

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 deliver 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

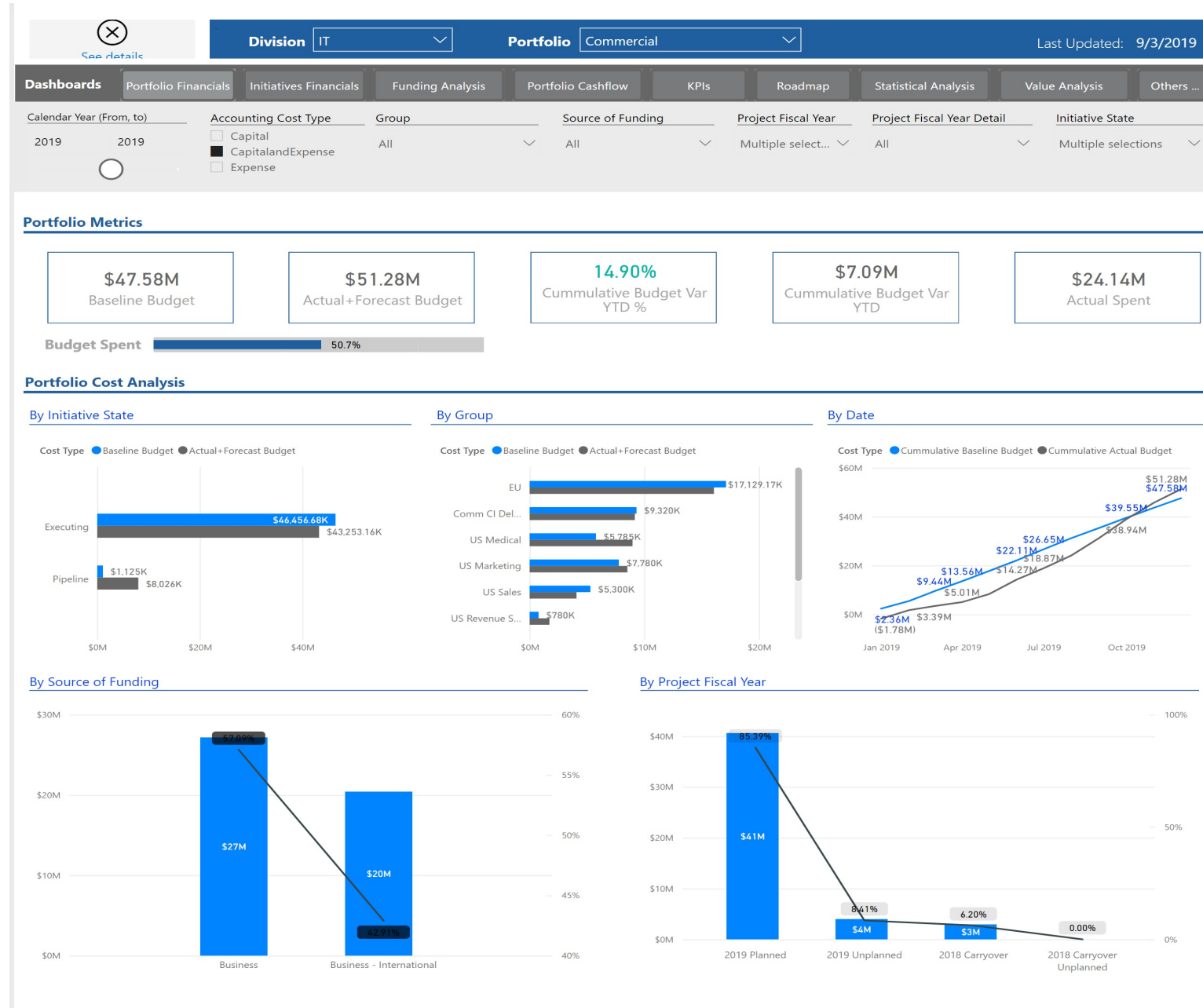
2. Project KPIs

- Detail KPIs for the project, overall, components, including historical trends and statistical process control charts associated with key KPIs

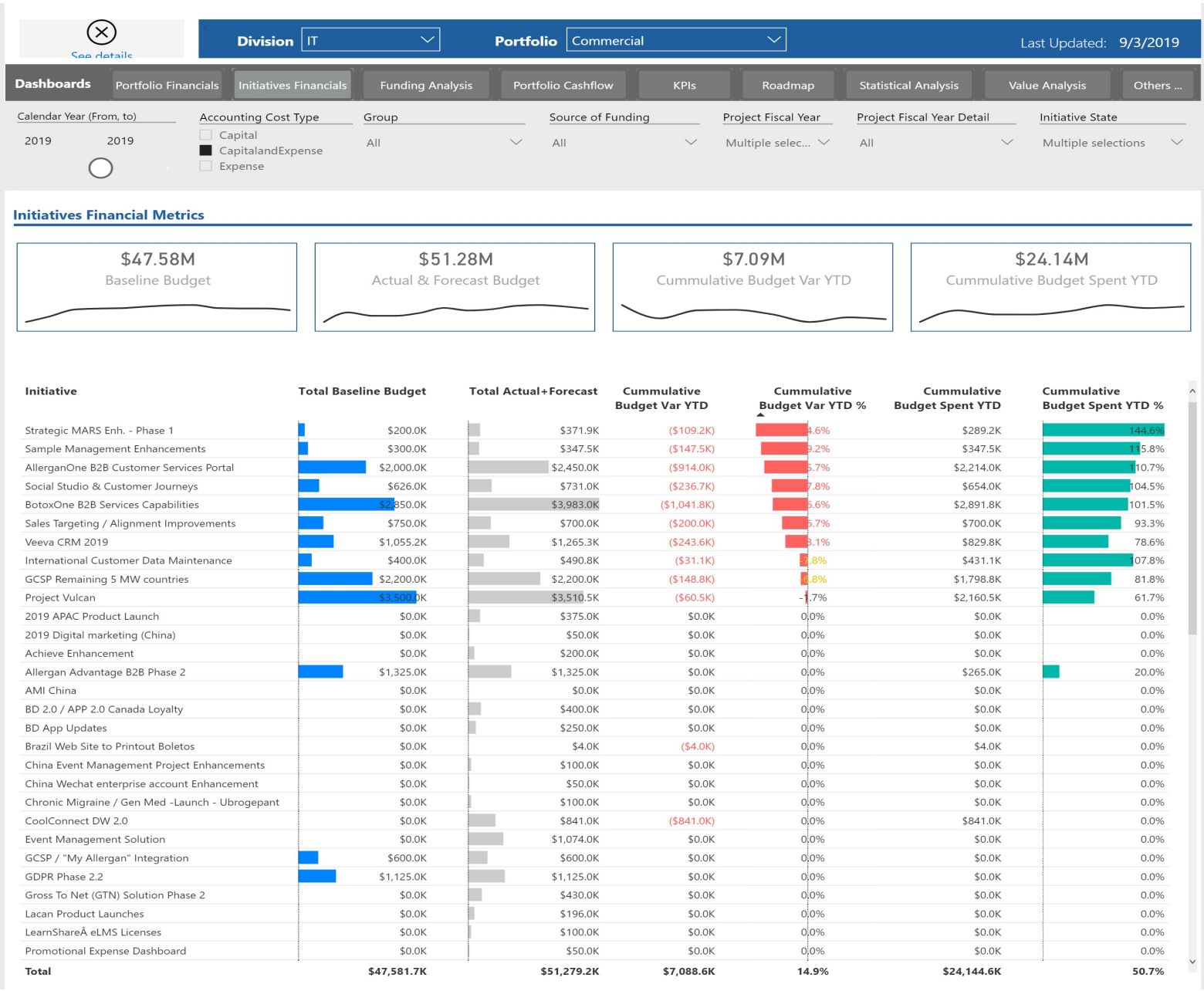
3. Project Value Analysis

- Detailed analysis of the valued realized versus forecasted

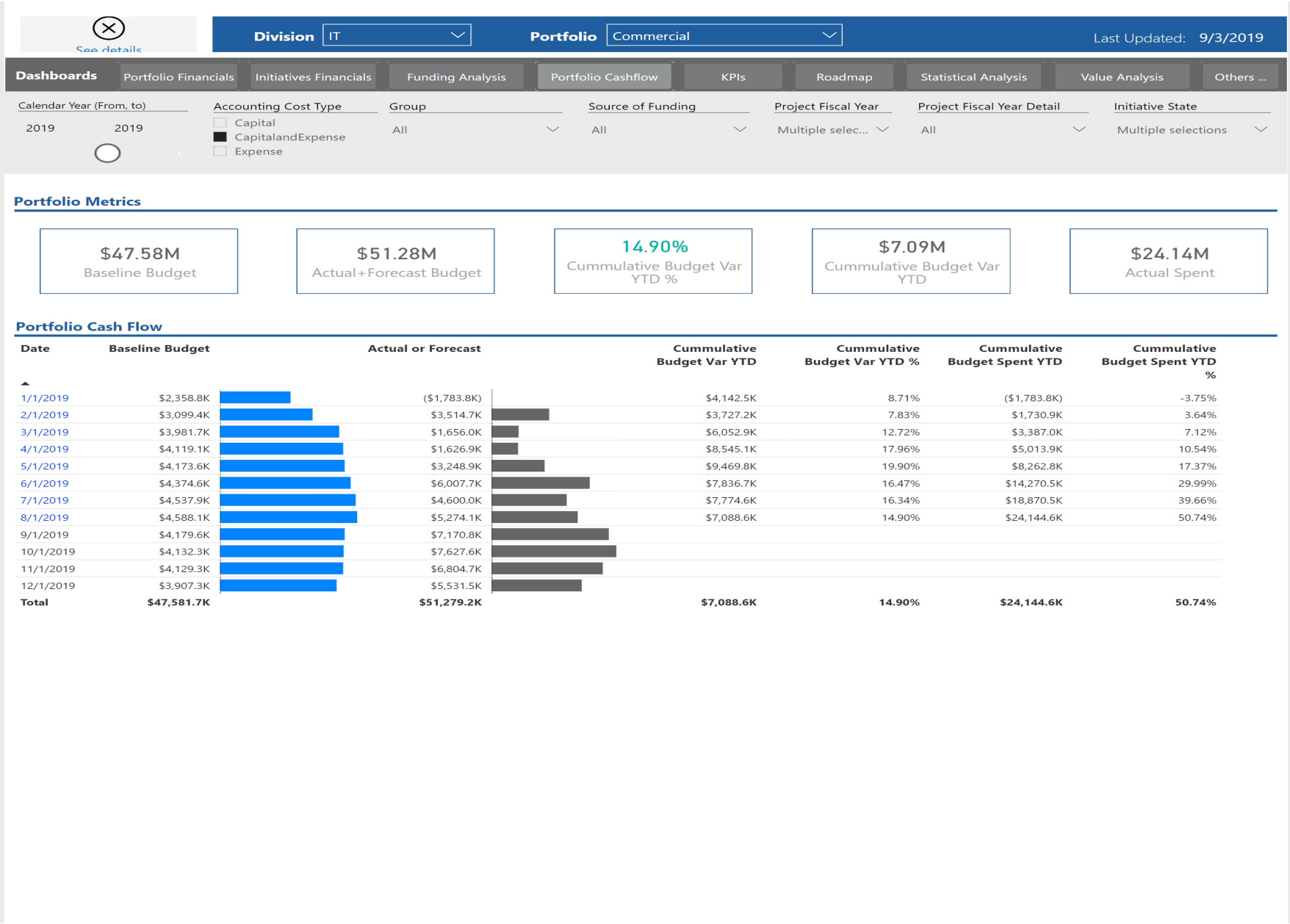
Portfolio Financials



Initiative Financials



Portfolio Cashflow



Portfolio KPIs

