Portfolio Planning

Aytekin Ulaş, PSM I
Project Portfolio Manager

- What is Portfolio?
- Planning
- Garden
- Governance
About Us

Established in 2006 as a subsidiary of Türkiye İş Bankası

980 Employees
34 Age Average

%38
%62

73% Undergraduate
19% Graduate
8% Other

Largest software company with local capital in Turkey

www.softtech.com.tr  company/softtechas  @SoftTechAS
Softtech – 8 Locations
Portfolio Planning | What is Portfolio?
Ethymology of «Portfolio»

Google search: «ethymology of portfolio»
Definition of «Portfolio Management» in PMI

**Portfolio**: A portfolio is a component collection of programs, projects, or operations managed as a group to achieve **strategic objectives**. The portfolio components may not necessarily be interdependent or have related objectives. The portfolio components are quantifiable, that is, they can be measured, ranked, and prioritized.

**Portfolio Management**: Portfolio management is the coordinated management of one or more portfolios to achieve **organizational strategies and objectives**. It includes interrelated organizational processes by which an organization evaluates, selects, prioritizes, and allocates its limited internal resources to best accomplish organizational strategies consistent with its vision, mission, and values.
Numbers in Softtech

5  # of portfolios
9  # of programs
179 # of projects in 2018
363 # of project demands for 2019
Coordination and alignment is critical to achieve final objectives.
Portfolio Planning | Planning
Project portfolio management is a cyclic process

1. Generate Project Ideas
   - Systematically document project ideas

2. Assess Project Ideas
   - Conduct overall assessment (feasibility)

3. Prioritize Project Ideas
   - Ensure prioritization based on comparable data

4. Detail Projects, Optimize Portfolio
   - Specify and detail project scope

5. Decide on Project Portfolio
   - Set strategic priorities for portfolio

6. Realize Project
   - Plan, execute and monitor according to project plan

7. Tap into Benefit
   - Ensure deployment of project solution to realize expected benefit

8. Initiate Portfolio Definition
   -
Demand and Available Resources are often not in a balance

- More demands than capacity
- Multiple no.1 priorities
- Too many stakeholders

- Transparency
- Collaboration
- Limit work in progress

- Achievable
- Aligned
- Time to market

To Do
Immediately! (if not sooner)

Dr. Robyn Odegaard
On-going projects

Capacity available for planning (Total Capacity – Other Activities)

Demand Management

Personal Rights (Annual leave, training courses etc.)

Maintenance (Incidents, Problems, Operational tasks etc.)

Total Capacity
Workflow

INPUTS

DEMAND EVALUATION

Team Capacities
Prioritized and Ranked Demands
Strategies & Targets
On-going projects

WHAT?

Vision
Business Targets
IT Targets
Identify Stakeholders
Rough Estimation

HOW?

Scheduling
Review
Confidence Voting

OUTPUTS

Team back-logs
Possible Risks
Skill Map
Budget

Before Event
Event Day
Portfolio Planning | GARDEN
GARDEN – PI Planning

Day 1 Agenda

8:00-9:00
Business Context

9:00-10:30
Product/Solution Vision

10:30-11:30
Architecture Vision & Development Practices

11:30-1:00
Planning Context & Lunch

1:00-2:00
Team Breakouts

2:00-2:15
Program Risks

2:15-???
Confidence Vote

4:00-5:00
Plan Rework?

5:00-6:00
Management Review & Problem Solving

Day 2 Agenda

8:00-9:00
Planning Adjustments

9:00-11:00
Team Breakouts

11:00-1:00
Final Plan Review & Lunch

1:00-2:00
Program Risks

2:00-2:15
Confidence Vote

2:15-???
Plan Rework?

https://www.scaledagileframework.com/pi-planning/
Participants
Team Breakouts
Tools & Techniques
Tools & Techniques
Digitalization is on the stage – Capacity Planning

<table>
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<tr>
<th></th>
<th>Q1</th>
<th>Q2</th>
<th>Q3</th>
<th>Q4</th>
<th>2019</th>
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<tbody>
<tr>
<td>Capacity</td>
<td>3.772,00</td>
<td>3.720,75</td>
<td>3.720,75</td>
<td>4.041,50</td>
<td>15.255,00</td>
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<td>Project Effort</td>
<td>-3.499,00</td>
<td>-3.451,00</td>
<td>-3.164,00</td>
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<td>-12.973,00</td>
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<td>Demands</td>
<td>-120,00</td>
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<td>-120,00</td>
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<td>Maintainence</td>
<td>-330,08</td>
<td>-326,10</td>
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<td>Personal Rights</td>
<td>-428,13</td>
<td>-614,30</td>
<td>-534,23</td>
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<td>Available Capacity</td>
<td>-605,21</td>
<td>-790,64</td>
<td>-423,57</td>
<td>326,64</td>
<td>-1.492,78</td>
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Digitalization is on the stage – Skill Map

- **Required Skill Set**
- **Proposed Skill Set**
Portfolio Planning | Governance
PPM Tool

- Portfolio Management (Portfolio, Program, Project, Deliverables definitions)
- Risk, Issue, Dependency, Milestone Management
- Project Planning
- Capacity Planning
- Source of Reporting
## Governance Meetings

<table>
<thead>
<tr>
<th>Details</th>
<th>Frequency</th>
<th>Participants</th>
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<tbody>
<tr>
<td><strong>Portfolio Assessment</strong>&lt;br&gt;• Monitoring portfolio in terms of dependencies, risks and open issues</td>
<td>• Weekly</td>
<td>• Softtech Top Management&lt;br&gt;• Portfolio Managers&lt;br&gt;• Lead Architects</td>
</tr>
<tr>
<td><strong>Design Authority</strong>&lt;br&gt;• Risk &amp; impact analysis assessment, sign-off scope &amp; timeline changes</td>
<td>• Biweekly</td>
<td>• Softtech Top Management&lt;br&gt;• EA, IT, Data Top Management&lt;br&gt;• Portfolio Managers</td>
</tr>
<tr>
<td><strong>Enterprise Architecture</strong>&lt;br&gt;• Alignment with business and IT architecture</td>
<td>• Weekly</td>
<td>• Enterprise Architects&lt;br&gt;• Lead Architects&lt;br&gt;• Portfolio Managers&lt;br&gt;• Product Team</td>
</tr>
<tr>
<td><strong>IT Architecture</strong>&lt;br&gt;• Discussion of technical stacks and exceptions</td>
<td>• Weekly</td>
<td>• Lead Architects&lt;br&gt;• Data Architects&lt;br&gt;• IT Architects</td>
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<tr>
<td><strong>GARDEN</strong>&lt;br&gt;• Evaluation of new &amp; on-going projects and demands, capacity &amp; portfolio planning</td>
<td>• Quarterly</td>
<td>• Top Management&lt;br&gt;• Product Teams&lt;br&gt;• Portfolio Managers&lt;br&gt;• EA, IT, Data Teams</td>
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Health checks are made by using traffic lights and risk assessment.
Completed deliverables 245

Completion Ratio (%) 82.49

Projected end of year completion 97.84

Deliverable Committed vs. Completed
Monitoring – Program Specific Completion

- Payments Hub: 77.30%
- Core Banking: 82.31%
- Front-end & Middleware: 78.52%
- Data Foundation: 100%
- Overall Completion: 81.38%
See you...