

itd Portfolio Optimizer

Add-on for Clarity

August 2025



Agenda

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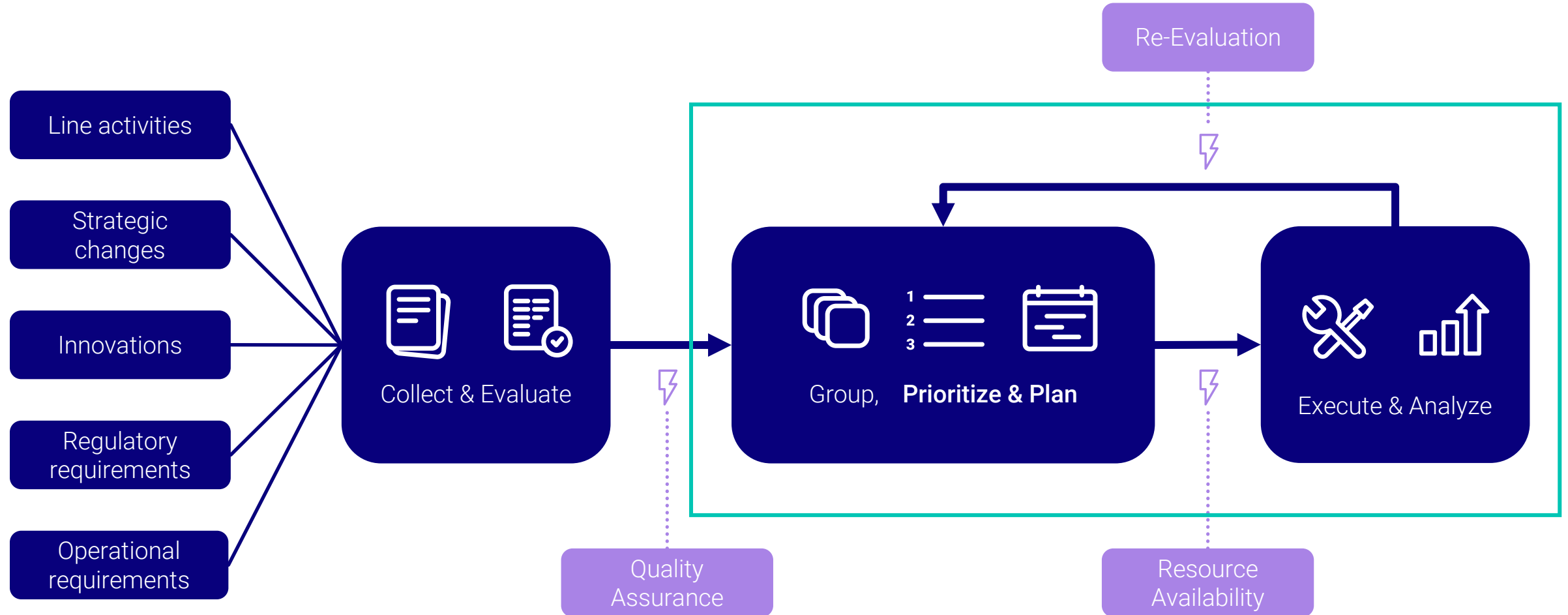


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How We Understand Portfolio Management

What Do We Mean by Portfolio Management?



Portfolio Management

The link between Strategy and Operations

Management



Purpose,
Strategy & Goals

*Why does our organization exist?
How do we work?
What do we do?
What do we want to achieve?*

Strategic Management

Strategic Portfolio Management



Portfolio

*Which investments should we
implement?*

- Evaluate potential investments
- Prioritize investments
- Make investment decisions

Strategic Portfolio Management

Operative Portfolio Management



Portfolio Plan

*How and when should we
implement which investment?*

- Plan implementation of investments
- Monitor and control investments
- Identify risks and solve conflicts

Operative Portfolio Management

Project Manager



Projects, Programs, ..

How can we do one thing right?

Work / Project Management

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Business Case

Business Case

What?

- ✓ Finding the optimal portfolio while considering goals, budgets, and constraints
- ✓ Strategic portfolio planning: Which investment should we implement?
- ✓ Operational portfolio planning: How and when should we implement which investment?

How?

- ✓ Having all relevant dimensions of portfolio planning in one interactive view:
 - Vertical sorting of investment (prioritization)
 - Cut-off-line
 - Horizontal sorting of investment (scheduling)
 - Impact on resource utilization
 - Impact on goals and budgets
- ✓ Data-driven, efficient, transparent, and directly in Clarity

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Clarity Standard

Clarity Standard



Background

- > As portfolio management in your company matures, decision-makers may need a quick overview of dependencies and impacts.



Problem

- > Everything needed for portfolio management spread across different modules, no single view to display all aspects
- > Strategic portfolio management: Ranking of investments based on live data not possible (only in the scenario mode)
- > Operational portfolio management: In the Staffing module, no direct feedback regarding constraints & goals



Our Solution

- > All relevant dimensions of portfolio planning in one interactive view



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Live Demo



Live Demo

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Added Value

itd Portfolio Optimizer

Strategic and Operational Portfolio Management at a Glance

Customizable view

Prioritization via Drag & Drop

Interactive cut-off-line

The screenshot displays the 'itd Portfolio Optimizer' interface. At the top, there's a header with the 'itdesign' logo and the title 'itd Portfolio Optimizer 00000015'. Below this, a dashboard section contains four configurable widgets: 'Risk Score' (121% with a red bar chart), 'Strategy Score' (128.3% with a green gauge), 'Budget (\$)' (80% with a green bar chart), and 'Planned Revenue (\$)' (89.6% with a red bar chart). The main area is divided into two sections: 'ALLOCATIONS' and 'RESOURCES'. The 'ALLOCATIONS' section features a table with columns for Name, Ranking, Risk Score, Strategy Score, Budget, Revenue, and a timeline from Q3 2025 to Q1 2027. It lists 13 items, including 'ABLE Payments Module', 'AI-Powered Transformation', 'CRM Upgrade', 'DPM Loan App Rel 5.0', 'Digital Workforce Evolution', 'International Trade Show', 'eBusiness Mobile Network', 'BI Reporting Tool', 'Omnichannel Integration', 'Email SAN Storage Implementation', 'DPM Loan App Rel 6.0', 'EMEA GDPR Certifications', and 'Financial Showcase'. The 'RESOURCES' section has a similar table with columns for Name, Manager, Skills, Resource Pool, and the same timeline. It lists five roles: Architect, Product Manager, Product Marketing, Project Manager, and Solutions Marketing. A 'SHOW UTILIZATION FILTER' button is located at the bottom right of the resources table. On the left side of the interface, there is a vertical sidebar with various icons for navigation. On the right side, there are three callout boxes: 'Configurable widgets' pointing to the dashboard widgets, 'Real-time feedback' pointing to the resource utilization bars, and 'Interactive cut-off-line' pointing to the 'eBusiness Mobile Network' row in the allocations table.

Configurable widgets

Real-time feedback

Added Value



Strategic and operational portfolio management **in one single view**



Faster decision-making
(e.g., in case of conflicting goals)



Easy to use
with high level of functionality



Transparent **prioritization**
of all investments



Automated **prioritization suggestions**
based on self-defined criteria



**Tailored to
your needs**



Overview of **portfolio's impact** on
resources, budgets, and other targets



Deep **anchoring of Clarity**
through high strategic value



Synergy effects when using
itd Advanced Resource Planning

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Outlook

What's next?

Outlook for 2026

Expanding Widget Functionality

- > Add filter options
- > Support for time-scaled-values
- > Introduce new widget types

Improved Aggregation in the Utilization Panel

- > Enhance aggregation logic
- > Enable more flexible and insightful utilization views

Scenario Planning

- > Build portfolios within scenario environments
- > Simulate different portfolio strategies
- > Transfer scenario results to live portfolio data

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Q&A

Space for Your Questions

We are here for you.



Patrick Schuler

Senior Sales Consultant

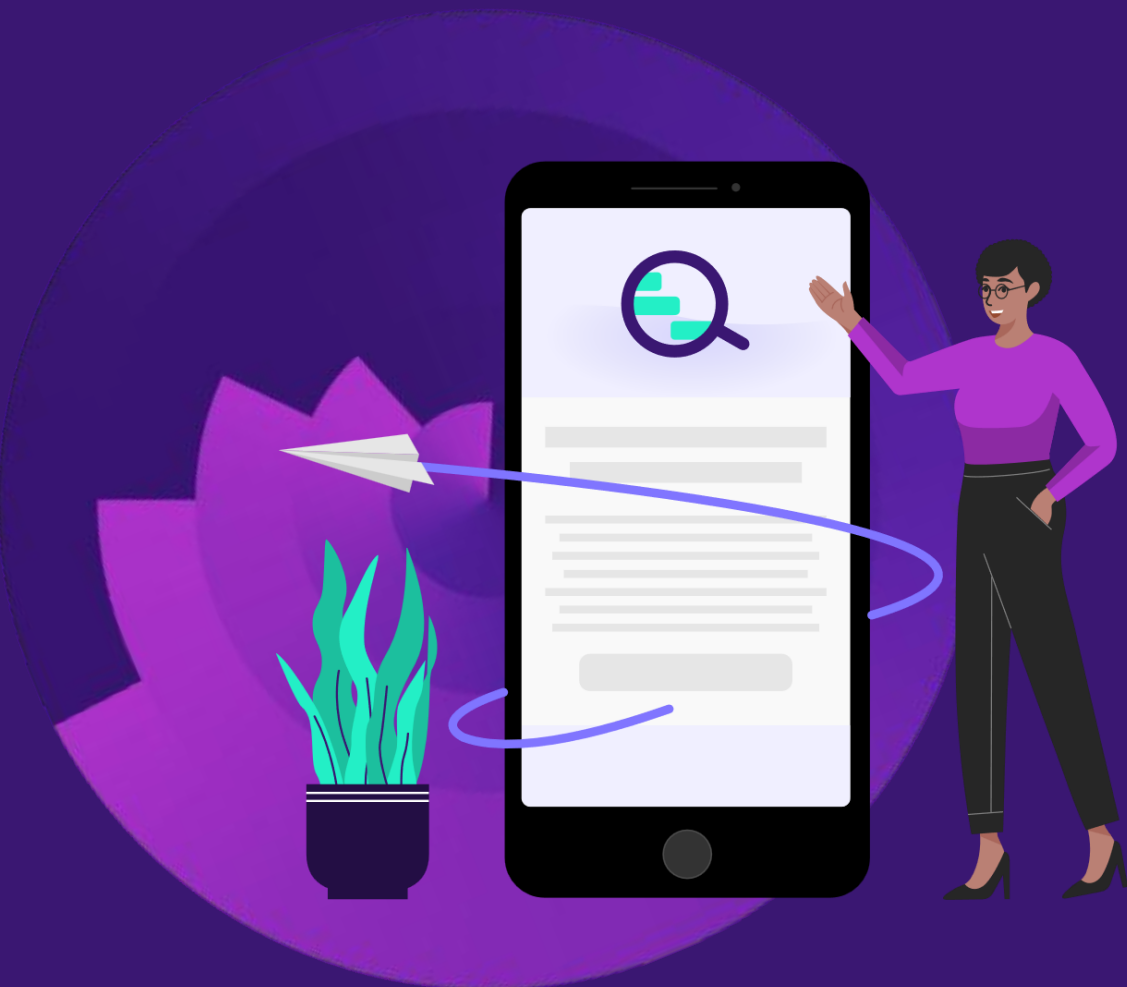
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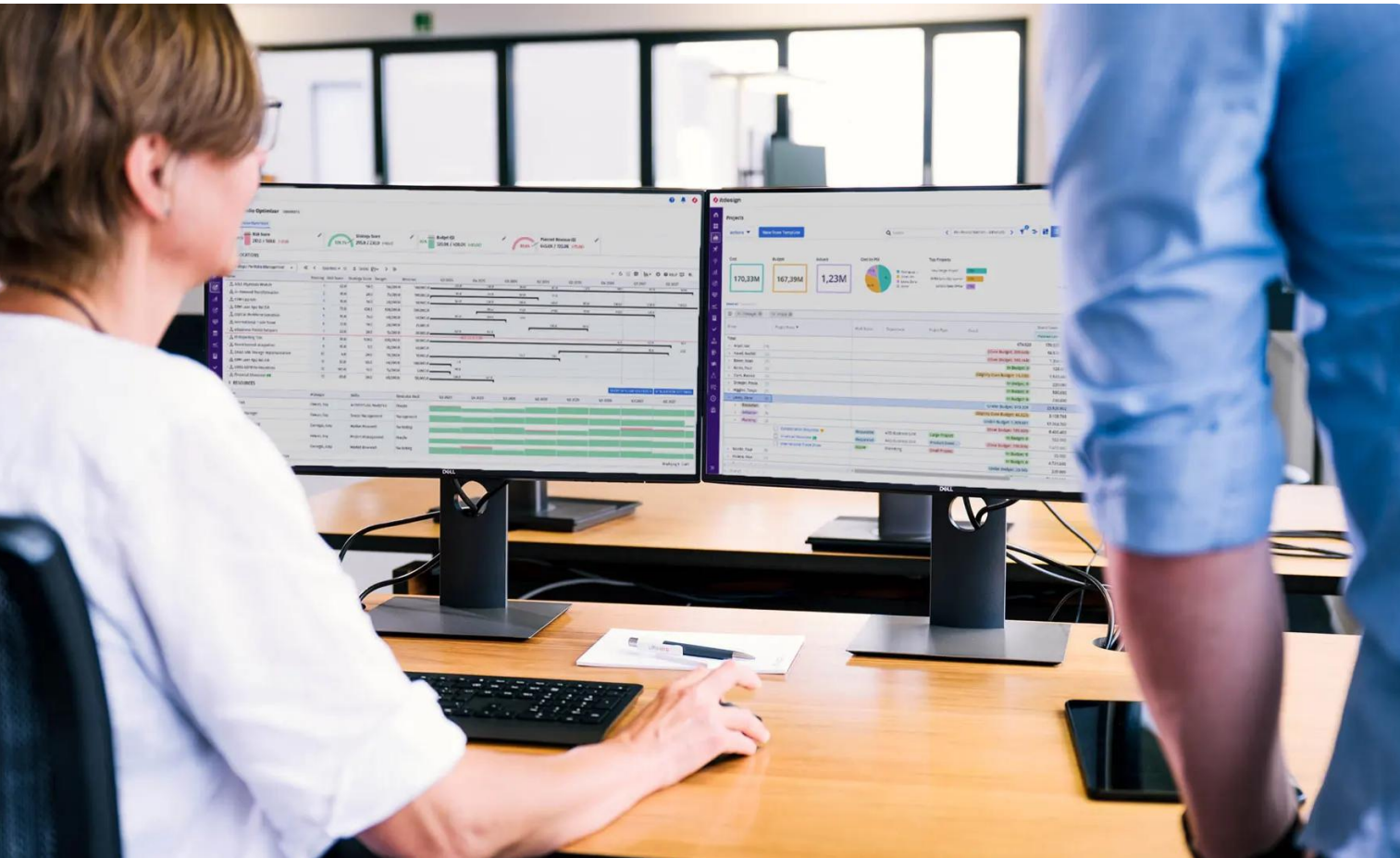
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Further Information



Find an overview of the itd Portfolio Optimizer on our website:

[Learn more »](#)