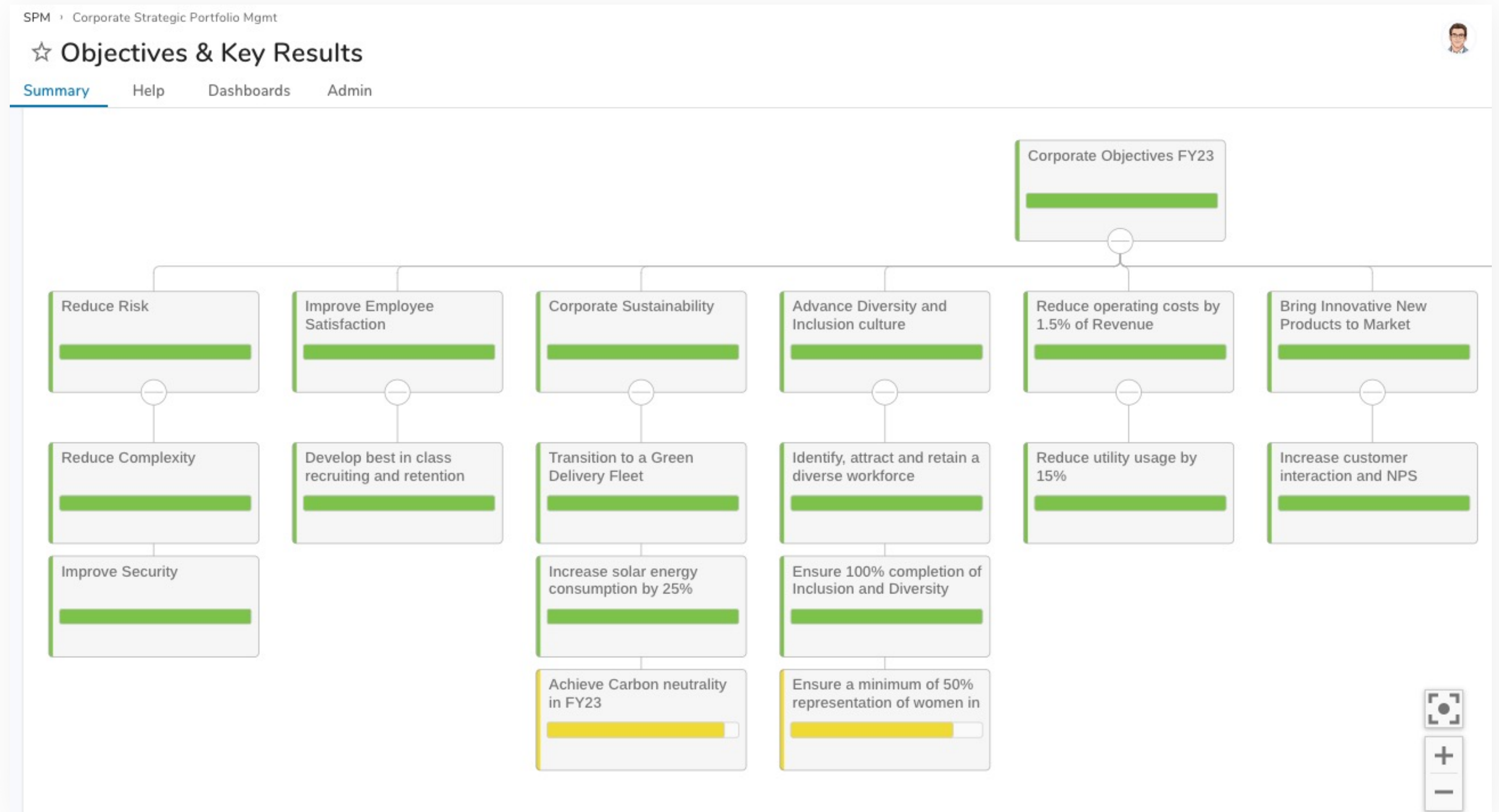
Request a Shibumi demo

Define the objectives and key results for the portfolio

Strategy Mgmt
Objectives & Key Results

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
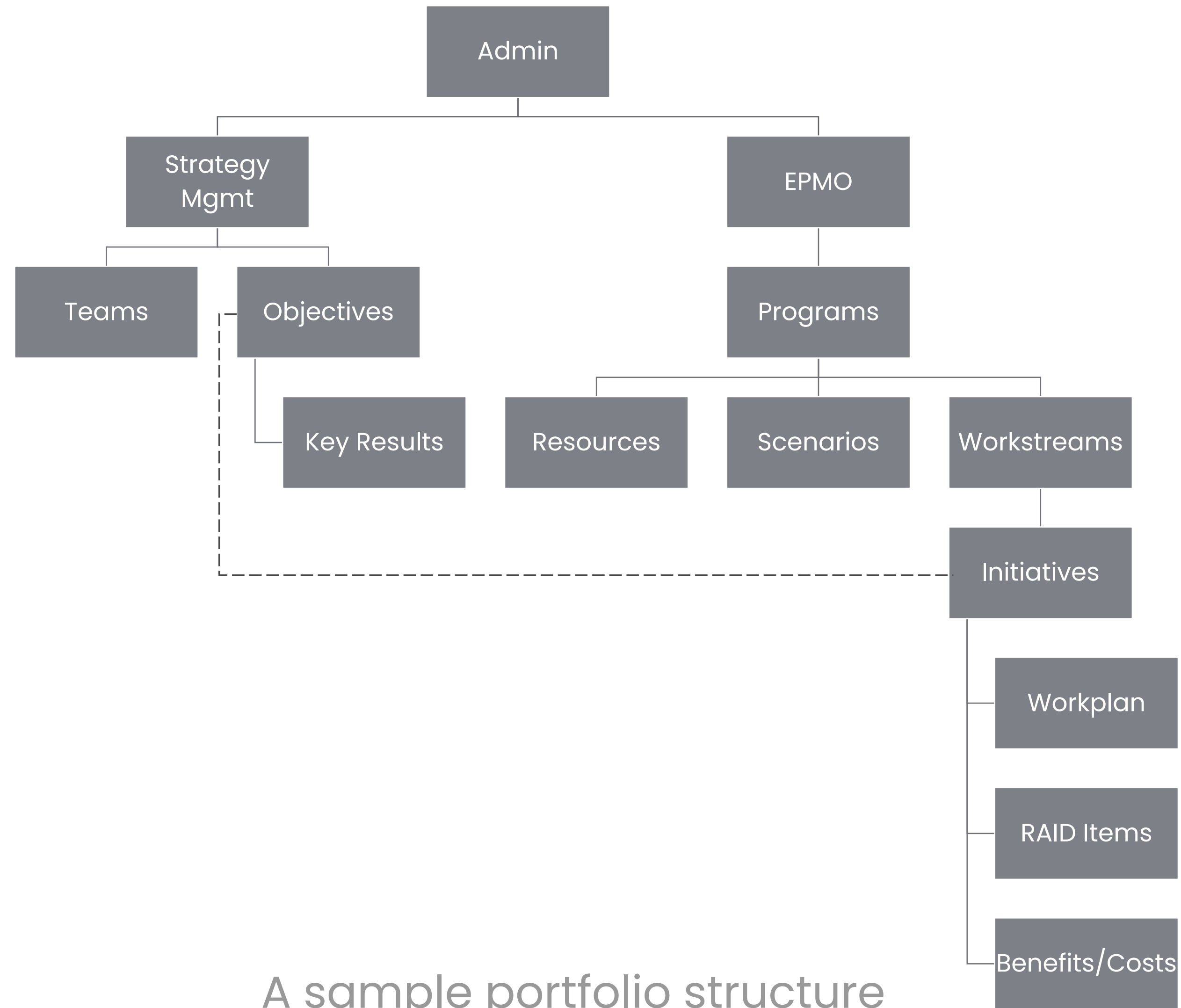
A sample portfolio structure

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Create process for governing the portfolio and assign roles

Governance
Workflow & Approvals

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.

Stage	Details
Stage 1 - Identify	• High level estimate and estimated start date • Charter information
Stage 2 - Plan	• Add Benefit drivers to calculate Plan (target) • Activities
Stage 3 - Implement	• Execute activities • A mix of plan and actuals
Stage 4 - Realize	• Monitor over time • Update actuals
Stage 5 - Completed	• Business as usual

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Set up an intake form to centrally collect project ideas

Idea Intake
Simple intake forms

Set up intake forms with required fields to solicit project ideas for Stage 1 triage and prioritization. Define the prioritization method and incorporate it into the idea intake form. This information should feed into your portfolio management app.

Initiative

-- Select --

Name

Description

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 i period)?

7-9 months

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Investment Assessment

Level of impact idea will improve our reputation within the industry?

High

Level of impact on corporate STARS scoring

High

Level of impact this idea will improve the overall member experience
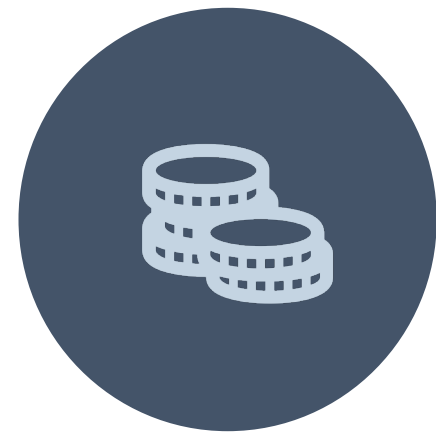
Medium

Estimated annual financial benefits?

$500 - $999k

← BACK   FINISH →

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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 run-rate 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 New Logistics Technology**

Plan Charter Activities Resources Risks History Discussions

Details

Start Date	Due Date
Jan 13, 2022	Apr 3, 2022

Description

Deploy logistics technologies such as robotic warehouse systems to make automation a reality, drones to improve last-mile delivery capabilities and better tracking with tools like RFID tags improve visibility throughout our supply chain.

Business Case Document
🔗

Team

Owner
Ken Pellegrino

Business Sponsor
--

Collaborator
Barbara Schu...

Investment Score   65

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

Risk Score   55

Level of impact on customer information?
Medium

Number of business areas this will impact?
1

Level of impact on regulatory or compliance proce...
Very High

How many months after implementation to achiev...
10-12 months

Benefit Drivers

Name	Type	Recur	Planned		Actual	
			Monthly Benefit	Starting	Monthly Benefit	Starting
License Savings from System Retirement (Recurring)	Opex Benefit	Recurring	5,000	Dec 1, 2020	6,000	Nov 18, 2020
Infrastructure Savings from System Retirement (Non-Recurring)	Capex Benefit	Non Recurring	50,000	Dec 1, 2020	60,000	Dec 1, 2020
Efficiency Savings (Recurring)	Opex Benefit	Recurring	20,000	Oct 1, 2020	20,000	Oct 1, 2020

Cost Drivers

Name	Type	Recur	Planned		Actual	
			Monthly Cost	Starting	Monthly Cost	Starting
Maintenance Fees	Opex Cost	Recurring	1,500.00	Nov 1, 2020	1,500.00	Nov 1, 2020
Staff Training	Capex Cost	Non Recurring	7,500.00	Oct 1, 2020	7,500.00	Oct 1, 2020

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Estimate the resources each initiative will need to succeed

Resource Mgmt
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	Available Starting
2.0	Jan 1, 2020

Overage Hours per Month

Active Projects Participating In

Name	Stage	Start Date	Due Date	Hours over utilized
Cluster Decom	4 - Realize	Aug 26, 2022	Oct 7, 2022	320
IT and Facilities Efficiency Plan	3 - Implement	Apr 15, 2022	Jun 17, 2022	0
Deploy New Service Management Tool	3 - Implement	Jul 22, 2022	Oct 14, 2022	328
Energy Efficient Vehicle Transition	3 - Implement	Aug 23, 2022	Oct 4, 2022	320
Reduce Outside Contractors	3 - Implement	Dec 29, 2021	Mar 2, 2022	0
New Marketing Campaign	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 Management
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).
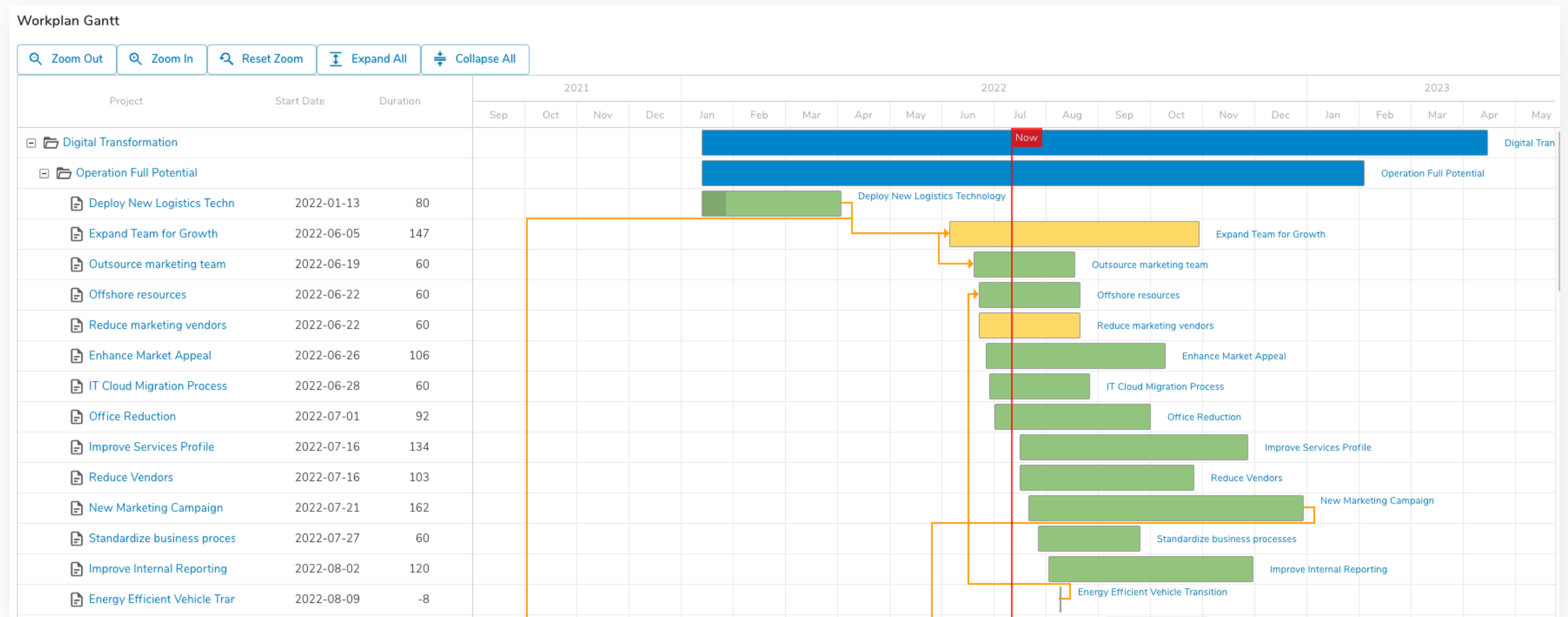
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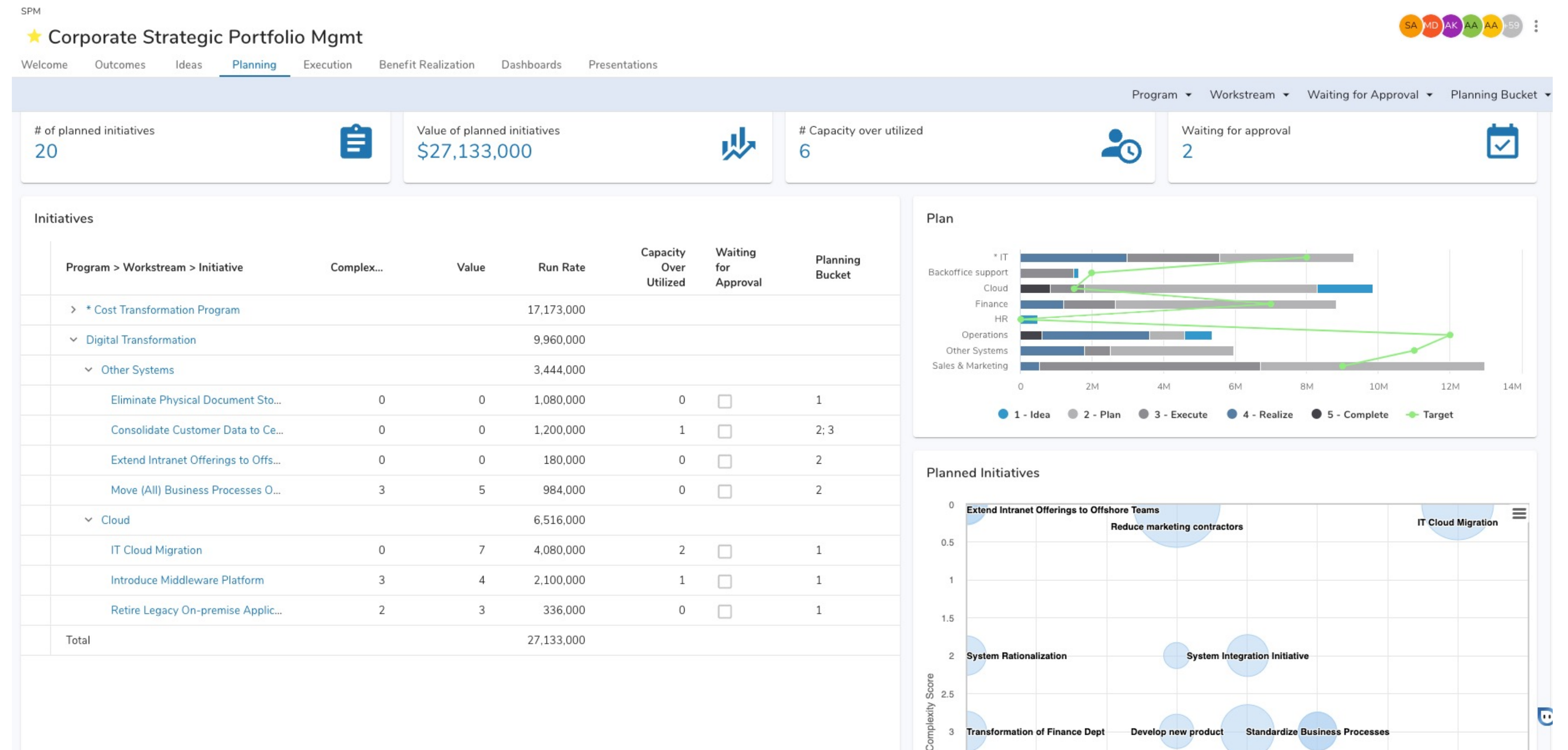
Build visual roadmaps to enhance planning and execution

Roadmaps

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.

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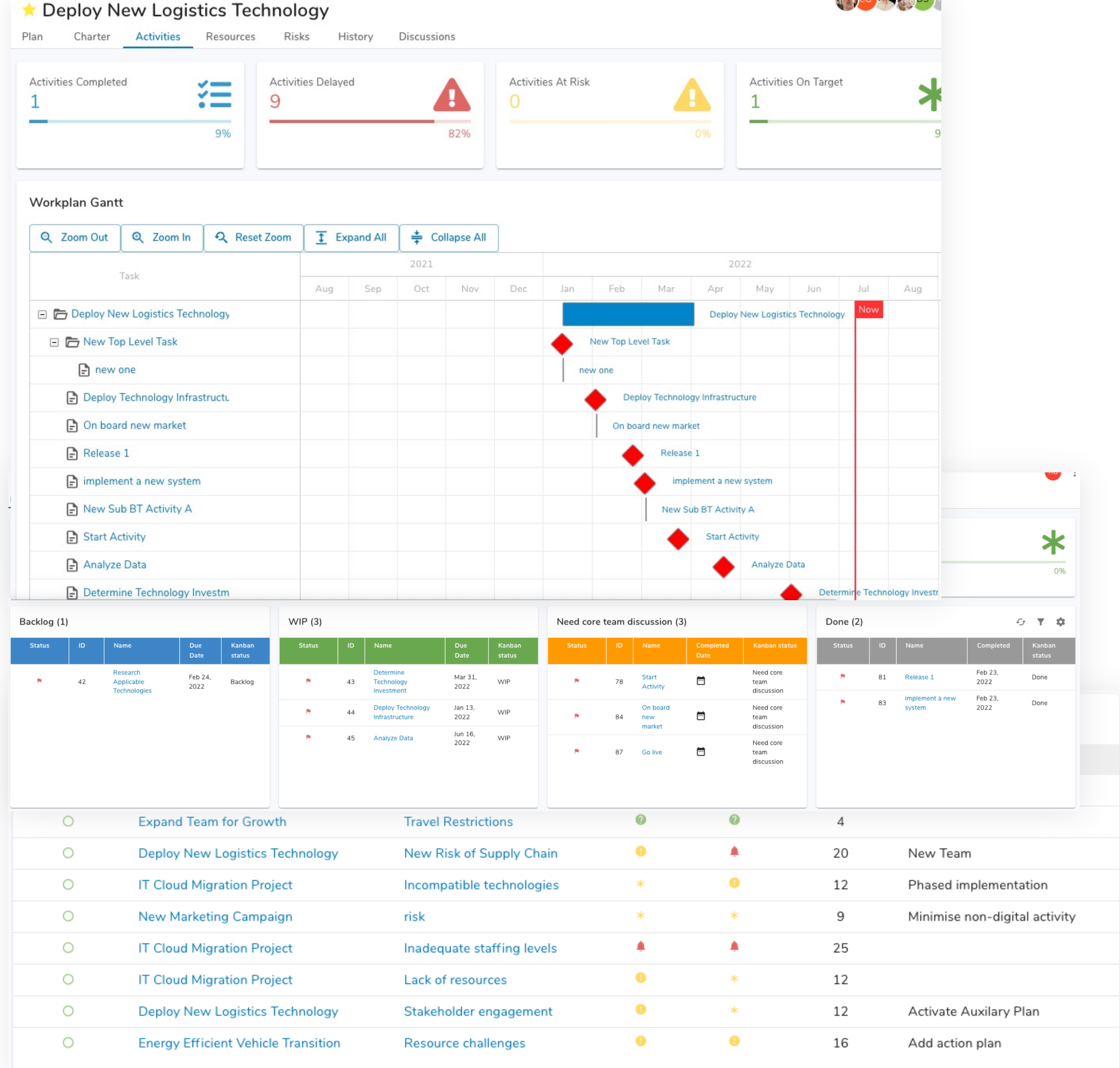**Strategic portfolio management template**

Track milestones and surface risks

Work Planning

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.

Track benefit realization across all initiatives

Benefit Realization

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

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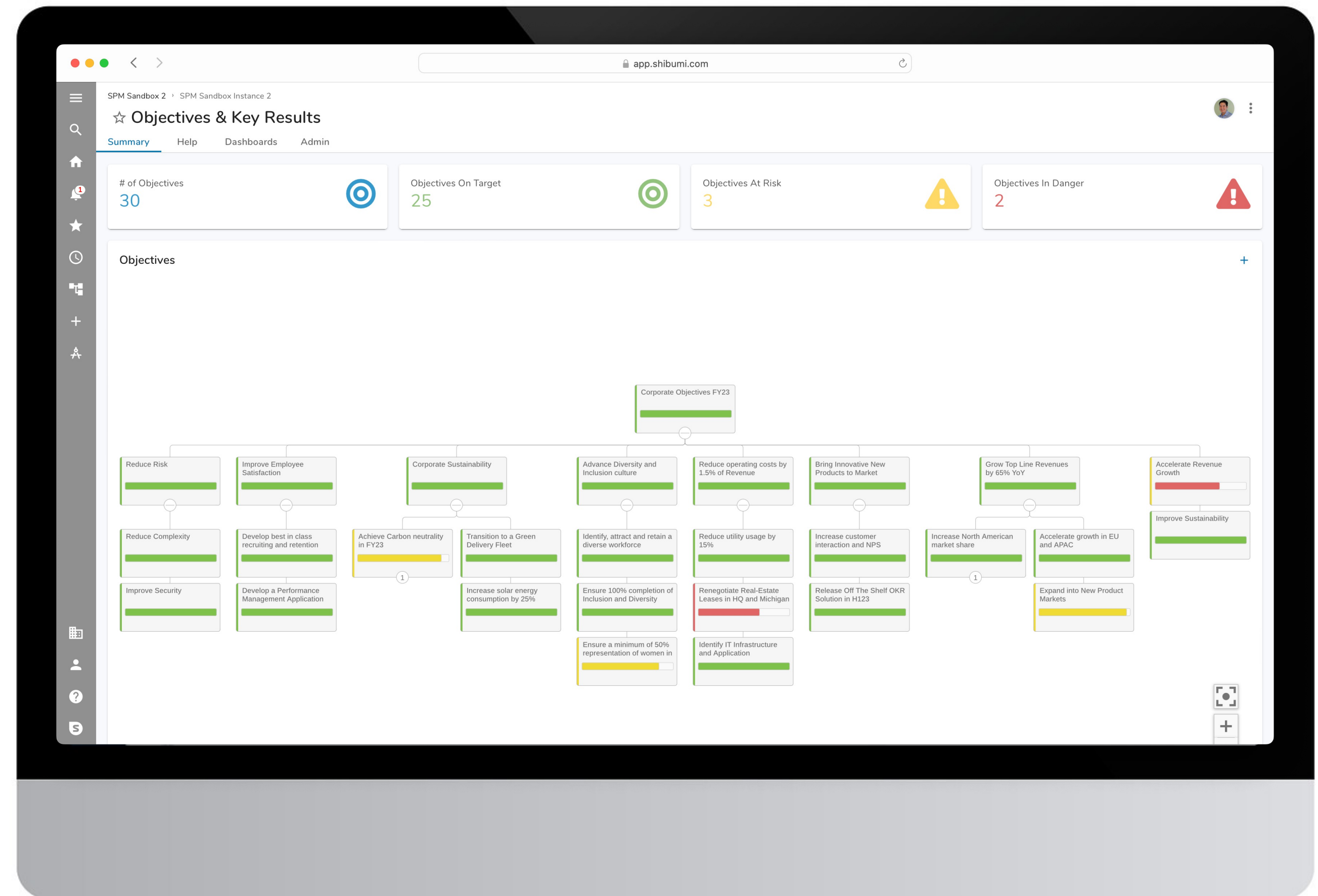# Why use specialized portfolio management software like Shibumi?

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

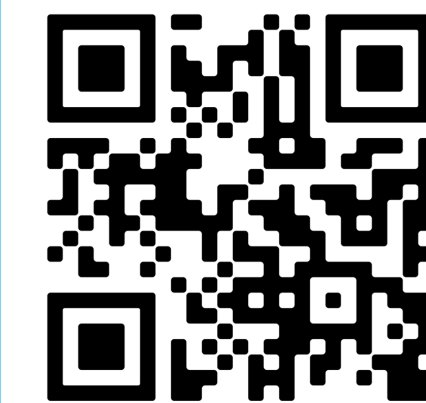**Make better decisions** with more timely and accurate data from a single source of truth

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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