itd Portfolio Optimizer

Add-on for Clarity

August 2025

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Agenda

1. How We Understand Portfolio Management

2. Business Case

3. Clarity Standard
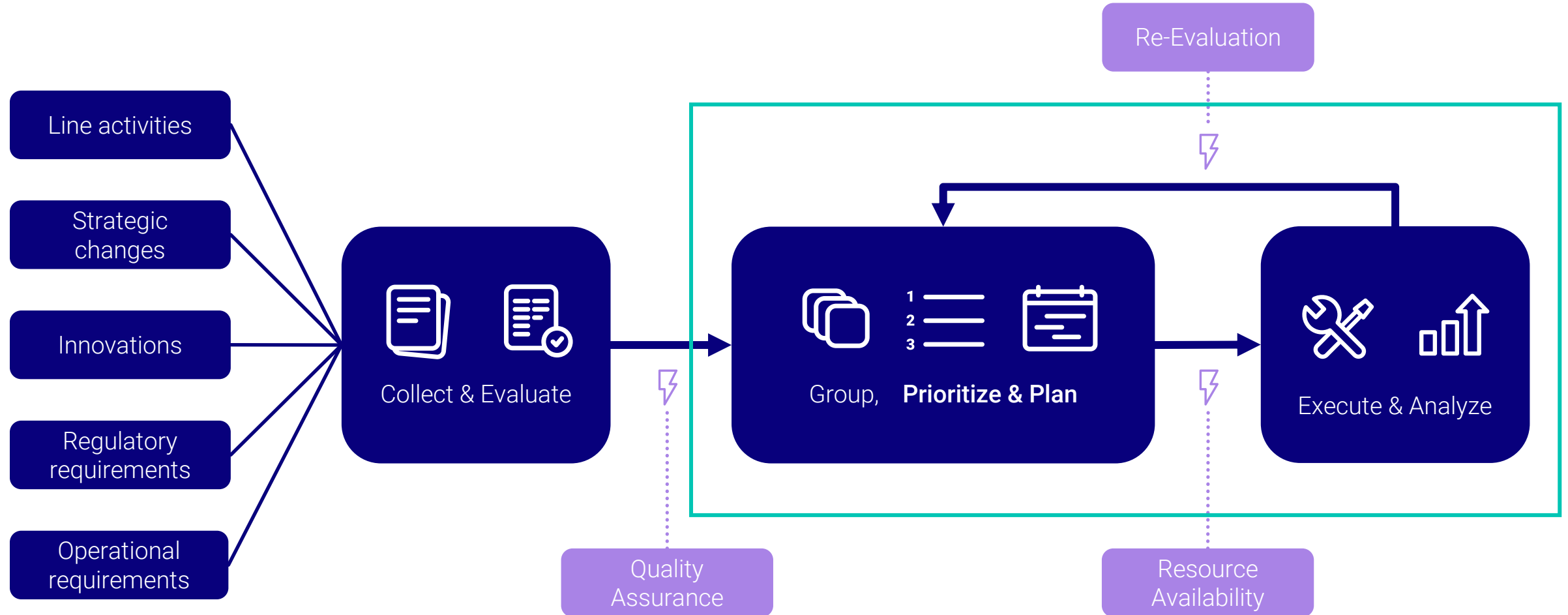
4. Demo

5. Added Value

6. Outlook

7. Q&A

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How We Understand Portfolio Management

What Do We Mean by Portfolio Management?

Re-Evaluation

Line activities

Strategic changes

Innovations

Regulatory requirements

Operational requirements

Collect & Evaluate

Group, **Prioritize & Plan**

Execute & Analyze

Quality Assurance

Resource Availability

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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 Board

Portfolio

Which investments should we implement?

- Evaluate potential investments
- Prio... Strategic Portfolio Management
- Make investment decisions

Operative Portfolio Management

Portfolio Manager

Portfolio Plan

How and when should we implement which investment?

- Plan implementation of investments
- Mon... Operative Portfolio Management
- Identify risks and solve conflicts

Project Manager

Projects, Programs, ..

How can we do one thing right?

Work / Project Management

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Business Case

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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

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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

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Strategic and Operational Portfolio Management at a Glance

Customizable view

Prioritization via Drag & Drop

Interactive cut-off-line

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

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Space for Your Questions

We are here for you.

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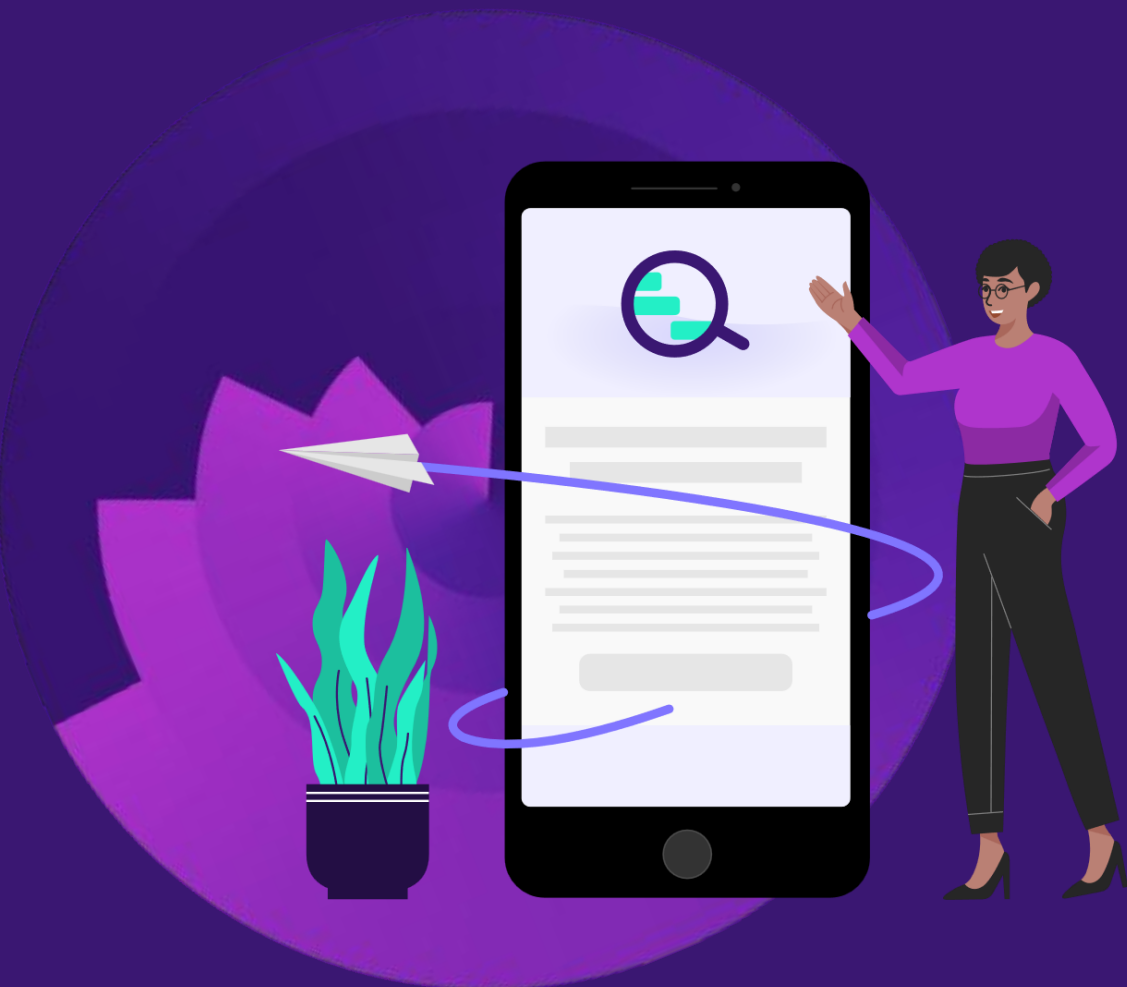
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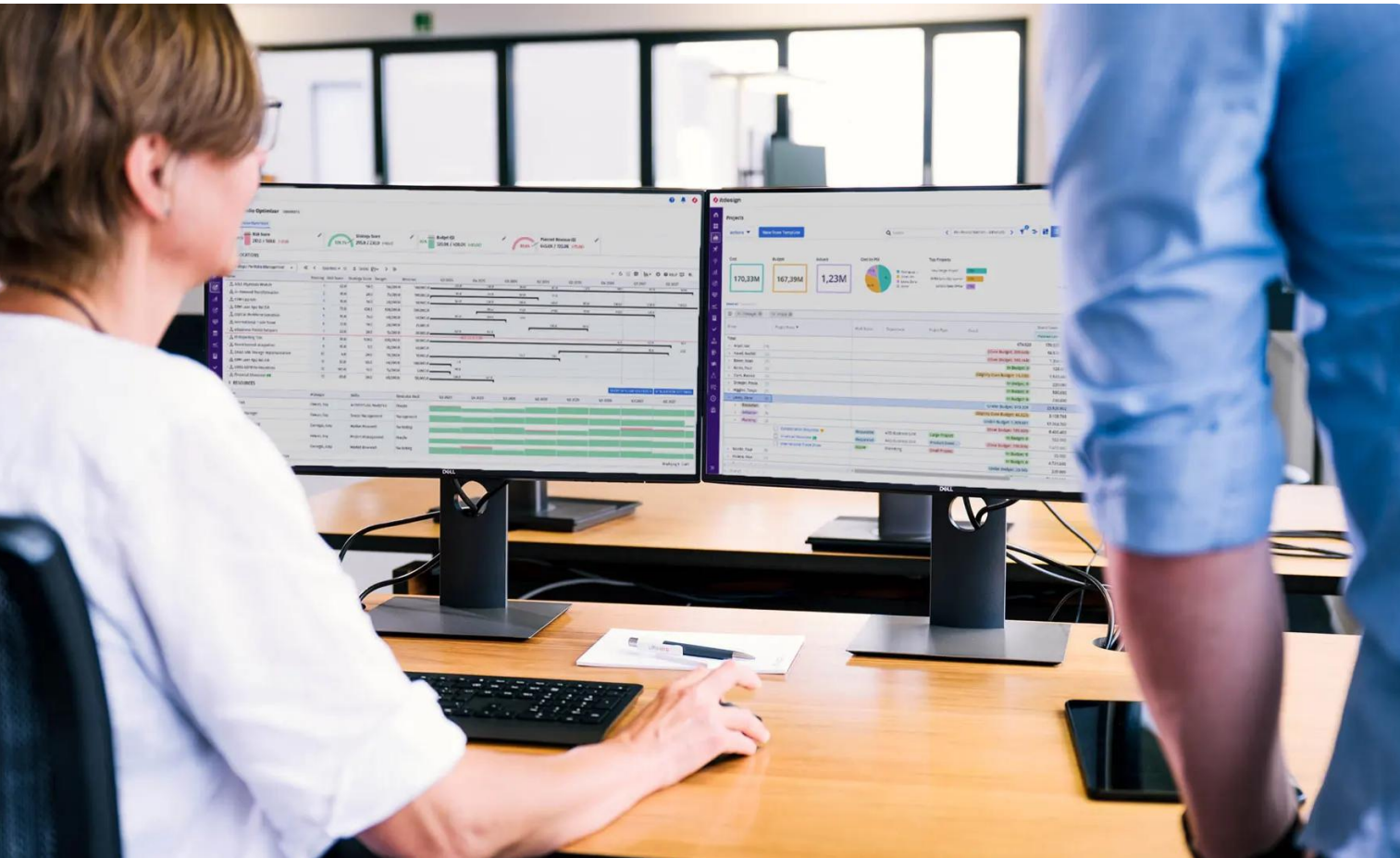
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Further Information

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

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