



Multi-Portfolio Platform Whitepaper

An Overview of Integrated Portfolio Capabilities (HUB)



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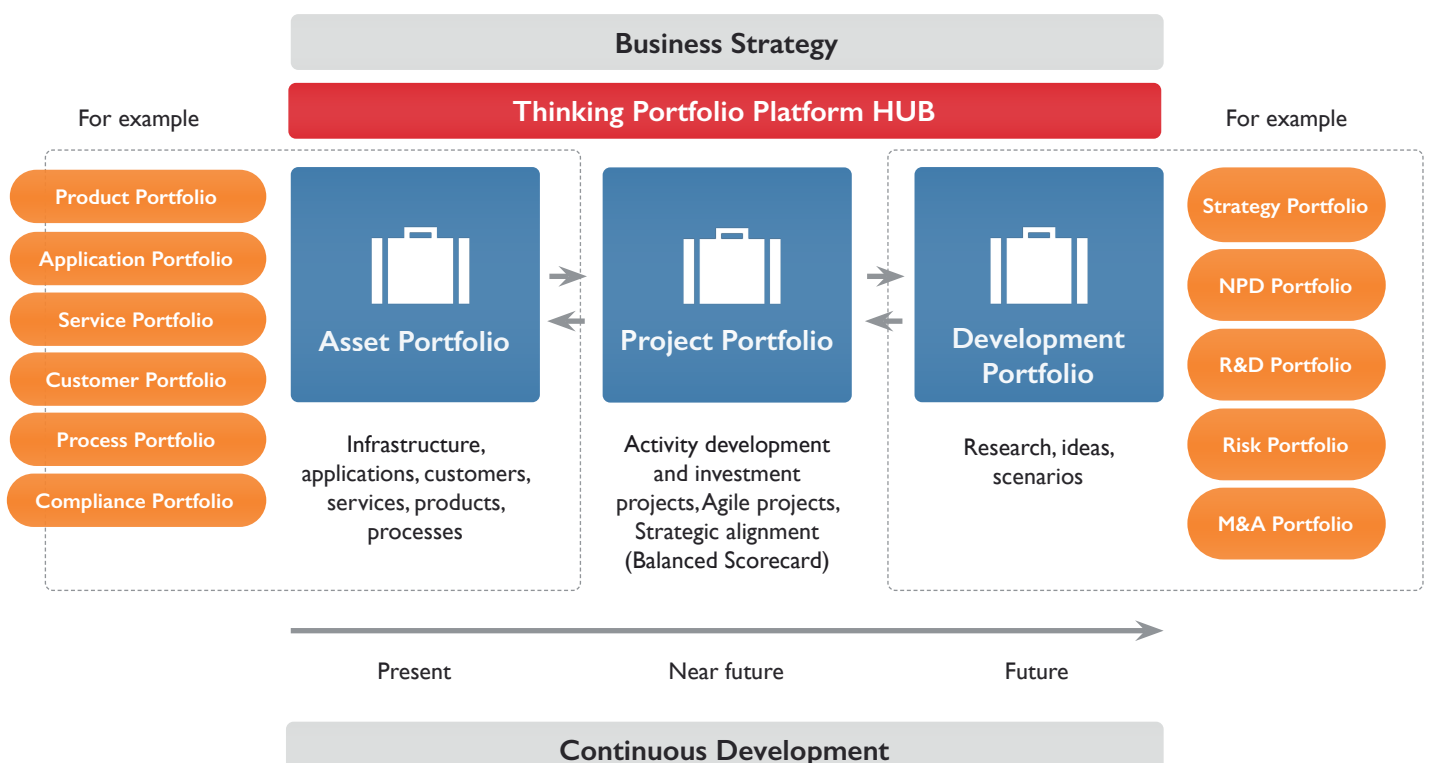
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An Overview of Integrated Portfolio Capabilities (HUB)

Portfolio Platform HUB means utilizing multiple parallel portfolios for management, communication and decision making in your most critical assets and development areas.

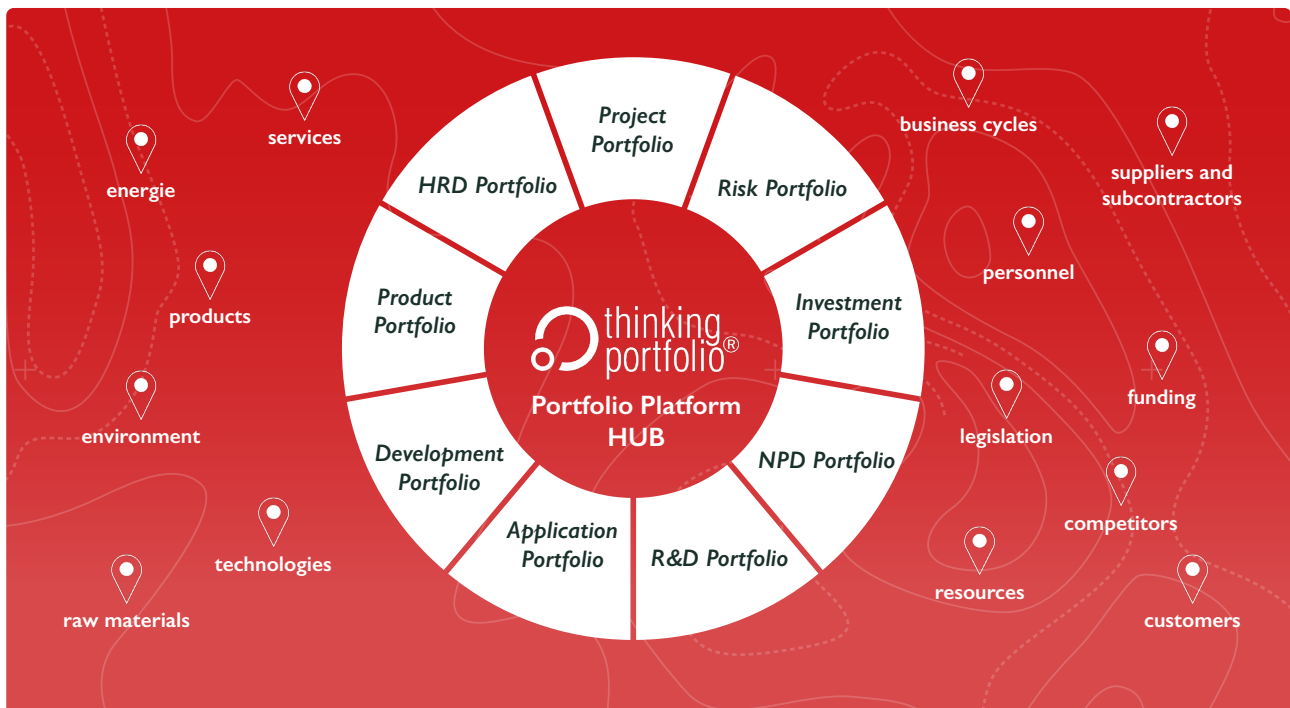
Thinking Portfolio platform is used by hundreds of customers, in dozens of various portfolio management positions. The portfolios support each other with interconnected data models. Dependencies on different aspects of management become visible. There are links noted that illustrate possibilities of dependency mapping between portfolios.

Manage risks, resources and quality of your business development efforts comprehensively. Examples of different portfolio management applications and variations of our platform are presented in this document. Please contact us for further details or a demo on detailed functionalities.



Thinking Portfolio® Integrated Platform (HUB)

– centralised resource planning at the core



Benefits of Integrated Platform (HUB)

More versatile user management

- Capability
- Load
- Resourcing

Enhances the deployment of multiple portfolios

- Overall resourcing for all portfolios
- Creating relationships and dependencies between portfolios
- Creating new experimental portfolios and developing further as the operations are maturing

Administrator's user management of different portfolios

- For a user, an opportunity to supplement their knowledge



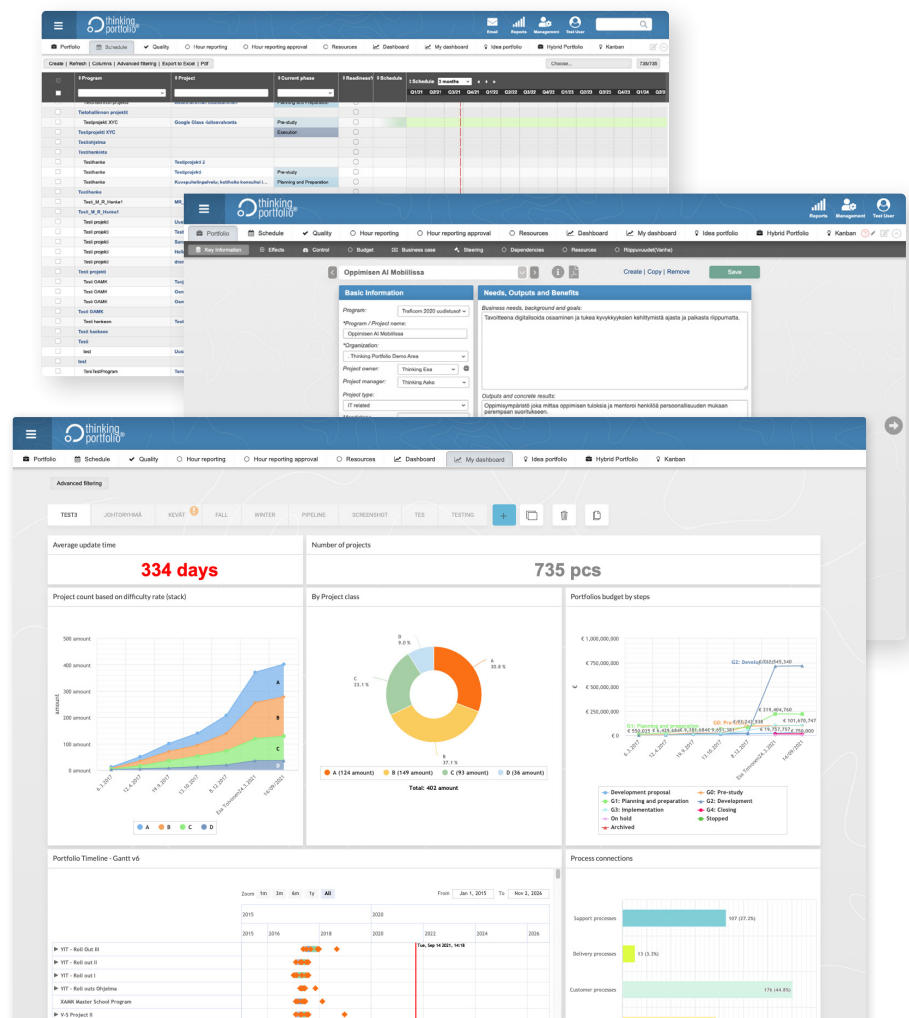
Project Portfolio

manage all your ideas, innovations, projects and tasks all-in-one

- Maintain programs, projects and sub-projects that are planned, underway or completed
- Keep and report your projects in one portfolio
- Use as a tool for strategic management. Let your management team focus on portfolio level without falling into details
- Visualize strategy implementation by smart dashboards representing your focus areas, Must-Win-Battles or any other strategy framework
- Prioritize projects by your key value drivers or resources
- Open organizational communication by opening development portfolios to your entire organization
- Simplify and focus project managers' reporting and status checks to one format

Key Functionalities

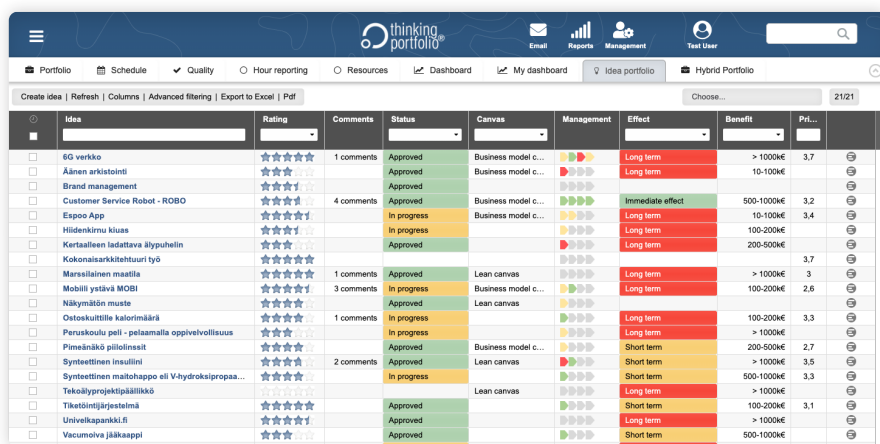
- Portfolio reporting
- Portfolio prioritization and quality management
- Project management and reporting
- Control and steering
- Scheduling, budgeting and forecasting
- Resource allocation & control
- Project strategic positioning and impact management
- Kanban
- Task Management with task hierarchy



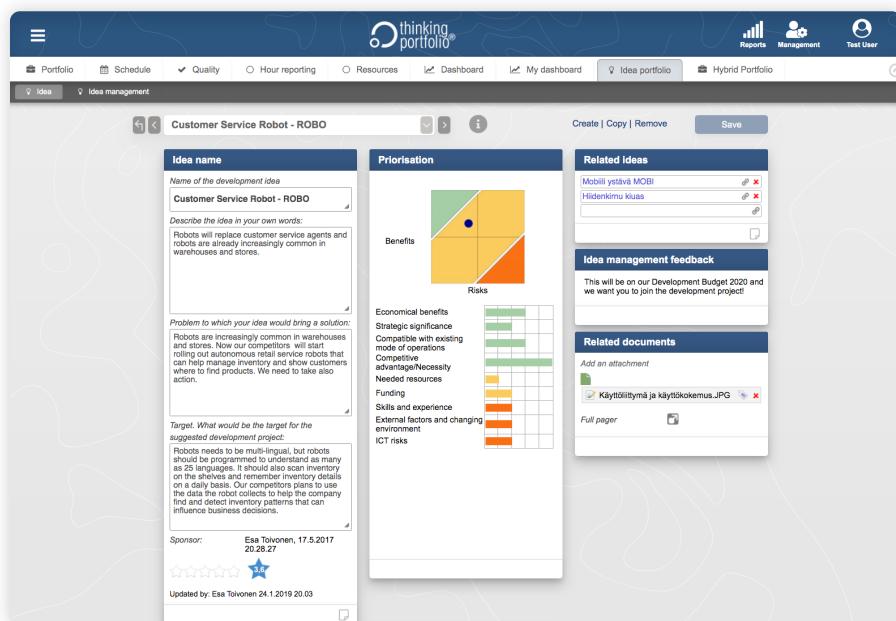
- Incorporate idea management to project portfolio management
- Classify, vote and manage ideas
- Manage idea funnel
- Conduct and lead idea competitions
- Develop idea into project proposal
- Transfer ideas to project portfolio

Key Functionalities

- Evaluation, voting and prioritization of evaluated ideas
- Idea lifecycle support
- Filtering, selecting and sorting ideas with advanced filtering and sorting options
- Process flow to support any required phases or decision points
- Transferring ideas into project proposals by one click!
- Can be integrated as part of your project portfolio or as a separate unit



Idea	Rating	Comments	Status	Canvas	Management	Effect	Benefit	Pri...
60 verkko	★★★★★	1 comments	Approved	Business model c...	Long term	> 1000€	3.7	
Äänen arkistointi	★★★★★		Approved	Business model c...	Long term	10-100€		
Brand management	★★★★★		Approved	Business model c...	Long term			
Customer Service Robot - ROBO	★★★★★	4 comments	Approved	Business model c...	Immediate effect	500-1000€	3.2	
Espoo App	★★★★★		In progress	Business model c...	Long term	10-100€	3.4	
Hiidenkirju kuus	★★★★★		In progress	Business model c...	Long term	100-200€		
Kertaalleen ladattava älypuhelin	★★★★★		Approved	Business model c...	Long term	200-500€		
Kokonaistarkoituksellisuus	★★★★★						3.7	
Marsilainen maailla	★★★★★	1 comments	Approved	Lean canvas	Long term	> 1000€	3	
MOBI ystävä MOBI	★★★★★	3 comments	In progress	Business model c...	Long term	100-200€	2.6	
Näköystävien muisti	★★★★★		Approved	Lean canvas	Long term	100-200€	3.3	
Ostokäytännön kalentrimäkä	★★★★★	1 comments	In progress	Business model c...	Long term	> 1000€		
Peruskoulu peili - pelata nalla oppivelvollisuus	★★★★★		In progress	Business model c...	Long term	200-500€	2.7	
Pimeästä pilvistä	★★★★★		Approved	Business model c...	Short term	> 1000€	3.5	
Synteettinen insuliini	★★★★★	2 comments	Approved	Lean canvas	Short term	500-1000€	3.3	
Synteettinen maltohapko eli V-hydroksiprop...	★★★★★		In progress	Lean canvas	Long term	> 1000€	3.1	
Tiketoimintajärjestelmä	★★★★★		Approved	Lean canvas	Long term	> 1000€		
Univelkapankki.fi	★★★★★		Approved		Long term	> 1000€		
Vacumova jääkaappi	★★★★★		Approved		Short term	500-1000€		



Customer Service Robot - ROBO

Idea name
Name of the development idea
Customer Service Robot - ROBO

Description
Describe the idea in your own words:
Robots will replace customer service agents and robots are already increasingly common in warehouses and stores.

Problem to which your idea would bring a solution:
Robots are increasingly common in warehouses and stores. New our competitors will start rolling out autonomous retail service robots that can help manage inventory and show customers where to find products. We need to take also action.

Target. What would be the target for the suggested development project:
Robots needs to be multi-lingual, but robots should be programmed to understand as many as 25 languages. It should also scan inventory on a daily basis. Our competitors plans to use the data the robot collects to help the company find and detect inventory systems that can influence business decisions.

Sponsor: Esa Toivonen, 17.5.2017 20:28:27

Updated by: Esa Toivonen 24.1.2019 20:03

Prioritization
Benefits vs Risks matrix showing a blue dot in the high benefit, low risk quadrant.

Related ideas
MOBI ystävä MOBI
Hiidenkirju kuus

Idea management feedback
This will be on our Development Budget 2020 and we want you to join the development project!

Related documents
Add an attachment
Käytännössä ja käytökäytännössä.JPG
Full paper



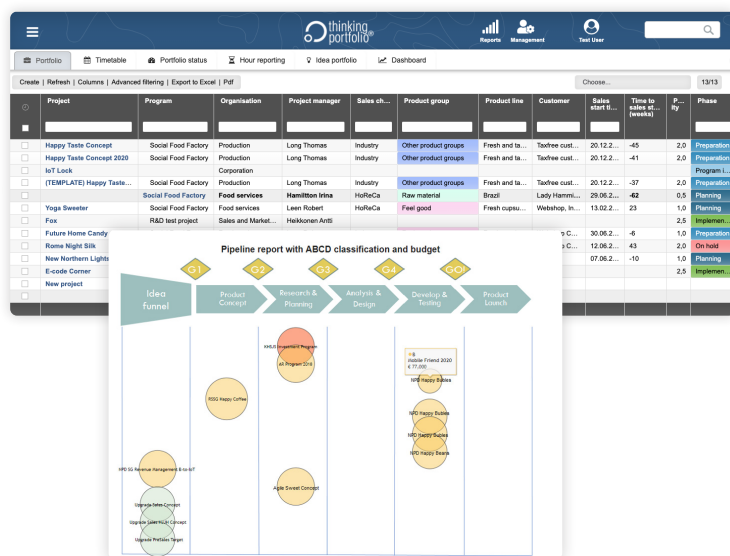
NPD Portfolio

build your new products from scratch to launch

- Manage fast-moving NPD-process on strategic level, by portfolio level prioritization, resourcing and scheduling
- Facilitate quick decision-making and follow-up
- Maintain an up-to-date view of current development situation
- View initiatives in one place
- Analyze product-market-fit, cannibalization or product sizing
- Evaluate effects on production planning
- Enable shorter product development cycle
- Manage and co-ordinate all stakeholders and networks

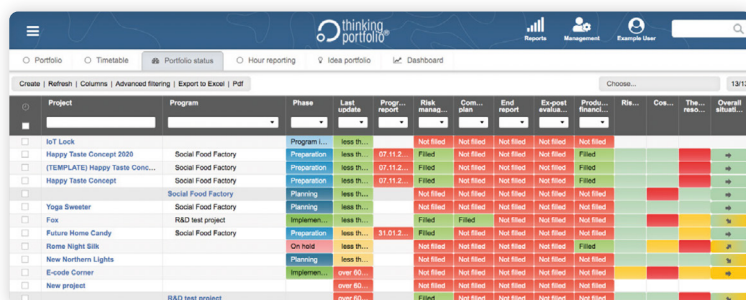
Key Functionalities

- Portfolio reporting
- Portfolio prioritization and quality management
- NPD-related key information set-up to support your key parameters
- Product positioning and impact management
- Project management and reporting based on your key needs
- Resource allocation & control



R&D Portfolio

- Manage Research and development (R&D) activities and projects that companies undertake to innovate and introduce new products and services. Manage your first stage in the development process to target resources to the activities that answer to the needs of the future customers.





Service Portfolio

nurture your services in a portfolio

- Create a unified view and a management routine of services
- Manage decisions and development of services
- Understand, develop and manage service life-cycles
- Ensure that customer expectations and requirements are met
- Manage service-points, quality criteria and service KPI's
- Allow access to service information throughout the organization
- Visualize service dependencies
- Map services against development efforts and projects, even across portfolios (landscape functionality!)

Key Functionalities

- Service life-cycle management
- Service value and quality metrics tracking
- Customer expectations and requirements mapping
- KPI and service management functionalities
- Service backlog, steering functionalities and tasks
- Service cost and resource mapping and management
- Reporting across all data managed on platform
- Link services to projects to gain visibility across dependencies

Capabilities

- Define and confirm that capabilities and resources to serve are always present (Link to HRD-portfolio – human capabilities may be also in HRD portfolio)

Service Need

Service Need	Required Service Level
4 Business-Critical	5 Critical
3 Essential / Required by Authorities	4 High
2 Supportive / Non-Critical	3 Medium
1 Discretionary / Developing	2 Low
	1 Undefined

Required Service Level

Availability: 5 Critical (selected), 4 High, 3 Medium, 2 Low, 1 Undefined

Service hours: 24

Days: Business days



Application Portfolio

business perspective of IT systems and services

- Create a comprehensive view of IT-systems and services from a strategic perspective
- Connect IT-applications to business goals
- Allow access to IT-information throughout the organization
- Visualize application dependencies
- Simplify application lifecycle management
- Map applications against development efforts and projects, even across portfolios (multi-portfolio functionality!)

Key Functionalities

- Lifecycle management
- Quality assurance
- KPI and service management functionalities
- Service backlog, steering functionalities and tasks
- Service cost and resource mapping and management
- Reporting across all data managed on platform eg. life cycle costs across portfolio
- Dependencies to services and projects (Link to Service Portfolio and Project Portfolio, to gain visibility across dependencies)

Portfolio	System name	System entity	Life cycle phase	Costs from previous year	Criticality	Value	Action	Functional quality
Henkilöstöhallinto	Työvuorosuunnittelu	Payroll	Active development	65 000€	Critical / severe (C-level)	48	Abandon	1
Gemeente Zundert	Makelaar	HR-system			Very critical (D-level)	0	Abandon	0
Gemeente Zundert	Nieuwe applicatie							
Gemeente Zundert	key2financien	HR-system			Critical / severe (C-level)			
Gemeente Zundert	burgerzaken				Very critical (D-level)			
Thinking Portfolio Demo Sovellus	Flexible Real Estate			9 000€	Normal (B-level)	17	Abandon	2
Julkishallinnon palvelut	Salesforce	Finance System	Active development	50 000€	Normal (B-level)	37	Abandon	3
Kansainväliset palvelut	QlikView R10		Active development	56 000€	Normal (B-level)	54	Renew	3
Kansainväliset palvelut	Tableid S2		Active development	66 000€	Normal (B-level)	59	Renew	4
Zorg	Quality Management		Removed		Very critical (D-level)	23	Abandon	3
Thinking Portfolio Demo Sovellus	SAP SCM	HR-system	Shutdown		Very critical (D-level)	47	Tolerate	2
ICT	Master Data Management		Shutdown		Normal (B-level)	87	Invest	2
HBM	Ship 2009		Maintenance	16 000€	Critical / severe (C-level)	70	Renew	2
Thinking Portfolio Demo Sovellus	SAP CO			21 000€	Critical / severe (C-level)	83	Renew	3
TUT	HOPS							

Personal data handling

Does the system handle personal information? **Yes**

Clarification of the processing of personal data

Does the application collect information from customers directly or send communications to customers? **Yes**

Is the application the original source of personal data, the place where personal data is created for the first time? **Yes**

Is the application strategic and integrally important for business? **No**

Does the system handle sensitive personal information? **Yes**

Registers

Ensihoidon rekisteri **X**

Profiilirekisteri **X**

Kutsuohjelmarekisteri **X**

Basic Data Protection (EU Data Protection)

How is the data protected? **Teidot on tieteokannassa kryptattuna ja niitä käsitellään ISO27001 sekä omien tietoturvasuhteiden mukaisesti suojattu.**

How is data usage and application activity monitored? **Audittrail, lokitus sekä roolipohjainen käyttöoikeuksienhallinta**

System-controlled data **Algoritmeilla hallitaan henkilöstön työvuorosuunnittelua huomioiden TES-vaatimukset nimityksissä ammattiryhmissä.**

The internal owner of the information in the system **Tuotantopäällikö, tuotantopäällikö**

Main user groups and user authorizations: **Henkilöstö, työnohjat, laatusiis, controller, paikalliskassant**

Internal organization that uses system data: **Henkilöstöhallinto**

Estimate of the amount of data:

Data protection

Is there a plan for backing up the system and its data, which takes into account different data recovery needs?	Not known
Is the restore of backups tested?	No
Is there an automated distribution of (security) updates?	No
Is there a disaster recovery plan?	Yes
Has the need to encrypt or pseudonymize the personal data been identified?	Not known
Are data transfers outside the organization been encrypted?	Yes
Do regular security checks take place?	Yes



Process Portfolio

streamline your process management

- Classify and manage process information
- Manage process risks and lifecycle
- Visualize current and up-coming processes and their dependencies
- Make smart decisions on process improvement based on actual data
- Nurture process improvement culture
- Ensure processes support your Customer Experience targets
- Identify dependencies between projects, applications and processes (Link to Service Portfolio, Application Portfolio and Project Portfolio, to gain visibility across dependencies)

Key

Functionalities

- Process hierarchy management and listing
- Detailed process management, tailored to your needs
- Development activity mapping
- Process risk management
- Process Quality assurance
- KPI and service management functionalities
- Steering functionalities, reporting and controls

Stage: Active						
Log						
Task	Start	End	Responsible	Status	Description	
1	Select Date 15.11.2019	X Select Date 14.11.2019	X	Work in progress		
2	Select Date 15.11.2019	X Select Date 23.11.2019	X	Not started		
3	Select Date	Select Date 2.11.2019	X	Started		
4	Select Date 22.11.2019	X Select Date 21.11.2019	X	Started		
5	Select Date	Select Date		Work in progress		



Customer Portfolio

An easy-to-use solution for managing your organization's customer data

- An easy-to-use solution for managing your organization's customer data
- Customer relations road map and life cycle management
- Clear, on-demand reports. Take a benefit from your own dashboards
- A quickly way to share customer data to rest of organization
- Integration with other portfolios (HUB)
- Easy integration with REST API

Key Functionalities

- Management for customer contact information
- Memos and notes of customer meetings
- Customer offers
- Task list and reminders (Kanban)
- Agreements and other documation management
- Services and product representations
- Customer life cycle management
- Integrations from other systems like financial management
- Resourch and schedule planning
- Indentifying new customer potential

thinking portfolio®

Asiakkuudet

Tarjoukset

Lisää

Päivitä

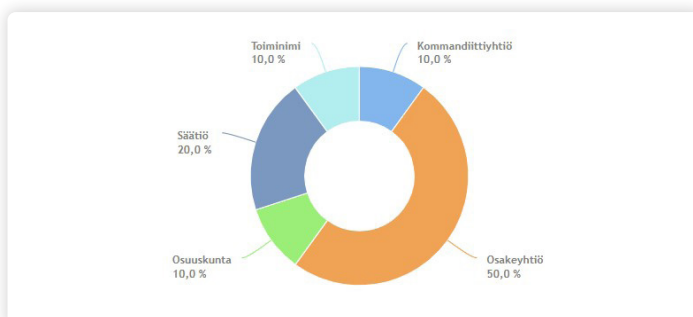
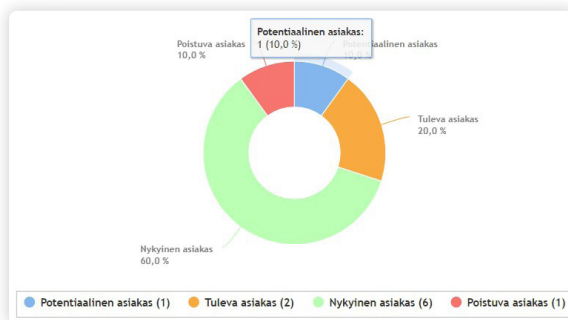
Sarakkeet

Laaja suodatus

Tietojen vienti

Pdf

	Virallinen nimi	Asiakkuuden tila	Tuotannon aloitus	Yritysmuoto	Asiakassegmentti	Omistajayksikkö
	Creative campus	Poistuva asiakas	1.9.2018	Osuuskunta	Pienrytitykset	Thinking Portfolio Oy
	Leipomo Miinan maukkaat	Nykyinen asiakas	2.1.2020	Kommandiittiyhtiö	Keskisuuret	Thinking Portfolio Oy
	Kulttuurisaatio Nallen kartano	Nykyinen asiakas	26.10.2020	Saatio	Suuryritykset	Thinking Portfolio Oy
	Anna ja Toivo Niemisen saatio	Nykyinen asiakas	3.5.2021	Saatio	Suuryritykset	Thinking Portfolio Oy
	Forest Management Oy	Nykyinen asiakas	4.10.2021	Osakeyhtiö	Keskisuuret	Thinking Portfolio Oy
	M&A Consulting Oy	Nykyinen asiakas	25.10.2018	Osakeyhtiö	Keskisuuret	Thinking Portfolio Oy
	Machinery Group Oy	Nykyinen asiakas	26.10.2020	Osakeyhtiö	Suuryritykset	Thinking Portfolio Oy
	Ossin sovellusapu	Tuleva asiakas	7.12.2021	Toiminimi	Pienryitykset	Thinking Portfolio Oy
	Quickdata Oy	Tuleva asiakas	13.12.2021	Osakeyhtiö	Suuryritykset	Thinking Portfolio Oy
	Figures Oy	Potentiaalinen asiakas		Osakeyhtiö	Keskisuuret	Thinking Portfolio Oy





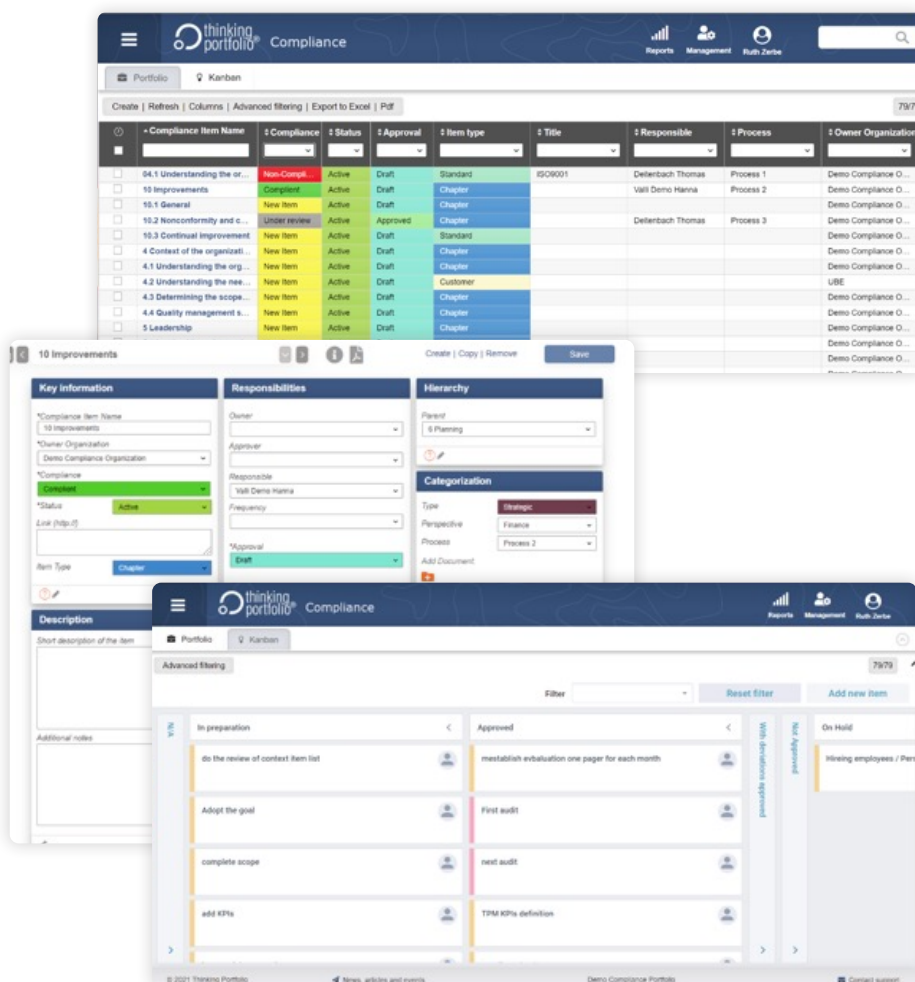
Compliance Portfolio

manage your business activities' conformity with law and regulations

- Use the Compliance Portfolio as a tool for operational planning and internal communication
- Report and control legal conformity, observance of the law and applicable regulations
- Report and control compliance with internal rules and principles such as the code of conduct, value management specifications, honesty and integrity
- Evaluate compliance performance
- Follow and visualize compliance status and processes with Kanban
- Organize and report quality management requirements
- Evaluate, categorize, prioritize, monitor and measure resources and tasks
- Create reports within the same tool

Key Functionalities

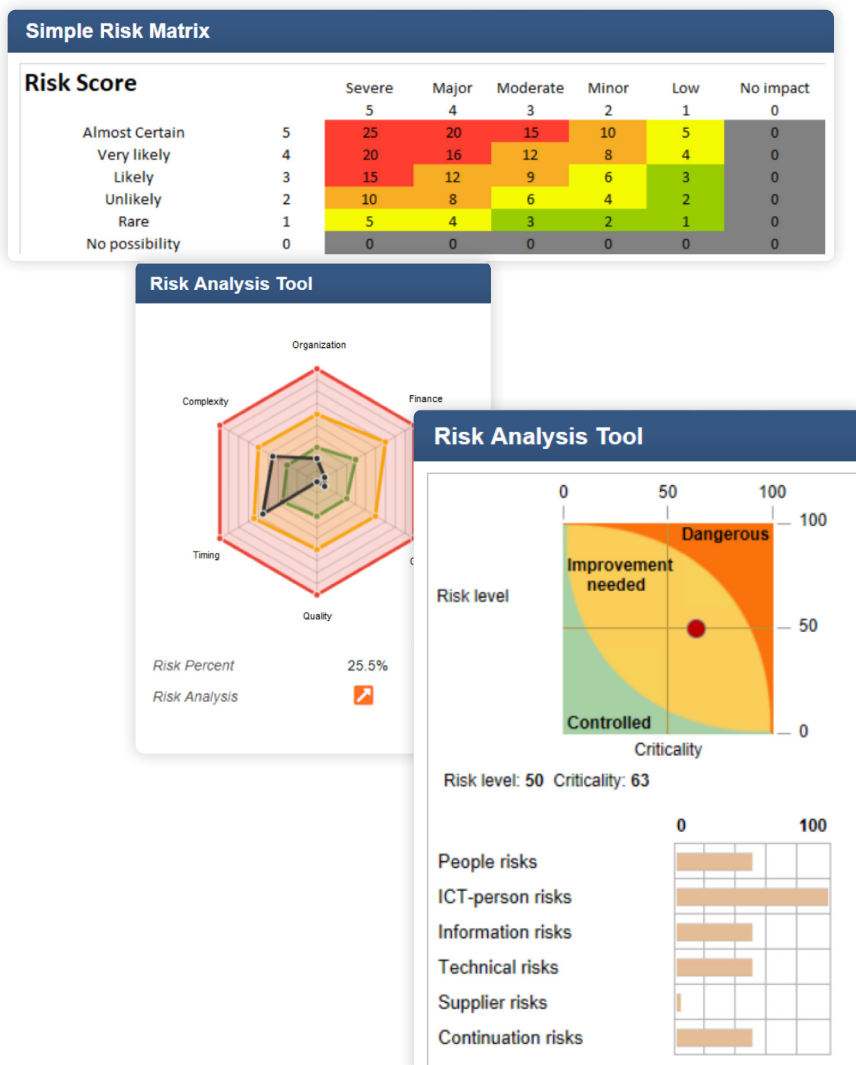
- Quality assurance
- Compliance status
- KPI functionalities
- Control of changes
- Design and development inputs
- Non-conformity
- Continual improvement
- Customer focus
- Resources
- Postdelivery activities
- Management review
- Internal audits



- Keep and manage an up-to-date view of the current risk situation
- Manage risk discovery, risk analysis and mitigating actions
- Make informed decisions with up-to-date risk information.
- Govern and manage audit-trail for officials and auditors
- Manage and control risk management procedures
- Report on risks and mitigating actions

Key Functionalities

- Risk Categorization and life-cycle management
- Impact analysis and reporting
- Risk Management and Governance
- Scheduled Mitigating Actions (Link to Project Portfolio – Projects can be mitigating actions)
- Mitigation management on portfolio level (Link to Compliance Portfolio – Auditing is always risk based and controls may act as mitigation methods etc.)
- Reminders, tasks and reporting cycles





M&A Portfolio

A platform for the strategic management of your M&A, market-, and competitor foresight information

- Report on M&A targets and market information for your stakeholders
- Keep your continuous market and competitor information analysis up to date
- Record and follow numerous M&A targets or other dimensions of market information
- Gain effectiveness, efficiency, quality and security in information and document management
- Make informed decisions and prioritisation based on up-to-date information
- Manage the lifecycle of the M&A targets

Key Functionalities

- Target discovery
- Target analysis
- Actions and integration
- Continuous assessment
- Categorisation
- Feasibility analysis
- Financial analysis
- Reminders and alerts
- Reports
- Target and Action Templates
- Integration to business processes
- Document Templates
- User Interface Based on M&A Target Type
- Collaboration and commenting
- Diary

The interface displays a detailed view of a target, 'Fast Banana Inc.', with fields for Key information (Group, Company Name) and Description (Business description). Below this, a summary table lists various targets with columns for Company name, Competitor type, Country (HQ), M&A attractiveness, and ABC Score.

Company name	Competitor type	Country (HQ)	M&A attractiveness	ABC Score
Cheshire County Hygiene Services	Vertical Expansion...	Finland	1,0	B
Beauty Box	Other companies t...	Sweden	3,5	C+
Baby Swim	Strategic alliances	Austria	3,0	C
Yoga Baby	Global Competitors	Germany	2,7	B
Fast Banana Inc.	Vertical Expansion...	United Kingdom	3,0	B

A map view shows the geographical distribution of targets, with a callout for 'Fast Banana Inc. (UK)' showing an M&A Attractiveness of 3,0 and Revenue of 90 ME.

Map left, Table right

Company table with logos and grouped by country

Name	HQ	Competitor Type	Revenue ME	M&A Attr.
Fast Banana Inc.	United Kingdom	Vertical Expansion...	90	3,0
Yoga Baby	Germany	Global Competitors		2,7
Baby Swim	Austria	Strategic alliances		3,0
Beauty Box	Sweden	Other companies t...		3,5
Cheshire County Hygiene Services	Finland	Vertical Expansion...		2,7



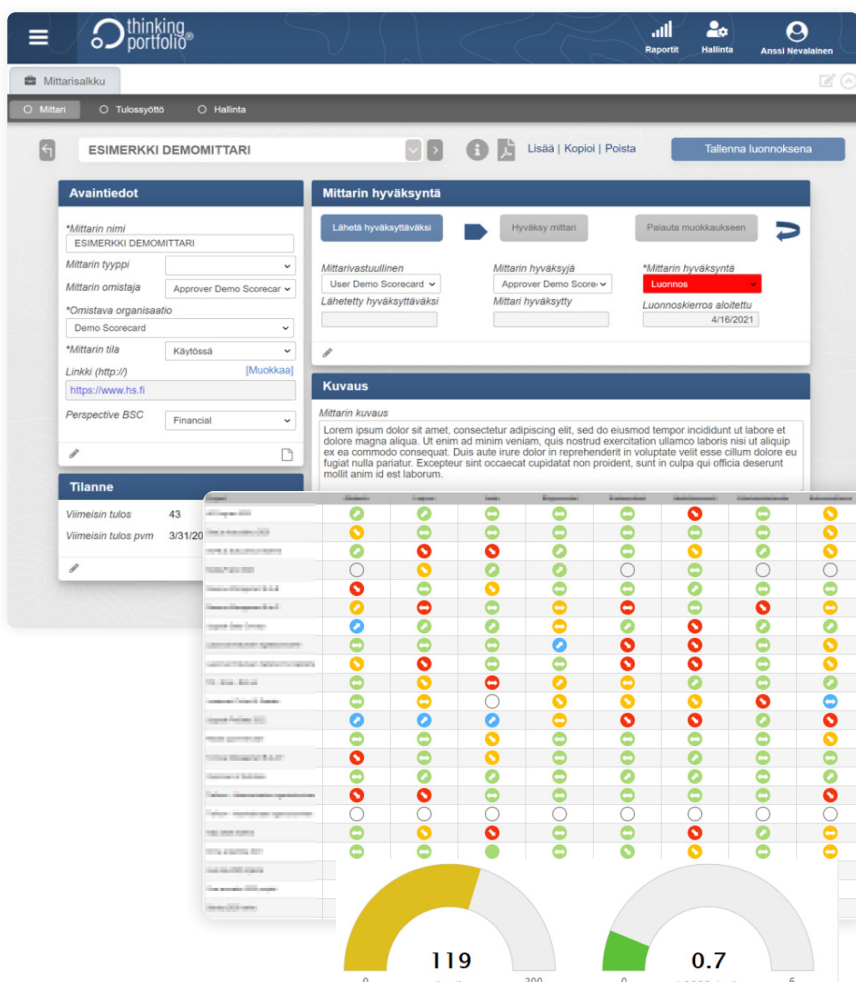
Key Performance Portfolio

Delivering business value with scorecard portfolio and KPI measurement

- Easy and secure tool to define targets indicators and record results
- Use strategy mapping to highlight cause-and-effect relationships
- Identify your critical success factors to ensure the right KPI metrics
- Up to date measuring with responsibilities and reminders
- Make informed decisions and prioritisation based on up-to-date KPI information
- Possibility to record many types of indicators in one place (qualitative, financial, KPI, different units etc.)
- Reporting platform included and may be parametrised for customer's needs
- Bring value to your management with a standalone Scorecard portfolio or extend your existing portfolio management with indicator related data model (e.g. align your project portfolio to strategy with KPI definition and measurement)

Key Functionalities

- Defining KPIs
- Strategy alignment
- Responsibilities
- Measuring unit definition
- Categorisation and hierarchies
- Aggregation (when needed and possible)
- Financial data possibilities
- Target setting and limits
- Calculation of derived results (e.g. rates for remuneration)
- Reminders and alerts
- Historical data and scheduling
- Reporting platform
- Optional: REST API import/export
- Integration to business processes
- Collaboration and commenting



Other Portfolio Data Models

Purchase or Supplier Portfolio

- Manage your tendering, purchase or supply chain activities
- Maintain momentum in your public tendering actions
- Balance your risk in tendering
- Keep an up-to-date view of your active tendering commitments
- Manage projects, resources and scheduling
- Report on your tendering activities

Corporate Management Portfolio

- Maintain and manage organizational assets
- Report on individual assets; finances, revenues, resources and other key information
- Cascade reporting to corporate level; corporate assets, weighting, strategic focus, commitments, risks and revenue
- Evaluate management needs, steer and log decisions and activities

Portfolio Hack!

We will experimentally create a new portfolio for you.

In two to three workshops we collect and further define all the needs your portfolio idea includes. With this information we will draft and make a demo. For a few days we focus on building solutions and on Friday we demonstrate the first draft of the possible solution.

What kind of portfolio would you build? Contact us, if you have a fundamental dimension of leadership in mind where portfolio management could be a solution!

Sales Contact Information



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