



IT Portfolio Management

optimize IT resources strategically make IT investments
gap analysis risk management & governance project & portfolio management
achieve balance: sustainment and **enterprise transformation**

Bring this course to your organization, call us to schedule an on-site session: 1-800-397-9744

1. Portfolio.

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

2. Transformation.

Enabling strategic alignment.

- Why evolutionary change is no longer sufficient
- Accountability, governance, and compliance drivers
- Moving beyond compliance: Strategic vs. reactive transformation
- The enterprise context for organizational transformation
 - Strategy, Governance, Architecture & Business Solutions
- Raising the bar on the role of IT: From cost control to value and innovation

3. Decision.

What's important for your organization?

- Establishing criteria for IT investment decisions
- Recognizing strategic drivers for your organization
- Risk, reward and other dimensions of decision criteria
- Identifying architecture principles that provide tactical direction
- Supporting decisions with leadership

4. Architecture.

Implications for IT Portfolio Management.

- Understanding IT architecture in a portfolio context
- Planning the enterprise's migration from "as-is" to "to-be"
- Recognizing transformation drivers and constraints
- How much architecture is just enough?
- Achieving capabilities, not just systems
- Adaptive Enterprise Architecture: Setting transformation blueprints

5. Strategic IT investment.

Portfolio management for assessing investments.

- Understanding IT decisions in a portfolio context
- Bringing transparency into the IT investment decision process
- Return-on-investment (ROI) and justification for proposed investments
- How to evaluate very different project needs?
- Governance that balances business and technology concerns

6. Effectiveness.

Getting the most value for the governance effort.

- Revisiting IT portfolio objectives
- Active executive leadership -- Being able to say "No" and "Enough!"
- Achieving visibility and consistency in IT investment decisions
- Balancing a portfolio
- Understanding the limitations of IT Portfolio Management
- Managing cultural change

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.

1. Baseline.

Understanding the enterprise's current portfolio.

- IT inventories:
 - Where they succeed and where they fail
- What constitutes value for an existing program or system?
- Recognizing business capabilities in projects, programs, and systems
- Assessing the current portfolio's strengths and weaknesses
- Identifying legacy, transitional, and target systems

2. Assessment.

Justifying projects and programs in a portfolio context.

- Establishing and running an assessment framework
 - The role of architecture and decision dimensions
 - Key performance parameters (KPPs)
 - Workbook mechanics
- Lessons learned in establishing a scoring process
- The investment review process
- Overcoming gaming strategies -- Managing the integrity of the process

3. Reengineering.

Strategies for legacy assets in the IT Portfolio.

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

4. Control.

Reviewing both individual projects and the entire portfolio.

- The importance of a regular, consistent review process
- Techniques for review of investments
 - The in-progress review
 - The annual review
 - Legacy systems in operation
- Risk management
- Pitfalls of control and review processes

5. Visibility.

Presenting understandable analysis to senior management.

- What do executives need to make the best decisions?
- The Dashboard -- making trends and issues clear and evident
- The role of the investment review board

6. Achieving Balance.

Managing alignment between IT and enterprise strategies.

- Supporting transformation in the enterprise
 - People and processes
 - Active executive leadership
 - Challenges for the IT organization
- Restraining potential gatekeepers and bureaucrats
- Recap of key lessons learned in the trenches

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Director, Information Management
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“ Absolutely excellent, current and immediately applicable. ”

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IT Portfolio Management



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Chief Information Officer (CIO)
Vice President/Director IS
IT Portfolio Manager/Program Director
Strategic Planner/Enterprise Architect
Information Systems Manager
Business Architect
IS/Technology Architect
IS/Technology Planner
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