



Value-led portfolio management Deployment Guide

*How to double your portfolio ROI & grow
PMO Impact with TransparentChoice*



transparent
choice



There are 5 value pillars you need to deploy to get 2x ROI

Project prioritization – eliminate weak projects by ranking driven by value

Business planning – connect portfolios with common data structure to enable dynamic allocation of resources

Portfolio optimization – generate highest value portfolio that can be achieved within given resource constraints, with scenarios

Project staggering – increase flow by optimizing start dates around resource bottlenecks

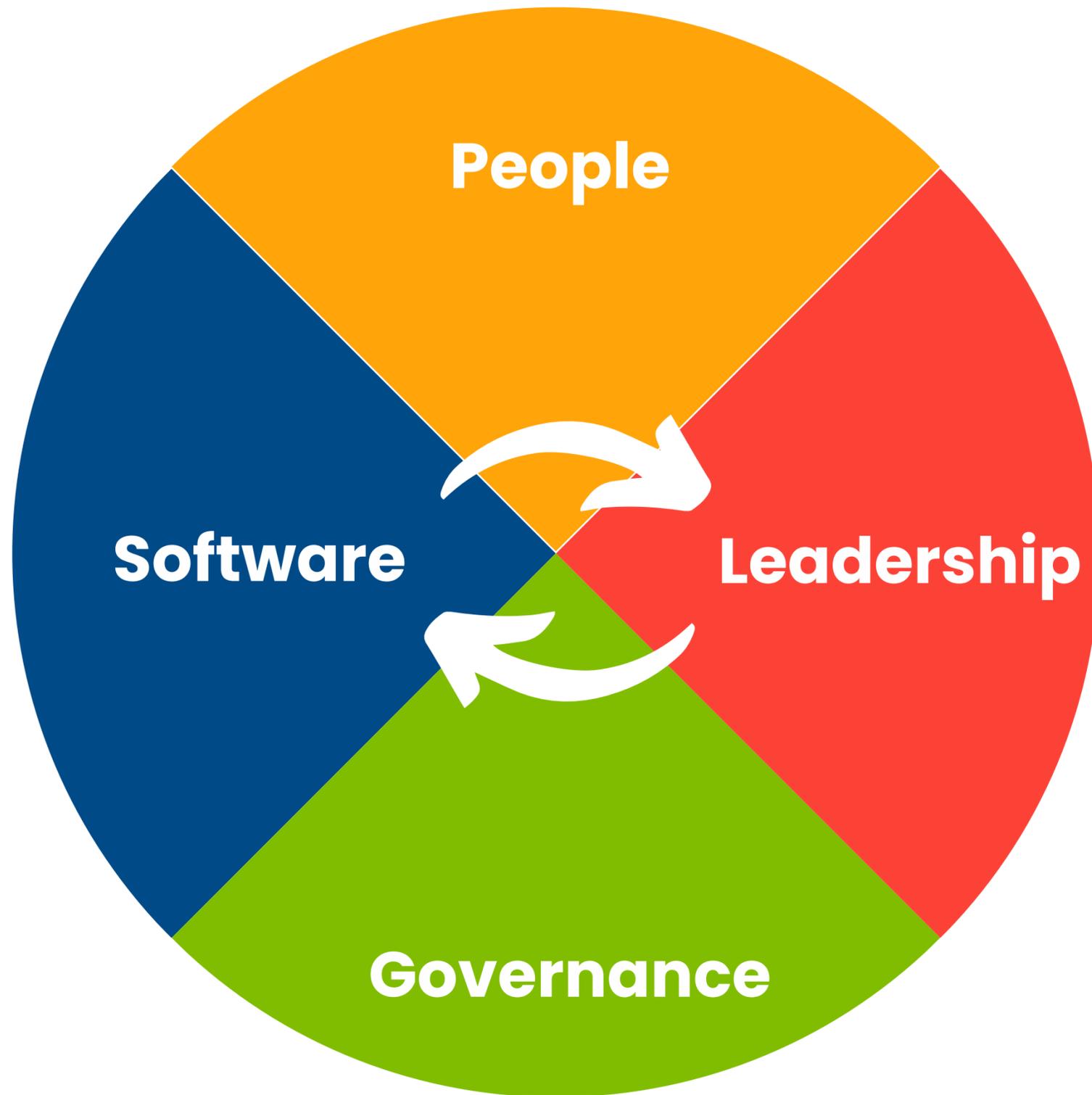
Benefits realization – track projects' value through to completion



Deployment also means a better PMO operating model

- Make the PMO champion of “value” not the “process police”
- Take control of the portfolio, giving executives choices (not headaches)
- Stop “horse trading” over resource, with data-led decisions
- Embed culture of accountability – stop ‘gaming’
- Reduce fire-fighting by allowing PMs to focus on projects
- Stop using high-risk, high-maintenance spreadsheets

Deployment needs to be approached via 4 perspectives



Leadership

Without leadership buy-in this won't work - to double ROI they must be driving the change

Governance

Decision making accountability must be functioning properly: new data will be worthless until it's actioned

Software

For an organization of any scale doing all this has to be driven via software

People

Change must make life easier day to day, so people see 'what's in it for me'

How we got to all this

(hint - we didn't just make it up)

Decision Science / Operations Research

AHP
Noise
Delphi
Theory of Constraints

Experience

10 years building software
Clients successes
Client pain points

Partners

Leading PMO voices
Experienced consultants
Decision science experts

Broader Research

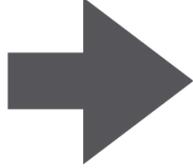
Our own 'Top 10' surveys
PMI research
Thought leadership (McK, HBR,
Adam Grant..)

[Learn More](#)

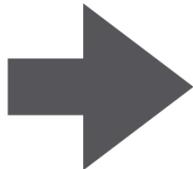
blog to follow...

Deployment Model

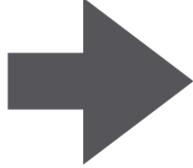
benefits are massive



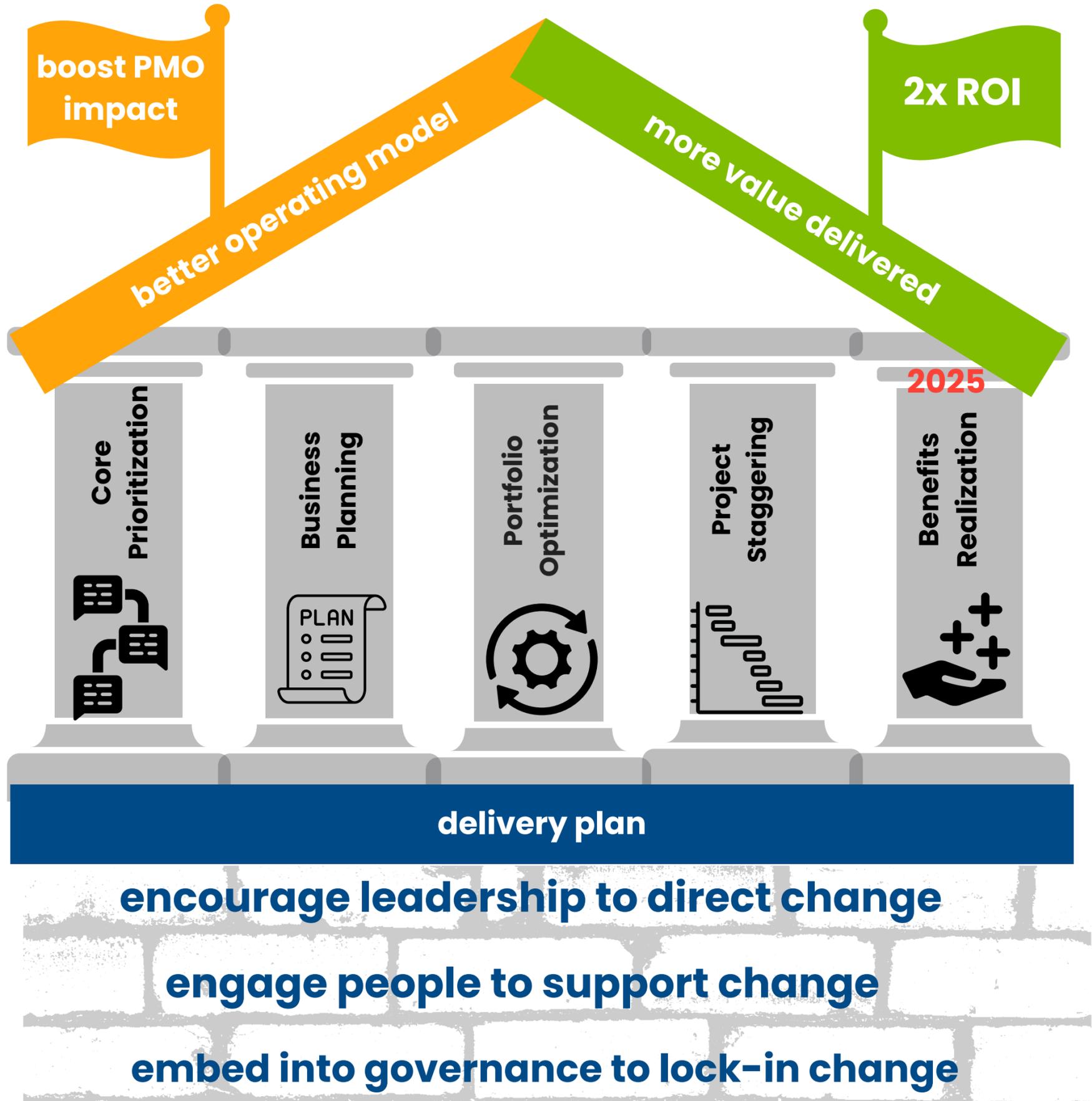
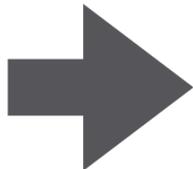
drive value via 5 steps



build a plan



change-management underpins success





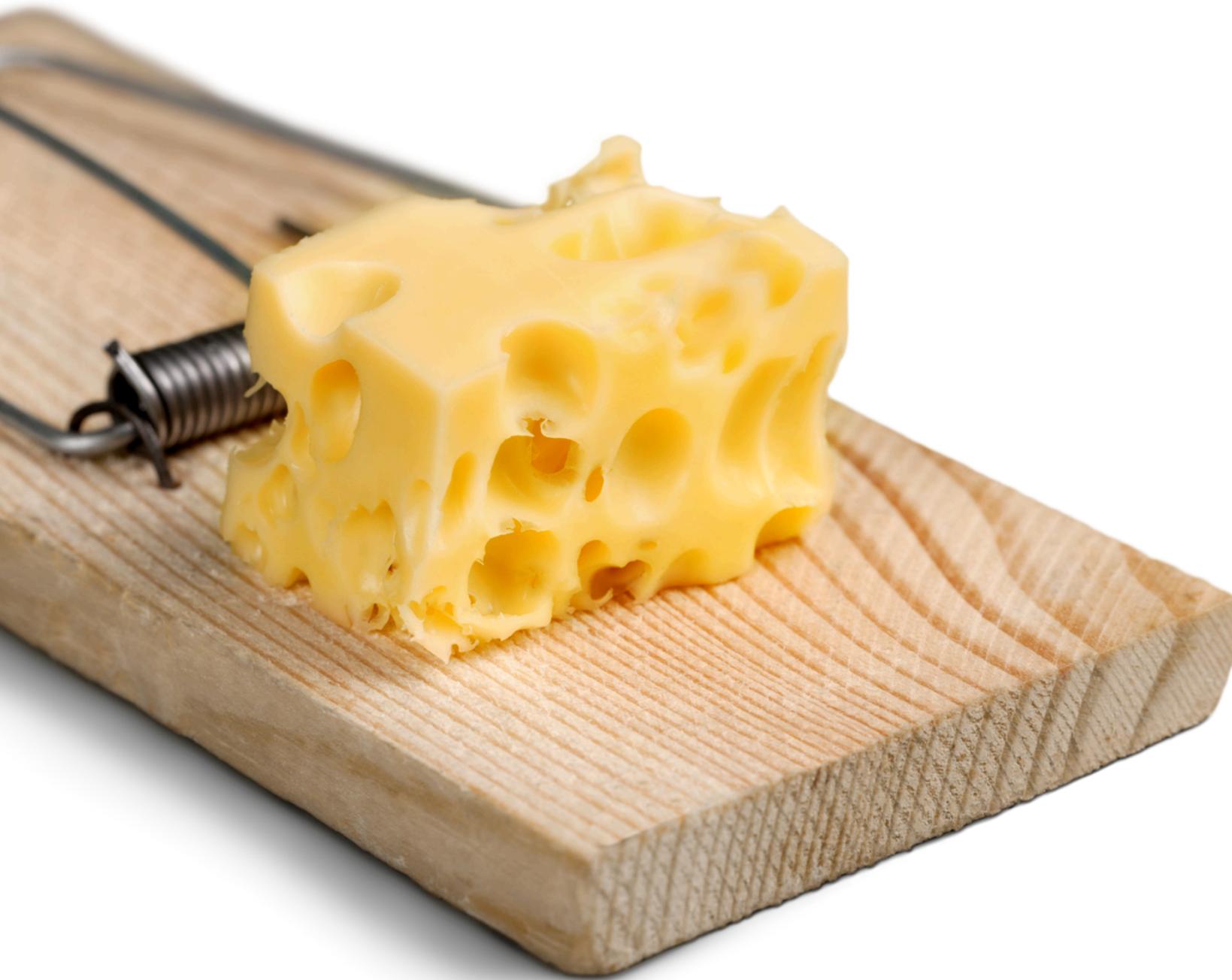
blog to follow...

Getting Started

- Get access to our Beta & try it yourself
 - Learn more via Client Hub
password is client@tch
- Build the case for change
 - Take our Business case quiz
 - Leadership get to double ROI
 - PMO drives alignment to value
- Build your criteria model with our tools
 - Read the Criteria E-Book
 - Take criteria quiz for quick model
- Book a meeting to talk more
 - Schedule a demo
 - Training & best practice

Traps to watch for... (and pre-emptively address)

blog to follow...



- Leadership lose interest
- PMO focuses on process not value
- PMO 'not mature enough'
- Scorers complain it's a lot of work
- People feel threatened by change
- Unclear connection to governance
- Challenges with (messy) data
- Lack of momentum when milestones are not locked-in



Deployment guide - step by step

Beta program flow



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In the context of [Select Features](#), which criterion is more important:
[Build a customer-led brand](#) or [Deliver Strategy](#)?

Group vote

Build a customer-led brand

More important ▾

Deliver Strategy

More important ▾

Equally important (1)

Follow the average (default)



Group vote

Votes	Chart	Comments	Average (33.33)	0	25	50	75	100
David Person			33.33	0	25	50	75	100
Alan Frost			33.33	0	25	50	75	100
Nigel Mansfield			33.33	0	25	50	75	100

David can you explain your vote....

Not sure I can... I'll change my vote now!

100 - Critical feature

75 - Important impact

50 - Solid part of plan

25 - Smaller smaller only

0 - No impact

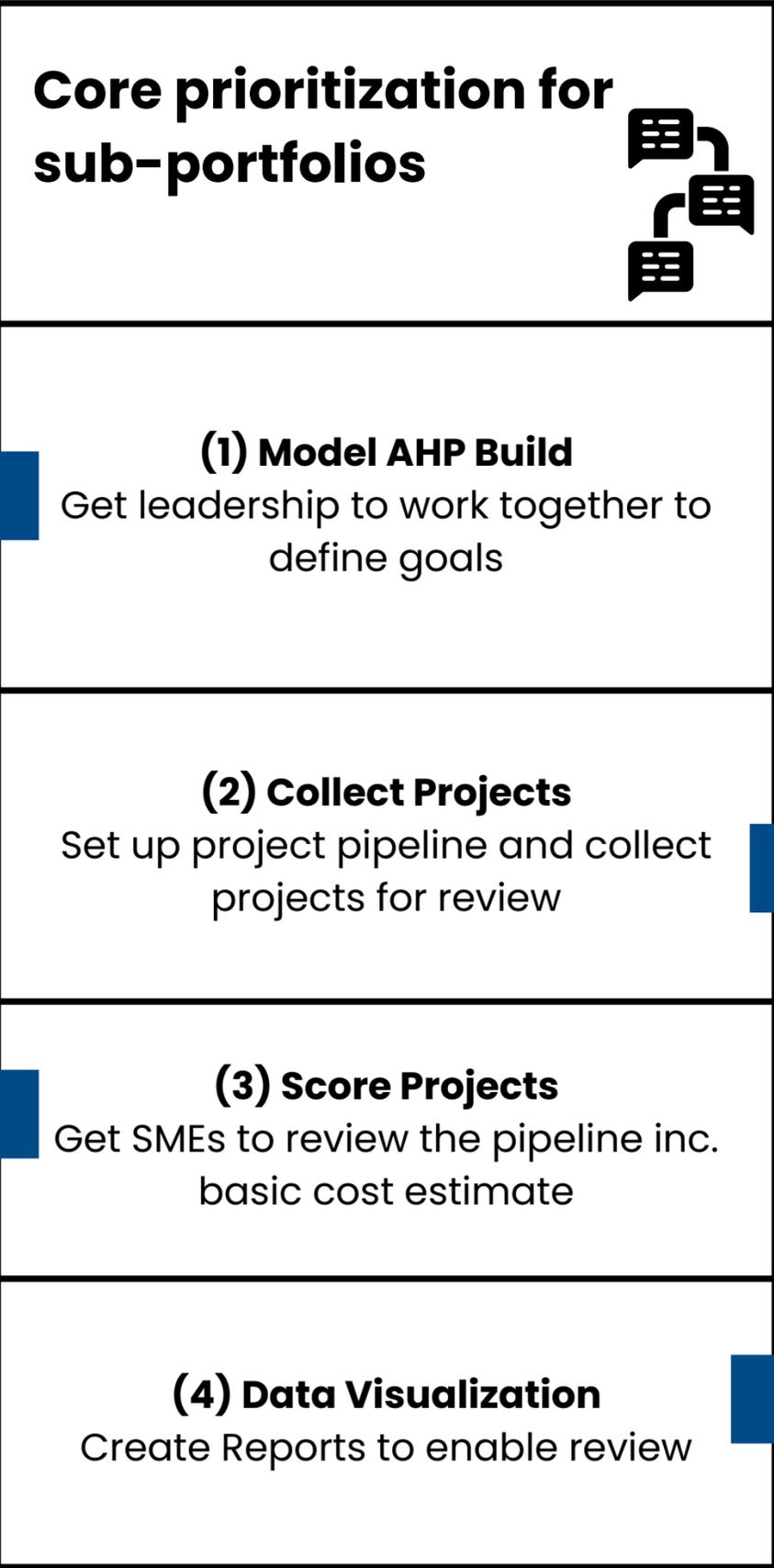
100 - Critical feature

75 - Important impact

50 - Solid part of plan

25 - Smaller smaller only

0 - No impact



Learn More

[See the Slides](#)

Request a project
You've seen what we're trying to achieve... now what proj

* Project Name:

Description:

IT Team Support: IT Resource: PM

Enter number...

- Rejected or Stopped (0)
- Completed (0)
- Work in Progress (0)
- Approved Not Started (0)
- Ready for Scoring (12)
- Scope Resource Requ
- New (0)

Approved Not Started (18)

- Demo 1
High
- Demo 11
Medium
- Demo 12
Low
- Demo 15



Resources

Name	Unit	P&L	Cost per unit (2024)
Data Team	FTE	OpEx	\$80,000
DBA	FTE	OpEx	\$85,000
Developers	FTE	OpEx	\$120,000
Division One Business Analyst	FTE	OpEx	\$90,000

Settings

- Resources
- Revenues
- Costs
- CAPEX
- Metrics
- P&Ls

Join portfolios & collect business plans



(1) Define portfolio structure

Link sub-portfolios under one corporate 'umbrella' plan

(2) Configure business plan template

Define resource, costs & benefits for projects, then map onto sub-portfolios

(3) Collect business plans

Back at sub-portfolio level, collect business cases for projects

(3) Set resource levels & share between portfolios

Define resource constraints & share between portfolios (preferably with a buffer)

coming soon!

Go to Client Hub

Portfolios

- Portfolio**
- [Business Portfolio Division A](#)
Workspace: Demo Model
- [IT Backlog](#)
Workspace: Demo Model

Data Team

Year	1
2024	5.8
2025	8.6

DBA

Year	1		
2024	1.2	3	3
2025	2.8	4	4

Portfolio	Allocation [%]
Business Portfolio Division A	60%
IT Backlog	30%
Business Portfolio Division A	60%
IT Backlog	30%
Business Portfolio Division A	50%
IT Backlog	30%

All values in: USD, Millions	Q1 24	Q2 24	Q3 24
Revenues % growth	0	0	0
COGS	0	0	0
Gross margin % of sales	0	0	0

	Resource allocations	Q1 (Y1/Q1)	Q2 (Y1/Q2)	Q3 (Y1/Q3)	Q4 (Y1/Q4)
IT Team % of sales	Division One Business Analyst [FTE]	0	0	0	0
Business Resources % of sales	Division Two Business Analyst [FTE]	0	0	0	0
EBITA % of sales	DBA [FTE]	0	0	0	0
	Data Team [FTE]	5.5	5.5	5.5	0

Business case

CAGR
 Risk adjusted benefits
 Millions ▾

All values in: USD, Millions	Q1 24	Q2 24
Revenues % growth	11	107.46 876.9%
COGS	5.5	53.73
Gross margin % of sales	5.5 50.0%	53.73 50.0%
	4.43 40.3%	16.56 15.4%
	1.07 9.7%	37.17 34.6%
Plan	1.07 9.7%	37.17 34.6%

Portfolio scenarios

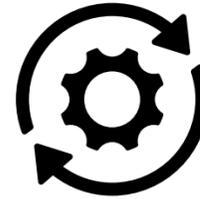
Accepted ...
 Div 2 Analysts -Accepted ...

48
Max: 50

Testers -Accepted ...
 Data Team-Accepted ...

Test Cost Bridge	Test Resou Bridge	Demo Value Score	Division One Business Analyst
	6	88	50
	5	93	1
	2	81	
	10	55	

Portfolio level optimization & scenarios



(1) Sub-portfolio optimization
Add sub-portfolio constraints* then use AI to build an achievable plan.

(2) Build portfolio scenarios
Play with constraints and/or Value Scores to create different options

(3) Review portfolio scenarios
Review different potential scenarios & decide which ones to consolidate in corporate level planning

*in Beta set these manually, we'll connect to corporate allocations in future iteration

Go to Client Hub

Resource constraints (6)

Optimize with AI

Division One Business Analyst	from Division One business Analyst	50
Division Two Business Analyst	from Division Two Business Analyst	50
DBA	from DBA	60
Developers	from Developers	50
Data Team	from Data Team	50
Testers	from Testers	100

1659.58
VALUE



Select projects for Resource Caps

[← scenarios](#)
[✎ edit](#)
[📄 clone](#)
[🔄 refresh](#)

Congratulations! All resolved.

Accepted (25)

Cloud Backup Solution
 Software Deployment

Rejected (7)

Email Migration
 Endpoint Security

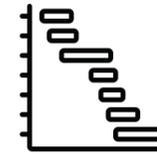
Schedule start date

Name	Start	End	2024						
			Jan	Feb	Mar	Apr	May	Jun	Jul
Cloud Migration	05/2024	05/2026					Cloud Migration		
Community Building Platform	10/2024	10/2026							
Competitive Analysis	07/2024	07/2026							Comp
Content Management	11/2024	11/2026							
CRM Implementation	10/2024	10/2026							
Cross-Selling Initiative	02/2024	02/2026	Cross-Selling Initiative						
Customer Analytics	06/2024	06/2026							Customer Analytics
Customer Feedback System	09/2024	09/2026							
Customer Journey Mapping	03/2024	03/2026	Customer Journey Mapping						
Customer Segmentation	11/2024	11/2026							
Customer Success Program	02/2024	02/2026	Customer Success Program						
Customer Support Chatbot	10/2024	10/2026							
Customer Survey System	08/2024	08/2026							
Data Analytics Upgrade	12/2024	12/2026							
Data Integration Project	05/2024	05/2026							Data Integration Project
Data Privacy Compliance	02/2024	02/2026							

All values in: USD, Millions	Q1 24	Q2 24	Q3 24	Q4 24
Revenues	43.33	82.91	133.86	258.78
% growth		91.3%	61.4%	93.3%
COGS	21.67	41.46	66.93	129.39
Gross margin	21.67	41.46	66.93	129.39
% of sales	50.0%	50.0%	50.0%	50.0%
Opex	27.14	40.43	41.33	48.5
% of sales				18.7%
EBITA				80.89
% of sales				31.3%

Name	Status	Division One Business Analyst
Customer Analytics	Accepted	52.5
User Experience Upgrade	Accepted	25.2
Content Management	Accepted	22.5
Partnership Management	Accepted	16.5
Product Launch Support	Accepted	16.5

Project staggering & corporate scenarios



(1) Pick sub-portfolios
Select complementary sub-portfolios to go into the corporate level scenario

(2) Lock 'fixed' projects
For projects with a fixed start date, or work in progress you don't want to delay, set a start date

(3) Generate roadmap
Use AI to schedule projects, seeing the results as a Gantt, P&L or portfolio analysis

(4) Create more scenarios
Repeat, with different sub-portfolios with different objectives / constraints

Go to Client Hub

Portfolios

Portfolio
Business Portfolio Division A
IT Backlog

Actions

- Manage portfolio scenarios
- Choose portfolio scenario
- Base Case
- Stretch

Cybersecurity

Search...

Status
New

Created
March 11, 2024

Start date
January, 2024

Edit start date

2024

January	February	March
April	May	June
July	August	September
October	November	December

Cancel Confirm



Deployment guide deep dive - Project Prioritization

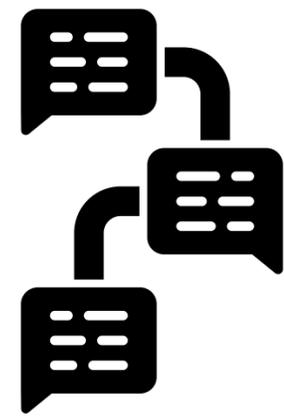
Backup with detail on how to
deliver Project Prioritization



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Project Prioritization 	Core point of value	Software Set-Up	Governance	People	Leadership
(1) Model AHP Build Get leadership to work together to define goals	Documented model that leadership align on to cascade into the org	Set Up Goals & Measurement, & Criteria Weights	Decide on portfolio structures - all one model or split up?	Cascade leadership's review	Build Model Weight Criteria Document outcome
(2) Collect Projects Set up project pipeline and collect projects for review	All new & existing projects in one place, portfolio split into sub-portfolios, scoring process agreed	Import existing projects & set up request page for new Configure Kanban to define process & define data requirements	Decide on how projects will be scored Set critical path	Collect ideas for new projects	
(3) Score Projects Get SMEs to review the pipeline inc. basic cost estimate	All projects ranked by value, with team involved	Assessments Panel Set Up / send out links Run Meetings to Review scores	Hold people to account on good quality scoring - no gaming!	Make sure the "what's in it for me" lands with everyone who is scoring	Re-iterate support & push for compliance
(4) Data Visualization Create Reports to enable review	Clear ranking data shared with stakeholders	Set up Reports, publish via My Dashboard. Include overlays for extra insight.	Make sure reports are set up to support Governance Board	Cascade data as appropriate to build transparency	

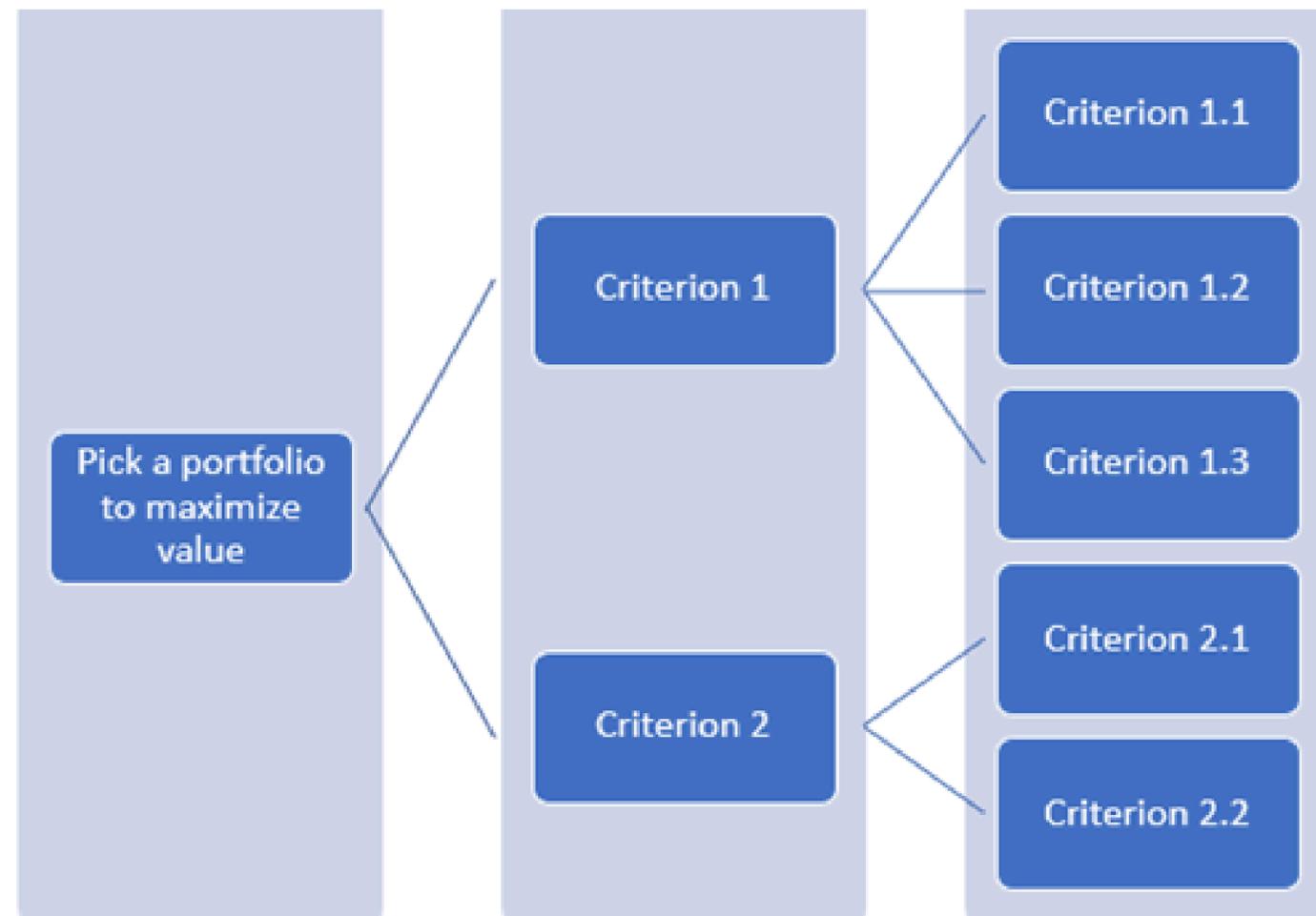
(1.1) BUILD AHP MODEL - CRITERIA



This is the goal of your model

Criteria are the high level objectives (financial, strategic, operational etc.)

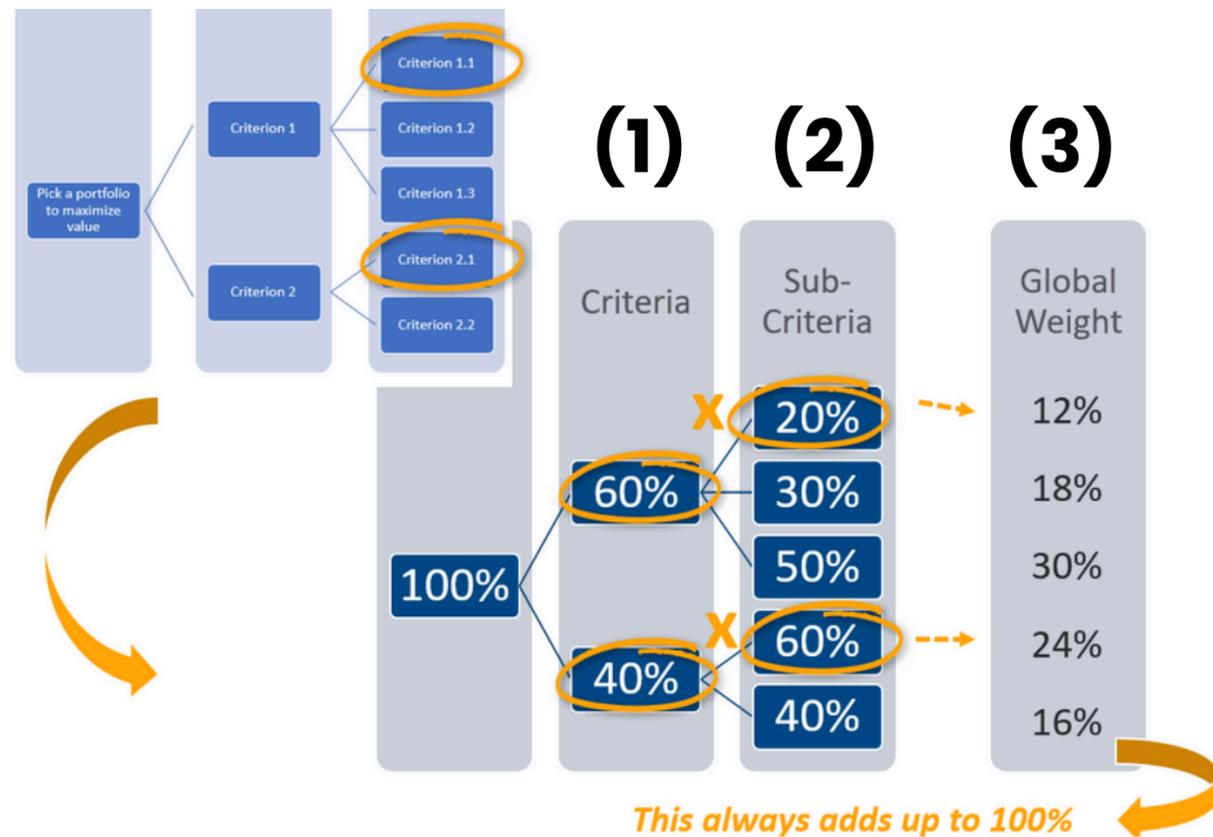
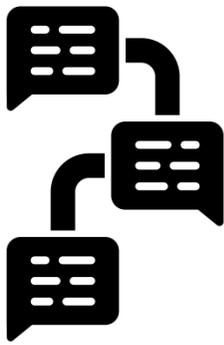
Sub-criteria break criteria into underlying drivers that can be used for scoring projects



How to build criteria:

- Find out what key stakeholders want to achieve
- Use existing documentation / strategy papers etc
- Review “pros and cons” of existing projects
- Use AHP best practice (via e-book and/or AI) to put into model structure
- Pick the size of model that you need for your review
 - **“Small”** = 3-5 criteria, no sub-criteria
 - **“Medium”** = 3-5 criteria, each with 2-4 sub-criteria
 - **“Large”** = no limit, but be careful about how much work you’ll have to do scoring

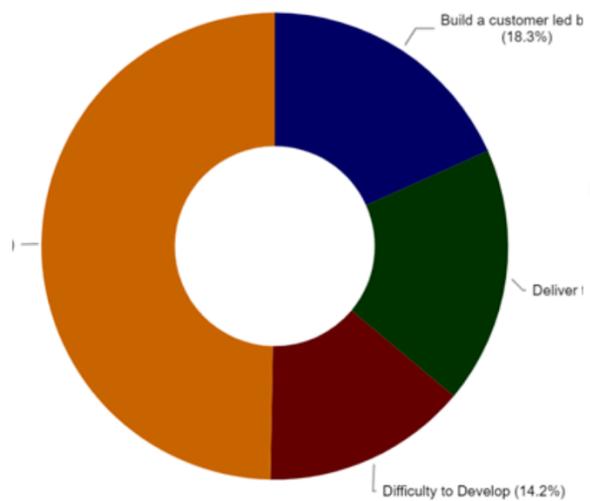
(1.3) GENERATE CRITERIA WEIGHTS



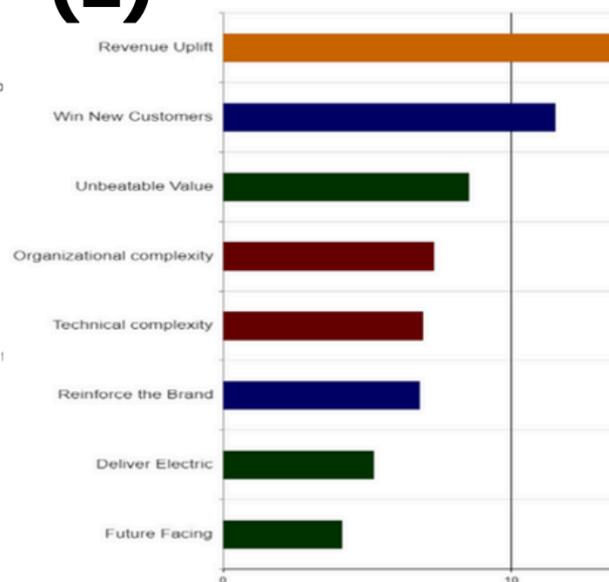
How the Weight Set is formed

- (1) Pairwise preferences generate a percentage weight for each branch of the model via an in-built AHP algorithm
- (2) Sub-criteria are compared to each other using Pairwise, and 'share' weight assigned to the parent criterion
- (3) The resulting weight is the "Global Weight" that each sub-criteria is worth: this will be used to score projects & adds up to 100

(1)



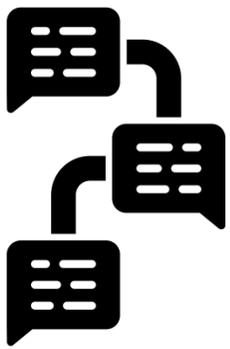
(2)



How the Weight Set is used

- (1) View high-level criteria weights in the donut chart: it should 'feel' like an accurate view of the portfolio goals that everyone can buy into
- (2) Sub-criteria scores on the column chart show detailed scoring model: this is how projects will be scored in your model

(1.4) ADD SCALES FOR MEASUREMENT



Example scale

2.1 Achieve Market Leadership by 2030

To what extent will this Project support growth towards market position targets?

0 - No Impact

This Project makes no contribution towards delivering this goal.

25 - Small Impact

This Project makes a marginal contribution towards delivering this goal.

50 - Medium Impact

This Project makes a solid contribution towards delivering this goal.

75 - High Impact

This Project makes an important contribution to the delivery of this goal.

100 - Very High Impact

This Project is key to the delivery of this goal, a real game changer.

Quick guide to Measurement

- **Scales** connect your sub-criteria (“what you want to achieve”) to your projects (“actions that will advance your goals”)
- Each level should be a distinct step, with a definition to **reduce ambiguity** so anyone scoring a project understands the difference in levels
- For extra precision use a **benchmark** (“similar to project x which was fantastic”) or **banded quantification** (“will deliver \$x-\$y”)
- **5-point scales** are a good default, but it’s flexible
- Use **library scales** as a base but always edit to customize for your organization

(2.1) BUILD A DECISION PIPELINE IN KANBAN



Example Kanban



Use Kanban to structure review process

Make your own pipeline to cover key steps in how to make a good decision... typical activities may include:

- **Ideation:** long list
- **Data Collection:** get basic metrics / estimates
- **Gating Factors:** knock out lowest value candidates
- **Scoring/ business case development:** get deeper into the data to quality projects
- **Sign-off:** push projects into Optimization and Scheduling

Configure it to be as simple or detailed as required

(2.2) ADD PROJECTS - NEW & EXISTING



^	Rejected or Stopped (0)
^	Completed (0)
^	Work in Progress (0)
^	Approved Not Started (18)
^	Ready for Scoping (12)
^	Scope Resource Requirements (0)
^	New (0)

Approved Not Started (18)	
<input type="checkbox"/>	Demo 1 <i>High</i>
<input type="checkbox"/>	Demo 11 <i>Medium</i>
<input type="checkbox"/>	Demo 12 <i>Low</i>
<input type="checkbox"/>	Demo 15



Request a project

You've seen what we're trying to achieve... now what

* Project Name

Description

IT Team Support - Days

IT Resource: PM

Preview

* Project Name

Description

Geography

T-Shirt Size

Project Manager

Make it easy to manage your data

Import projects via excel or request a connector to a project management system

Generate new requests with a **Request Page** that enables stakeholders to ask for new projects

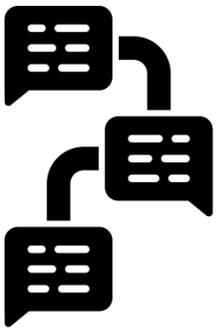
Track projects through the **Kanban** as you add data, apply gates and build the business case

Collect data - sponsor, overlays, cost etc - via **Forms**

Set up Notifications to send alerts as projects progress

Use dynamic **Lists** to build groups of projects based on data inputs & status progress

(3.1) SCORE PROJECTS - SETTING UP



Assessments

Export to xls ▼ Create panel i

Search Q Filter by: All owners ▼

Deliverability Panel
Owner: Dan Dures
Panelists: 4
Attributes: 3/18
Projects: All
Review Save scores Actions ▼

Finance Pre-Biz Case Estimates
Owner: Dan Dures
Panelists: 5
Attributes: 1/18
Projects: All
Review Save scores Actions ▼

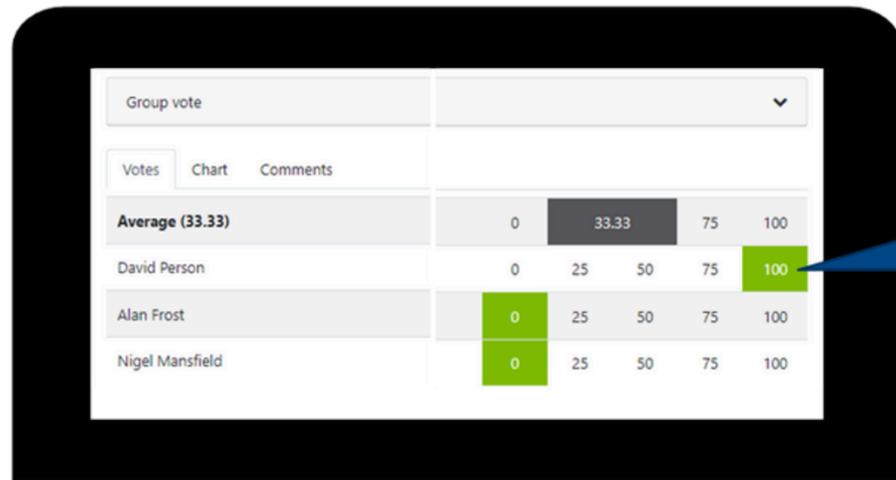
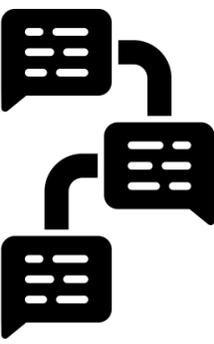
PM - T-Shirt Scoping
Owner: Dan Dures
Panelists: 15
Attributes: 1/18
Projects: All
Review Save scores Actions ▼

Strategic Delivery Board Review
Owner: Dan Dures
Panelists: 3
Attributes: 4/18
Projects: All
Review Save scores Actions ▼

How to collect scoring data

- Aim for 3/4 people to score to cut 'Noise' where opinions / judgements really matter (and vary)
- If you data is less contentious target 1 person or import data directly via Kanban
- Don't load everything on the sponsor
- Divide up the work between the experts - they can score sub-sets of criteria in different groups then add up to get a total value - so strategy with strategy team, risk with risk team etc.
- Add project details to help scorers understand the scope of the project

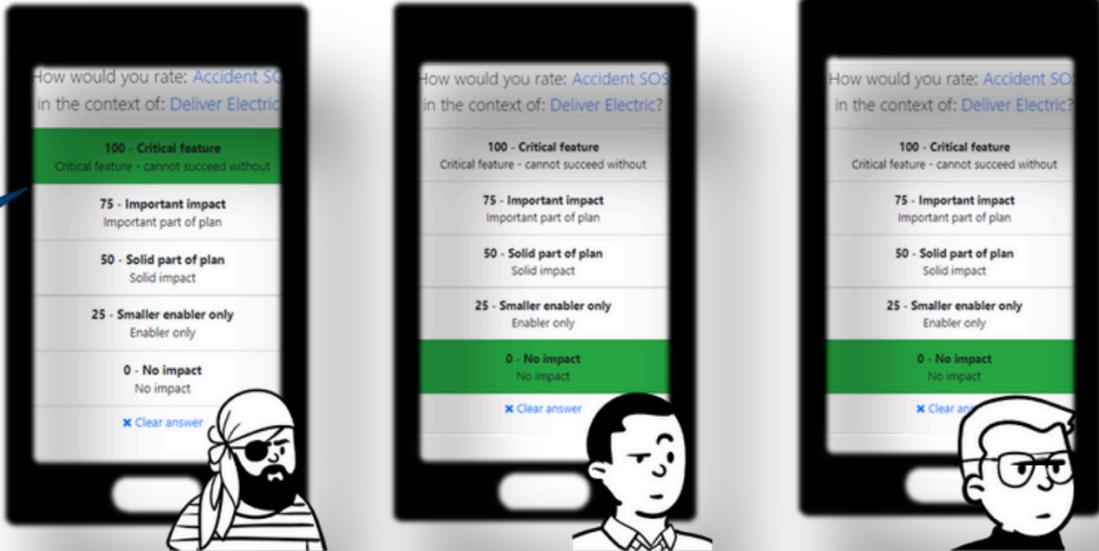
(3.2) SCORE PROJECTS - QUALITY DATA



David can you explain your vote....

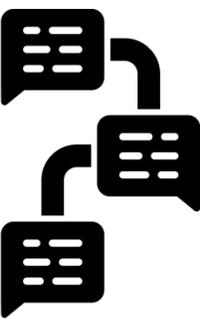
Good engagement with scoring is critical

- Like any model, AHP can suffer from “garbage in-garbage -out”
- Scorers must buy into what they are doing: it will not work if it’s a reluctant “task” they resent doing
- Use in-software UX (like Criteria Weights) to have a live meeting to build knowledge & alignment
- Allow enough time to do the job well

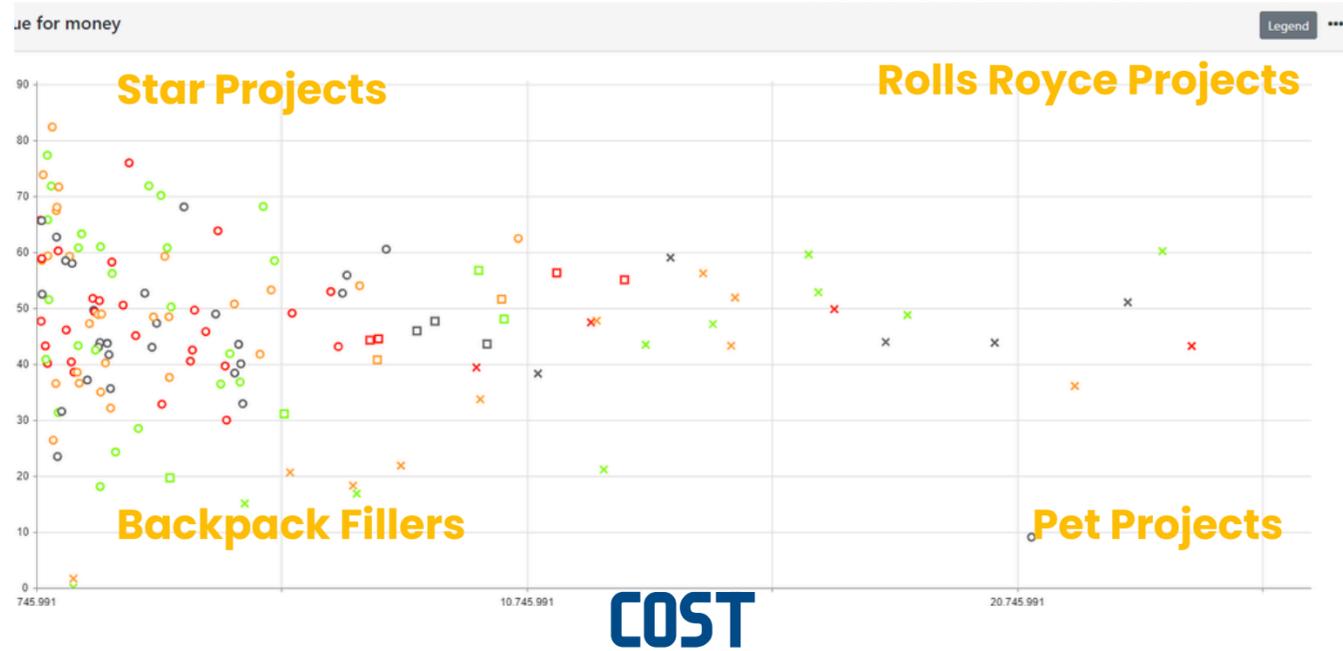


Not sure I can... I'll change my vote now!

(4.1) DATA VISUALIZATION - SET-UP



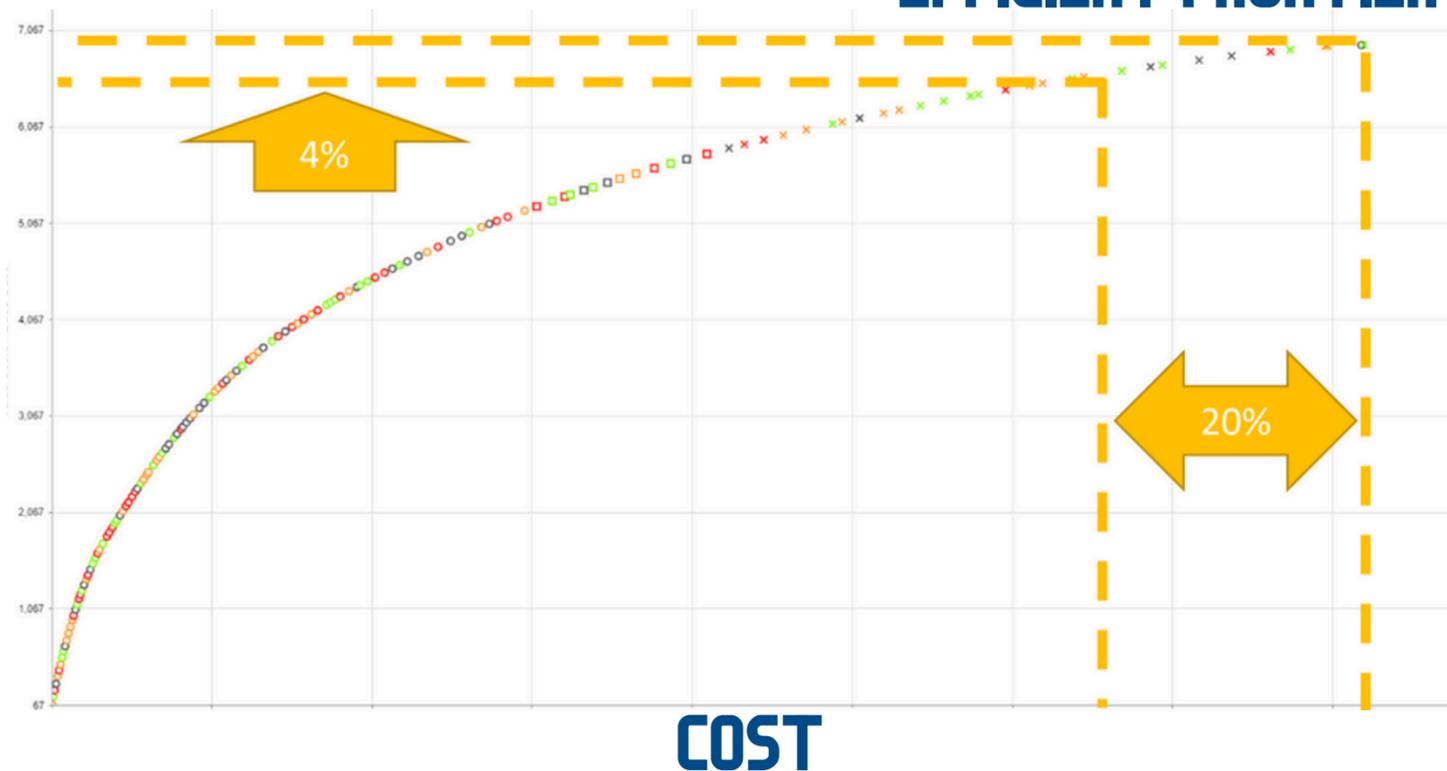
PRIORITIZATION MATRIX



Reports are configurable but key outputs are:

- **Prioritization Matrix** – Compare Value vs. Cost to identify projects to stop, quick wins etc
- **Efficient Frontier** – Same data, but rank by Value for Money cumulatively to find out how to get the most from a limited budget
- **Grid View** – interactive dashboard view at project level

EFFICIENT FRONTIER

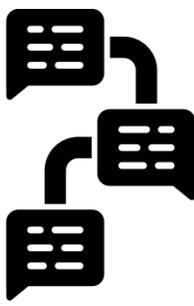


Add more – metrics, charts, custom forms and overlays as part of set up for no-code share-able reporting

GRID VIEW

Name	Status	Risk Toggle	Risk Factor Input	Risk Adjusted Score	Total Resources	Post-Business Case Score	Total Cost	Post-Business Case Value for Money	1.1 Revenue: 24 months	1.2 Cost Saving: 24 months	Reliability Score	Strategy Score
Website Optimizati...	Rejected	0	80	30.4	1.8	30.4	0.149	204			66.95	68.39
Webinar Hosting Platform	Rejected	0	80	21.4	1.8	21.4	0.149	144	262.5	38.7		57.56
Product Recomme...	Rejected	0	80	26.3	5.6	26.3	0.532	49	221.2		87.31	52.15
Referral Program	Rejected	0	80	28.8	8.4	28.8	0.868	33		63.75	86.09	59.39

(4.2) DATA VISUALIZATION - ANALYZE



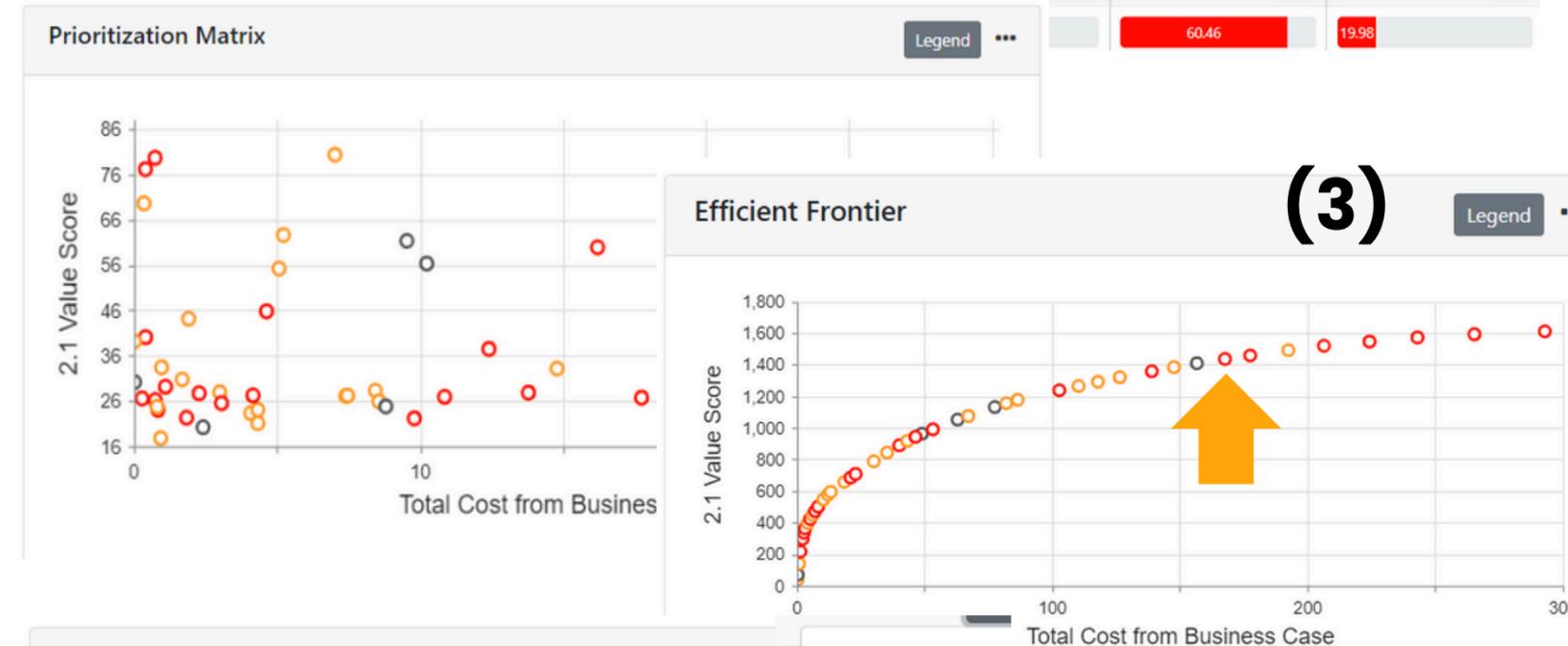
(1)

nn header and drop it here to group by that column

Name	2.5 Value for Money	2.4 Total Cost	2.1 Value Score	1.1C Revenue: 24 months - Model	2.2 Strategy Score	2.3 Delivery Risk Score
Affiliate Marketing Setup	0.7	27.58	17.99		46.98	12.3
Cross-Selling Initiative	0.9	22.288	20.75		39.25	76.98
AB Testing Platform	1.4	18.805	25.68		54.13	71.97
Market Research Tool	1.5	17.88	26.82		55.47	79.64
					60.46	19.98

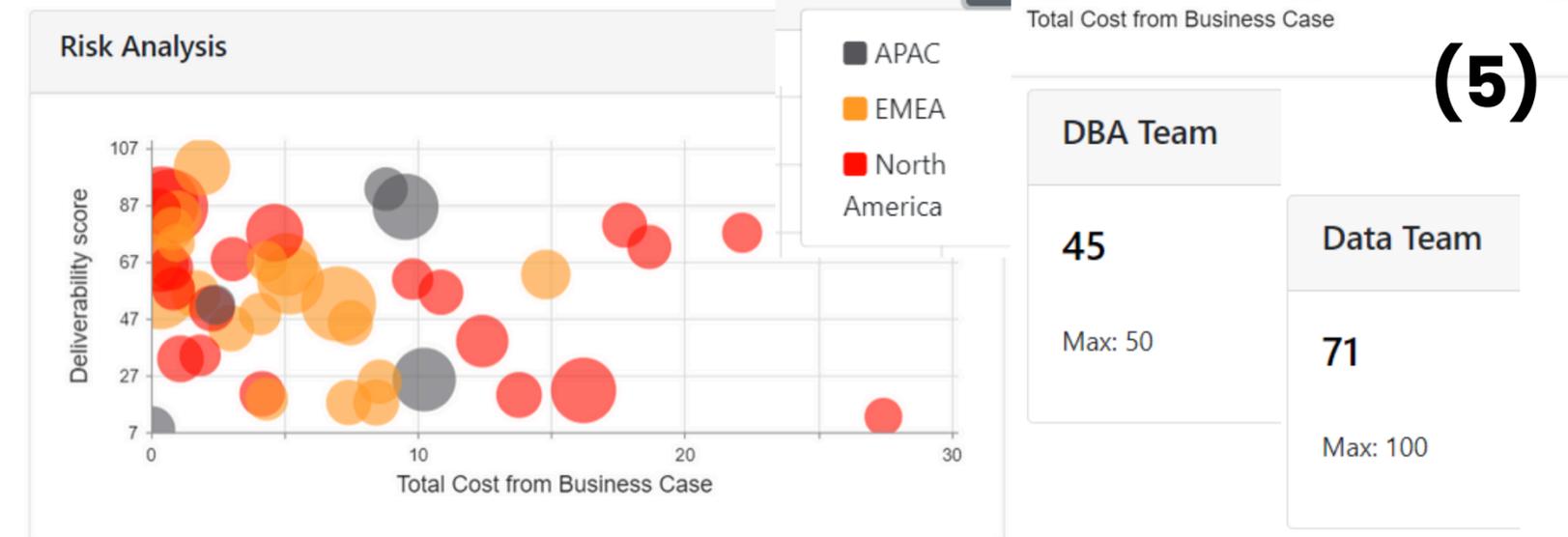
Analyzing the data is different for every use-case but could go something like...

(2)



(3)

(4)

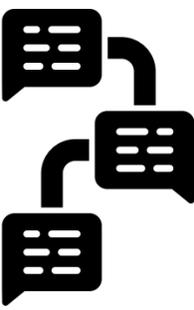


(5)

1. Review project scores from model to make sure scoring is fair, consistent and intuitive.
2. Look at the Prioritization Matrix – identify “pet projects” & challenge overly-costly projects
3. Use the Efficient Frontier to build a plan based on how much budget you have
4. Overlay Risk (for example) as a factor – e.g. don’t start two high risk projects together
5. Overlay simple resource constraints to build an “Approved” portfolio based on multiple bottlenecks *(NB we’ll revisit this in Optimization)*

Work with your Governance Board to agree what they need to see in order to make decisions about what to prioritize

(4.3) DATA VISUALIZATION - SHARE



Input needed

Reports

Long List Review from Business Portfoli...

Request pages

Request a New Project for Division A b...

Prioritization panels

C-Suite Review from Business Portfolio ...

Assesments panels

Finance Pre-Biz Case Estimates from Bu...

Deliverability Review from Business Por...

Share Compare A & B

You are about to share **Compare A & B** owned by **Oracle** data in TransparentChoice application

- Share via Link: URL visible to anyone with the link
- Share to Workspace: URL visible to anyone in Workspace
- Share to People: URL visible to anyone in People section

- Share for 1 hour
- Share for 4 hours
- Share for 8 hours
- Share for 24 hours
- Share for 7 days
- Share for 30 days
- Share for 60 days
- Share for 90 days
- Share for 180 days
- Share forever

Back

Share

My dashboard personalizes secure access

- Set up Business User who will only see links aimed at them (i.e. all “their” URLs in 1 pace)
- Collates Reports, Request Pages, Scoring Surveys & Request Pages in 1 place
- Offers secure manageable access to live data... with no risk of people seeing too much or ‘breaking’ models
- Simple password based access, or use SSO for super-quick access