



Balancing Strategic Goals, Budget and Capacity with the itd Portfolio Optimizer

Your Guides:
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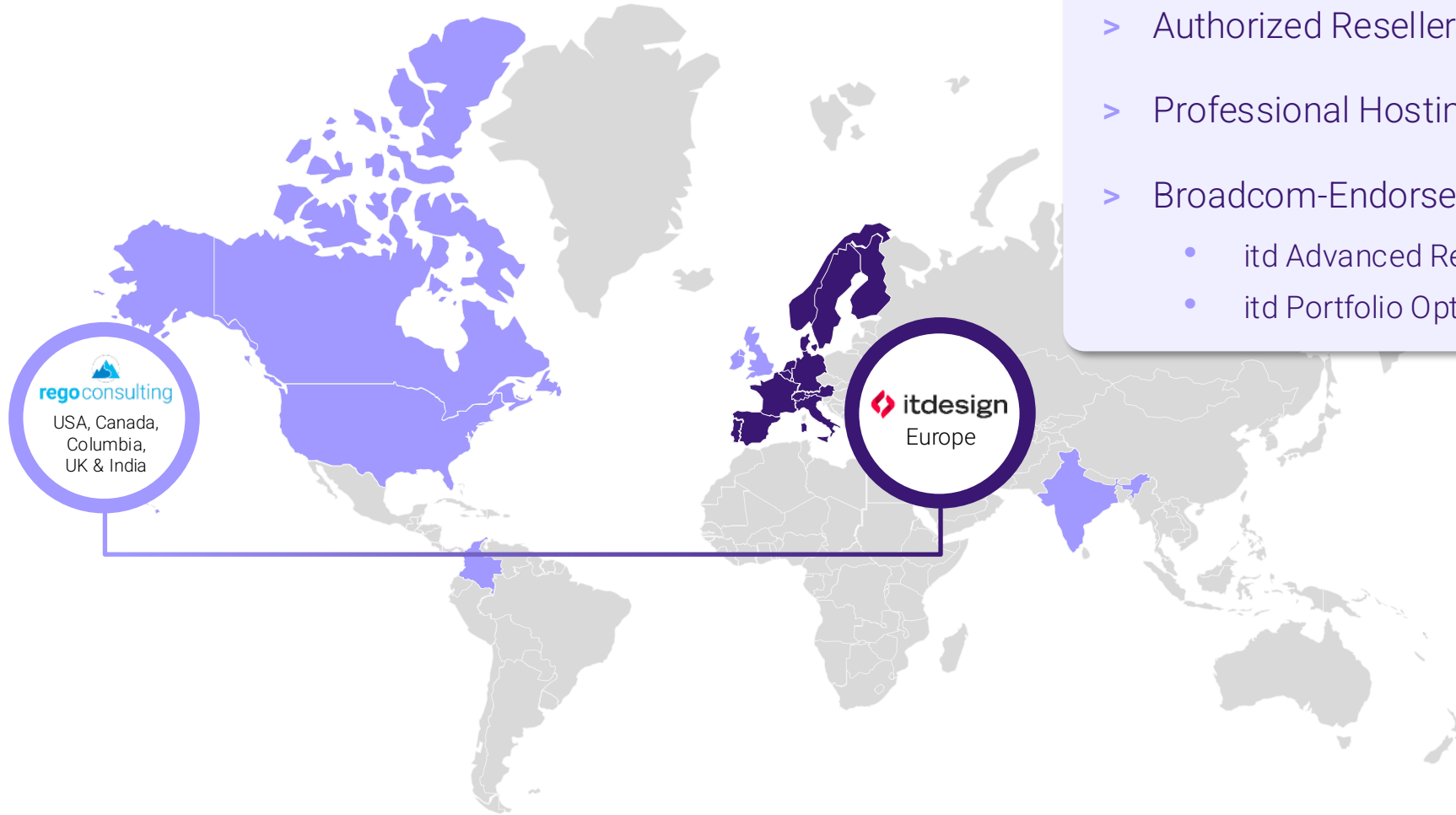


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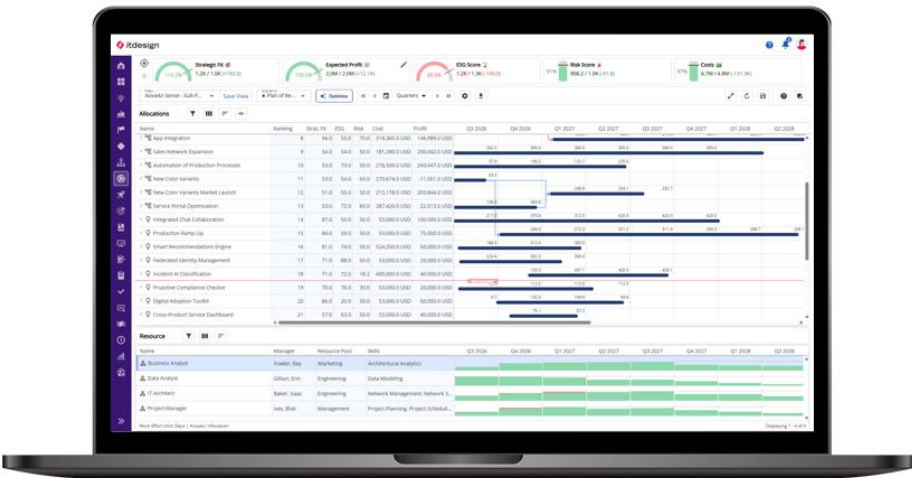


itdesign is the largest Clarity partner in Europe

- > Authorized Reseller (Tier 1)
- > Professional Hosting Services
- > Broadcom-Endorsed Clarity Extensions:
 - itd Advanced Resource Planning
 - itd Portfolio Optimizer



Things that make us happy...



clarity

Agenda



1. The Reality of Portfolio Management
2. From Flight Levels to Decisions
3. Live Demo: Portfolio Optimization in Action
4. Key Takeaways & Q&A



1



The Reality of Portfolio Management

What are your typical challenges in Portfolio Management?

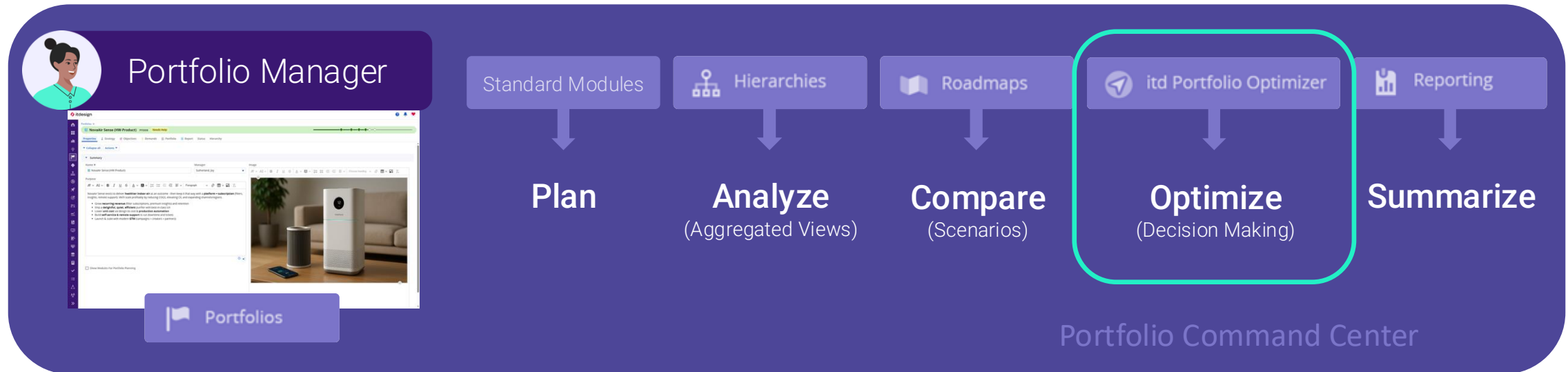


2

Recap: From Flight Levels to Decisions

Short Recap: From Configuration to Better Portfolio Decisions

Turn Clarity into a Portfolio Command Center through thoughtful configuration



3

Live Demo: Portfolio Optimization in Action

Current Situation

Prioritize and execute the right initiatives

- > Two Portfolio Managers are responsible for multiple portfolios with different objectives and priorities
- > All portfolios compete for the same resources and budget
- > Prioritization decisions are often difficult and subjective and business priorities change continuously
- > Which KPIs and factors are relevant for prioritization?
- > How do we ensure that the most valuable initiatives are prioritized and delivered first?
- > What does the resource utilization look like?



3a

Create Transparency

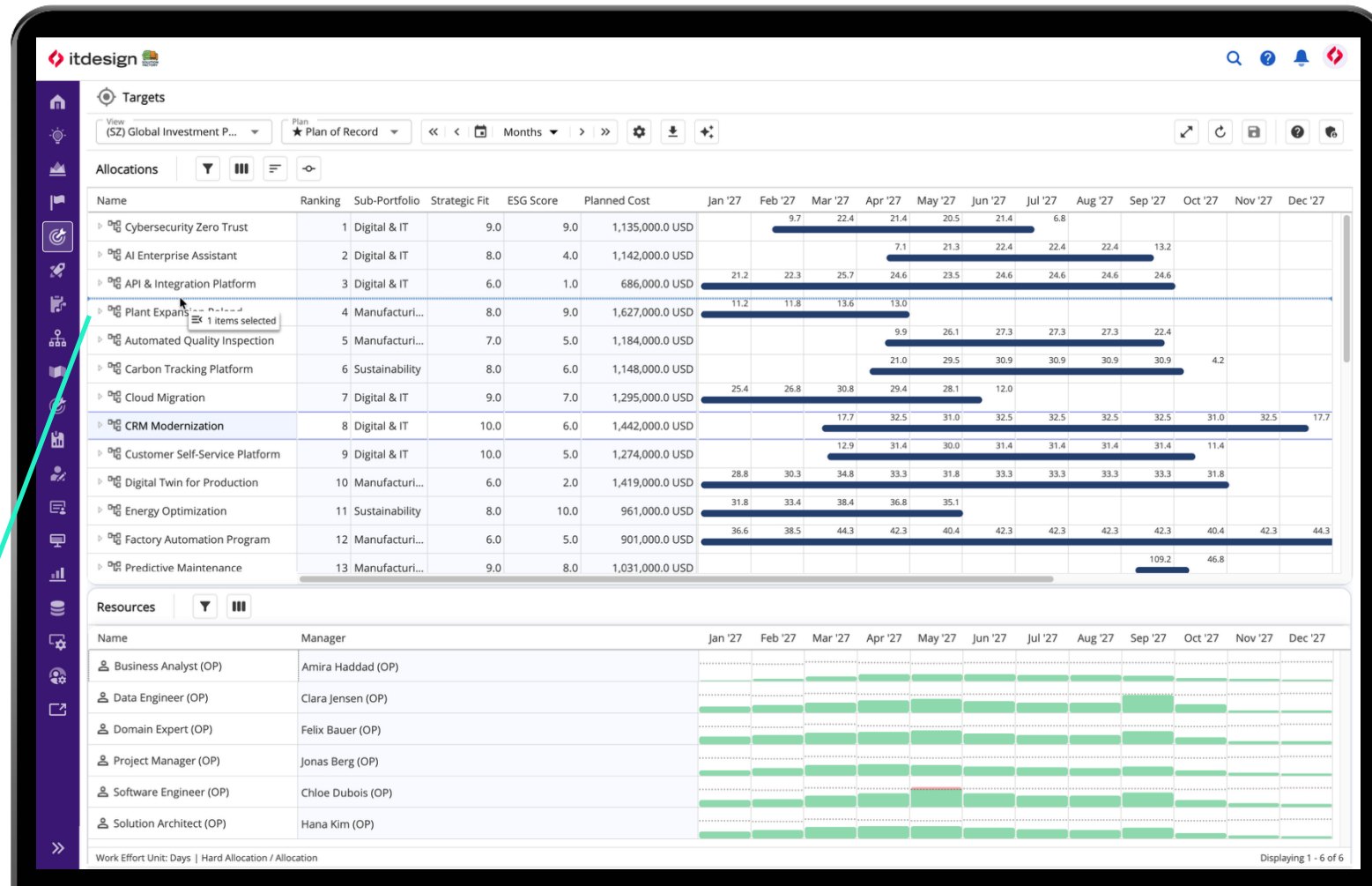
1. Create transparency

Achieve transparency across investments, priorities, KPIs, and resource capacity

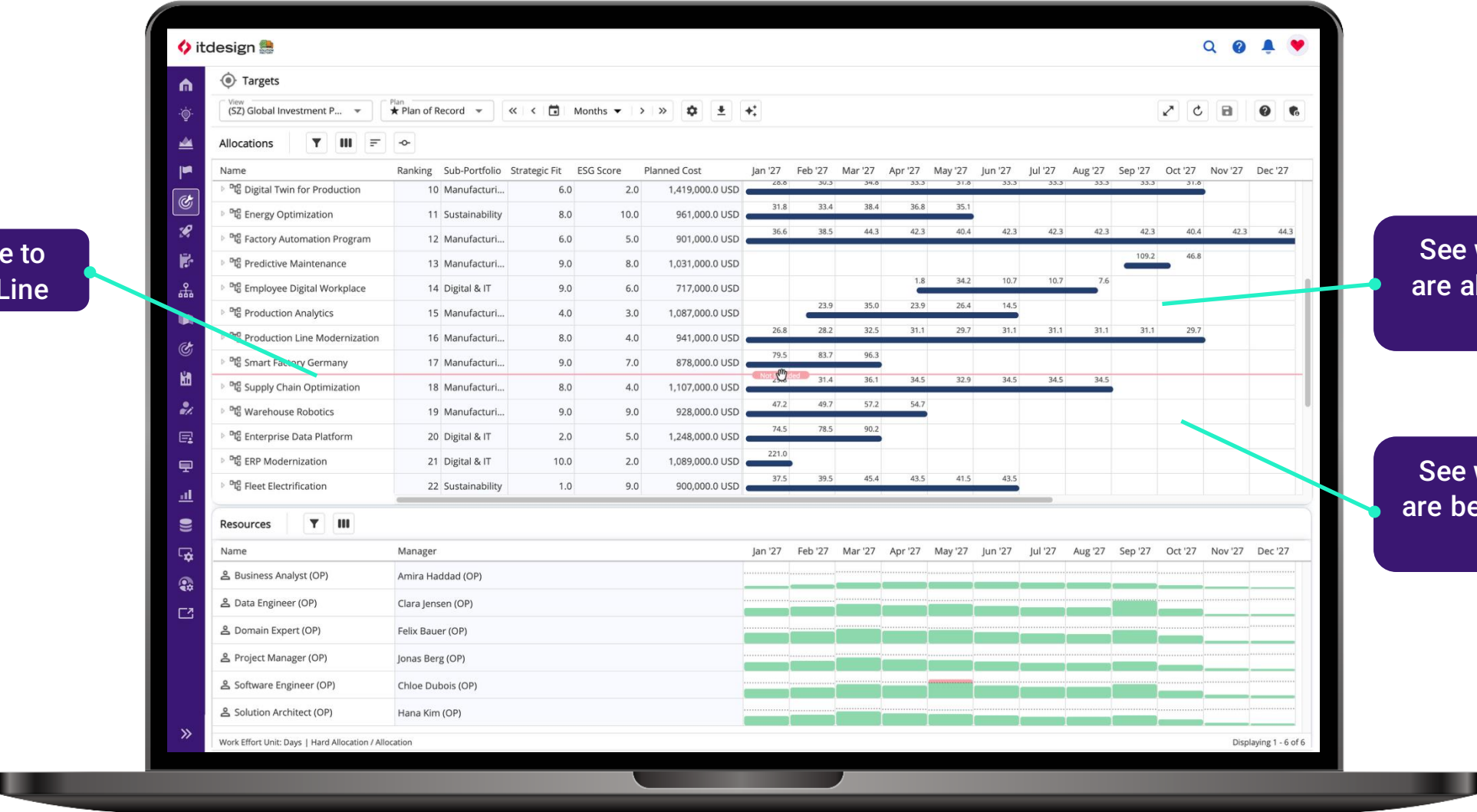


1. What is in our portfolio?
2. What should be prioritized?
3. What drives our decisions? Which KPIs, targets, and factors matter most?
4. Do we have the capacity to deliver?

What should be prioritized?



What is considered in my Portfolio?

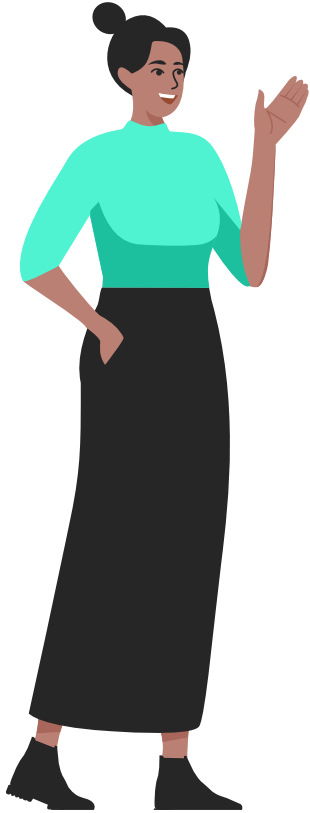


Navigate to Cut-off Line

See which investments are above the line and in Plan

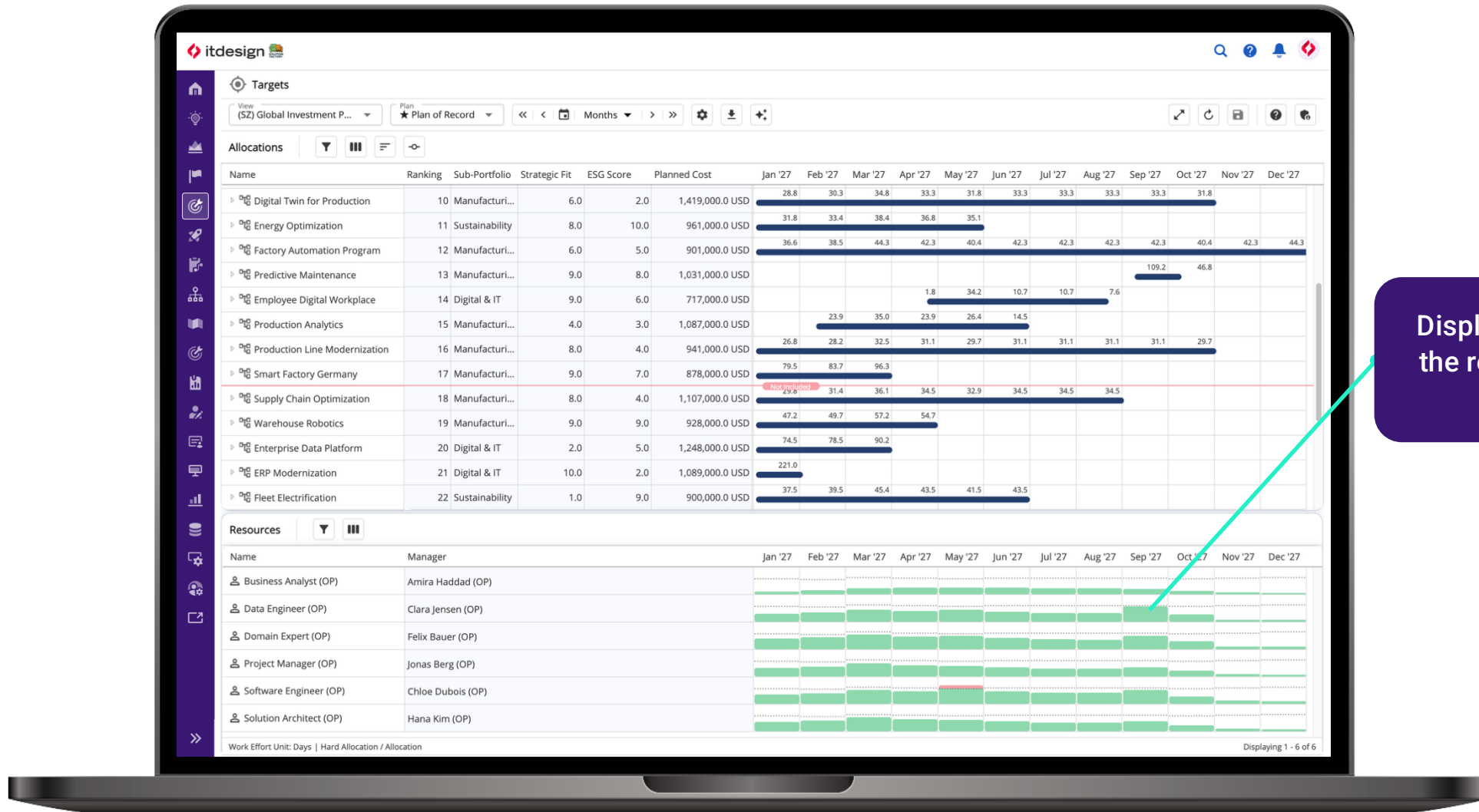
See which investments are below the line and not in Plan

Business Value



We know which investments take priority
and which ones are planned

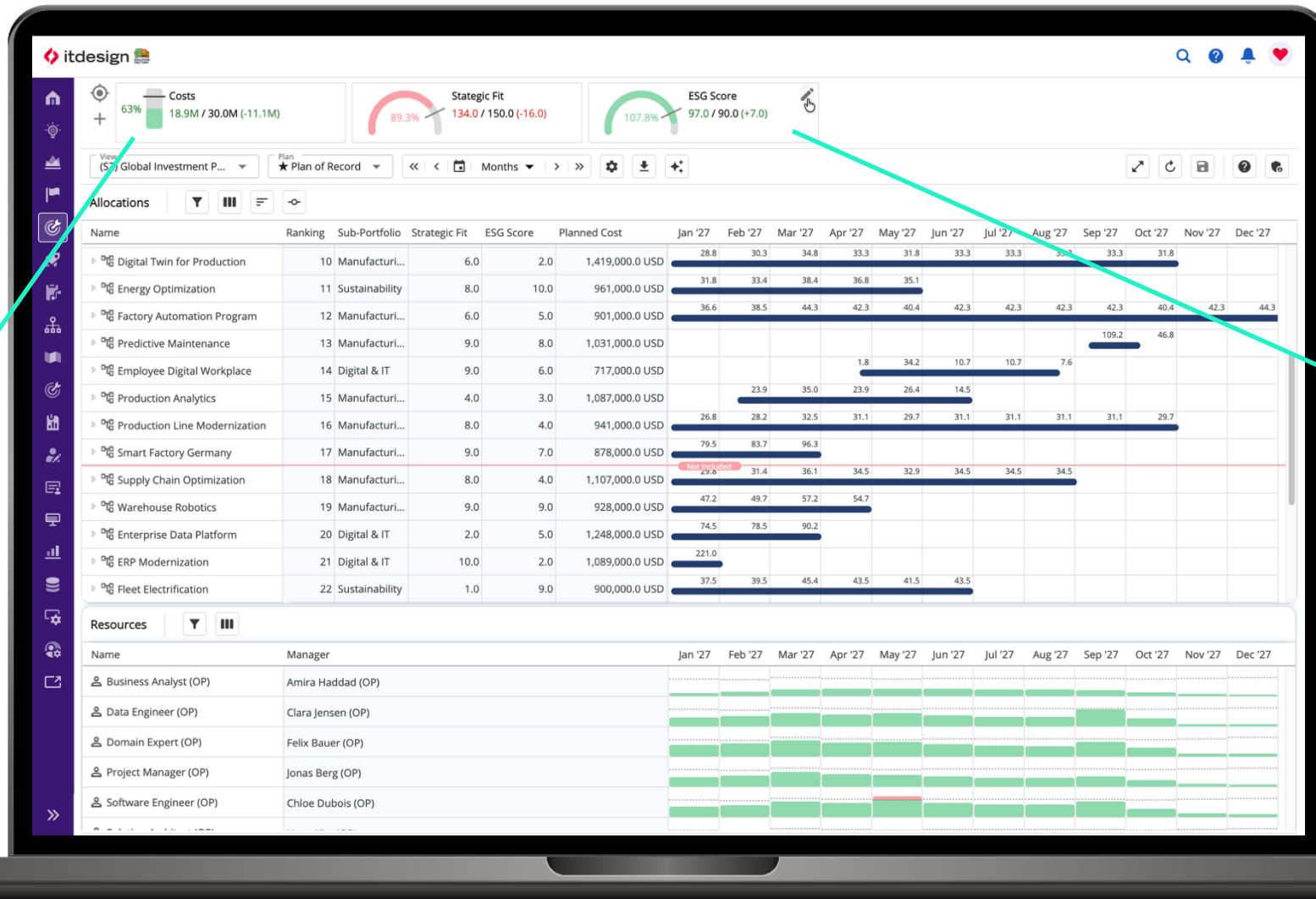
Do we have the capacity to deliver?



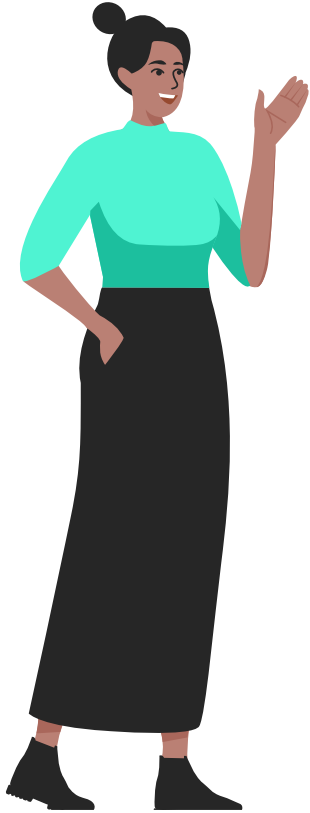
Do we have enough budget and meet our targets?

Display KPIs and targets that are relevant to the portfolio as widgets

Portfolio constraints and goals can be flexibly defined



Business Value



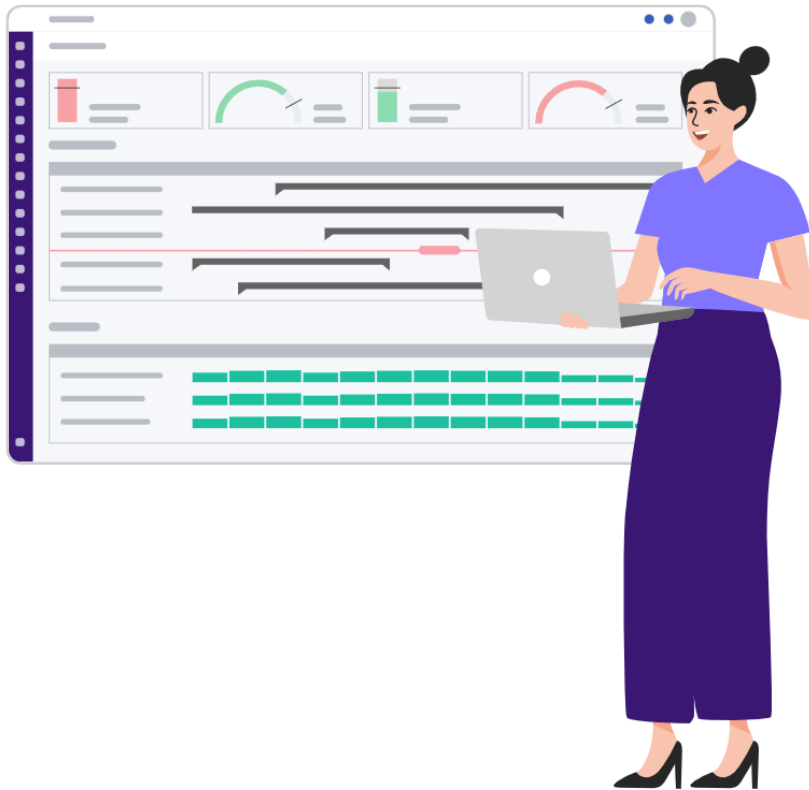
Directly see in one view your portfolio priorities, key targets, and resource utilization

3b

Optimize Portfolio Prioritization

2. Optimize Portfolio Prioritization

Evaluate trade-offs and optimize the portfolio based on capacity constraints

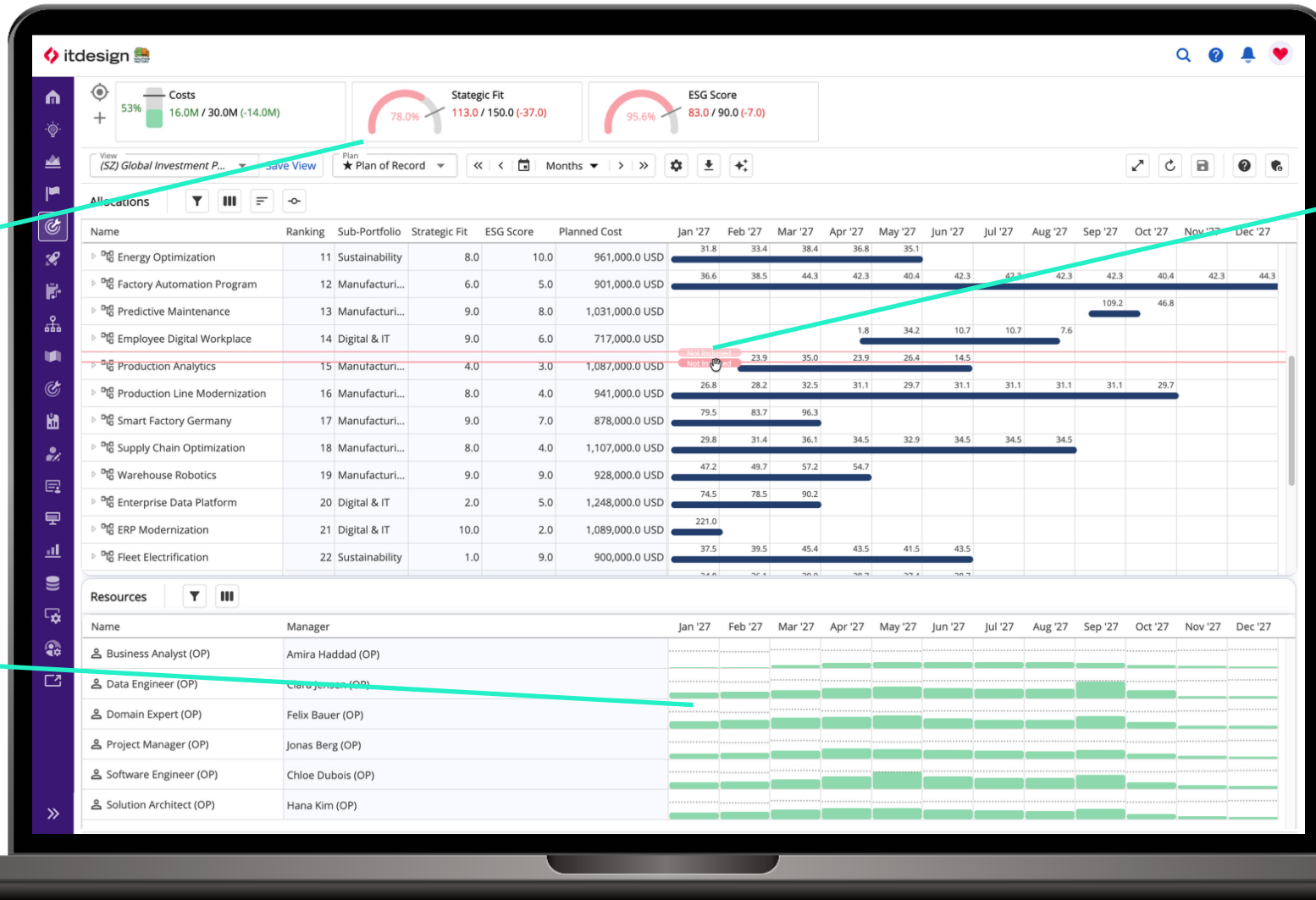


1. What can we deprioritize?
2. Can we reduce the planned scope?
3. What can we postpone?
4. What is the impact on resources and targets?

Can we adjust our current planning?

Moving the Cut-off Line affects not only the portfolio targets but also the resource utilization

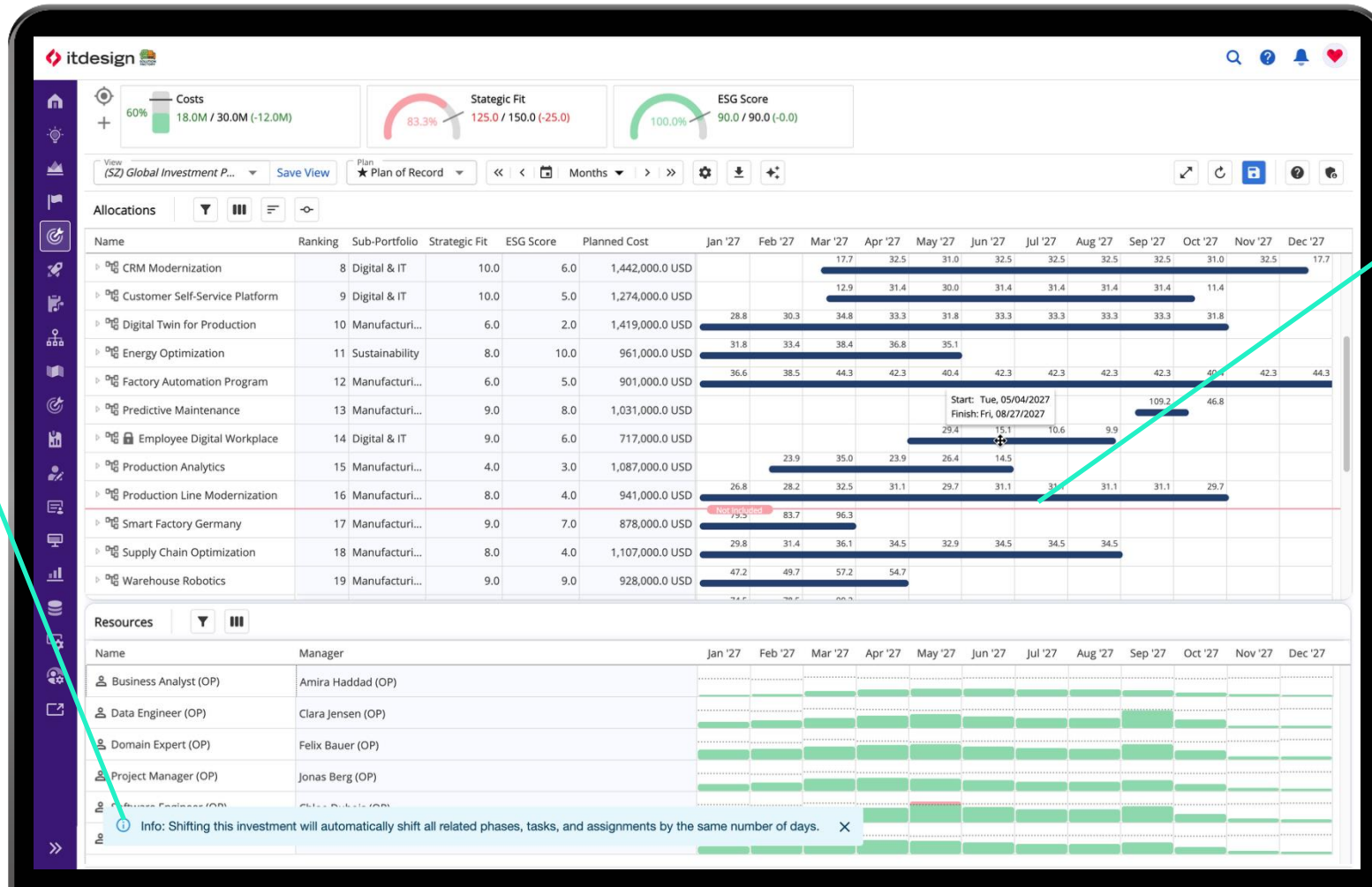
The Cut-off Line can be moved



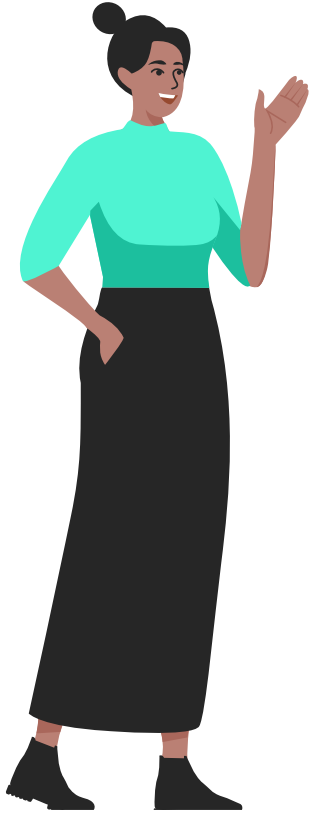
Optimize the Portfolio: What can we postpone?

All related phases, tasks, and assignments are updated automatically

Investments can be moved, extended, or shortened with ease



Business Value



Explore multiple ways to optimize your portfolio: reprioritize investments and reschedule or modify investment timelines

3c

Scenario Planning and Comparison

3. Scenario Planning and Comparison

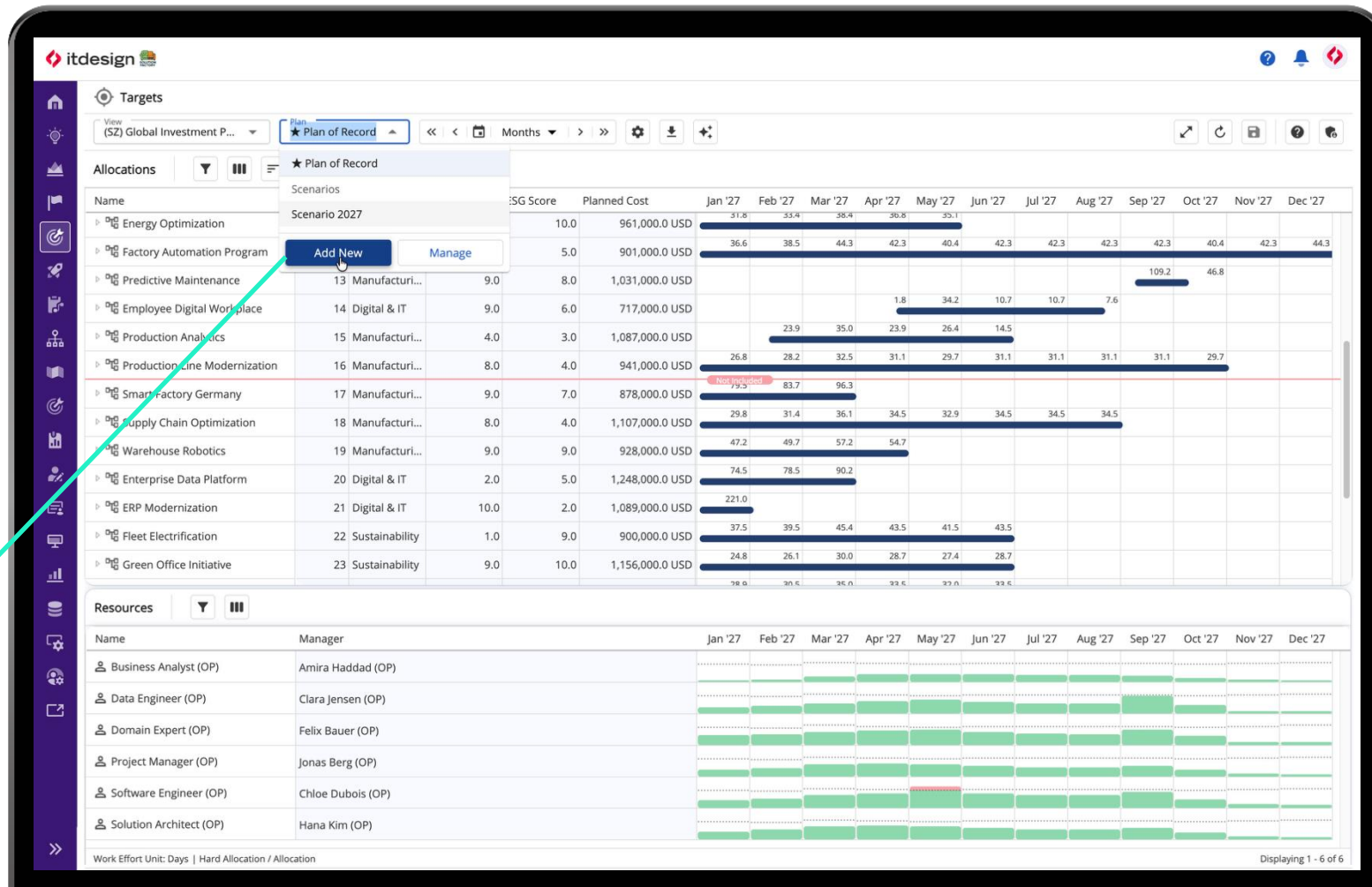
Compare planning alternatives and understand trade-offs



1. What if our priorities change?
2. How would alternative scenarios impact our targets?
3. Which scenario delivers the best outcome?
4. How can we align on the preferred plan?

How would alternative scenarios impact our targets?

Create scenarios to evaluate different portfolio strategies and potential outcomes



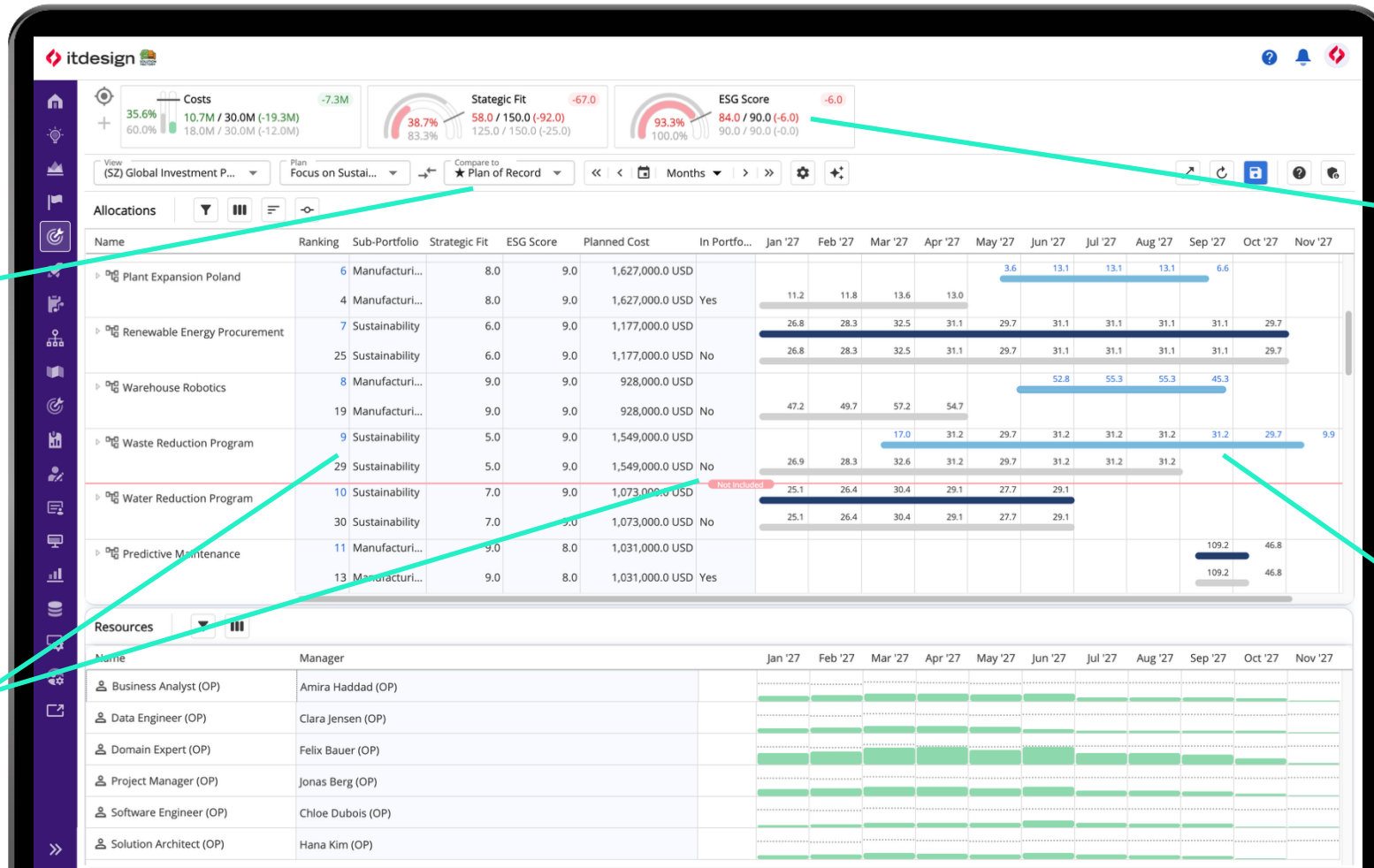
Compare your Scenario with your Actual Plan

Compare your scenario against the Plan of Record or alternative scenarios

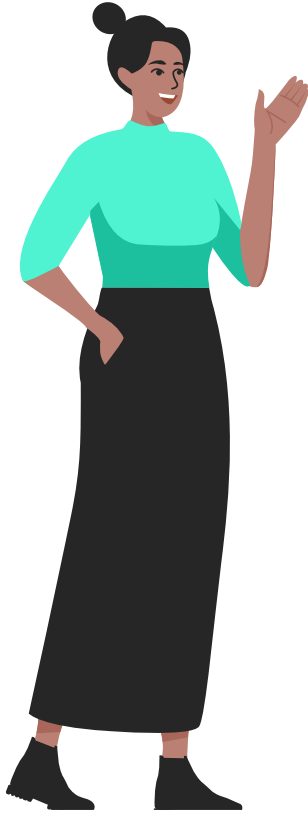
Compare different investment rankings and portfolio inclusion

Analyze how your scenario performs compared to the selected baseline

All changes made are marked blue



Business Value



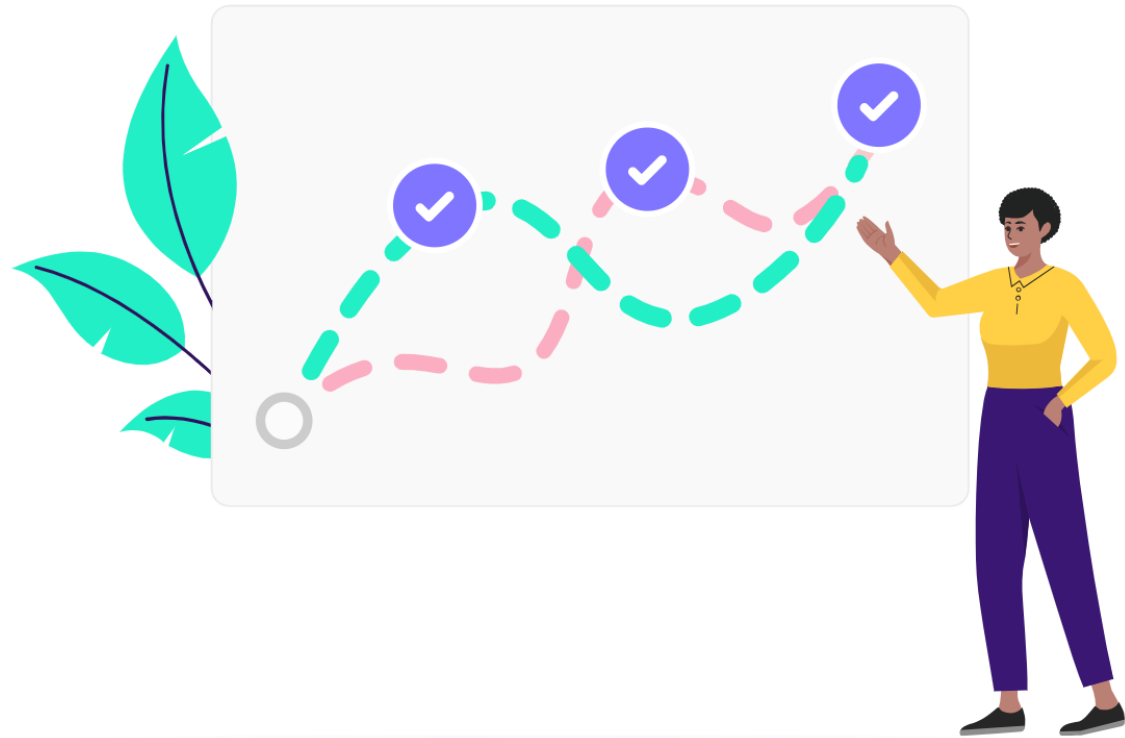
Explore alternative portfolio strategies,
instantly assess their impact, and
collaborate with stakeholders to identify
the best path forward

3d

AI-based Portfolio Optimization

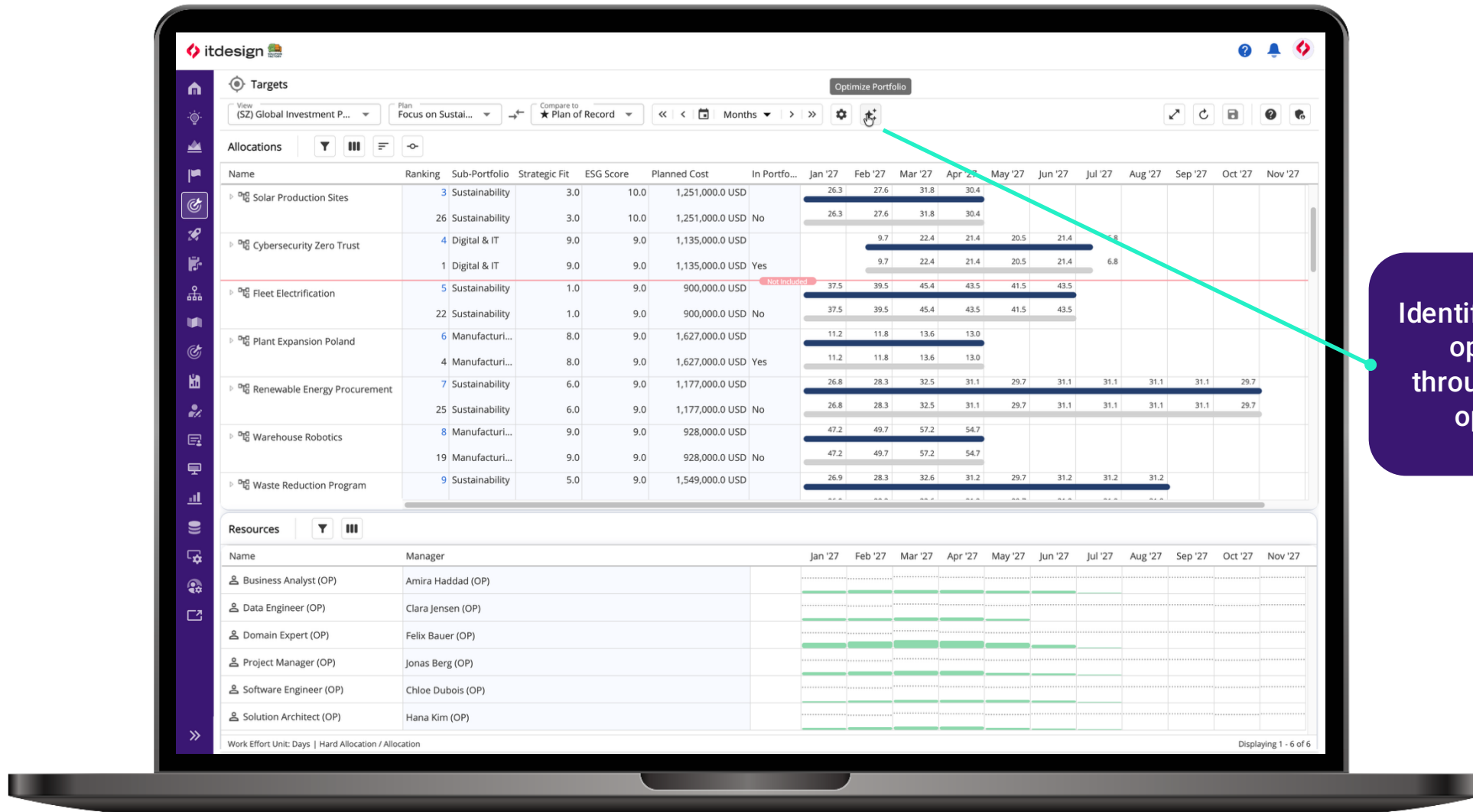
4. AI-based Portfolio Optimization

AI identifies optimization opportunities and recommends the best portfolio configuration



1. What is the best possible plan?
2. What if priorities or the strategy changes?
3. What recommendations would AI make?
4. Where would the AI move the investments to or set the Cut-off Line?

Automate Portfolio Optimization with AI



Identify new portfolio opportunities through automated optimization

Find the optimal Cut-off Line

The screenshot displays the itdesign software interface. The main window is titled 'Targets' and shows a table of project allocations. Below this, the 'Resources' section lists team members and their availability. On the right, the 'itd Portfolio Optimizer' panel is open, showing options to 'Ready to optimize', 'Source scenario', 'Planning horizon', and 'Constraints'. A callout box points to the 'Optimize Cut-off Line only' option in the 'Choose an optimization approach' section.

Targets Table:

Name	Ranking	Sub-Portfolio	Strategic Fit	ESG Score	Planned Cost	In Portf...	Jan '27	Feb '27	Mar '27	Apr '27	Ma
Energy Optimization	1	Sustainability	8.0	10.0	961,000.0 USD		31.8	33.4	38.4	36.8	
	11	Sustainability	8.0	10.0	961,000.0 USD	Yes	31.8	33.4	38.4	36.8	
Green Office Initiative	2	Sustainability	9.0	10.0	1,156,000.0 USD		24.8	26.1	30.0	28.7	
	23	Sustainability	9.0	10.0	1,156,000.0 USD	No	24.8	26.1	30.0	28.7	
Solar Production Sites	3	Sustainability	3.0	10.0	1,251,000.0 USD		26.3	27.6	31.8	30.4	
	26	Sustainability	3.0	10.0	1,251,000.0 USD	No	26.3	27.6	31.8	30.4	
Cybersecurity Zero Trust	4	Digital & IT	9.0	9.0	1,135,000.0 USD			9.7	22.4	21.4	
	1	Digital & IT	9.0	9.0	1,135,000.0 USD	Yes		9.7	22.4	21.4	
Fleet Electrification	5	Sustainability	1.0	9.0	900,000.0 USD	Not included	37.5	39.5	45.4	43.5	
	22	Sustainability	1.0	9.0	900,000.0 USD	No	37.5	39.5	45.4	43.5	
Plant Expansion Poland	6	Manufacturi...	8.0	9.0	1,627,000.0 USD		11.2	11.8	13.6	13.0	
	4	Manufacturi...	8.0	9.0	1,627,000.0 USD	Yes	11.2	11.8	13.6	13.0	
Renewable Energy Procurement	7	Sustainability	6.0	9.0	1,177,000.0 USD		26.8	28.3	32.5	31.1	
	25	Sustainability	6.0	9.0	1,177,000.0 USD	No	26.8	28.3	32.5	31.1	

Resources Table:

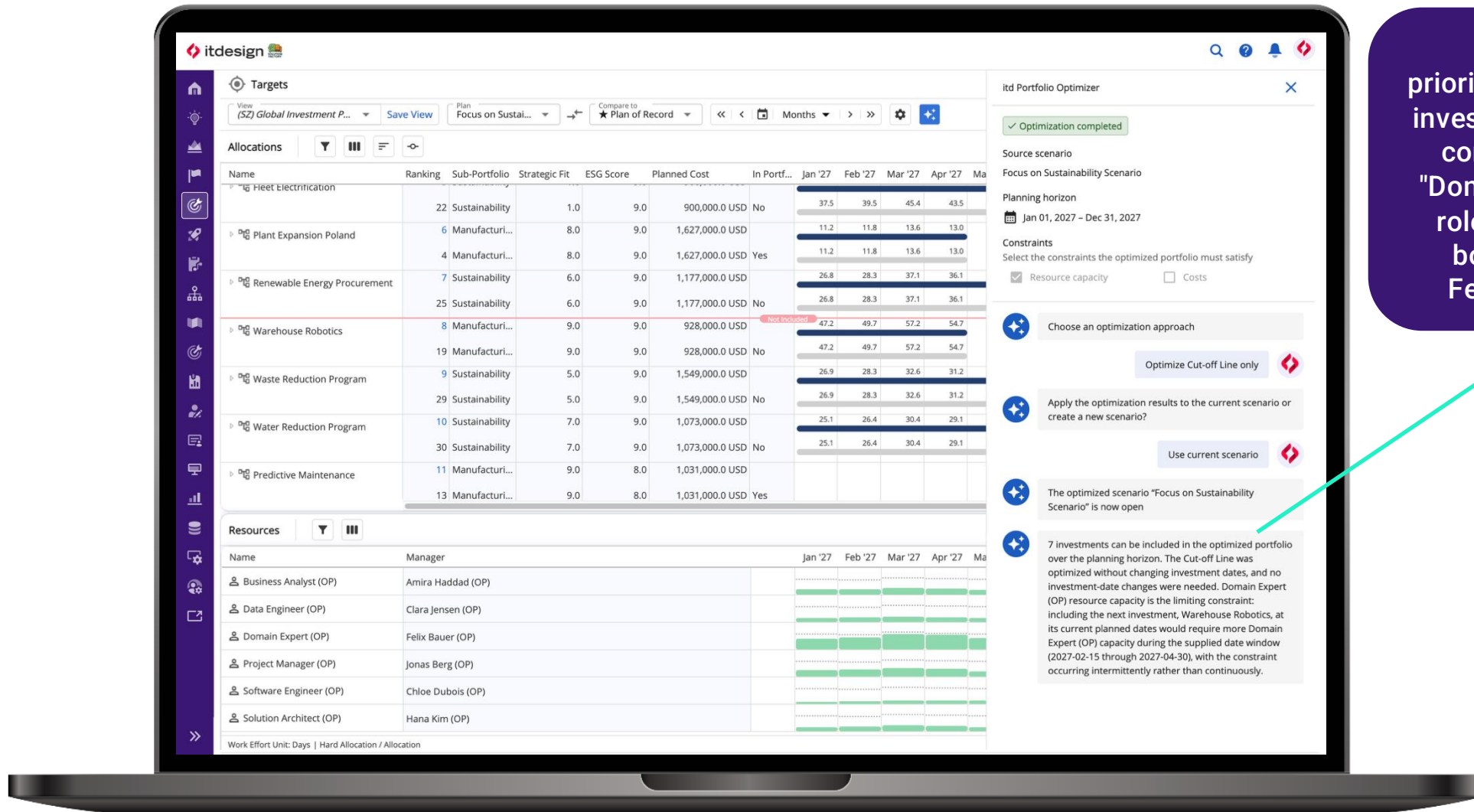
Name	Manager	Jan '27	Feb '27	Mar '27	Apr '27	Ma
Business Analyst (OP)	Amira Haddad (OP)					
Data Engineer (OP)	Clara Jensen (OP)					
Domain Expert (OP)	Felix Bauer (OP)					
Project Manager (OP)	Jonas Berg (OP)					
Software Engineer (OP)	Chloe Dubois (OP)					
Solution Architect (OP)	Hana Kim (OP)					

itd Portfolio Optimizer Panel:

- Ready to optimize
- Source scenario: Focus on Sustainability Scenario
- Planning horizon: Jan 01, 2027 - Dec 31, 2027
- Constraints: Select the constraints the optimized portfolio must satisfy
 - ☒ Resource capacity
 - ☐ Costs
- Choose an optimization approach
 - Optimize with date changes: Adjust the Cut-off Line and investment dates within the planning horizon
 - Optimize Cut-off Line only**: Adjust the Cut-off Line without changing investment dates

Automatically determine the optimal Cut-off Line

The AI recommends what's possible and what's not



The current prioritization enables 7 investments. Capacity constraints of the "Domain Expert (OP)" role create the key bottleneck from February to April

Let AI optimize your current planning

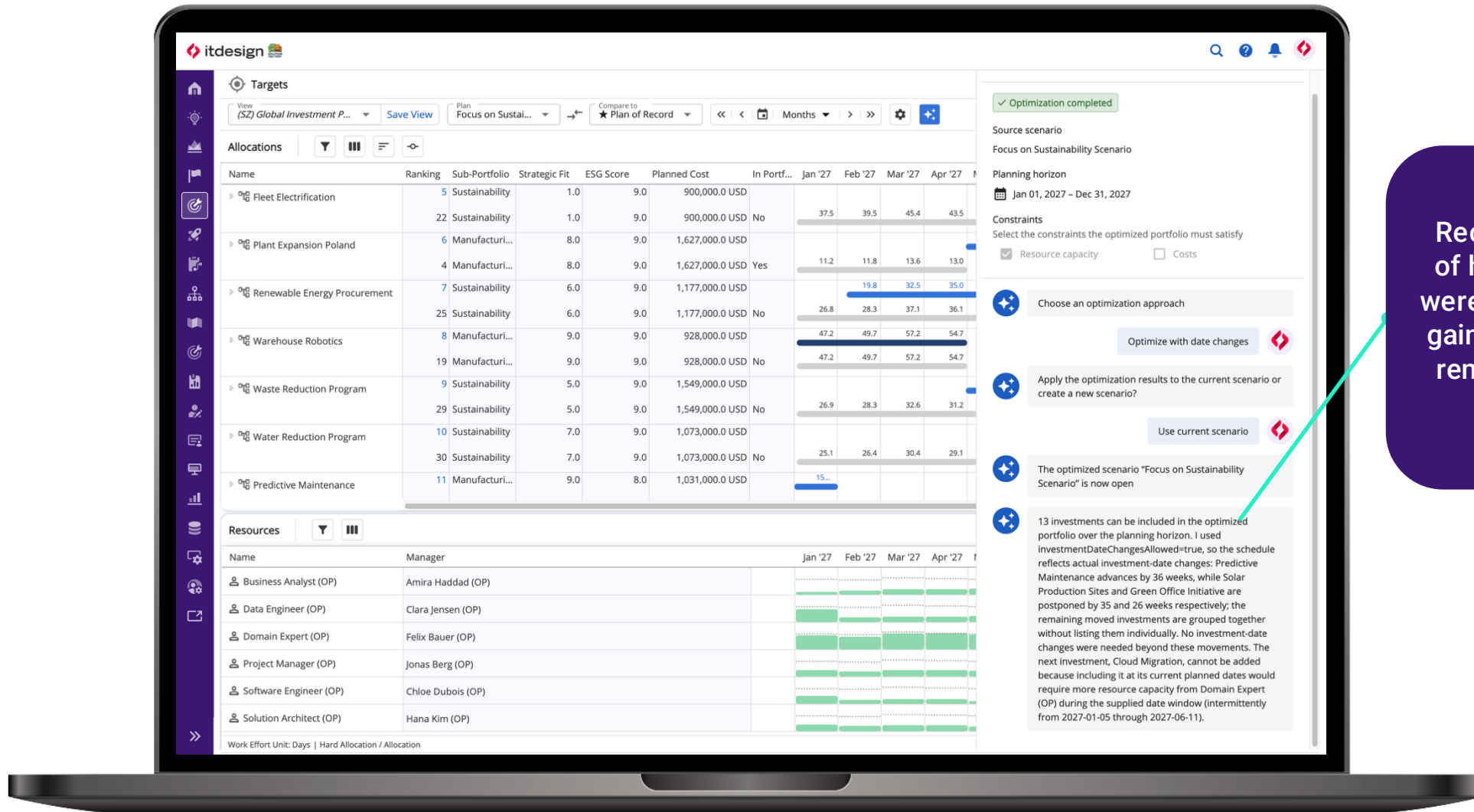
The screenshot displays the itdesign software interface, which is used for portfolio optimization. The interface is divided into several sections:

- Targets:** A section at the top right of the main content area, showing a view selector (Global Investment P...), a save view button, and a plan selector (Focus on Sustai...). It also includes a compare to dropdown (Plan of Record) and navigation controls for months.
- Allocations:** A table listing various projects and their associated metrics. The table has columns for Name, Ranking, Sub-Portfolio, Strategic Fit, ESG Score, Planned Cost, In Portf..., and a series of monthly values (Jan '27, Feb '27, Mar '27, Apr '27, Ma).
- Resources:** A table at the bottom left listing team members and their roles, with columns for Name, Manager, and monthly values.
- itd Portfolio Optimizer:** A panel on the right side of the interface, containing options to optimize, source scenarios, planning horizons, and constraints. It also includes a section for choosing an optimization approach.

A callout box on the right side of the image, pointing to the 'Optimize with date changes' option in the optimizer panel, contains the following text:

If investment changes are acceptable, create an optimized scenario that resolves bottlenecks while maximizing portfolio value

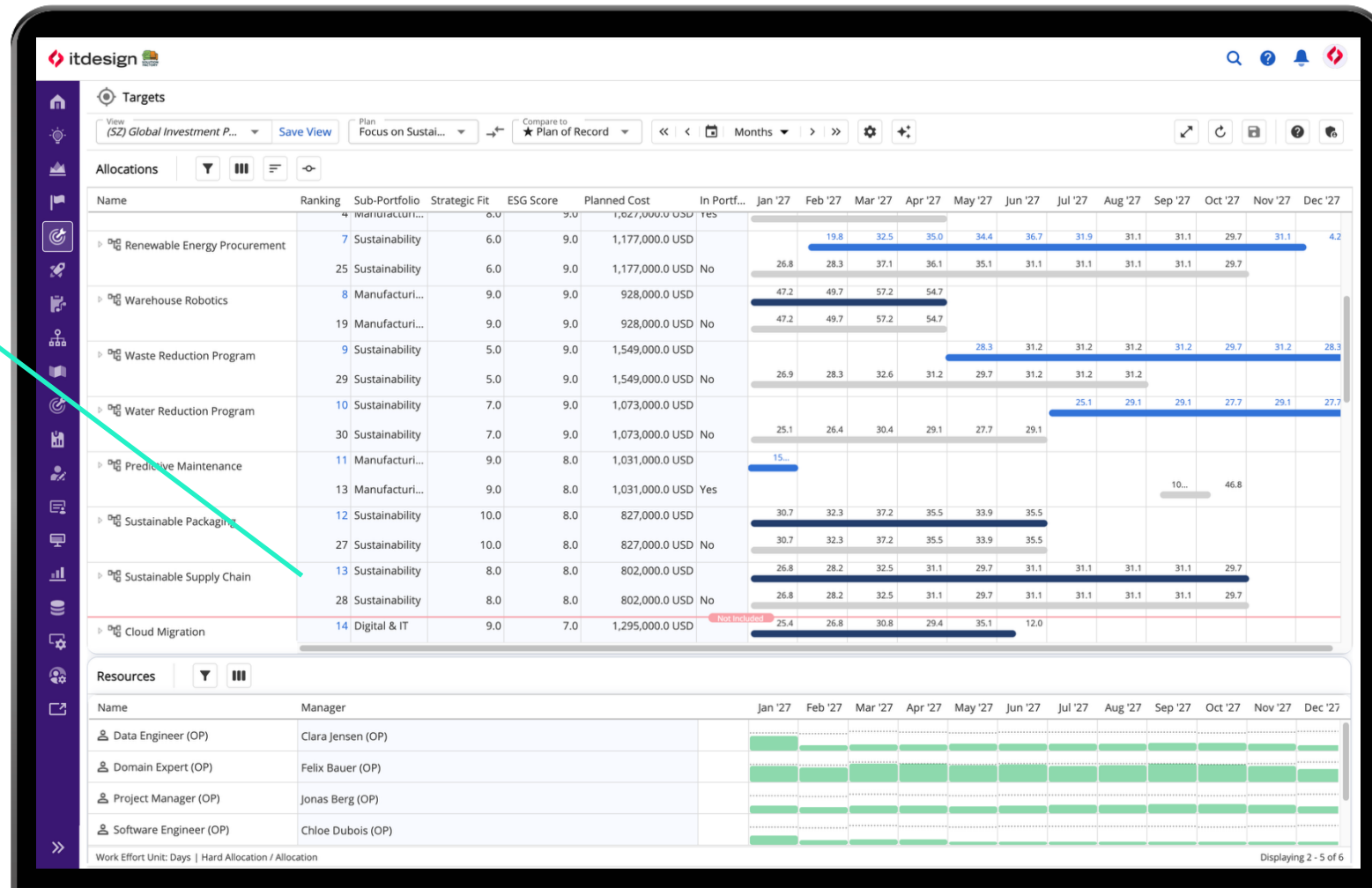
Vaia shows the summary of the Changes



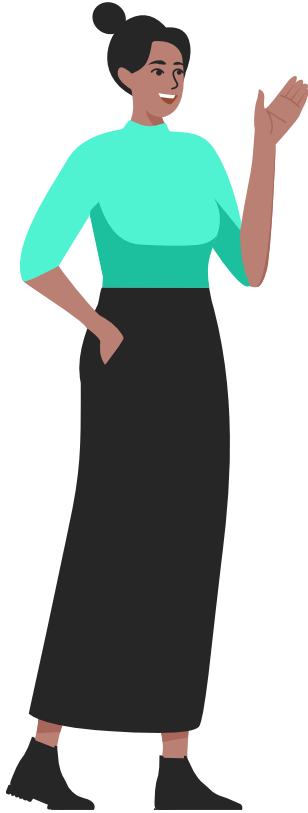
Receive a summary of how investments were rescheduled and gain insights into the remaining resource bottlenecks

Explore further planning opportunities

See that
rescheduling
investments
creates
capacity for 6
additional
investments in
the portfolio



Business Value



AI identifies optimization opportunities, evaluates trade-offs, and recommends the best portfolio configuration for smarter portfolio decisions

4



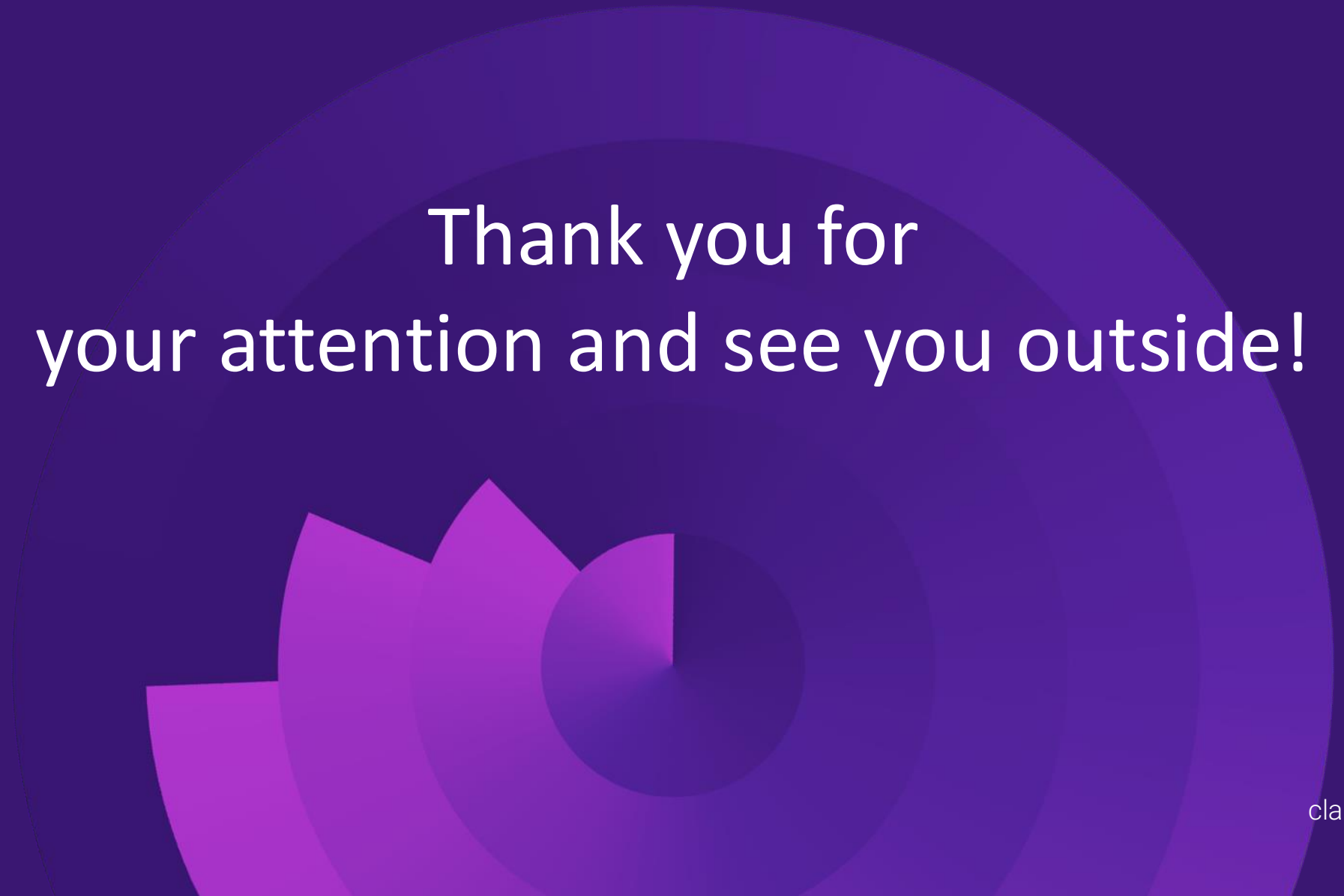
Key Takeaways

What did we Learn?

The itd Portfolio Optimizer helps organizations..



- ✓ **Gain full transparency** across investments, priorities, KPIs, and resource capacity
- ✓ **Make prioritization decisions visible** rather than relying on assumptions
- ✓ **Identify resource conflicts early** across portfolios and investments
- ✓ **Evaluate alternative scenarios** before making strategic decisions
- ✓ **Optimize portfolio outcomes** through manual and AI-assisted planning



Thank you for
your attention and see you outside!

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