Web-based Portfolio and Project Evaluation System

Portfolio Navigator™ is a web-based software solution that evaluates and tracks the economic value of R&D and new product development projects and portfolios. The system integrates a process framework with a powerful decision analysis engine to provide clear understanding of the drivers of economic value, including quantitative analysis of the impact of risk and uncertainty. It brings people, process and analysis together to identify a portfolio of best projects.

“Portfolio Navigator showed us what our portfolio could deliver in meaningful, bottom-line terms, giving us real insight into which projects to fund.”

Executive
Major Oil Company

Templates Bring Teams Together
Templates at the core of the system describe the value proposition of each project, e.g. new market, share expansion or cost reduction. Models embedded in the templates calculate the economic value of each project and adjust this value to reflect the impact of risk and uncertainty on future results.

The web-based system is accessible and interactive, creating meaningful conversations about value as project and portfolio stakeholders instantly see the impact of their assumptions and decisions.

Peer and Expert Review
During the review process, the project leader peer group and experts compare key project-level outputs across the portfolio. They assure comparability and credibility by feeding corrections and observations back to the project teams and enforcing standards. Comparison displays include Commercial Contribution, Probability of Success, Range of Uncertainty and Investment Levels.

Portfolio Evaluation
After Portfolio Navigator combines project evaluations into a portfolio, the system produces a wide variety of reports that provide managers and executives with the information needed to select a portfolio of best projects.

Graphic reports include Investment Productivity Charts, Project Value by Category Displays, Innovation Screens, Upside and Downside Scenarios, and Value Tracking over Time. Each display can be sliced and diced to reveal the implications of proposed portfolio choices.

The Portfolio Navigator Process

Implementing Portfolio Navigator
The Portfolio Navigator system consists of a software license based on the number of project slots plus services that support configuration and implementation. Services include custom development of evaluation templates, system training, coaching, and consulting on integrating the system into the company.

Typically, customers evaluate their system needs in one of two ways, a Demonstration or a Pilot Installation. During a Demonstration, we load customer data—real or fictitious—into the system and demonstrate the results during an on-site or web meeting. A Pilot Installation enables prospective customers to temporarily deploy the system to address a subset of the portfolio or evaluate a project prior to committing to rolling out a full system.

Technical Requirements
Portfolio Navigator operates on Microsoft web servers and supports SQL Server or Access databases. Microsoft Office Suite 2000 and Internet Explorer V5.5 or later versions must be installed on each user’s computer.

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