

# Portfolio Management Tooling

Insight, overview and grip on the portfolio



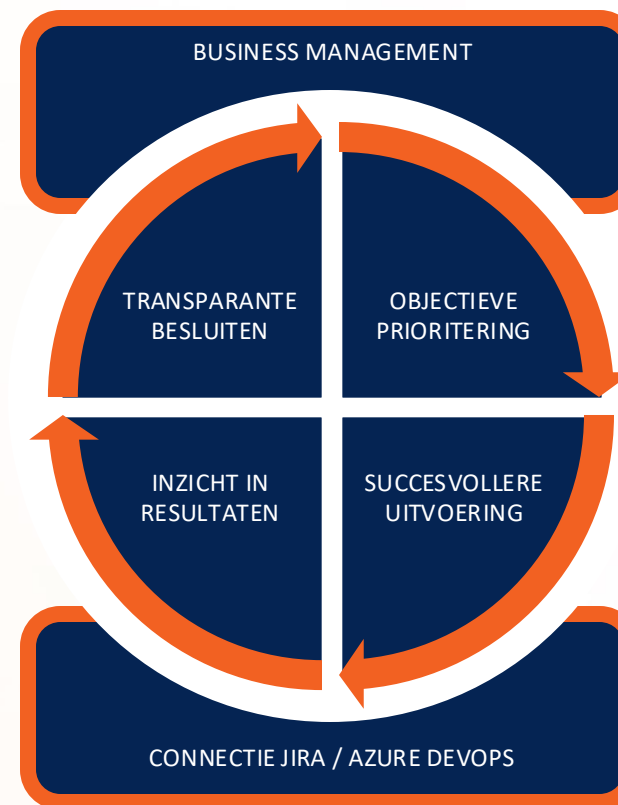


# Portfolio Management tooling

Insight, overview and control with portfolio management tooling

## ADDED VALUE PORTFOLIO MANAGEMENT TOOL

- Creating transparency in decisions in how the strategic goals are translated into strategic initiatives and what benefits they bring to the organization.
- Making objective prioritization in portfolio priorities based on your own prioritization model. Compare the priorities of the strategic initiatives in different scenarios.
- A more successful execution of the projects by supporting the PI planning with the dependency tracker in the roadmap. Create insight into the dependencies and risks in the portfolio.
- Gaining insight into the results of the portfolio and the delivered business value. Use these insights to improve your portfolio.
- Seamless connection to Jira and Azure DevOps.





1. Save PMO > 20% of work, and focus on improving portfolio management

1. Supports the **total cycle of the portfolio management** process
2. It **removes all PowerPoint, Excel and digital whiteboards** in your process.
3. Let Cockpit check your data quality while **AI fixes it** for you



2. Be more proactive by minimizing surprises and building more trust

1. Support **data driven decision** making, on value and effort.
2. Easy outlook to the future, with **automated road mapping** suggestions
3. Let **predictive analyses** help you in finding possible future issues.



3. Execute your business strategy

1. Centre your organization to your **business strategy and objectives**
2. Easy to use **attractive tooling**, suitable for boardroom and PI events
3. Create multiple **portfolio scenario's** and select the most suitable one



4. Little effort and fast benefits

1. Connect to Azure DevOps or Jira **in 5 minutes**
2. Learn the basics of the solution in a **few hours**
3. Gain benefits after **the first weeks**



# Transparent decision making

- Translate your goals into clearly defined strategic initiatives
- Define your goals based on clear metrics
- Gain insight into how the strategic initiatives contribute to the realization of the strategy



**Epic Dashboard**  
Planning > Default - Demo Portfolio > Epic Dashboard

+ Create Demo Portfolio [Settings] AD

Epic Feature

Filters [Warning] [Close] [Fullscreen] Search... [Goal View] [Value Stream View]

Create Analyse Backlog (2) Implementation

▼ Aanpassing bestaand pensioen administratiesysteem  
Owned By: Demo user 2 [Nieuwe Pensioen Regeling](#)

- Upgrade bestaande systemen
- Analyse consequenties NPR

▼ Module Nieuwe Pensioen Regeling operationeel  
Owned By: Admin Demo [Nieuwe Pensioen Regeling](#)

- Mobiele applicatie NPR
- Webmodule NPR
- Registratie NPR

▼ Transitie naar Nieuwe Pensioen Regeling  
Owned By: Demo user 1 [Nieuwe Pensioen Regeling](#)

- Transitiemodule NPR
- Rekenmodule NPR
- Info portal transitie naar NPR
- Migratie data NPR Story Points : 2

▼ Others

# Objective prioritization

- Prioritize based on your own chosen prioritization model
- Make choices based on the goals and Kanban phases you want to prioritize
- Create different scenarios to achieve the correct prioritization



**Prioritization** + Create Demo Portfolio ⚙️ AD

Planning > Default - Demo Portfolio > Prioritization

**Epic** Feature

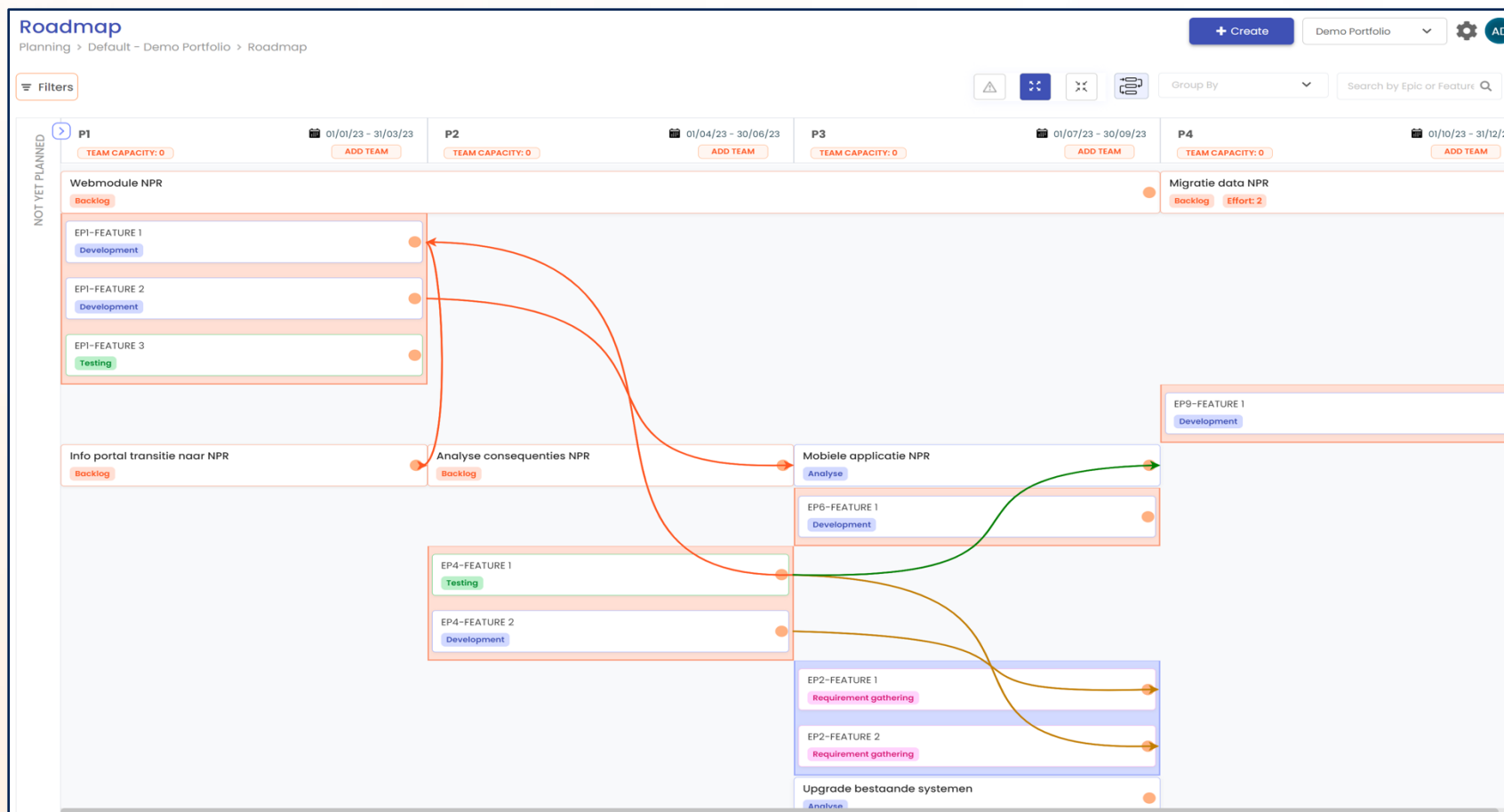
Filters Priority Model - WSJF Funnel View → Bubble View → Update

			3	1	1			
			Business Value	Time Criticality	RR   OE	Effort	Ranking	
			User Business Value	Time Criticality	RR   OE	Story Points	Calculate	
✓ Upgrade bestaande systemen +	🕒	Aanpassing bestaand pensioen administratiesysteem	Analyse	5	8	13	5	5.2
✓ Analyse consequenties NPR +	🕒	Aanpassing bestaand pensioen administratiesysteem	Backlog	2	5	13	5	4.0
✓ Migratie data NPR +	🕒	Transitie naar Nieuwe Pensioen Regeling	Backlog	2	5	8	5	3.0
✓ Registratie NPR +	🕒	Module Nieuwe Pensioen Regeling operationeel	Analyse	1	5	8	5	2.8
✓ Info portal transitie naar NPR +	🕒	Transitie naar Nieuwe Pensioen Regeling	Backlog	5	8	8	13	1.6
✓ Transitie module NPR +	🕒	Transitie naar Nieuwe Pensioen Regeling	Create	5	1	13	13	1.5
✓ Webmodule NPR +	🕒	Module Nieuwe Pensioen Regeling operationeel	Backlog	5	1	13	13	1.5
✓ Rekenmodule NPR +	🕒	Transitie naar Nieuwe Pensioen Regeling	Analyse	3	8	13	21	1.1
✓ Mobile applicatie NPR +	🕒	Module Nieuwe Pensioen Regeling operationeel	Analyse	3	5	8	21	0.8

+ Create Epic

# Successful execution

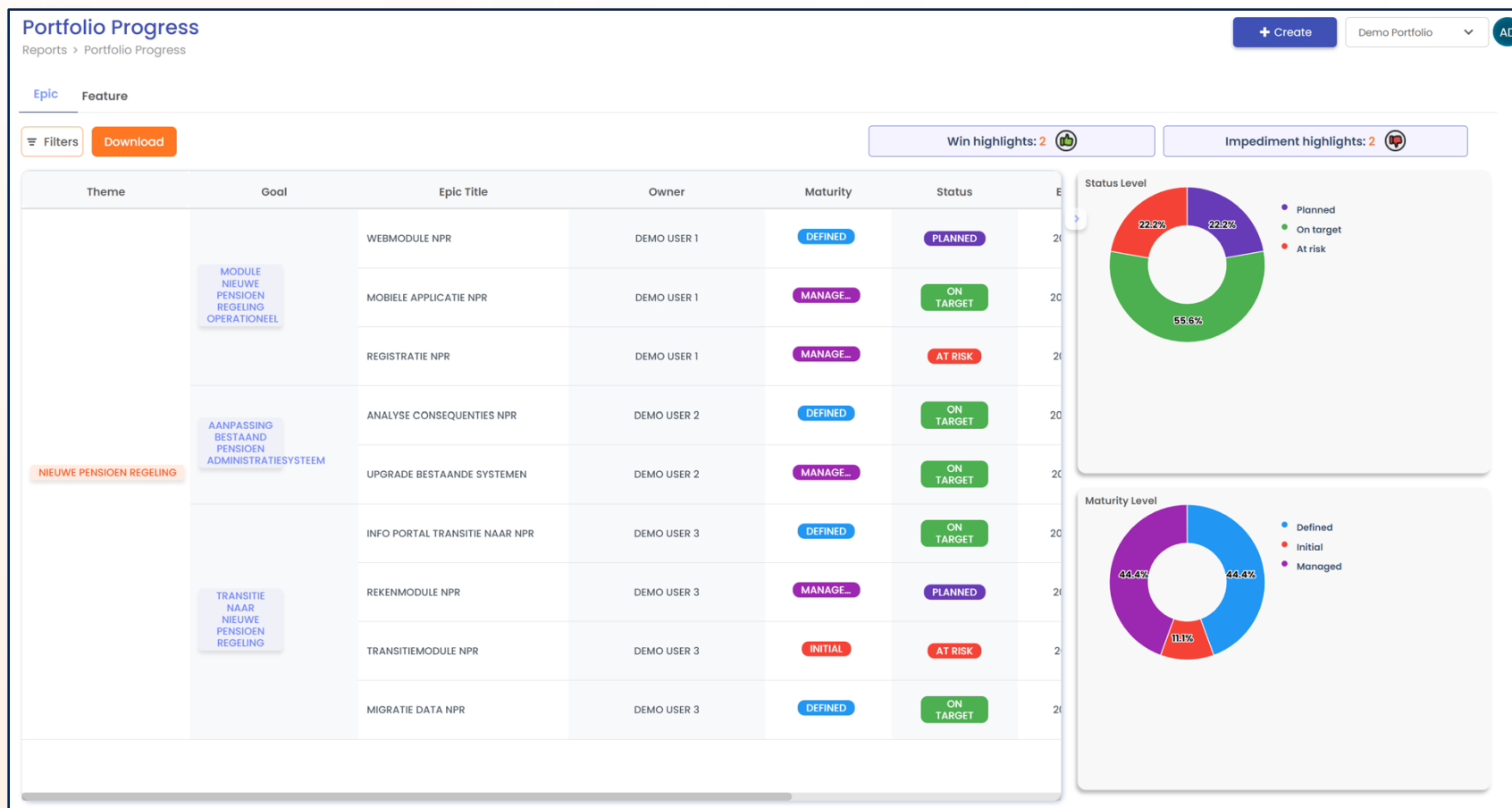
- Make decisions in the planning of the chosen priorities
- Gain insight into how the underlying characteristics relate to the chosen strategic initiatives
- Manage the risks in your portfolio by mapping the dependencies in your roadmap during the PI event





# Insights into results

- Gain real-time insight into the status of strategic initiatives
- Follow the high and lowlights of the various strategic initiatives
- Bring together the results from different portfolios in a clear manner





# Seamless connection Jira/ Azure DevOps

- Link portfolios from your administrator account to the projects from Jira and/or Azure DevOps
- Choose which type of work items/fields you want to sync
- Get an overview of possible sync issues







# Business Management

- All management data accessible from a tool, where the teams continue to work in Jira and/or Azure DevOps.
- A place to work from for portfolio managers and initiative owners.
- Unique reporting method, real-time insight for the organization.



Financial Projects

Azure Boards Feature Roadmap

Portfolio Progress

Theme	Goal	Epic Title	Owner	Maturity	Status	E
		WEBMODULE NPR	DEMO USER 1	DEFINED	PLANNED	2
		MOBILE APPICATE NPR	DEMO USER 1	MANAGE	ON TARGET	20
		REGISTRATE NPR	DEMO USER 1	MANAGE	AT RISK	2

Portfolio Dashboard

Projects: 21  
Effort: 18 Mil  
Effort Completed: 6,648  
Effort Remaining: 11 Mil

Project	Link	Project Manager	Start	Finish	Progress	Effort (hours)	Task Count	Overdue tasks	Late tasks	On Track tasks	Future tasks	Completed tasks
Annual employees update meeting		Kasey Banks	17/06/2019	08/07/2019	100%	128	3					3
Heat awareness poster program		Maria Christmas	05/08/2019	24/09/2019	100%	176	6					6
Email Campaign - Wave 1		Eva Hebert	18/09/2019	22/10/2019	100%	208	25					25
Support mobile account inquiry		Eva Hebert	25/10/2019	25/10/2019	75%	0	3	2				
Rider Survey		Eva Hebert	02/09/2019	31/10/2019	10%	1,217	25	17	2			1
Email campaign to increase rider's awareness.		Eva Hebert	07/10/2019	04/11/2019	25%	754	22	14				5
E-discovery		Nick Tufner	14/10/2019	05/11/2019	30%	392	51	14				18
Marketing plan FY2020		Eva Hebert	21/10/2019	14/11/2019	36%	224	7	1		1		4
Track upgrades (miles 3 thru 6)		Eva Hebert	29/08/2019	25/11/2019	26%	2,668	7					2
Email campaign to increase rider's awareness.		Eva Hebert	21/10/2019	25/11/2019	24%	536	21					16
Service Design		Eva Hebert	30/09/2019	28/11/2019	20%	661	4					2
Total					100%	17,613	280	45	2	21		132



Brassersplein 1  
2612 CT, Delft  
The Netherlands

+31 15 241 18 80  
info@xeleron.nl

[www.xeleron.nl](http://www.xeleron.nl)