IT Portfolio Dashboards

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Agenda

- Overview
- Portfolio Dashboards
- Project Dashboards
- Sample Portfolio Dashboards

Overview

Managing a large set of projects, programs, and portfolios in a large organization requires an analytical approach. Tools from enterprise vendors are focus on managing projects or portfolio of projects as a list of projects, and products such Planview and Clarity, are mainly focus on managing projects and their typical metadata, which varies by underlying methodology (Scrum, Kanban, Waterfall, and Critical Chain). Enterprise PPM products lack forecast and statistical tools to manage at the enterprise level, except for Critical Chain. EPPM tools do not provide comprehensive statistical metrics, control charts, and forecasting analysis to manage a portfolio or initiatives, as of 2018, non of the major enterprise PPM vendors included even simplest Monte Carlo analysis for estimating project's duration and cost.

A generic set of dynamic dashboards categorized by analysis type were designed and implemented to present a comprehensive state of a portfolio and/or project. Analytics, KPIs, Monte Carlo, Statistical Process Control charts, among others were utilized for forecasting and obtaining a deeper understanding of a given program or portfolio. In addition, a generic set of of dynamic filters were included, such as: Calendar Year Range, Accounting Cost Type, Division, Department, Project Fiscal Year, Initiative State, Source of Funding, etc. to allow slicing and aggregating of portfolio data. All metrics and statistics derived are automatically refreshed per user-defined filtering criteria.

Every project, program or portfolio are approved and executed to create value; value can be tangible or un-tangible. Understanding the value generation for each portfolio or project, it is critical to access the actual success or lack thereof, and most importantly to integrate the results in a continue improvement process to increase the efficiency of actual value delivered in future initiatives and portfolios. This topic is extensive, and the dashboards, and detailed explanation are discussed in the document, Quantitative Portfolio Management of Initiatives.

Portfolio Dashboards

The following dashboards were created:

1. Portfolio Financials

   Aggregate level information for a given portfolio or set of portfolios in the company

2. Initiative Financials

   Detail level information for each initiative in a portfolio

3. Funding Analysis

   Source of funding historically and aggregate for initiative types per portfolio or across portfolios

4. Portfolio Cashflow

   Monthly summary cashflow for a portfolio, including comparisons between budgeted amounts and actuals, and forecast amounts

5. Portfolio Summary KPIs

   Initiative level historical KPIs for cost, duration status

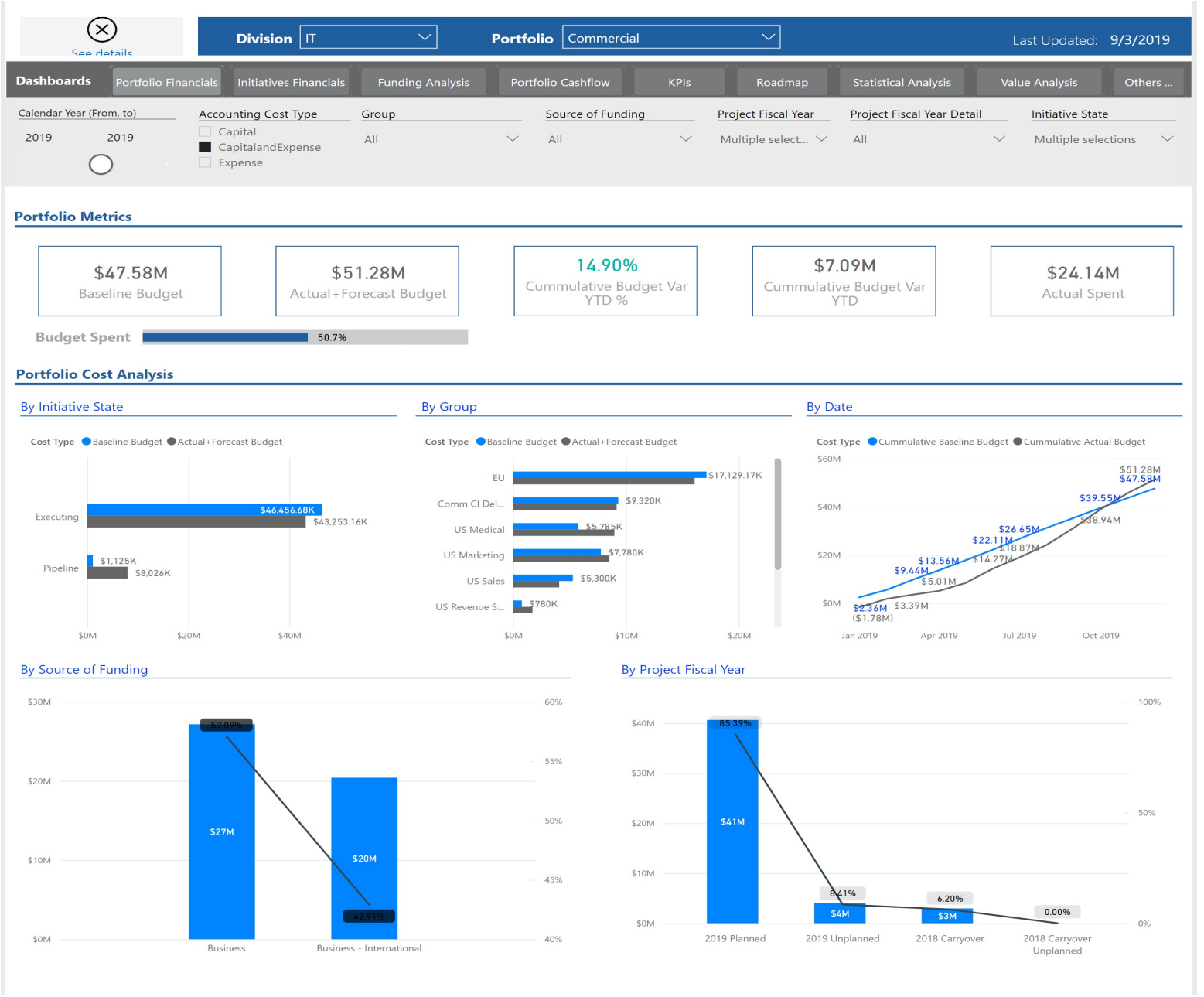
6. Portfolio Statistical Process Control Charts for KPIs
7. Portfolio Roadmap
   - Gantt level view of the portfolio providing single visual that presents the initiatives start, initial forecasted date, current forecasted date, % completion, % budget utilized, and highlighted by duration and budget status
8. Portfolio Value Analysis
   - Detailed analysis of the valued realized versus forecasted

Project Dashboards

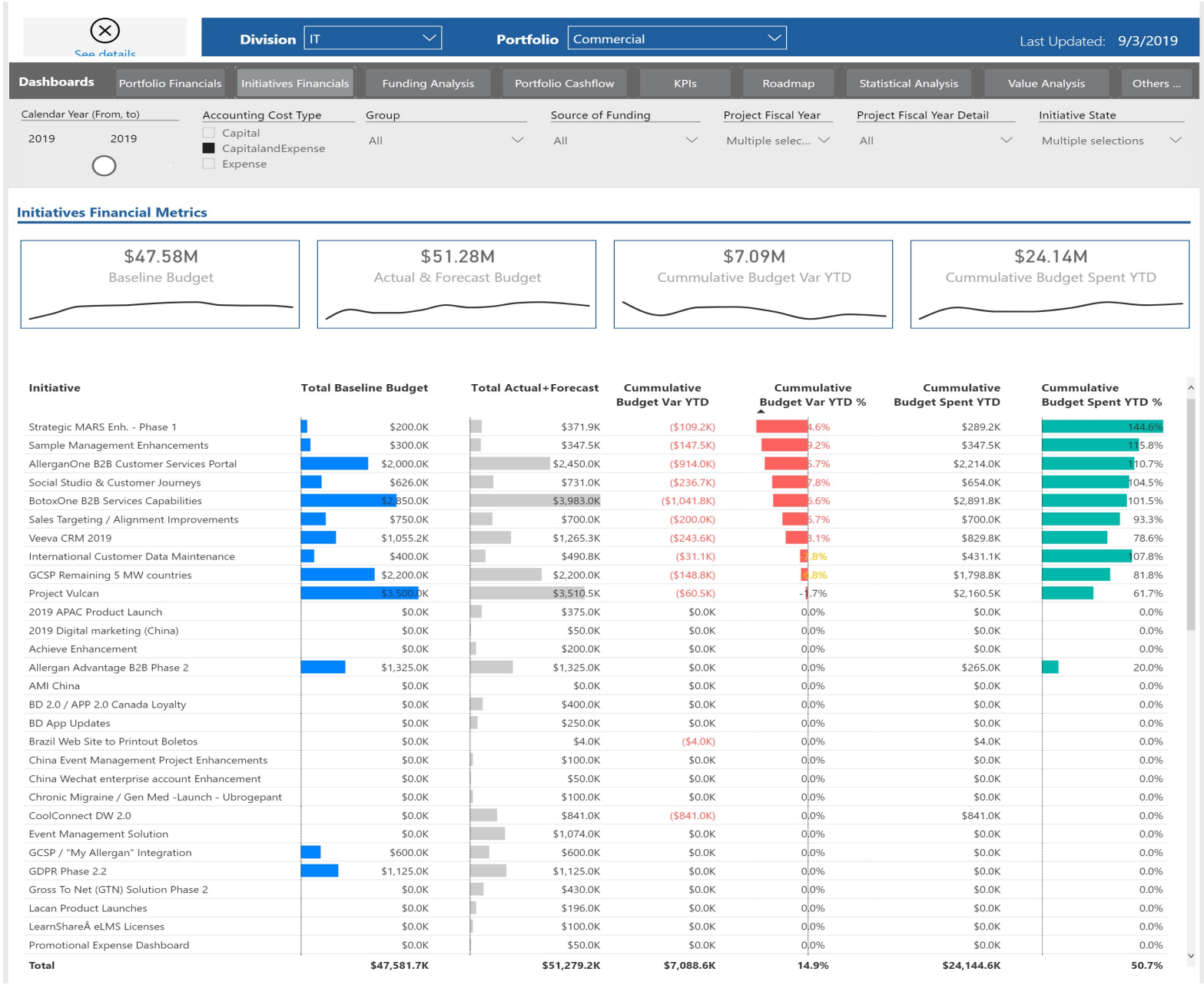
The following dashboards were created:

1. Project Overview
    - Project overview metrics, including key metadata
    - Summary visuals for statistical process control of duration, cost
    - Burned down rate
    - Current and historical KPI values for status of duration, cost, risks
    - Forecast completion date and cost using Monte Carlo Analysis, inclusive of risks to the project
2. Project KPIs
    - Detail KPIs for the project, overall, components, including historical trends and statistical process control charts associated with key KPIs
3. Project Value Analysis
    - Detailed analysis of the valued realized versus forecasted

Portfolio Financials

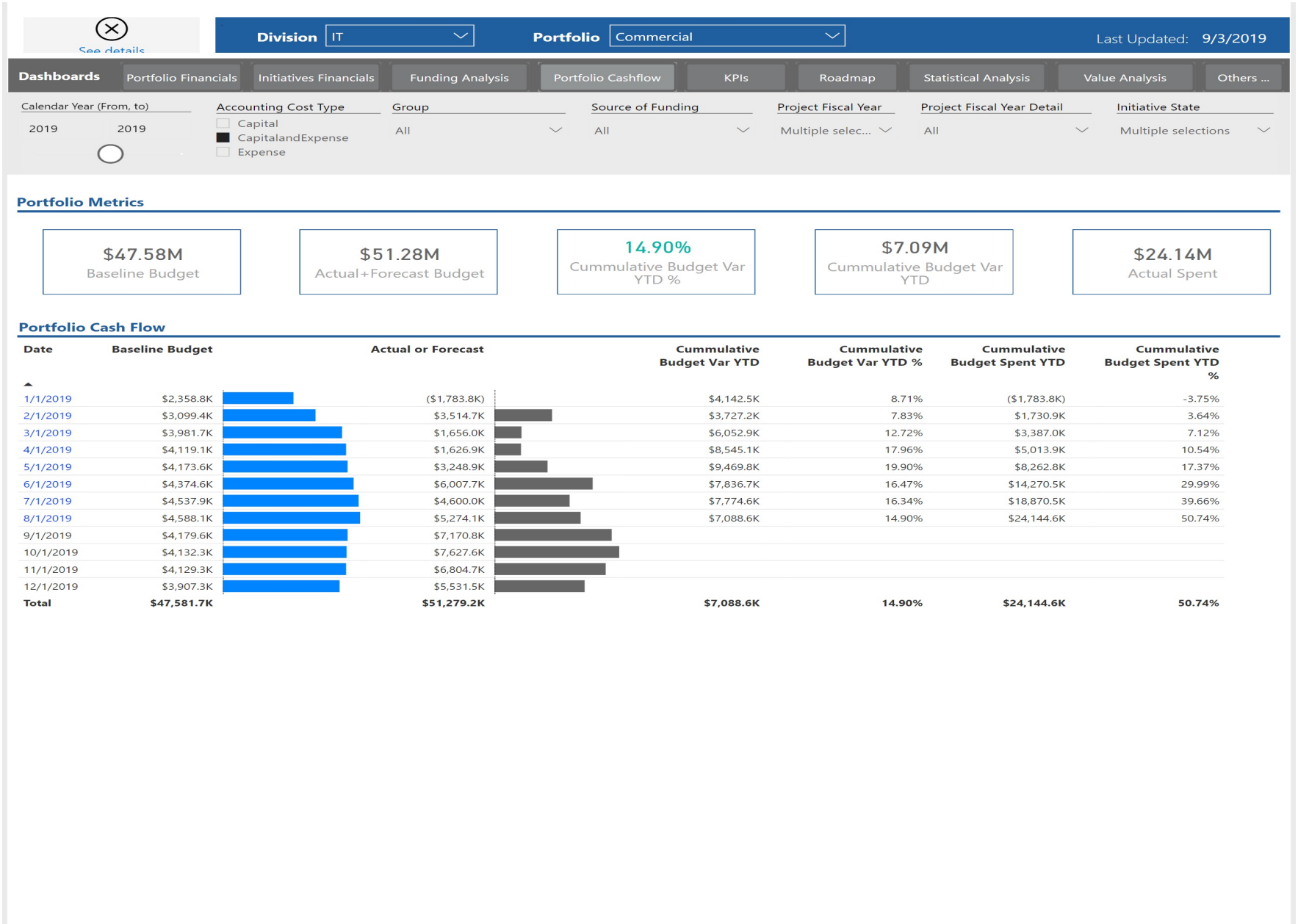


Initiative Financials



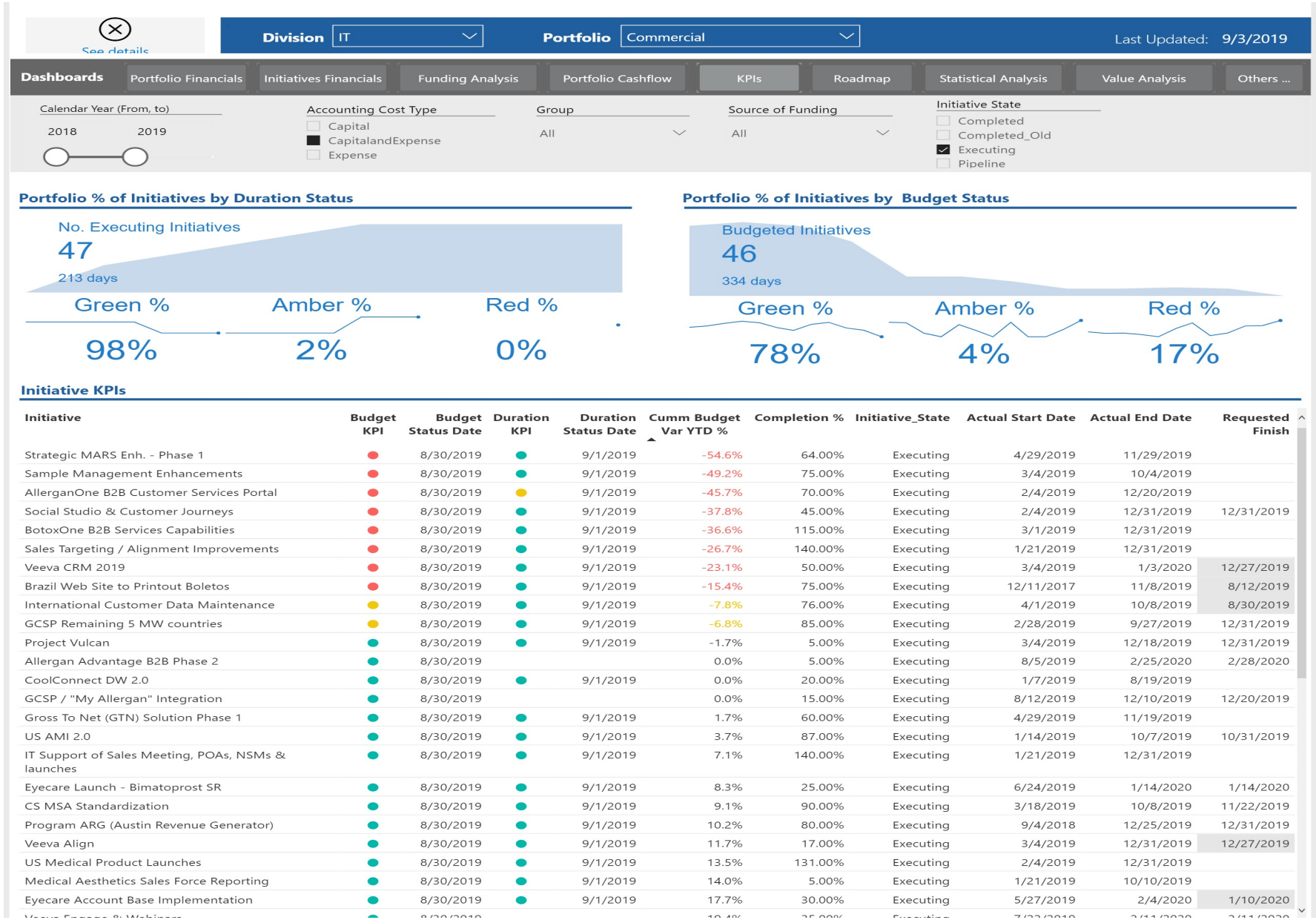
Initiative	Total Baseline Budget	Total Actual+Forecast	Cummulative Budget Var YTD	Cummulative Budget Var YTD %	Cummulative Budget Spent YTD	Cummulative Budget Spent YTD %
Strategic MARS Enh. - Phase 1	$200.0K	$371.9K	($109.2K)	-54.6%	$289.2K	144.6%
Sample Management Enhancements	$300.0K	$347.5K	($147.5K)	-49.2%	$347.5K	115.8%
AllerganOne B2B Customer Services Portal	$2,000.0K	$2,450.0K	($914.0K)	-45.7%	$2,214.0K	110.7%
Social Studio & Customer Journeys	$626.0K	$731.0K	($236.7K)	-37.8%	$654.0K	104.5%
BotoxOne B2B Services Capabilities	$2,850.0K	$3,983.0K	($1,041.8K)	-36.6%	$2,891.8K	101.5%
Sales Targeting / Alignment Improvements	$750.0K	$700.0K	($200.0K)	-26.7%	$700.0K	93.3%
Veeva CRM 2019	$1,055.2K	$1,265.3K	($243.6K)	-23.1%	$829.8K	78.6%
International Customer Data Maintenance	$400.0K	$490.8K	($31.1K)	-7.8%	$431.1K	107.8%
GCSP Remaining 5 MW countries	$2,200.0K	$2,200.0K	($148.8K)	-6.8%	$1,798.8K	81.8%
Project Vulcan	$3,500.0K	$3,510.5K	($60.5K)	-1.7%	$2,160.5K	61.7%
2019 APAC Product Launch	$0.0K	$375.0K	$0.0K	0.0%	$0.0K	0.0%
2019 Digital marketing (China)	$0.0K	$50.0K	$0.0K	0.0%	$0.0K	0.0%
Achieve Enhancement	$0.0K	$200.0K	$0.0K	0.0%	$0.0K	0.0%
Allergan Advantage B2B Phase 2	$1,325.0K	$1,325.0K	$0.0K	0.0%	$265.0K	20.0%
AMI China	$0.0K	$0.0K	$0.0K	0.0%	$0.0K	0.0%
BD 2.0 / APP 2.0 Canada Loyalty	$0.0K	$400.0K	$0.0K	0.0%	$0.0K	0.0%
BD App Updates	$0.0K	$250.0K	$0.0K	0.0%	$0.0K	0.0%
Brazil Web Site to Printout Boletos	$0.0K	$4.0K	($4.0K)	0.0%	$4.0K	0.0%
China Event Management Project Enhancements	$0.0K	$100.0K	$0.0K	0.0%	$0.0K	0.0%
China Wechat enterprise account Enhancement	$0.0K	$50.0K	$0.0K	0.0%	$0.0K	0.0%
Chronic Migraine / Gen Med -Launch - Ubrogepant	$0.0K	$100.0K	$0.0K	0.0%	$0.0K	0.0%
CoolConnect DW 2.0	$0.0K	$841.0K	($841.0K)	0.0%	$841.0K	0.0%
Event Management Solution	$0.0K	$1,074.0K	$0.0K	0.0%	$0.0K	0.0%
GCSP / "My Allergan" Integration	$600.0K	$600.0K	$0.0K	0.0%	$0.0K	0.0%
GDPR Phase 2.2	$1,125.0K	$1,125.0K	$0.0K	0.0%	$0.0K	0.0%
Gross To Net (GTN) Solution Phase 2	$0.0K	$430.0K	$0.0K	0.0%	$0.0K	0.0%
Lacan Product Launches	$0.0K	$196.0K	$0.0K	0.0%	$0.0K	0.0%
LearnShareÂ eLMS Licenses	$0.0K	$100.0K	$0.0K	0.0%	$0.0K	0.0%
Promotional Expense Dashboard	$0.0K	$50.0K	$0.0K	0.0%	$0.0K	0.0%
Total	**$47,581.7K**	**$51,279.2K**	**$7,088.6K**	**14.9%**	**$24,144.6K**	**50.7%**

Portfolio Cashflow



Date	Baseline Budget	Actual or Forecast	Cummulative Budget Var YTD	Cummulative Budget Var YTD %	Cummulative Budget Spent YTD	Cummulative Budget Spent YTD %
1/1/2019	$2,358.8K	($1,783.8K)	$4,142.5K	8.71%	($1,783.8K)	-3.75%
2/1/2019	$3,099.4K	$3,514.7K	$3,727.2K	7.83%	$1,730.9K	3.64%
3/1/2019	$3,981.7K	$1,656.0K	$6,052.9K	12.72%	$3,387.0K	7.12%
4/1/2019	$4,119.1K	$1,626.9K	$8,545.1K	17.96%	$5,013.9K	10.54%
5/1/2019	$4,173.6K	$3,248.9K	$9,469.8K	19.90%	$8,262.8K	17.37%
6/1/2019	$4,374.6K	$6,007.7K	$7,836.7K	16.47%	$14,270.5K	29.99%
7/1/2019	$4,537.9K	$4,600.0K	$7,774.6K	16.34%	$18,870.5K	39.66%
8/1/2019	$4,588.1K	$5,274.1K	$7,088.6K	14.90%	$24,144.6K	50.74%
9/1/2019	$4,179.6K	$7,170.8K				
10/1/2019	$4,132.3K	$7,627.6K				
11/1/2019	$4,129.3K	$6,804.7K				
12/1/2019	$3,907.3K	$5,531.5K				
Total	**$47,581.7K**	**$51,279.2K**	**$7,088.6K**	**14.90%**	**$24,144.6K**	**50.74%**

Portfolio KPIs



Initiative	Budget KPI	Budget Status Date	Duration KPI	Duration Status Date	Cumm Budget Var YTD %	Completion %	Initiative_State	Actual Start Date	Actual End Date	Requested Finish
Strategic MARS Enh. - Phase 1		8/30/2019		9/1/2019	-54.6%	64.00%	Executing	4/29/2019	11/29/2019	
Sample Management Enhancements		8/30/2019		9/1/2019	-49.2%	75.00%	Executing	3/4/2019	10/4/2019	
AllerganOne B2B Customer Services Portal		8/30/2019		9/1/2019	-45.7%	70.00%	Executing	2/4/2019	12/20/2019	
Social Studio & Customer Journeys		8/30/2019		9/1/2019	-37.8%	45.00%	Executing	2/4/2019	12/31/2019	12/31/2019
BotoxOne B2B Services Capabilities		8/30/2019		9/1/2019	-36.6%	115.00%	Executing	3/1/2019	12/31/2019	
Sales Targeting / Alignment Improvements		8/30/2019		9/1/2019	-26.7%	140.00%	Executing	1/21/2019	12/31/2019	
Veeva CRM 2019		8/30/2019		9/1/2019	-23.1%	50.00%	Executing	3/4/2019	1/3/2020	12/27/2019
Brazil Web Site to Printout Boletos		8/30/2019		9/1/2019	-15.4%	75.00%	Executing	12/11/2017	11/8/2019	8/12/2019
International Customer Data Maintenance		8/30/2019		9/1/2019	-7.8%	76.00%	Executing	4/1/2019	10/8/2019	8/30/2019
GCSP Remaining 5 MW countries		8/30/2019		9/1/2019	-6.8%	85.00%	Executing	2/28/2019	9/27/2019	12/31/2019
Project Vulcan		8/30/2019		9/1/2019	-1.7%	5.00%	Executing	3/4/2019	12/18/2019	12/31/2019
Allergan Advantage B2B Phase 2		8/30/2019			0.0%	5.00%	Executing	8/5/2019	2/25/2020	2/28/2020
CoolConnect DW 2.0		8/30/2019		9/1/2019	0.0%	20.00%	Executing	1/7/2019	8/19/2019	
GCSP / "My Allergan" Integration		8/30/2019			0.0%	15.00%	Executing	8/12/2019	12/10/2019	12/20/2019
Gross To Net (GTN) Solution Phase 1		8/30/2019		9/1/2019	1.7%	60.00%	Executing	4/29/2019	11/19/2019	
US AMI 2.0		8/30/2019		9/1/2019	3.7%	87.00%	Executing	1/14/2019	10/7/2019	10/31/2019
IT Support of Sales Meeting, POAs, NSMs & launches		8/30/2019		9/1/2019	7.1%	140.00%	Executing	1/21/2019	12/31/2019	
Eyecare Launch - Bimatoprost SR		8/30/2019		9/1/2019	8.3%	25.00%	Executing	6/24/2019	1/14/2020	1/14/2020
CS MSA Standardization		8/30/2019		9/1/2019	9.1%	90.00%	Executing	3/18/2019	10/8/2019	11/22/2019
Program ARG (Austin Revenue Generator)		8/30/2019		9/1/2019	10.2%	80.00%	Executing	9/4/2018	12/25/2019	12/31/2019
Veeva Align		8/30/2019		9/1/2019	11.7%	17.00%	Executing	3/4/2019	12/31/2019	12/27/2019
US Medical Product Launches		8/30/2019		9/1/2019	13.5%	131.00%	Executing	2/4/2019	12/31/2019	
Medical Aesthetics Sales Force Reporting		8/30/2019		9/1/2019	14.0%	5.00%	Executing	1/21/2019	10/10/2019	
Eyecare Account Base Implementation		8/30/2019		9/1/2019	17.7%	30.00%	Executing	5/27/2019	2/4/2020	1/10/2020