

Portfolio and Project Management - Assessment Questions

Portfolio Management - Overall strategy, envision and product roadmap with business goals, master backlog

- How do we validate the ideation and process of vetting that idea
- How do we prioritize the backlog (define the weight) of a list of ideas to determine
- Application Process Management - to get it done thru Engineering
- Capacity management - how do business measure the capacity required for a deliverable vs. cost
- Process for defining a portfolio item, and how is its lifecycle managed
- How do we measure success (planned vs. delivered) and revenue expected vs. revenue actual
- Epics - Themes to provide query script to analyze
- *** need to come up with a plan to define scorecard and provide standard scoring model

Program Management - Understanding appropriate requirements divided into phases of prod development, release management

- Provide high level engagement with business team on what is agreed upon and what to be delivered over the course of a timeline
- Sequence items and manage change control process for change of business priority vs. technology strategy
- Define standards and enforce models for scrum teams
- Own end-2-end delivery and lifecycle management of the product (including operationalization and monitoring)
- Features / FeatureSets (lifecycle management, plan release vs. actual release, change control items (internal / external), release planning)
- Capacity management - what is the billable ratio dev and friends (time allocation, ratio values, measurement)
- Delivery model supported (How are the scrum teams defined, organized, environment strategy, metrics / measurement, release overview, production oversight)

Question	Why we ask?	How to score/rate? (1 lowest - 5 highest)	Weight?	What data can we pull to quantify?
How to manage velocity of different projects in portfolio How to measure success ?	Being able to easily inform the clients about portfolios is a powerful tool of satisfaction and fostering client loyalty. Reporting is not any more a path for differentiation, but just a minimum service to provide. Today, clients require a 24/7 access to their assets via smartphones. (planned vs. delivered) and revenue expected vs. revenue actual			
How privacy data manage ?	Does your tool allow you to encrypt information, to set users' rights and users' access to information?			
How is overall strategy, envision and product roadmap with business goals, master backlog	JIRA or any portfolio dashboard to manage multiple projects/program			
How do we validate the ideation and process of vetting that idea	Workflow documents/project charters			
How do we prioritize the backlog (define the weight) of a list of ideas to determine	Steering committee meetings for planning activities			
Do we have application process management	User guides			
How do business measure the capacity required for a deliverable vs. cost	Velocity of different projects			
Process for defining a portfolio item, and how is its lifecycle managed	Process life cycle management			
How epics defined for each portfolios	Monthly steering committee meetings			
How project requirements divided into phases of prod development, release management	Tools used for project management			

what is high level engagement with business team on what is agreed upon and what to be delivered over the course of a timeline	frequency for stakeholder engagement			
Is there any change control board where manage change control process for change of business priority vs. technology strategy	Milestone achievements ceremony			
what kind of delivery framework used	delivery framework models, Waterfall/Agile/Kanban used for scrum teams			
what are application monitoring	end-2-end delivery and lifecycle management of the product, including operationalization and monitoring			
How features / featureSets release life cycle management	lifecycle management, plan release vs. actual release, change control items (internal / external), release planning			
How application capacity managed	velocity of different applications and key metrics			
Which delivery model used for applications	How are the scrum teams defined, organized, environment strategy, metrics / measurement, release overview, production oversight			
How big is the team ?	The more employees you have, the more difficult it is to convey information and to have a clear vision on tasks execution. It is then vital to go for a solution integrating all the functionalities which are necessary to optimise team working efficiently. Adopt centralised management software			
Application access/used locally or globally ?	Many management companies are not working on one single site, meaning they have several offices. Therefore, they need to work on a software that would be complete and highly customisable. The goal of such a solution is to provide the same tool to all teams worldwide and to give them the opportunity to customise the solution as they want in order to use the software as efficiently as possible. If your company is operating on 2 different sites or more, it is recommended to use a centralised portfolio management software.			
Customers access and authentication so specific role based policy assignment	Use powerful tool has to provide a solution including dynamic management profiles that can evolve easily regarding the company's objectives and the specific regulations to which this client is submitted. It is essential to be able to control at any customer access management for all customers			
How is your database growth	The more clients you have, the harder it is to deeply know each one of them. Operational risks are increasing with the number of transactions to realise for each portfolio. Again, the risk is high to miss an important information and to depart from clients' profiles A portfolio management system will help you reminding and registering clients' profiles that are highly different, and to easily follow flows and movements.			
Is your application have specific features which introduce more complexity	Being able to manage a huge amount of contacts, each one of them having different strategic characteristics (for instance law regulations or commercial links) is one of the key aspect of an efficient solution. Using CRM that is included in a complete solution is the only way to answer positively and efficiently to all your clients' investment wishes and desires.			
What tool used for management process	The daily management of your activity requires to complete tasks that can be complex and repetitive. If you are working with more than 5 partners or custodians, a centralized management solution recommended			
How big is the management team.	Centralized management solutions should be used for visibility across multiple portfolio applications			
Is there any limitations with current management processes	The integration of a centralised, upgradeable and scalable management solution makes it possible to support the development of the activity by offering tools and a flexibility of use that match each stage of the development. Integrate a centralised management solution that offers you flexibility and adaptability for each step of your growth.			
Is there any consolidation for portfolio management ?	The automatic consolidation of data, regardless of the number of custodians with whom you're working, the used currencies or the diversity of your investments formats (financial, unquoted, real estate...) is a strategic challenge in terms of commercial performance and client relationship management. A portfolio management solution will automatically manage this task according to several criteria. The owner will gain time and performance. The client will benefit of a top solution having detailed views.			

Any compliance management in place ?	The compliance management isn't only a matter of audit. It's a daily practice that raises your level of requirement. This rigor has an immediate impact on your clients' trust. Managing compliance is still today one of the main challenges of independent managers. Their overall performance is partly linked to their capability to quickly and efficiently manage regulations and administrative constraints.			
Any critical data processing/encryptions ?	The order book is one of the most vital data for a portfolio management company. Being an audit and management tool at the same time is at the heart of the decision-making process. The lack of visibility and the complexity of the achievement of this task are usually the causes of the lack of reactivity and thus of efficiency. Centralising and automating this process is a way to save costs, mainly human resources.			
How to manage velocity of different projects in portfolio How to measure success ?	Being able to easily inform the clients about portfolios is a powerful tool of satisfaction and fostering client loyalty. Reporting is not any more a path for differentiation, but just a minimum service to provide. Today, clients require a 24/7 access to their assets via smartphones. (planned vs. delivered) and revenue expected vs. revenue actual			
How privacy data manage ?	Does your tool allow you to encrypt information, to set users' rights and users' access to information?			
Are your processes consistent across product divisions and products?	understand business drive for different project/product activities			
What charts has the team used to display the components of variation in the process?	Any matrix reporting used and frequency of those review with stakeholders			
How does the team ensure that all the necessary product development steps are adequately followed under the pressure of being first to market?	Steering Committee			
Do the teams release products without ever having to complete some requirements? recent events	Any aggressive product deliverable for different application			
How do you productize your APIs across products and measure impact and use?				