

The background image shows three hikers with large backpacks crossing a rocky stream in a mountainous area. The scene is overlaid with a complex geometric pattern of white and grey lines and polygons, creating a modern, digital aesthetic. The text is positioned in the upper left quadrant of the image.

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Portfolio Management | Implementation Best Practices

Your Guide: Jen Scarlato, Ross Hensel

Introductions

- Take 5 Minutes
- Turn to a Person Near You
- Introduce Yourself



Session Goal And Objectives

- **Course Goal:** Discuss the best practices for implementing portfolio management.
- **Course Objective:** In this class we will review Portfolio Management best practices as they relate to:
 - How portfolios work
 - What's needed to use portfolios in CA PPM?
 - Add additional attributes to Portfolios
 - Building Portfolio Contents
 - Setting Portfolio targets
 - Building Portfolio Plans
 - Setting Ranking Rules
 - PMO Accelerator (Reports)

Portfolio Basics and Overall Best Practices

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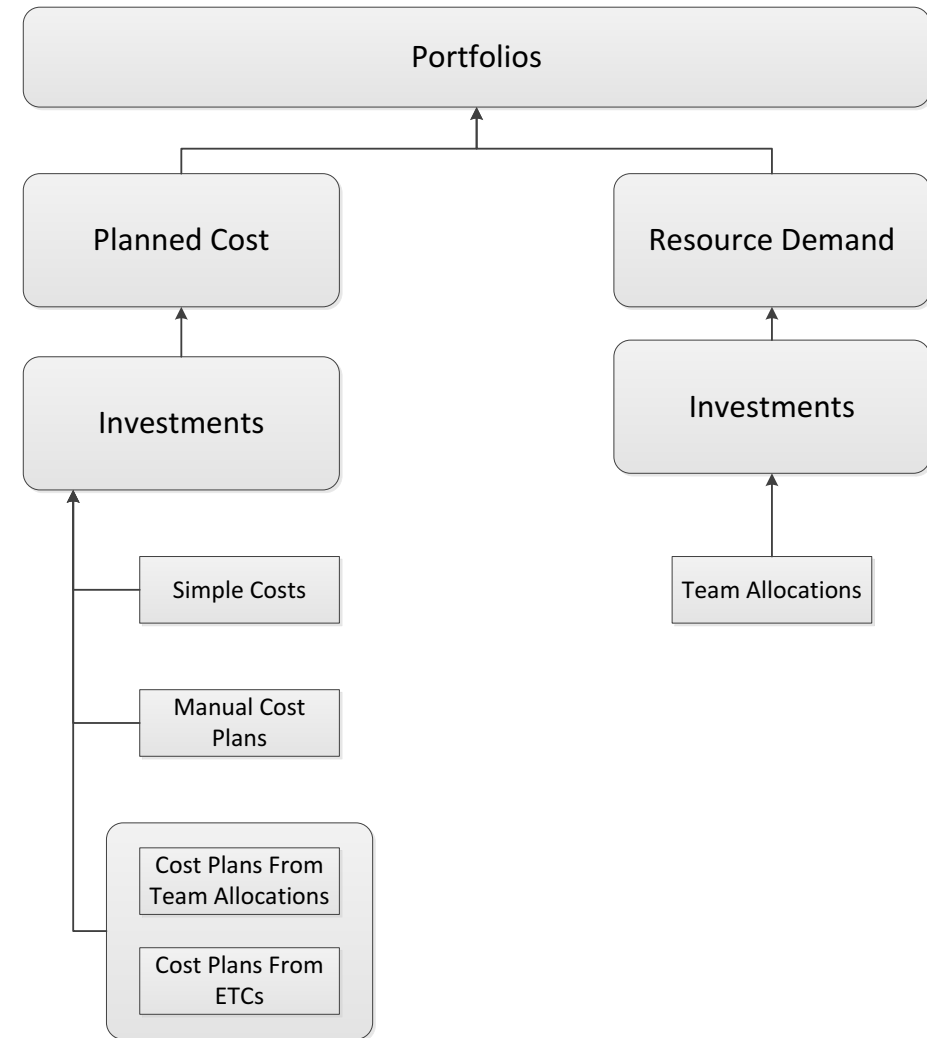
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How Portfolios Work

- The portfolio is an entirely separate object, containing its own tables not tied directly to the CA PPM tables.
 - Data is 'synced' between the live PPM tables and the portfolio tables.
- Portfolios may be synced individually via the "Sync" button within the portfolio. Additionally, you may create a schedule to automatically sync with the portfolio.
- Read and Write access to portfolios is also controlled within the portfolio:
 - **Managers:** View and Edit rights to the portfolio. This includes the right to sync.
 - **Stakeholders:** View rights to the portfolio.

What Data is Used in Portfolios?

- What data elements do portfolios use?
 - Investments
 - Planned Costs (simple budget or cost plans)
 - Resource Demand (allocations)
- What is the minimum to get in the portfolio game?
 - **Simple:** Investment Data - Simple grouping of projects
 - **Medium:** Grouping of projects with either planned cost or resource data
 - **High:** Project, financial and team data to provide a deep-drive into what is/is not possible from a resource, timeline and cost perspective.



Add Additional Attributes to Portfolios

- Since Portfolios are in separate tables, an administrator must select the field(s) that should be included when the portfolio is synced.
- Best practice is to create any attributes that will be shared between investments types on the Investment object.
- Up to 700 attributes may be synced.

Properties Attributes Linking Actions Views **Attribute Registry** Access to this Object ▾

Object: Portfolio Investment - *Attribute Registry*

Attribute Settings

Available Attributes	Selected Attributes	Required Attributes
% Complete Calculation Method	% Complete	Above Waterline
Actuals for Labor Resources	% Expended	Above Waterline Caption
Actuals Sum for Labor Resources	Actuals	Active
Actual To Date	ACWP	Actual Capital %
Affiliated Project	Alignment	Actual Capital % (Total)
Agency Requirements	Architectural Fit	Actual Capital Cost
Approval 1	BAC	Actual Capital Cost (Total)
Approval 2	Baseline Finish	Actual Cost
Approval 3	Baseline Start	Actual Cost (Total)
Approval 4	Baseline Usage	Actual Operating %
Approved	BCWP	Actual Operating % (Total)
Approved By	BCWS	Actual Operating Cost
Architectural Application Review	Business	Actual Operating Cost (Total)
Architectural Infrastructure Review	Business Alignment	Actuals As Of Date
Are agency approvals complete or plan in place to assure... [inv_agency_app]	Business Sponsor	Approved
Are any difficulties anticipated for production at full ... [inv_difficulties]	Business Unit Priority	Approved Caption
Are production systems (BOM, SAP) updated for product wi... [inv_production_sys]	Charge Code	Approved Flag
Are raw materials and additives availability and expecte... [inv_raw_mat]	Child Investment	Budgeted % Spent
Are updates needed to the Process Risk Assessment or Man... [inv_updates_needed]	Commercial Value	Budgeted Benefit
As applicable, is capability to produce in multiple loca... [inv_prod_capa]	Corporate Priority	Budgeted Benefit (Total)

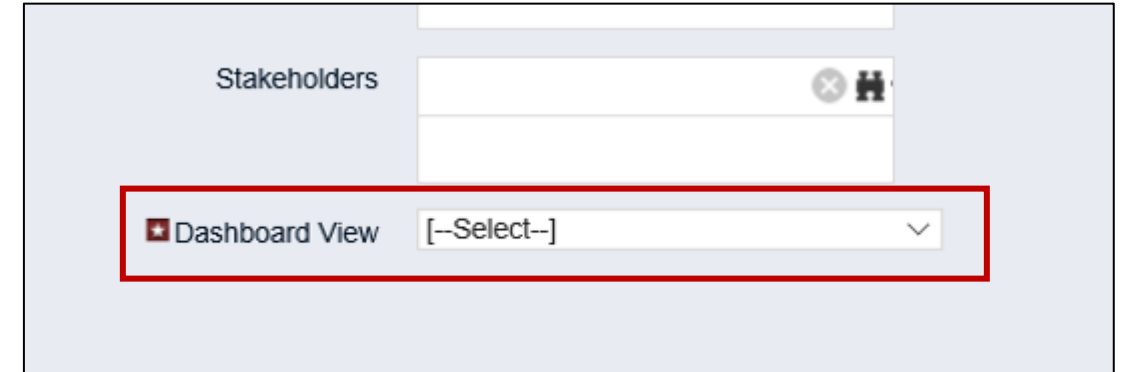
Add Attribute ➡ ➡ Remove Attribute

Save Save And Return Return

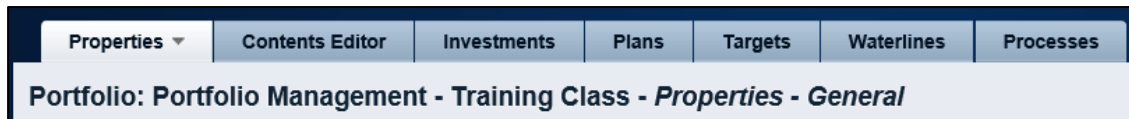
252 towards the limit of 700 attributes have already been added to the portfolio.

Portfolio Page Layout

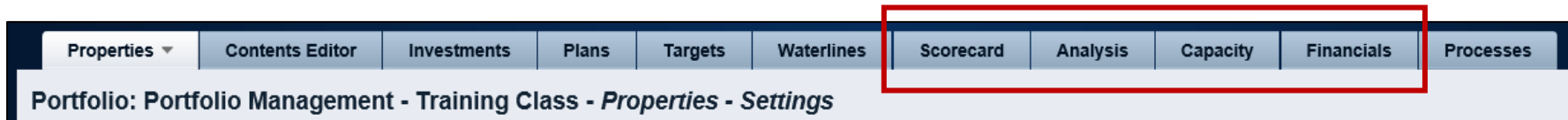
- Before you can save the portfolio, you need to set the portfolio page layout



- Portfolio Default Layout



- PMO-Portfolio Investment Dashboard



Child Portfolios

- The Child Portfolio functionality is extremely basic
- There are no true hierarchies in portfolios
- This simply creates a link in reference only.

Portfolio: Training Portfolio - Contents Editor

Include and Filter Investments

<input type="checkbox"/>	Investment Type	Included	Filter Definition
<input type="checkbox"/>	Application		[Build Power Filter]
<input type="checkbox"/>	Asset		[Build Power Filter]
<input type="checkbox"/>	Idea		[Build Power Filter]
<input type="checkbox"/>	Other Work		[Build Power Filter]
<input type="checkbox"/>	Product		[Build Power Filter]
<input checked="" type="checkbox"/>	Project	✓	((Project Manager = 'Bianchi, Monica') and (Project Start >= '1/1/15'))
<input type="checkbox"/>	Service		[Build Power Filter]

Include Exclude Clear Power Filter

Individual Investments

No individual investments have been added to this portfolio.

Add

Child Portfolios

No child portfolios have been added to this portfolio.

Add

Sync Now

Building the Portfolio

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Best Practices In Building Portfolio Content

- Portfolios can contain all investment types in CA PPM
- There is no limit to the number of investments that a portfolio can contain (v14.2+)
- Investments should be aligned with organizational goals and objectives
- Investments should have common features that allow for the organization to group them in some way to manage them more effectively
- Be quantifiable: Measure, rank, prioritize



Best Practice

- When starting out, focus on a subset of investments to understand how you will optimize your portfolio
- Consider how to group the investments together. What ties them together within a portfolio
- Focus on key investments in the organization, and ensure that the data in the investments is accurate so that the right decisions are made when prioritizing the portfolio
- Remember that portfolio data is only as current as the last portfolio synch. Have a clearly communicated portfolio synch schedule

Including Ideas

- It is common to include **Ideas** in portfolios to track upcoming demand
- However, keep in mind that when an **Idea** is converted to a Project, they will both carry costs.
- It is important to remove the **Idea** from the portfolio, or to build in a rule that will exclude **Ideas** that have been converted from being brought in.
- If an **Idea** is going to be converted into multiple **Projects**, and those **Projects** are not converted at the same time, things can get tricky! You will need to keep this in mind when including **Ideas** in your **Portfolios**.



Best Practice

- Include Ideas so that you can track upcoming demand on cost and resources
- Remember to have a plan for when Ideas get converted to projects.
- If an Idea has actual costs, and those costs are to be deducted from the portfolio targets, you don't want to delete the ideas from the portfolio as this is money that was already spent. The planned costs in the idea will need to be reduced once the idea is converted

Master Projects and Programs

- The portfolio will allow you to add master projects as well as programs
- If you include the master project/program and you include one of its children, the costs and demand from the added child is subtracted from its parent. – No double counting.

The children of master projects/programs are not automatically brought into the portfolio

- There is no hierarchy view of a master project/program and its children in the portfolio. All investments are flattened in hierarchy



Best Practice

- Include Master Projects, or Programs when the following is true:
 - All of the costs/demand is included as a part of the targets in the portfolio
 - The Program and Master Projects can be treated as a single entity and prioritized as a single entity
- Include Children of Master Projects or Programs if:
 - The costs must be split within a program across multiple portfolios
 - The children need to be prioritized independently of one another
 - *NOTE: Including children can get tricky. It is important to have a solid plan for how to handle child investments within the portfolio.*

Portfolio Targets

Setting Portfolio Constraints

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Setting Portfolio Targets

- Once we know what investments will be included in our portfolio, we can look again at the targets that we would like to hit when executing the portfolio.
- The targets page allows you to get more granular with your targeted costs, benefits and resource availability and distribute the targets across the horizon of the portfolio.
- These period-based targets show up on the waterlines view where you can analyze your portfolio performance



The targets can only be distributed on a calendar period basis. They currently do not support fiscal periods.

Defining Detailed Planning Targets

- Navigate to the **Targets** tab within the portfolio
- Set the targets and distribute the costs within the duration of the specified portfolio timeline

Properties Contents Editor Investments Plans **Targets** Waterlines Processes Sharepoint

Portfolio: Training Portfolio - Targets Plan: [--Select--]

Cost: Portfolio Cost Totals (USD)

	Target	Distributed Target	Variance	Distributed Target (Total)	May 15	Jun 15	Jul 15	Aug 15	Sep 15	Oct 15
Total	0	0	0	0	0	0	0	0	0	0
Capital	0	0	0	0	0	0	0	0	0	0
Operating	0	0	0	0	0	0	0	0	0	0

Benefit: Portfolio Benefit Totals (USD)

	Target	Distributed Target	Variance	Distributed Target (Total)	May 15	Jun 15	Jul 15	Aug 15	Sep 15	Oct 15
Benefit	0	0	0	0	0	0	0	0	0	0

Role: Portfolio Role Totals (Hours)

	Target	Distributed Target	Variance	Distributed Target (Total)	May 15	Jun 15	Jul 15	Aug 15	Sep 15	Oct 15
Overall	0	0	0	0	0	0	0	0	0	0
Total	0	0	0	0	0	0	0	0	0	0
Variance	0	0	0	0	0	0	0	0	0	0

Add Roles Remove Populate Capacity Scale Capacity Clear

Save Sync Now

Targets Definitions

- **Target:** The aggregated target for the portfolio investments.
- **Distributed Target:** The planned targets for the portfolio investments as it scales over time within the portfolio horizon. This field is not editable. It is populated by changes in the Distributed Target (Total) value. This value is what us utilized in the Waterline view as a constraint of the portfolio.
- **Variance:** The difference between the distributed and approved target amounts.
- **Distributed Target (Total):** The planned targeted amount that can be defined beyond the portfolio horizon.

Cost: Portfolio Cost Totals (USD)											
	Target	Distributed Target	Variance	Distributed Target (Total)	May 15	Jun 15	Jul 15	Aug 15	Sep 15	Oct 15	
Total	450,000	50,000	400,000	50,000	6,327	6,122	6,327	6,327	6,122	6,327	
Capital	50,000	50,000	0	50,000	6,327	6,122	6,327	6,327	6,122	6,327	
Operating	400,000	0	400,000	0	0	0	0	0	0	0	



When you edit values, a red triangle displays by the changed value until you **Save**

Tracking Portfolios Against Targets

- Targets can be set for planned costs as well as resource demand within a portfolio
- Targets can be distributed over a period of time
- Targets can be set as:
 - Operational Costs
 - Capital Costs
 - Total Costs
 - Role Capacity
 - Planned Benefit



Best Practice

- Have a good understanding of where the targets are coming from.
- Focus on a specific target, either costs or resource demands, to begin with, rather than trying to track against all possible constraints.
- Often times operational demand is not accounted for when tracking resource targets. Remember to account for operational demand when setting the portfolio role capacity

Scenario Planning

Creating portfolio plans

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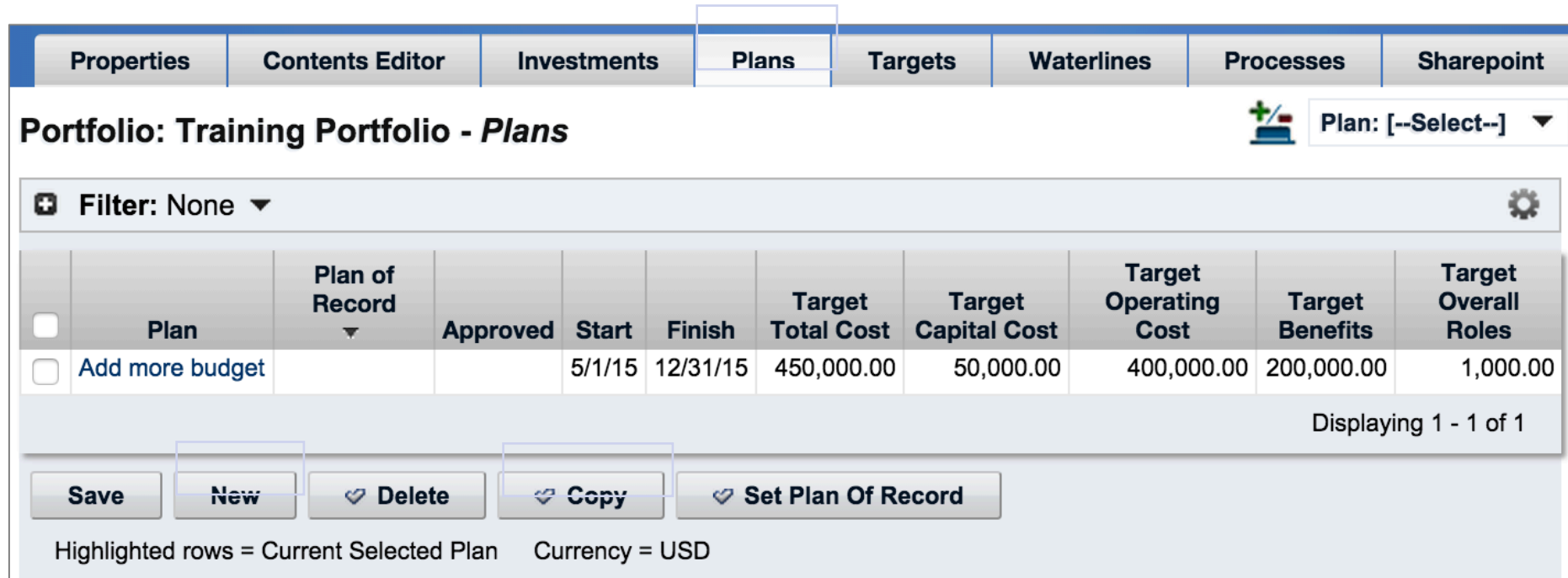
Creating Multiple Plans

- Define plans to determine the best scenario to accomplish the portfolio goal
- When you find a desirable plan, set it as the 'Plan of Record' in the portfolio
- You can create multiple plans within a single portfolio that can contain different:
 - Start and Finish dates
 - Rankings
 - Targets
- This allows you to explore portfolio alternatives and save them for future reference

Portfolio: Training Portfolio - Plans					
+ Filter: None ▼					
<input type="checkbox"/>	Plan	Plan of Record▼	Approved	Start	Finish
<input type="checkbox"/>	Add more budget			11/1/14	12/31/15
<input type="checkbox"/>	Add more Prog Analyst			11/1/14	12/31/15
<input type="checkbox"/>	Reduce the budget by 10%			11/1/14	12/31/15

Creating Portfolio Plans

1. Open your portfolio and click on the **Plans** tab
2. Click the **New** button to create a new plan
3. If a plan has already been created, select the plan for which you want to create a version and click the **Copy** button.



Portfolio: Training Portfolio - *Plans*

Plan: [--Select--]

Filter: None

	Plan	Plan of Record	Approved	Start	Finish	Target Total Cost	Target Capital Cost	Target Operating Cost	Target Benefits	Target Overall Roles
<input type="checkbox"/>	Add more budget			5/1/15	12/31/15	450,000.00	50,000.00	400,000.00	200,000.00	1,000.00

Displaying 1 - 1 of 1

Save New Delete Copy Set Plan Of Record

Highlighted rows = Current Selected Plan Currency = USD

Creating Portfolio Plans

4. Enter the plan attributes and click the **Save** button.

Create Portfolio Plan

General

★ Plan Name

Add More Resources

★ ★ Plan ID

002

Description

★ Dashboard View

Portfolio Plan Default Layout

Save

Save And Return

Return

★ = Required

★ = Unique

Creating Portfolio Plans

- You can now edit the plan properties based on the new requirements.
- For instance, there may be a new Planned Capital cost, or Operating cost.

Properties Processes

Portfolio Plan: Add More Resources - Properties - General

Portfolio Reference

Portfolio Name Training Portfolio Start Date 5/1/2015
Finish Date 12/31/2015

General

★ Plan Name Add More Resources Approved ☐
★✱ Plan ID 002 Start Date 5/1/2015
Description Finish Date 12/31/2015

Targets

Plan Total Cost	450,000.00	Portfolio Total Cost	450,000.00
Plan Capital Cost	50,000.00	Portfolio Capital Cost	50,000.00
Plan Operating Cost	400,000.00	Portfolio Operating Cost	400,000.00
Plan Benefits	200,000.00	Portfolio Benefits	200,000.00
Plan Roles	1,000	Portfolio Roles	1,000
Currency	USD		
Capacity Unit Type	Hours		

Save Save And Return Return

★ = Required ✱ = Unique Currency = USD WorkEffort = Hours

Comparing Plans

- Once you change plans, analyze and evaluate those changes to understand the implications of the changes as if the plans are real.
- To compare different versions of a plan by the following factors, use portfolio reports:
 - Portfolio constraints
 - Investment counts
 - Financial metrics (for example, NPV, ROI)



To access and view the portfolio reports that you can use to compare portfolio plans, install and apply the PMO Accelerator add-in

Creating Portfolio Plans

- Portfolio Plans can be created to do “what – if” scenarios
- Within a portfolio plan, individual targets can be set
- Plans allow you to modify the costs and resource demand on individual investments
- You can setup different ranking rules and schedules within a portfolio plan
- **An unmodified scenario plan will be OVERWRITTEN when you sync. It should not be used as a snapshot.**



Best Practice

- Create many Portfolio Plans. Take advantage of the capability and use the tool to see different implementation plans of the investments.
- Take good notes when modifying investment data within a portfolio plan so that you can trace what was changed
- Utilize portfolio plans to extend or shrink the portfolio horizon if you are looking for an annual planning view, or a 5 year planning period

Portfolio Waterline & Ranking

See The Portfolio In Action

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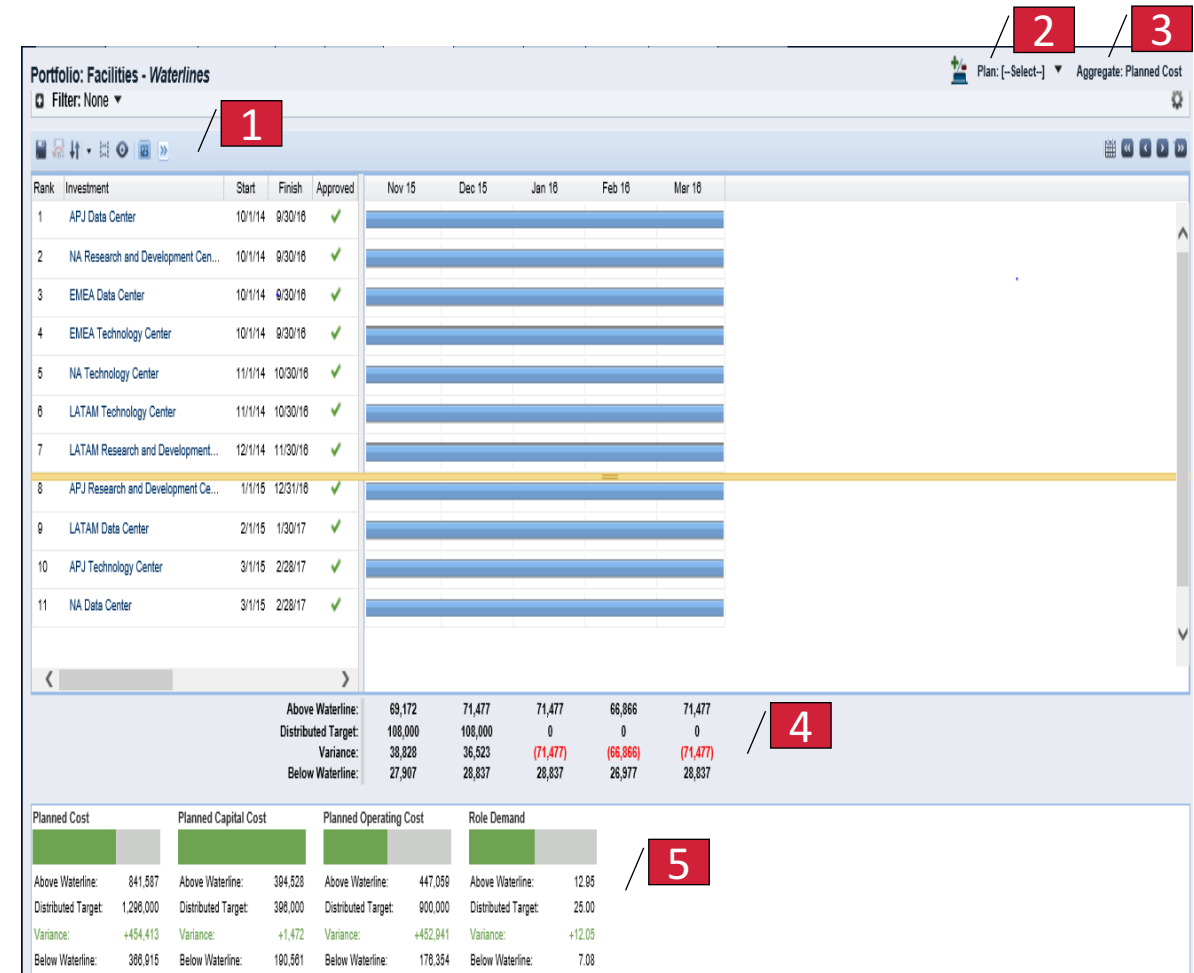
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Utilizing The Portfolio Waterline

- Waterlines allow you to see how planned targets match up with the investments in the portfolio
- By default, approved investments with the most recent finish dates sort to the top of the list
- Waterlines allow you to analyze your portfolio
 - Prioritized work with investment attributes, including data about budget and benefits
 - How the portfolio targets spread over the portfolio horizon
 - Approved and unapproved investments
 - Initial alignment of the portfolio with the goals
 - Actual amounts spent on investments compared to the initial targets of capital and operating costs
 - Where and when demands exceed targets

Portfolio Waterlines - Overview

- 1. Toolbar.** Lets you define investment ranking rules, display constraint gauges at the bottom of the view, and display time-scaled aggregates for investments in the Gantt chart.
- 2. Plan drop-down.** Lets you select any existing plans for the portfolio. The Waterline view changes to match the data in the plan.
- 3. Aggregation constraint drop-down.** Lets you select the portfolio constraint that you want to view in the aggregation rows.
- 4. Aggregation rows.** Display time-scaled aggregates of the above waterline, below waterline, and variance values for a selected portfolio constraint.
- 5. Constraint Gauges.** Display variance information about the totals above and below the waterline. Any column constraints that you display in the list also display as constraint gauges.



Weighted Ranking and Scoring

There are two different strategies for ranking the portfolio.

1. Single – Criterion Prioritization Model

	PROJECT A	PROJECT B	PROJECT C	PROJECT D	PROJECT E	PROJECT F	RANK	
PROJECT A	1	1	1	1	1	1	5	First Priority
PROJECT B	0	1	0	1	1	0	2	
PROJECT C	0	1	1	1	1	0	3	
PROJECT D	0	0	0	1	1	0	1	
PROJECT E	0	0	0	0	1	0	0	Last Priority
PROJECT F	0	1	1	1	1	1	4	



CA PPM supports both strategies within the ranking rules

2. Multiple – Criteria Weighted Ranking

PROJECTS	Criterion 1		Criterion 2 * Probability of Success		Criterion 3		Criterion 4		PRIORITY	
	Measure	Rank	Result	Rank	Level of Importance	Rank	Measure	Rank	Score	Priority
Project 1	16.0	2	8.8 (\$11M X 80%)	2	5 (++)	1	\$2M	1	1.50	1
Project 3	14.0	4	18.9 (\$21M X 90%)	1	4	2	\$2.5M	2	2.25	2
Project 4	15.5	3	8.45 (\$13M X 65%)	3	2	4	\$3M	3	3.25	3
Project 2	19.0	1	5.95 (\$7M X 85%)	4	1 (--)	6	\$4.3M	4	3.75	4
Project 5	10.0	6	5.4 (\$6M X 90%)	5	3	3	\$5.2M	6	5.00	5
Project 6	12.0	5	2.1 (\$3M X 70%)	6	1.5	5	\$4.6M	5	5.25	6

Defining Ranking Rules

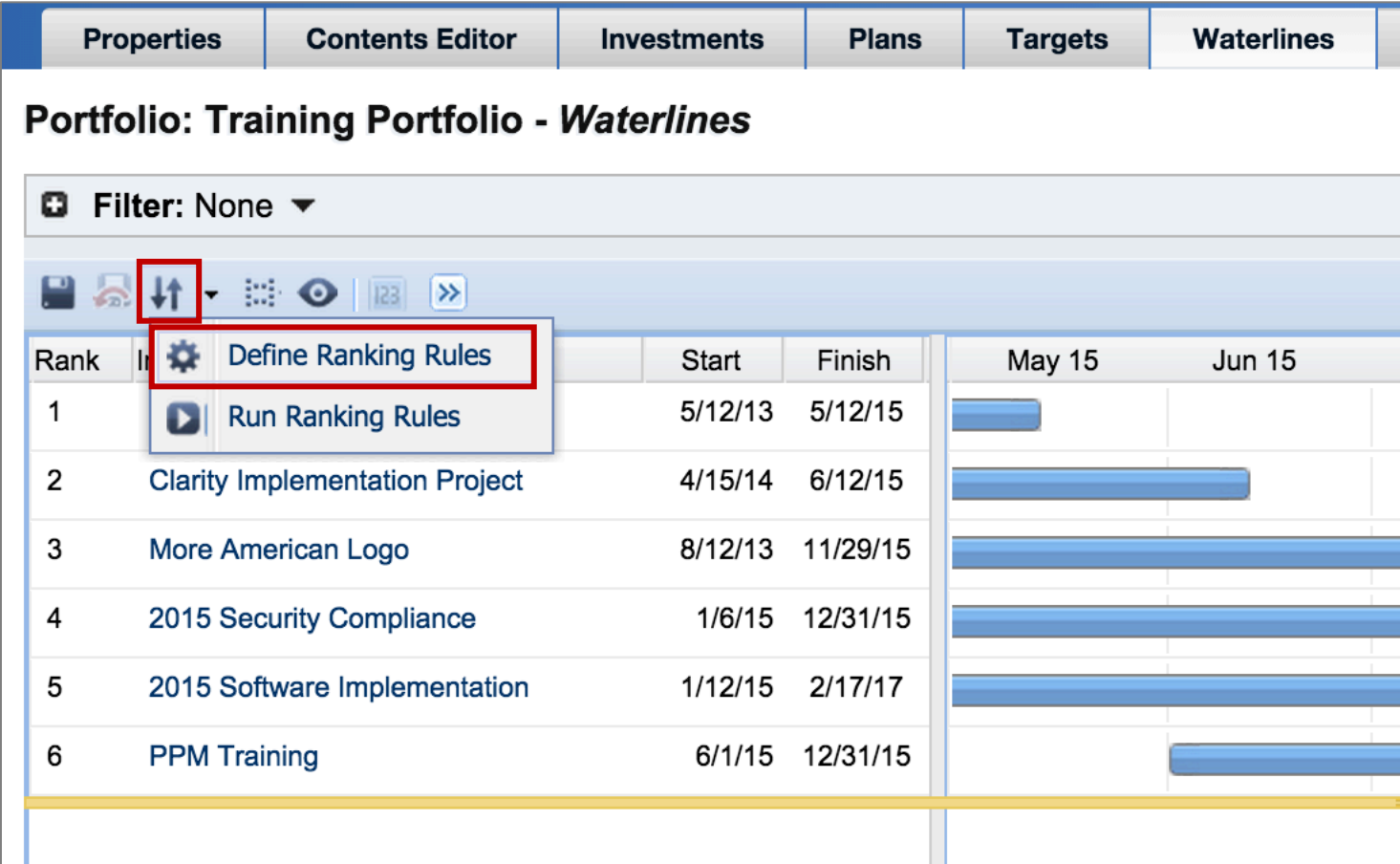
The high level steps to setup ranking rules:

1. Select the primary portfolio constraint for the waterline
2. Select the investment attributes available at the portfolio level and assign weights to the attributes. You can select from all available attributes for all investment types that are included in the portfolio.
3. To indicate more importance, assign an attribute greater weight.

Defining Ranking Rules

To set and run rankings:

1. Click the **Ranking Rules** icon on the toolbar and select **Define Ranking Rules**



The screenshot shows the 'Portfolio: Training Portfolio - Waterlines' interface. The toolbar at the top includes tabs for Properties, Contents Editor, Investments, Plans, Targets, and Waterlines. Below the tabs, the title 'Portfolio: Training Portfolio - Waterlines' is displayed. A filter dropdown is set to 'None'. The main toolbar contains several icons, including a gear icon for 'Ranking Rules', which is highlighted with a red box. A dropdown menu is open from this icon, showing two options: 'Define Ranking Rules' and 'Run Ranking Rules'. Below the toolbar is a table with columns for Rank, Item, Start, Finish, and two date-based columns (May 15 and Jun 15). The table lists six items with their respective start and finish dates and corresponding horizontal bars.

Rank	Item	Start	Finish	May 15	Jun 15
1		5/12/13	5/12/15		
2	Clarity Implementation Project	4/15/14	6/12/15		
3	More American Logo	8/12/13	11/29/15		
4	2015 Security Compliance	1/6/15	12/31/15		
5	2015 Software Implementation	1/12/15	2/17/17		
6	PPM Training	6/1/15	12/31/15		

Selecting Ranking Attributes

2. Add rules by clicking on the **Add** button.
3. You will be presented with all of the investment attributes that are available.

Portfolio: Training Portfolio - *Prioritization Criteria*

Primary Constraint Planned Cost

Weighted Ranking Rules

No attributes have been added.

♥ Add ♥ Remove

Save Save And Return Return

Setting The Attribute Ranking

4. Once you have the attributes selected, set their individual ranking.
5. For each attribute you can select:
 - Ranking Method
 - Lower is better
 - Higher is better
 - Attribute Weighting (numeric value)
 - If you select an attribute that is a lookup, you can assign weights to the individual values of the lookup (highlighted below)

Portfolio: Training Portfolio - Prioritization Criteria

Primary Constraint: Planned Cost

Weighted Ranking Rules

	Attribute	Ranking Method	Attribute Weighting	Lookup Weighting
<input type="checkbox"/>	Actuals	Lower is better	1	
<input type="checkbox"/>	Goal	Lower is better	1	Lookup Value Weighting

Displaying 1 - 2 of 2

Running Ranking Rules

6. Click **Save and Return**
7. Once the ranking rules have been set, it is necessary to run the ranking rules.
8. The investments will be ranked based on the rules

Portfolio: Training Portfolio - Waterlines

Filter: None ▼

Icons: Save, Print, Sort, View, 123, >>

Rank	Investment	Start	Finish	May 15	Jun 15
1		5/12/13	5/12/15		
2	Clarity Implementation Project	4/15/14	6/12/15		
3	More American Logo	8/12/13	11/29/15		
4	2015 Security Compliance	1/6/15	12/31/15		

Context Menu:

- Define Ranking Rules
- Run Ranking Rules

Setting Ranking Rules

- Portfolios can manage both single criterion as well as multi and weighted criterion
- Custom attributes can be utilized for prioritization
- Different ranking rules can be created across individual plans and portfolios.



Best Practice

- Make certain that you understand the criteria for prioritization
- Don't overcomplicate your prioritization rules
- In the event there is a 'tie' there needs to be someone, or a group, that can make the ultimate decision on portfolio prioritization
- Keep in mind that investments ranking is only known within its portfolio. Investments could be included in multiple portfolios, but ranked differently in each one. This can create confusion for anyone looking at that investment and it's position in the enterprise.

PMO Accelerator

Additional Views

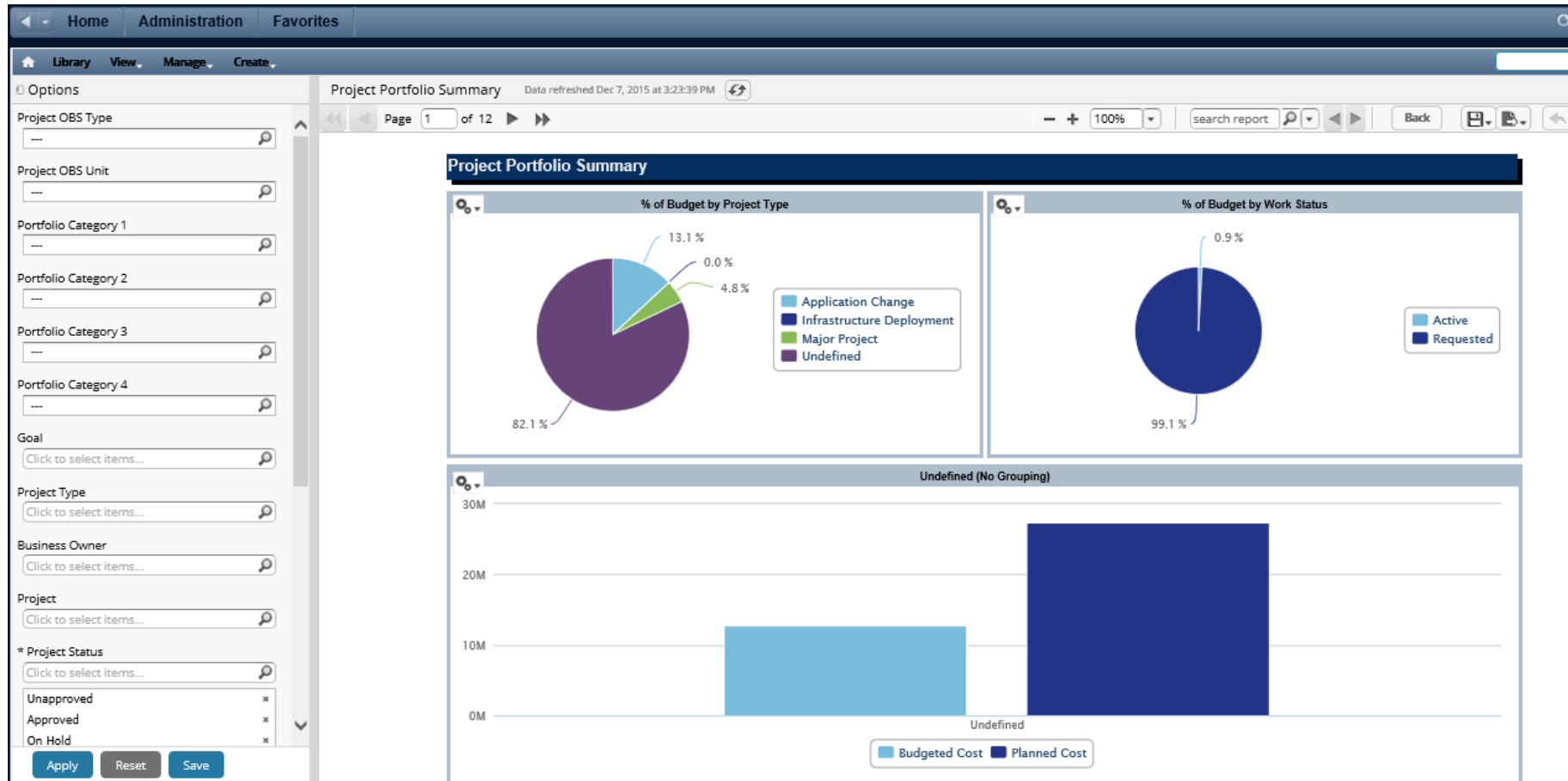
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Portfolio Reports

- Clarity v14.3+ includes a set of Portfolio Reports within the PMO Accelerator Solution Pack.
 - Project Portfolio Summary with Charts and Detail
 - Portfolio Plan Comparison
 - Portfolio Plan Changes
 - Portfolio Plan Changes - Waterline and Rank

Project Portfolio Summary - Charts



Project Portfolio Summary - Detail

Project Portfolio Summary								
Project Name	Status	Work Status	Alignment	Risk	Budget Cost	Planned Cost	Variance	% Variance
Cost Avoidance								
2015 Spring Franchise Manager Release	Approved	Requested	⬇️	⬆️	0.00	6,805,400.00	-6,805,400.00	0.00
A Fantastic Project	Approved	Requested	⬇️	⬆️	0.00	700,000.00	-700,000.00	0.00
Anesthesia Delivery	Approved	Requested	⬇️	⬆️	0.00	2,629,620.00	-2,629,620.00	0.00
Application Security Audit	Approved	Requested	⬇️	⬆️	450,000.00	500,000.00	-50,000.00	-11.11
Compliance Audit - Security	Approved	Requested	⬆️	⬆️	0.00	250,000.00	-250,000.00	0.00
Financial Workflow Development	Approved	Requested	⬆️	⬆️	0.00	210,000.00	-210,000.00	0.00
Total					450,000.00	11,095,020.00	-10,645,020.00	-2,365.56
Cost Reduction								
eBusiness Mobile Network	Approved	Requested	⬆️	⬆️	0.00	646,820.00	-646,820.00	0.00
eCommerce Portal	Approved	Requested	⬆️	⬆️	384,200.00	414,200.00	-30,000.00	-7.81
Executive Dashboard Visibility	Approved	Requested	⬆️	⬆️	0.00	264,400.00	-264,400.00	0.00
Mobile Time and Approvals	Approved	Requested	⬆️	⬆️	0.00	179,960.00	-179,960.00	0.00
Online Order Performance Improvements	Approved	Requested	⬆️	⬆️	244,400.00	264,400.00	-20,000.00	-3.18
Order Management Release 2	Approved	Requested	⬆️	⬆️	228,800.00	188,800.00	40,000.00	17.48
Reduce Code Defects	Approved	Requested	⬆️	⬆️	0.00	8,960.00	-8,960.00	0.00
Reduced Purchase/Payment Cycle Time	Approved	Requested	⬆️	⬆️	0.00	519,680.00	-519,680.00	0.00
Reduce Sick Leave	Approved	Requested	⬆️	⬆️	150,000.00	150,000.00	0.00	0.00
Security Compliance V2	Approved	Requested	⬆️	⬆️	0.00	349,200.00	-349,200.00	0.00
Streamline Onboarding Process	Approved	Requested	⬆️	⬆️	25,000.00	25,000.00	0.00	0.00
Total					1,032,400.00	3,011,420.00	-1,979,020.00	-191.69
Grow the Business								
2015 Mobile Advertising	Approved	Requested	⬇️	⬆️	0.00	0.00	0.00	0.00
2015 Robotics Project	Approved	Requested	⬇️	⬆️	0.00	401,939.49	-401,939.49	0.00
Automated Security Enhancements	Approved	Requested	⬇️	⬆️	0.00	314,400.00	-314,400.00	0.00
BI Analytics	Approved	Requested	⬇️	⬆️	0.00	302,000.00	-302,000.00	0.00
CRM Contact Center Development	Approved	Requested	⬆️	⬆️	408,800.00	475,800.00	-67,000.00	-16.39

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Portfolio Plan Comparison

- The **Portfolio Plan Comparison** report is grouped by portfolio and displays distributed target and above waterline investment cost.
- The report provides visibility into portfolio amounts, allowing a comparison of up to three portfolio plans.
- The change amount and change percentage for each plan, compared to portfolio, are presented.

Portfolio Plan Comparison

Portfolio Plan Comparison										
Business Technologies										
Description	Portfolio	Goal Alignment and Required			Cost Reduction			High ROI / Low Risk		
	Amount	Amount	Change	%	Amount	Change	%	Amount	Change	%
Distributed Target Totals										
Total Cost	2,220,000.00	2,220,000.00	0.00	0	1,776,000.00	-444,000.00	-20	2,220,000.00	0.00	0
Capital Cost	720,000.00	720,000.00	0.00	0	576,000.00	-144,000.00	-20	720,000.00	0.00	0
Operating Cost	1,500,000.00	1,500,000.00	0.00	0	1,200,000.00	-300,000.00	-20	1,500,000.00	0.00	0
Benefit	6,000,000.00	6,000,000.00	0.00	0	4,800,000.00	-1,200,000.00	-20	6,000,000.00	0.00	0
Role: Overall Total	15,000.00	15,000.00	0.00	0	12,000.00	-3,000.00	-20	15,000.00	0.00	0
Role: Architect	1,200.00	1,200.00	0.00	0	960.00	-240.00	-20	1,200.00	0.00	0
Role: Business Analyst	2,400.00	2,400.00	0.00	0	1,920.00	-480.00	-20	2,400.00	0.00	0
Role: Developer	4,800.00	4,800.00	0.00	0	3,840.00	-960.00	-20	4,800.00	0.00	0
Role: Project Manager	4,800.00	4,800.00	0.00	0	3,840.00	-960.00	-20	4,800.00	0.00	0
Role: Test Engineer	1,200.00	1,200.00	0.00	0	960.00	-240.00	-20	1,200.00	0.00	0
Role: Total	14,400.00	14,400.00	0.00	0	11,520.00	-2,880.00	-20	14,400.00	0.00	0
Role: Variance	600.00	600.00	0.00	0	480.00	-120.00	-20	600.00	0.00	0
Above Waterline Investment Totals										
Planned Cost	2,105,000.00	2,161,650.00	56,650.00	3	1,690,800.00	-414,200.00	-20	2,149,760.00	44,760.00	2
Planned Capital Cost	1,586,200.00	1,621,850.00	35,650.00	2	1,306,400.00	-279,800.00	-18	1,374,600.00	-211,600.00	-13
Planned Operating Cost	518,800.00	539,800.00	21,000.00	4	384,400.00	-134,400.00	-26	775,160.00	256,360.00	49
Planned Benefit	3,675,000.00	3,335,000.00	-340,000.00	-9	3,075,000.00	-600,000.00	-16	4,200,000.00	525,000.00	14
Role: Architect	1,694.00	1,718.00	24.00	1	1,432.00	-262.00	-15	1,862.00	168.00	10
Role: Business Analyst	1,056.00	1,456.00	400.00	38	840.00	-216.00	-20	1,632.00	576.00	55
Role: Developer	3,756.00	3,732.00	-24.00	-1	3,168.00	-588.00	-16	3,220.00	-536.00	-14
Role: Project Manager	2,152.00	2,192.00	40.00	2	1,944.00	-208.00	-10	2,248.00	96.00	4
Role: Test Engineer	1,942.00	2,206.00	264.00	14	1,652.00	-290.00	-15	1,698.00	-244.00	-13
Role: Other Roles	4,584.00	4,784.00	200.00	4	1,528.00	-3,056.00	-67	5,104.00	520.00	11
Role: Total	15,184.00	16,088.00	904.00	6	10,564.00	-4,620.00	-30	15,764.00	580.00	4
Above Waterline Investment Metrics										
Planned NPV	1,512,962.00	1,860,870.00	347,908.00	23	1,338,511.00	-174,451.00	-12	2,469,439.00	956,477.00	63
Planned Cost per Role	138.63	134.36	-4.27	-3	160.05	21.42	15	136.37	-2.26	-2
Planned Benefit per Role	242.03	207.30	-34.73	-14	291.08	49.05	20	266.43	24.40	10
Planned Profit per Role	103.40	72.93	-30.47	-29	131.03	27.63	27	130.06	26.66	26
Above Waterline Investment Counts										
All Investments	7	7	0	0	6	-1	-14	8	1	14
Project	7	7	0	0	6	-1	-14	8	1	14

Portfolio Plan Changes

- The **Portfolio Plan Changes** report is grouped by portfolio and displays investments that have key attributes modified in portfolio plans.
- These attributes include budgeted or planned cost and benefit, and schedule dates.
- The report provides visibility into investment level changes in portfolio plans.
- It compares the portfolio amounts to portfolio plan amounts, using highlighting and arrow indicators to identify changes, for up to three plans. Within each portfolio, the report may also be grouped by investment manager.

Portfolio Plan Changes (2)

Portfolio Plan Changes				
Business Technologies				
Investment / Attribute	Portfolio	Goal Alignment and Required	Cost Reduction	High ROI / Low Risk
Berks, Paul				
Automated Security Enhancements				
Planned Cost	264,400.00	364,400.00 ⬆	264,400.00	264,400.00
Planned Capital Cost	167,200.00	167,200.00	167,200.00	167,200.00
Planned Operating Cost	97,200.00	197,200.00 ⬆	97,200.00	97,200.00
Planned Benefit	900,000.00	1,000,000.00 ⬆	900,000.00	900,000.00
Planned NPV	627,488.00	627,500.00 ⬆	627,488.00	627,488.00
Planned ROI %	239.52	173.50 ⬇	239.52	239.52
Planned Payback(Months)	1.00	1.00	1.00	1.00
Planned Breakeven	5/31/2013	5/31/2013	5/31/2013	5/31/2013
Role: Architect	184.00	184.00	184.00	184.00
Role: Business Analyst	312.00	312.00	312.00	312.00
Role: Developer	304.00	304.00	304.00	304.00
Role: Project Manager	312.00	312.00	312.00	312.00
Role: Test Engineer	152.00	152.00	152.00	152.00
Role: Other Roles	440.00	440.00	440.00	440.00
Role: Total	1,704.00	1,704.00	1,704.00	1,704.00
Start Date	5/1/2013	5/1/2013	5/1/2013	5/1/2013
Finish Date	8/16/2013	8/16/2013	8/16/2013	8/16/2013
Approved				
Required				
Order Trending Analysis				
Planned Cost	264,400.00	152,240.00 ⬇	264,400.00	264,400.00
Planned Capital Cost	167,200.00	69,440.00 ⬇	167,200.00	167,200.00
Planned Operating Cost	97,200.00	82,800.00 ⬇	97,200.00	97,200.00
Planned Benefit	800,000.00	200,000.00 ⬇	800,000.00	800,000.00
Planned NPV	524,427.00	524,300.00 ⬇	524,427.00	524,427.00
Planned ROI %	200.18	200.10 ⬇	200.18	200.18
Planned Payback(Months)	2.00	2.00	2.00	2.00
Planned Breakeven	5/31/2013	5/31/2013	5/31/2013	5/31/2013
Role: Architect	160.00	160.00	160.00	160.00
Role: Business Analyst	280.00	160.00 ⬇	280.00	280.00
Role: Developer	336.00	200.00 ⬇	336.00	336.00
Role: Project Manager	280.00	160.00 ⬇	280.00	280.00
Role: Test Engineer	152.00	0.00 ⬇	152.00	152.00
Role: Other Roles	392.00	240.00 ⬇	392.00	392.00
Role: Total	1,600.00	920.00 ⬇	1,600.00	1,600.00

Portfolio Plan Changes – Waterline and Rank

- The **Portfolio Plan Changes - Waterline and Rank** report is grouped by portfolio and displays the above waterline indicator and rank number for investments in each portfolio.
- The report provides visibility into investment level waterline and rank changes in portfolio plans.
- It compares the waterline and rank information between the portfolio and portfolio plans, using highlighting to identify changes, for up to three plans.

Portfolio Plan Changes - Waterline and Rank								
Business Technologies								
Investment / Attribute	Portfolio		Goal Alignment and Required		Cost Reduction		High ROI / Low Risk	
	Above Waterline	Rank	Above Waterline	Rank	Above Waterline	Rank	Above Waterline	Rank
CRM Contact Center Development	✓	1.00	✓	5.00	✓	1.00	✓	8.00
CRM Enhancements	✓	2.00	✓	6.00	✓	2.00		10.00
Order Management Release 2	✓	3.00		12.00	✓	3.00		14.00
Online Order Performance Improvements	✓	4.00		11.00	✓	4.00	✓	4.00
Client Services Datamart	✓	5.00		13.00	✓	5.00		11.00
Financial Process Audit	✓	6.00		15.00	✓	6.00		12.00
eCommerce Portal	✓	7.00	✓	2.00		7.00	✓	7.00
Credit Card Processing Enhancement		9.00		14.00		9.00	✓	5.00
Online Order Catalog		10.00	✓	7.00		10.00		13.00
Order Trending Analysis		12.00		9.00		12.00	✓	2.00
4G Upgrade Readiness		13.00		16.00		13.00	✓	6.00
Automated Security Enhancements		14.00	✓	3.00		14.00	✓	1.00
Credit Card Security Improvements		15.00	✓	4.00		15.00		15.00
Learning Portal Optimization		16.00	✓	1.00		16.00	✓	3.00

Best Practices In Portfolio Management

- Are you currently utilizing Portfolio Management in CA PPM?
- What portion of portfolio management did you find hardest to implement/maintain (Resource Information, Financials, Investment Data)?
- Do you use a ranking system to prioritize within Ideas? How do you relate that information into the waterline/planning in portfolio?
- What are some best practices that you are following?

Questions?



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