

# Portfolio Management Processes

**PM 1.0 Understand the Portfolio**

**PM 2.0 Create Portfolio Strategy**

**PM 3.0 Provide Portfolio Consulting**

Business Process ID Number:

PM 1.0/2.0/3.0

Issue Number:

1.0

Document Status:

Approved

Issue Date:

3/22/01

Security Status:

Proprietary

Author:

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## Abstract

This document defines the processes used in Portfolio Management, to develop an understanding of the portfolio, create a portfolio strategy and provide portfolio consulting.

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# 1. Portfolio Management Processes

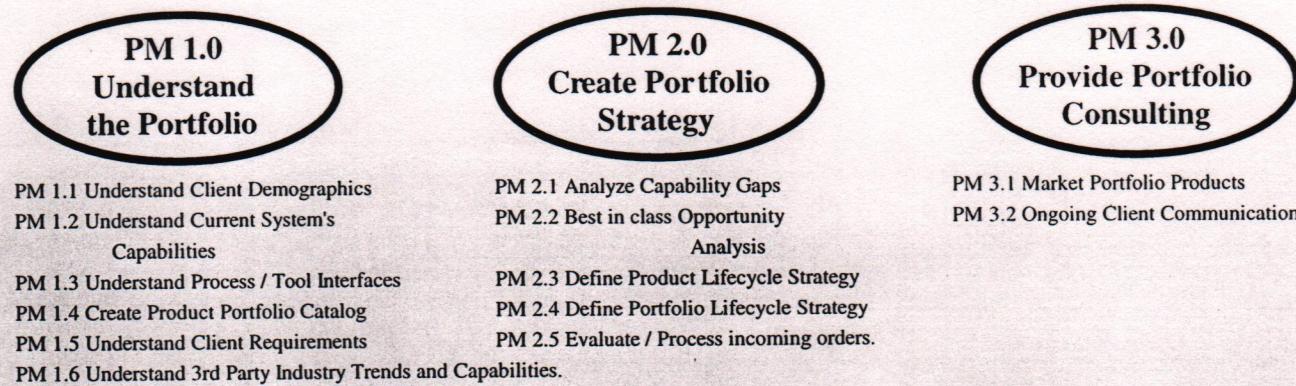
## Purpose / Scope

This document contains a detailed overview of the processes to be used by the Product/Portfolio management groups within the re-invented IS (RIS). It applies to those performing portfolio management functions for all portfolios in the solutions delivery organization.

## Overview

The processes have been partitioned into three main categories, corresponding to the main Portfolio Management high level process categories on the "This is RIS" process chart.

The three categories are:



## PM 1.0. Understand the Portfolio

(also referred to as Information Gathering processes)

These are the processes relating to pro-actively gathering information about the portfolio. This information is primarily used as input to further downstream Portfolio management processes. The information that is gathered includes demographics of client tool usage; current system capabilities; process and tool linkages; client requirements; 3rd party industry capability/trends; and other information that is contained in BART and the Portfolio/Product Catalog.

## PM 2.0. Create Portfolio Strategy

(also referred to as Strategy and Analysis processes)

These are the processes relating to formally creating a comprehensive strategy for each of the portfolio products as well as the overall portfolio. This strategy must address the client/business requirements and be compatible with the corporate architectures (process, application, information and data). These processes include the strategy analysis that needs to be done, as well as the steps for executing the strategy within RIS (influencing, recommending and enforcing).

## PM 3.0. Provide Portfolio Consulting.

(also referred to as Marketing and Client Management support processes).

These are the processes relating to information and expertise delivery. This includes pro-actively marketing the portfolio within the client base; providing tool and subject matter consulting to support client management; and general program communication to all interested parties.

## **PM 1.0 Understand the Portfolio**

### **PM 1.1 - Understand Client Demographics**

A general understanding of the client demographics (which clients are currently using what products, where, and how extensively) is basic information necessary for making strategy decisions. For some portfolios, this may only be a one-time process, to be replaced by a simple updating step on an ongoing basis. Also, it may be that this information may eventually be provided from elsewhere in RIS (e.g. Business Support). Nonetheless, there are a number of portfolios that currently require a documented understanding of their client demographics, so the process has been included here.

#### **Trigger(s)**

- Initial capture of information proactively initiated by Portfolio management.
- Updated annually or upon major additions/changes to the customer base.

#### **Responsibility**

- Portfolio management assigned prime, in conjunction with LOB Client Managers.
- Responsibility could transition to Business Support

#### **Inputs**

- LOB Client Management (product usage information of client base)
- Deployment (product usage information of new deployments)
- Business Support (possible source of information on tool usage)
- Product Usage Metrics

#### **Detailed Steps**

- Identify Client Manager for each client group listed in usage metrics
- Establish working relationship with Client Manager and key representative from the Client Group
- Determine for each client group:
  - Site location and line of business
  - Portfolio products in use within the client group
  - size of local user base and extent of tool usage.
- Publish information to client management and other interested parties within IS.

#### **Outputs**

- Documented listing of current Portfolio client groups together with their respective locations, line of business, currently implemented Portfolio products, and number of users/extent of usage.

## PM 1.2 Understand Current System's Capabilities

A detailed understanding of the capabilities of the current systems within the portfolio is required as a first step to determine whether client and business needs are being met. This needs to be documented in a form that can be distributed and understood by potential user of the portfolio.

### Trigger(s)

- Initial capture of information pro-actively initiated by Portfolio management.
- Updated annually or upon additions/changes to the portfolio functionality (e.g. major software releases).

### Responsibility

- Portfolio management assigned prime.

### Inputs

- Clients and Client Management (functionality in use)
- Development groups (detailed functionality)

### Detailed Steps

- Identify each system within the Portfolio
- For each system:
  - identify client base currently using each system and document functionality in use
  - identify development / support group responsible for tool
  - document (or consolidate existing documentation) the function(s) fulfilled by the system
  - document product cost and performance

### Outputs

- Detailed document listing current Portfolio products and their capabilities
- Costs and performance of current tools .

### Associated Activities

- |   |  |
|---|--|
| <ul style="list-style-type: none"><li>• Know # of systems</li><li>• Validate data in BART</li><li>• Learn strengths/weaknesses of current suite</li></ul> | <ul style="list-style-type: none"><li>• Know if systems are millennium compliant</li><li>• Understand product functionality</li><li>• Know system architecture</li></ul> |
|---|--|

## PM 1.3 Understand Process / Tool Interfaces

IS tools are used by clients to support their internal business processes. In supporting these processes, most tools have numerous interfaces and linkages to other tools, both within and outside of the portfolio. It is important to fully understand the mapping of IS tools and capability to the business processes that they support. It is also important to fully understand the tool interfaces, and how they support the overall business processes. It is not the role of portfolio management to define the business processes and required interfaces. However, it is necessary to understand it, as this is necessary information for the development of a comprehensive strategy that will include the evolution of the portfolio application architecture in addition to the evolution of individual tool capability.

### Trigger(s)

- Initial capture of information pro-actively initiated by Portfolio management.
- Updated annually or upon additions/changes to the portfolio interfaces or business processes that they support.

### Responsibility

- Portfolio management assigned prime(s).

### Inputs

- Output of Process PM 1.1 (Understand Client Demographics)
- Output of Process PM 1.2(Understand Current System Capabilities)
- Expertise of Process client manager and experts within the client community in mapping tool functionality to business processes.
- Development groups (expertise on tool interfaces)
- Application architecture group (expertise on inter-portfolio interface requirements).

### Detailed Steps

- For each client group identified by PM 1.1 (Understand Client Demographics):
  - identify key contacts within the client group and process client manager.
  - identify products in use by that group
  - understand the process in use and the role the product plays in the process
  - understand the links between tools within the process
- For each tool within the product portfolio
  - identify all interfaces to other tools within and outside of the portfolio

### Additional Benefits

Documentation permits discovery of redundant / unnecessary product usage (opportunities for consolidation / reuse)

Identification of gaps in product functionality as it relates to clients' processes

### Associated Activities

- Understand Business functions
- Develop LOB process understanding strategy
- Map tools to processes
- Understand differences across LOBs
- Identify Client business drivers & process owner
- Know processes supported

## PM 1.4 Create Product Portfolio Catalog

The Portfolio Product Catalog (and more detailed information in BART) are a primary mechanism for capturing and communicating information about the portfolio. As such, it is important that this information be captured accurately and kept up-to-date. The initial capture of all information for the 2000+ systems may take more than a year, so the focus will be on capturing the most vital information first.

### Trigger(s)

- Initial capture of information pro-actively initiated by Portfolio management.
- Updated upon any additions/changes to the product portfolio (e.g. gate reviews, software releases, deployments, notification of a change in BART, etc.). Reviewed annually for completeness.

### Responsibility

- Portfolio management assigned prime.

### Inputs

- Output of Process PM 1.1 (Understand Client Demographics)
- Output of Process PM 1.2 (Understand Current System Capabilities)
- Output of PM 1.3 (Understand Process / Tool Linkages)

### Detailed Steps

- Within the Portfolio, review the system identified by PM1.2 (Current System Capabilities), and select the systems that are considered to be high priority (wrt to documenting catalog information)
- For each of the high priority systems, update/validate the Product Portfolio Catalog entries for these systems, (including Name, ID, Business Processes, Business Service Functions, Business Subprocesses, Hardware Platforms, portfolio Management contact, Classification, Overview, Benefits to the Business, Key Features, Market Penetration, Cost Model, Solution Type and Category).
- For the lower priority systems, repeat the above step.
- Upon notification of a change in BART, a software release, deployment, change in costing, gate review or any other event within RIS that would indicate a change in the data for the Catalog, update the Catalog.
- Review the entire Catalog annually for completeness and identify any data that needs to be updated.

### Outputs

- On-line Portfolio Product catalog listing all products currently offered by the Portfolio, together with detailed information to allow clients to understand how the products address their business needs.

## PM 1.5 Understand Client Requirements

Client requirements are a primary input into the planning of the portfolio strategy. It is not a portfolio management role to be the prime in capturing client requirements, however, a full understanding of client requirements, including current needs and potential future needs, is important within portfolio management. Client management should be the prime source of this information, with direct contact with the client if required. For some portfolios, information from previous "requirements analysis" activities may be available in the form of historical requirements. These are valuable inputs and avoid duplication of previous effort, although they will need to be validated for the current environment.

### Trigger(s)

- Initial capture of information pro-actively initiated by Portfolio management
- Updated upon any inputs from LOB client management, Process client management, or any major additions/changes to the client base.
- Reviewed annually for completeness and validity.

### Responsibility

- Client management is the prime responsible for Client requirements definition.
- Portfolio management assigned prime is responsible for the accurate understanding of those requirements within Portfolio management.

### Inputs

- LOB Client Management (primary source of client requirements)
- Process Client Management (representing corporate process requirements)
- Client representatives (where appropriate)
- Historical user requirements (as recorded in various problem reporting systems)

### Detailed Steps

- Consolidate client requests from Client managers for various LOB's.
- Where required, work with Client management to establish methodology to be used for specific requirements gathering exercise (user forum, formal methodology [e.g. Objectory, QFD, etc.], customer value interviews, etc.). The requirement gathering process should be driven by Client management, but Portfolio Management may need to initiate/participate where Client management is not able to drive or cross LOB requirements are required.
- Determine target client group (together with responsible Client Manager)
- Conduct requirements gathering according to the chosen methodology
- Create listing of all known historic requests and review for current validity.
- For each requirement above, review against existing or planned capability
- Publish availability dates for requirements satisfied by current development plans
- For requests not satisfied by any current development plan:
  - Validate continuing necessity of requirement with client manager / request prime
  - Prioritize requirement with respect to other known requirements

### Outputs

- Prioritized list of validated, outstanding client requirements (to be used as a primary input for Product/Portfolio strategy). These requirements are approved by LOB client management, Process Client management, and clients.

## PM 1.6 Understand 3rd Party Industry Trends / Capabilities

It is a stated strategy of IS to use internal development as a last resort in providing clients with best-in-class tools. For systems where there are 3rd party alternatives to internally development, it is the role of Portfolio management to proactively investigate these opportunities. The benefits are time to market, access to best-in-class tools and reduced up-front and ongoing tool costs. Portfolio management must understand the capabilities and trends of the 3rd party industry in advance of these requirements being asked for by the client base.

### Trigger(s)

- Initial capture of information proactively initiated by Portfolio management.
- Updated upon major changes in the marketplace and/or special requests by clients.

### Responsibility

- Portfolio management assigned prime.

### Inputs

- Industry conferences related to the Portfolio
- External User Groups associated with Portfolio activities.
- Direct contact with 3rd party vendors
- Information exchange and benchmarking with other companies (IBM, HP, etc.)

### Detailed Steps

- Identify all relevant industry conferences and training sessions that provide information on related products. Create a multi-year attendance plan to ensure that major conferences are covered, while being efficient with travel budgets. Ensure that detailed trip reports are written for all trips. Create and maintain a file for all vendor specific information that is gathered.
- Regular review industry publications and analysis companies for information relating to the portfolio. File vendor specific information in vendor file.
- Identify specific vendors for in-depth study as appropriate. Methods for gaining understanding of product and trends include: on-site presentations by vendor sales and technical people; vendor site visits; installation of product for evaluation purposes; installation of product for technical trials.
- Site visits to other companies for information exchange and benchmarking the use of similar 3rd party products
- Analyze 3rd party capability with respect to current and potential Client requirements

### Outputs

- Ongoing, up to date document of overall capabilities and trends in 3rd party for the portfolio.
- Analysis of strengths and weaknesses of various industry products wrt general client needs.
- Active file for major vendors of detailed product information.
- Identification of best-in-class opportunities in the 3rd party marketplace.
- Benchmarking results of other companies using related 3rd party products.

## **PM 2.0 Create Portfolio Strategy**

### **PM 2.1 Analyse Capability Gaps**

With an understanding of the client business processes and current portfolio capability in place, a "capability gap analysis" will identify specific capabilities that are required to support the business process, but are not being provided by the current product portfolio. This is a necessary pro-active step in defining a portfolio strategy that will "fill in the gaps" and meet the clients current and future business needs.

#### **Trigger(s)**

- Initial gap analysis pro-actively initiated by Portfolio management.
- Updated upon major changes in portfolio capability or client processes and requirements.

#### **Responsibility**

- Portfolio management assigned prime.

#### **Inputs**

- Output of Process PM 1.1 (Understand Client Demographics)
- Output of Process PM 1.2 (Understand Current System Capabilities)
- Output of Process PM 1.3 (Understand Process / Tool Interfaces)
- Output of Process PM 1.5 (Understand Client Requirements)

#### **Detailed Steps**

- For each client group identified in PM 1.1:  
Using information from PM 1.2, (Current System Capability) PM 1.3 (Client processes and Tool Interfaces) and PM 1.5 (Client Requirements) identify areas in which products do not meet the needs of existing / future client business processes (e.g. "gaps")
- For each deficient area covered by existing development / delivery plans:
  - Publicize schedule for delivery to clients
- For each deficient area not addressed by current plans:
  - Add to the list of known functionality gaps for current business processes.

#### **Outputs**

- Detailed documentation of areas in which product functionality falls short of meeting requirements of current and future client business processes.

## PM 2.2 Best-in-class Opportunity Analysis

For each of the areas within a portfolio, it is necessary to determine what the possible options are for delivering best-in-class capability to the client. These options will range from a turn-key 3rd party solution to a custom developed system. It is the role of Portfolio management to pro-actively investigate these various options in advance of clients requesting the capability. This activity includes "make-vs-buy" analysis as well as "needs-vs-requirement" analysis. It is also the role of portfolio management to identify opportunities for re-use of existing options and rationalization of the existing portfolio to provide cost savings to the corporation.

### Trigger(s)

- The pro-active analysis of best-in-class opportunities and options will be initiated by Portfolio management. Analysis of opportunities for portfolio rationalization will also be pro-actively initiated by Portfolio management.
- The review of specific options for a given requirement and identification of specific options of re-use will be initiated in response to a request by client management / clients.
- Information will be updated upon changes to capability within the portfolio or industry trends.

### Responsibility

- Portfolio management assigned prime.

### Inputs

- Understanding of Internal (Solutions Delivery) Development Capability
- Output of Process PM 1.2 (Understand Current System Capabilities)
- Output of Process PM 1.3 (Understand Process / Tool Interfaces)
- Output of Process PM 1.6 (Understand 3rd Party Trend / Capabilities)
- Output of Process PM 2.1 (Analyse Capability Gaps)
- Output of Process PM 2.3 and PM 2.4 (Define Product / Portfolio Lifecycle Strategy)

### Detailed Steps

- Develop or acquire a formal capability assessment tool to be used to compare specific requirements with product capabilities.
- Examine variety of 3rd party vendors to determine "best fit" and "greatest likelihood for success" in sufficient detail to produce a short list (2 or 3) of the strongest candidates for given requirements.
- Identify lead projects in the Client community in which to conduct a formal pilot trial of potential 3rd party alternatives to internal development.
- Define expectations / assessment criteria / timeframe for a pilot and conduct the pilot as appropriate.
- Compare pilot results with known development capability to determine timeframe for successfully introducing a new product capability
- Review current portfolio and identify opportunities for portfolio rationalization or re-use within the portfolio.
- Respond to requests for capability with alternatives to internal development.

**PM 2.2 continued ..****Outputs**

- Pro-actively, and in response to requests for capability, documented set of options for providing Portfolio related capability (alternatives to internal development)
- Portfolio product strategy for a given subset of capability, with strengths and weaknesses (and recommendations) as to whether capability can be acquired externally or developed internally.
- Documented opportunities for Portfolio rationalization.

**Associated Activities**

- |   |  |
|---|--|
| <ul style="list-style-type: none"><li>• Capture Product Development Costs (GES, I/S, Internal, External) &amp; Deployment Costs</li><li>• Capture Performance Metrics</li><li>• Provide forecasts to D&amp;A</li><li>• Ensure Product stability</li><li>• Determine Interface strategy</li><li>• Ensure deployability</li></ul> | <ul style="list-style-type: none"><li>• Define acceptable quality metrics</li><li>• Ensure "best in class" tool selection</li><li>• Define application architecture</li><li>• Generate Portfolio migration strategies</li><li>• Benchmarking</li></ul> |
|---|--|

## PM 2.3 Define Product Lifecycle Strategy

One of the major roles of Portfolio management is to develop, maintain and execute and comprehensive lifecycle strategy for each of the products within the portfolio. A comprehensive strategy includes the short and long term expected investment plans for the product; the expected lifespan and retirement plans for the product; the capability evolution plans for the product; the architecture and tool interface plans for the product; etc. Execution of the strategy is through a combination of influencing, providing specific recommendations and sometimes enforcing parts of the strategy at gate review meetings and other formal events. It is through the product strategy that portfolio management can best evolve the products to best-in-class and achieve overall cost savings for the corporation.

### Trigger(s)

- Development of lifecycle strategy for each product is pro-actively initiated by Portfolio management.
- Execution of the strategy is ongoing, as well as in response to particular events including client requests for new capability and formal gate reviews.

### Responsibility

- Portfolio management assigned primes.

### Inputs

- Understanding of Internal (Solutions Delivery) Development Capability
- Output of Process PM 1.2 (Understand Current Systems' Capabilities)
- Output of Process PM 1.3 (Understand Process / Tools Interfaces )
- Output of Process PM 1.5 (Understand Client Requirements)
- Output of Process PM 1.6 (Understand Industry Trends and Capabilities)
- Output of Process PM 2.1 (Capability Gap Analysis)
- Output of Process PM 2.2 (Best-in-class Opportunity Analysis)

### Detailed Steps

For each tool within the Portfolio, the following steps are required:

- Make a decision as to whether new capability should be provided by Evolving the existing tool to meet requirements or Replace with new tool?
- Develop an investment strategy for the tool over the next 1-5 years. Communicate that strategy to the client base for long term budgeting.
- For tools that will be evolving, engage with D & A to produce forecasting of development costs and effort.
- Develop short and long term forecasts for major new capability that may be required within the tool.
- Develop short and long term plans for the interfaces of this tool within the application architecture.
- Create a plan for executing the strategy through a combination of influencing, recommendations and enforcement within the RIS model.

The above activities should be based on understanding of corporate direction, the size of the Needs Fulfillment Gap, availability of existing tools in the Portfolio to meet the need, effort required to evolve, internal development capability, existence of 3rd party tools, etc.)

**PM 2.3 cont'd****Outputs**

- A Detailed Product Lifecycle strategy for each product in the Portfolio

**Associated Activities**

- Provide technology opportunity assessment
- Perform / assist with opportunity evaluations
- Provide data on Release Plans / Vintage control / Project Tracking / Enhancements
- Handle Decommissioning
- Conduct feasibility studies
- Assist in translation of business requirements into specs
- Know enhancement costs

## PM 2.4 Define Portfolio Lifecycle Strategy

In addition to a defined lifecycle strategy for each of the products within the portfolio, there needs to be an overall strategy for the portfolio itself. The portfolio strategy will involve plans on how to cover gaps within the portfolio; rationalization of the products within the portfolio, integration of functionality within the portfolio; integration of products outside of the portfolio; evolution of the capability of the portfolio in response to major business process changes, etc.

### Trigger(s)

- Development of lifecycle strategy for each product is pro-actively initiated by Portfolio management.
- Execution of the strategy is ongoing, as well as in response to particular events including client requests for new capability and formal gate reviews.

### Responsibility

- Portfolio management assigned primes.

### Inputs

- Understanding of Internal (Solutions Delivery) Development Capability
- Output of Process PM 1.2 (Understand Current Systems' Capabilities)
- Output of Process PM 1.3 (Understand Process / Tools Interfaces )
- Output of Process PM 1.5 (Understand Client Requirements)
- Output of Process PM 1.6 (Understand Industry Trends and Capabilities)
- Output of Process PM 2.1 (Capability Gap Analysis)
- Output of Process PM 2.2 (Best-in-class Opportunity Analysis Strategy)

### Outputs

A detailed Lifecycle Strategy document for the overall portfolio.

### Associated Activities

- Identify opportunities for Portfolio alignment
- Develop & Maintain Catalog (covered under separate process)
- Track Portfolio effectiveness metrics
- Lead reuse of products
- Influence clients' investment
- Inventory Tracking
- Manage Portfolio Documentation
- Influence suppliers to create required solutions

## **PM 3.0 Provide Portfolio Consulting**

### **PM 3.1 Market Portfolio Products**

It is important to ensure our customers, and potential customers understand our products, and how they can be used to enhance their business. This will result in greater commonality of tools and processes within the corporation, and distribute costs over a larger user base.

#### **Trigger(s)**

- Proactive Marketing to new groups
- Requests from specific groups for product information

#### **Responsibility**

- Portfolio management Marketing.

#### **Inputs**

- Client Request for Marketing
- Portfolio Product Catalog

#### **Detailed Steps**

- Create (or re-use existing) Marketing Brochures
- Work with Client Management to deliver marketing information to Clients

#### **Outputs**

- Client receives accurate, timely marketing information.

#### **Associated Activities**

- |  |   |
|--|---|
| • Publish Product Catalog                          | • Provide marketing programs                    |
| • Provide product promotion & information          | • Generate Portfolio overviews                  |
| • Provide product & services offering              | • Provide Product specs & support               |
| • Provide metric info to clients by LOB Process    | • Provide Product Definition details            |
| • Provide Product Demos                            | • Promote alignment of LOBs with corp. strategy |
| • Advise on requirements for deployment            | • Gather and publish best practices             |
| • Determine criteria to populate catalog from BART |   |

## PM 3.2 Provide Ongoing Client Communications

Client communications are important, to ensure clients needs and values are understood, and to ensure their expectations are achievable.

### Trigger(s)

- Proactive communication of Portfolio strategy, project plans and product offerings.
- Client requests for Portfolio-related information

### Responsibility

- Portfolio management assigned prime.

### Inputs

- Portfolio Lifecycle Strategy
- Product Lifecycle Strategies
- Portfolio Product Catalog

### Outputs

- Variety of communication channels:
- User meetings
- Newsletters
- Conference calls

### Associated Activities

- |   |                              |
|---|------------------------------|
| • Provide investment recommendations  | • Focus group representation |
| • Provide proposals / assessment quotes   | • Provide teamwork solutions |
| • Advise on compatibility / variance between requirements and portfolio offerings |                              |

## 2. Revision History

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Issue No.	Description of changes	Issue Date	Changed By
1.0	Initial capture based on informal document written by Darrell Makarenko and Scott Hurd	970206	Ed Watts

### 3. Document Administration

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The original electronic file of this Business Process Definition document will be considered the Master, and a controlled copy may be obtained from the Information Systems Document Repository (ISDR) Administrator (e-mail "ISSD Quality"). All hardcopies are uncontrolled. Viewing of the on-line file will ensure access to the current issue.

In accordance with Document Control procedures, changes will be indicated by change bars and comments in the Publication History.

#### **How to view on-line**

not available at this time:

#### **Release Authority**

Ed Watts  
Manager,  
Design to Manufacture Portfolio Management

#### **Approval Authorities**

Name	Title	Organization
Darrell Makarenko	Senior Manager Design to Manufacture Portfolio	Portfolio Management

#### **Process Owner**

Ed Watts  
Manager,  
Design to Manufacture Portfolio Management

## 4. Process Control

### Deployment

This process is distributed via the IS process document repository. The senior portfolio managers are informed of updates via Email

### Reviews

Reviews with senior portfolio managers will be done when deemed necessary by the process owner.

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