

# IT Portfolio Management



**achieving balance** strategic IT investment assessment  
gap analysis governance risk management project & portfolio management  
enabling innovation **enterprise transformation**

3 day executive development program

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## 1. Portfolio Management.

Understanding what the enterprise invests in.

- What is an IT portfolio?
- Recognizing the organization's existing IT portfolio
- How many projects are chasing how many resources?
- The business case for IT portfolio management

## 2. IT Value.

Considering what IT investments are worth.

- Defining and recognizing IT value
- The language of value vs. the language of cost
- Cost avoidance and rework
- Value assessment approaches and tools

## 3. Capabilities.

Assessing what the enterprise needs for success.

- Identifying needed capabilities
- Distinguishing skills, talents, capabilities
- Capability-driven analysis

## 4. Portfolio Processes.

Activities that enable visibility and effective management.

- Selection and retirement of assets
- Analysis of investments
- Control and review of performance
- Evaluation against objectives and goals
- Criteria for a successfully managed portfolio

## 5. Transformation.

Enabling strategic alignment.

- The enterprise context for transformation
- Accountability, governance, and compliance drivers
- Transformation strategies
- Requirements for successful transformation

## 6. Architecture in a Portfolio Context.

Frameworks, enterprise strategies, and architecture standards.

- Planning the enterprise's migration from "as-is" to "to-be"
- How much architecture is just enough?
- Utilizing architecture principles in tactical decisions

## 7. Decision Methods.

Techniques for decision making and criteria-driven consensus.

- Establishing criteria for IT investment decisions
- Styles of decision making and management
- Decision dimensions and criteria
- Techniques for evaluating alternatives

## 8. Information, Transparency, and Analysis.

Assessing investments in portfolio management.

- Return-on-investment (ROI) and justifying proposed investments
- Process and criteria transparency in IT investment decisions
- What kinds of information do executives need?
- Analyzing the portfolio

## Your course leader

### Elliot Chikofsky



Elliot Chikofsky is a member of the Intervista faculty and is EM&I Fellow with Engineering Management & Integration (EM&I). He advises on IT investment and portfolio management, enterprise architecture, and systems management for both corporate and government clients.

He is also Vice Chair of IEEE's Technical Council on Software Engineering, as well as Chair of the Reengineering Forum industry association.

## 9. Recognizing the Baseline.

Understanding the enterprise's current portfolio.

- IT inventories: Where they succeed and where they fail
- What constitutes value for existing programs and systems?
- Recognizing business capabilities, targets, and transitional systems
- Assessing the current portfolio's strengths and weaknesses

## 10. Reengineering.

Strategies for legacy assets in the IT Portfolio.

- Recognizing when to replace, refresh, or reengineer
- The sunk cost vs. new investment trade-off
- Recovering lost value from existing assets
- Analyzing the gap between requirements and system capabilities

## 11. Assessment.

Justifying projects and programs in a portfolio context.

- Establishing and running an assessment framework
- Data collection and workbook mechanics
- Lessons learned on scoring projects and proposals
- The investment review process
- Managing process integrity and overcoming gaming

## 12. Control and Evaluation.

Reviewing both individual projects and the entire portfolio.

- The importance of a regular, consistent review process
- In-progress and annual review
- Reviewing legacy systems in operation
- Assessing and managing risk
- Pitfalls of control and review processes

## 13. Visibility.

Presenting understandable analysis to senior management.

- What do executives need regularly to make the best decisions?
- Transparency and "going graphic"
- The Dashboard -- making trends and issues clear and evident
- The role of the investment review working group

## 14. Achieving Balance.

Managing alignment between IT and enterprise strategies.

- Supporting transformation in the enterprise
- Challenges for the IT and business organizations
- Defeating portfolio management pitfalls
- Recap of key lessons learned in the trenches

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IS/Technology Planner

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