PortfolioSmart™

Executives are under more pressure than ever to drive value in their organizations. PortfolioSmart™—designed and built on the ServiceNow platform—enables executives to manage their portfolio of investments against organizational objectives and track progress against planned targets. Comprehensive portfolio visibility and informative analytics provide insights to support key decisions and actions.

Challenges	PortfolioSmart™	Target benefits

Common challenges faced by organizations in managing a portfolio of investments:

- Lack of visibility into initiatives; insufficient understanding of how individual projects and programs in a portfolio interact with each other

- Inadequate understanding of data that is tracked and available for consumption

- Lack of informed, data-driven decision making

- Undefined and unaddressed program and project risks

- Disparate, siloed business processes operating with inconsistent methods

- Cumbersome tools to manage and track projects

Organizations require a flexible project portfolio management (PPM) solution that provides line of sight into initiatives and visualizes key insights at the user's fingertips:

PortfolioSmart is a flexible portfolio management accelerator that moves beyond the "iron triangle" of managing scope, schedule, and budget. It is designed to standardize data collection, align program success to strategic organizational objectives, and promote informed decision making through the use of performance analytics. The accelerator provides line of sight into powerful portfolio status overviews, project health scores, and budget tracking across the enterprise by both program and project objectives.

PortfolioSmart is adaptable, scalable, and highly configurable. It can be tailored to meet the unique needs of an organization, regardless of size, complexity, or maturity.

PortfolioSmart provides the following core elements to clients and project teams:

- Supports standardization of data inputs from a wide variety of program management data sources

- Calculates and summarizes the health of programs through industry-standard KPIs

- Improves visibility into operations through the use of drill-down capability

- Enables informed, data-driven decision making

- Enhances risk management by providing actionable insights of key programmatic risks

- Provides a simple, interactive user interface that is intuitive and tablet-device compatible

- Promotes project and portfolio alignment to strategic objectives

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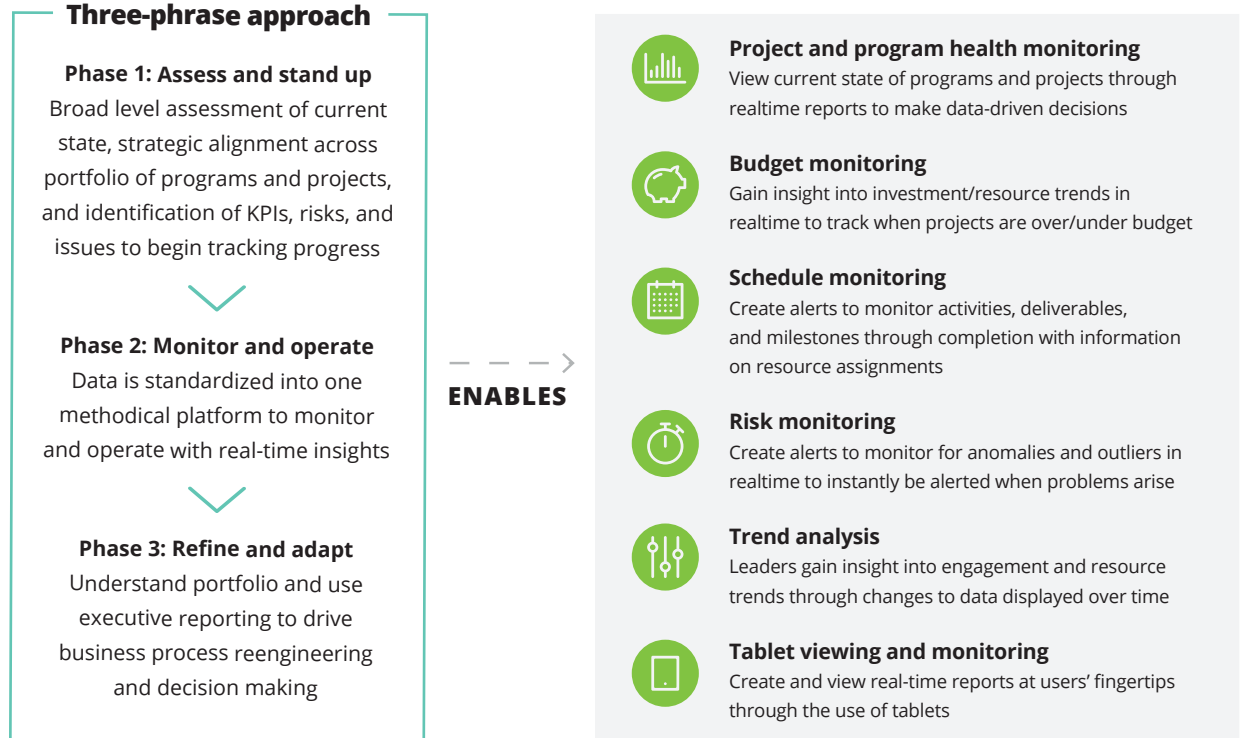Deloitte Consulting LLP

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APPLICATION CAPABILITIES

PortfolioSmart™ manages the data collection of project and program information, enabling reporting from one centralized data set. Information is entered via the easy-to-use intake survey that enforces consistent formatting and validation.

Three-phrase approach

Phase 1: Assess and stand up
Broad level assessment of current state, strategic alignment across portfolio of programs and projects, and identification of KPIs, risks, and issues to begin tracking progress

Phase 2: Monitor and operate
Data is standardized into one methodical platform to monitor and operate with real-time insights

Phase 3: Refine and adapt
Understand portfolio and use executive reporting to drive business process reengineering and decision making

ENABLES

Project and program health monitoring
View current state of programs and projects through realtime reports to make data-driven decisions

Budget monitoring
Gain insight into investment/resource trends in realtime to track when projects are over/under budget

Schedule monitoring
Create alerts to monitor activities, deliverables, and milestones through completion with information on resource assignments

Risk monitoring
Create alerts to monitor for anomalies and outliers in realtime to instantly be alerted when problems arise

Trend analysis
Leaders gain insight into engagement and resource trends through changes to data displayed over time

Tablet viewing and monitoring
Create and view real-time reports at users' fingertips through the use of tablets

WHY DELOITTE AND SERVICENOW?

Deloitte helps our clients optimize business outcomes by leveraging ServiceNow as an end-to-end digital workflow platform. We don't just leverage ServiceNow to automate your current processes: We reimagine how work gets done, delivering material improvements in revenue and cost reduction with higher job satisfaction. As a leading Global Systems Integrator and ServiceNow's Global Transformation Partner of the Year, Deloitte applies its breadth of industry and technology experience to help clients extract value from this powerful technology to create a united workflow with one platform.