



Better Decisions by Design:

Turning Clarity into a Strategic Portfolio Command Center

Your Guides:
Patrick Schuler and Moyan Oess

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ValueOps
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About itdesign

Consulting & software from one single source



MEISTERPLAN

Lean PPM

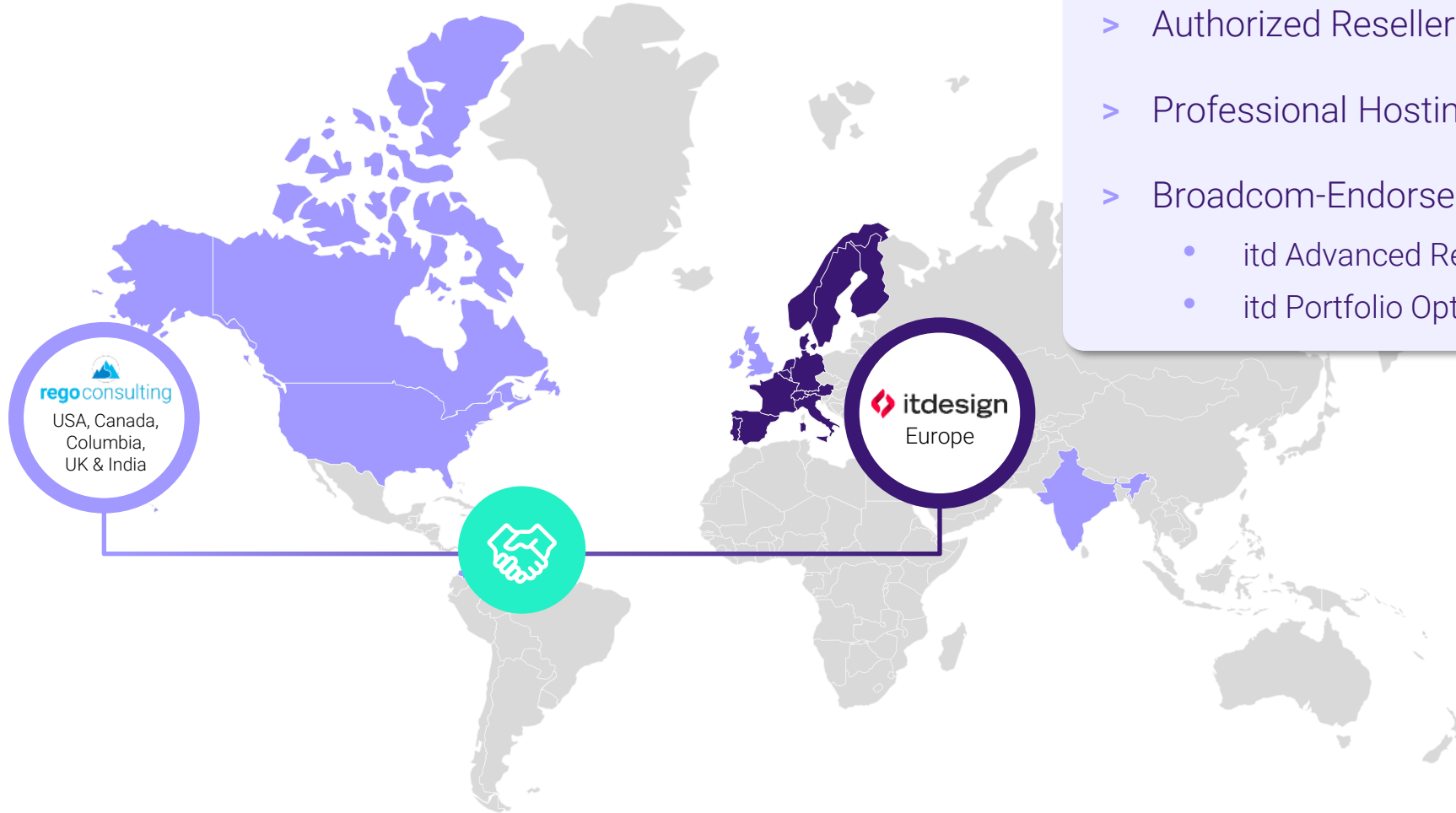
clarity

Project- & Portfolio
Management

CAS genesisWorld

Customer Relationship
Management

About itdesign



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



Who are we?



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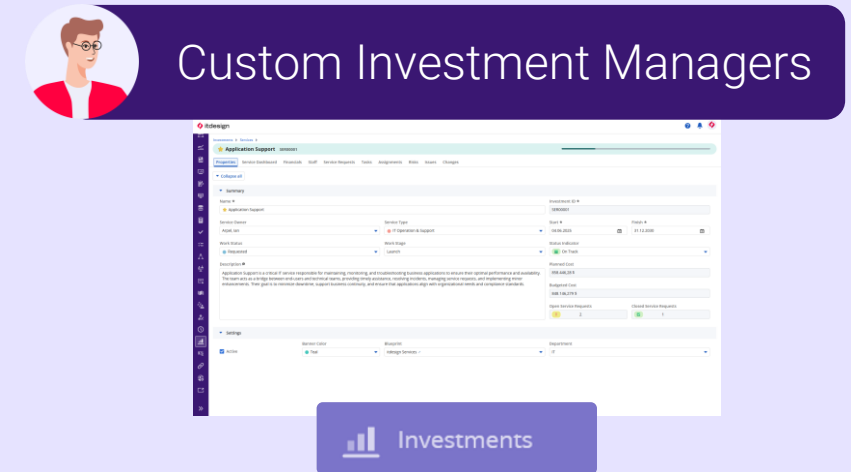
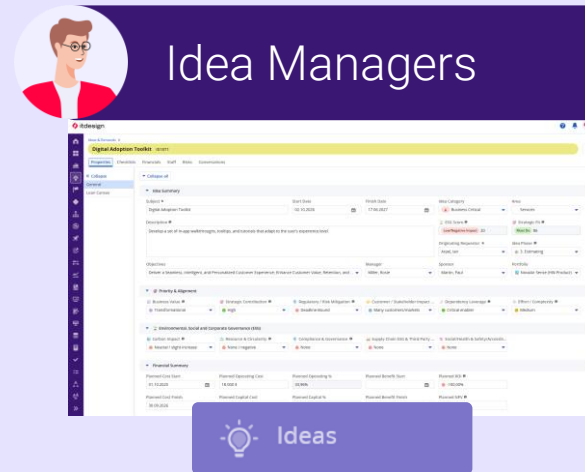
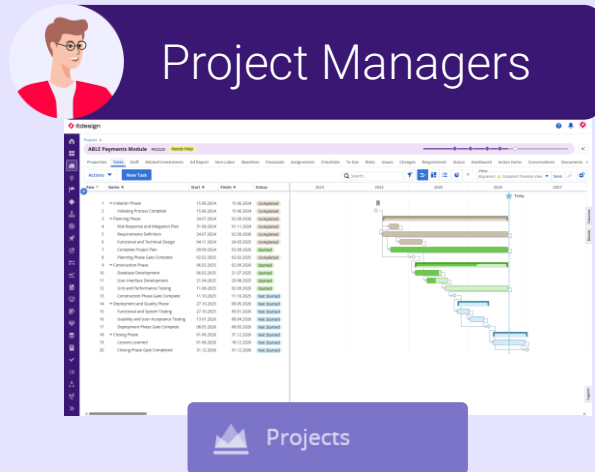
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Companies typically use Clarity to support delivery

Every delivery manager gets a cockpit tailored to their specific needs

Delivery
Level



But what about Portfolio Managers?

They are often forgotten and have to find their own way of working with the Clarity modules

Portfolio
Level



Portfolio Manager

 Hierarchies

 OKR

 itd Portfolio Optimizer

 Roadmaps

 Agreements

 Reporting

 Staffing

 Plans

 Pages

Delivery
Level



Project Managers

 Projects



Idea Managers

 Ideas



Custom Investment Managers

 Investments

But what about Portfolio Managers?

They are often forgotten and have to find their own way of working with the Clarity modules

Portfolio
Level



Portfolio Manager

Why don't we provide
a tailored cockpit
also for portfolio managers?



Delivery
Level



Project Managers



Projects



Idea Managers



Ideas



Custom Investment Managers

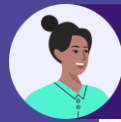


Investments

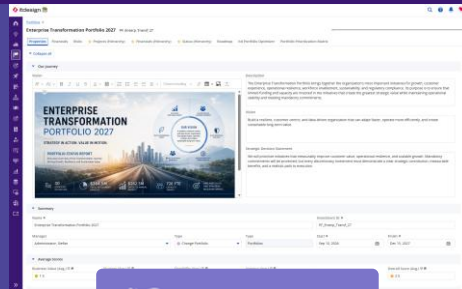
Give your portfolios a home

Recommendation #1

Portfolio
Level



Portfolio Manager



Portfolios

Delivery
Level



Project Managers



Projects



Idea Managers



Ideas



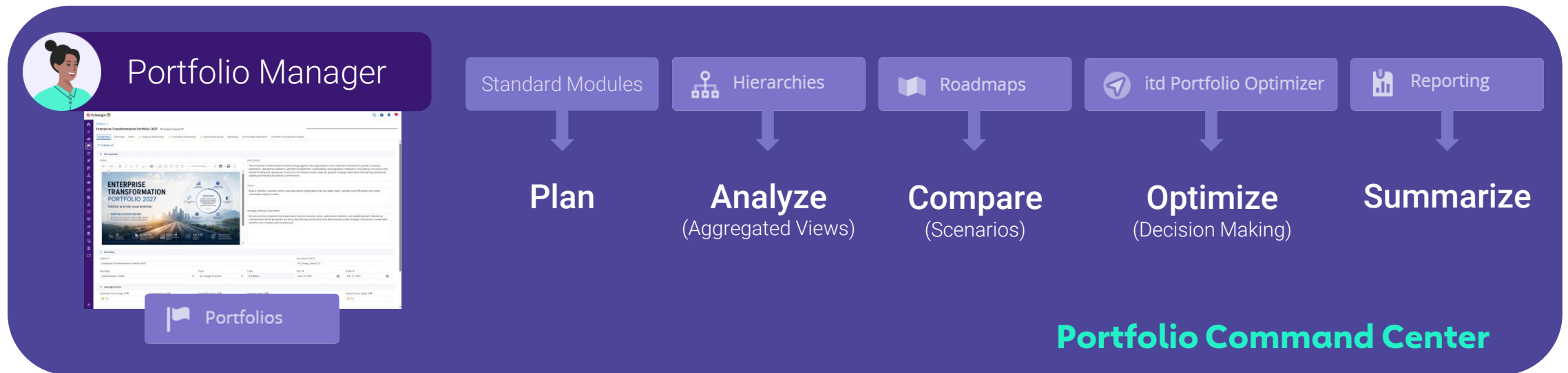
Custom Investment Managers



Investments

Integrate all Clarity features into one blueprint

Recommendation #2





Live Demo

Give your portfolios a home

The screenshot displays the 'Enterprise Transformation Portfolio 2027' interface within the itdesign application. The top navigation bar includes the itdesign logo, search, help, and notification icons. The main header shows the portfolio name 'Enterprise Transformation Portfolio 2027' and its ID 'PF_Enterp_Transf_27'. Below this, a tabbed interface allows switching between 'Properties', 'Financials', 'Risks', 'Projects (Hierarchy)', 'Financials (Hierarchy)', 'Status (Hierarchy)', 'Roadmap', 'itd Portfolio Optimizer', and 'Portfolio Prioritization Matrix'. The 'Properties' tab is active, showing a 'Collapse all' button and a section titled 'Our Journey'. The 'Vision' section features a rich text editor with a toolbar and a large image placeholder for the 'Enterprise Transformation Portfolio 2027' vision. The image shows a cityscape with a road leading towards the horizon, overlaid with a circular diagram titled 'OUR VISION' containing six strategic pillars: 'ACCELERATE PROFITABLE GROWTH', 'DELIVER SUPERIOR CUSTOMER EXPERIENCE', 'BUILD OPERATIONAL RESILIENCE', 'INCREASE PRODUCTIVITY THROUGH DATA & AI', 'ENABLE FUTURE-READY WORKFORCE', and 'REDUCE ENVIRONMENTAL IMPACT'. Below the image, a 'PORTFOLIO STATUS REPORT' provides an executive overview. The 'Description' section contains a text box with a paragraph about the portfolio's purpose. The 'Strategic Decision Statement' section contains a text box with a paragraph about prioritizing initiatives. The 'Summary' section at the bottom includes fields for 'Name' (Enterprise Transformation Portfolio 2027), 'Investment ID' (PF_Enterp_Transf_27), 'Manager' (Administrator, Stefan), 'Type' (Change Portfolio), 'Start' (Sep 10, 2026), and 'Finish' (Dec 15, 2027).

itdesign

Portfolios

Enterprise Transformation Portfolio 2027 PF_Enterp_Transf_27

Properties Financials Risks Projects (Hierarchy) Financials (Hierarchy) Status (Hierarchy) Roadmap itd Portfolio Optimizer Portfolio Prioritization Matrix

▼ Collapse all

▼ Our Journey

Vision

Description

Vision

Strategic Decision Statement

Summary

Name ★ Investment ID ★

Enterprise Transformation Portfolio 2027 PF_Enterp_Transf_27

Manager Type Type Start ★ Finish ★

Administrator, Stefan Change Portfolio Portfolios Sep 10, 2026 Dec 15, 2027

Integrate all Clarity features into one blueprint

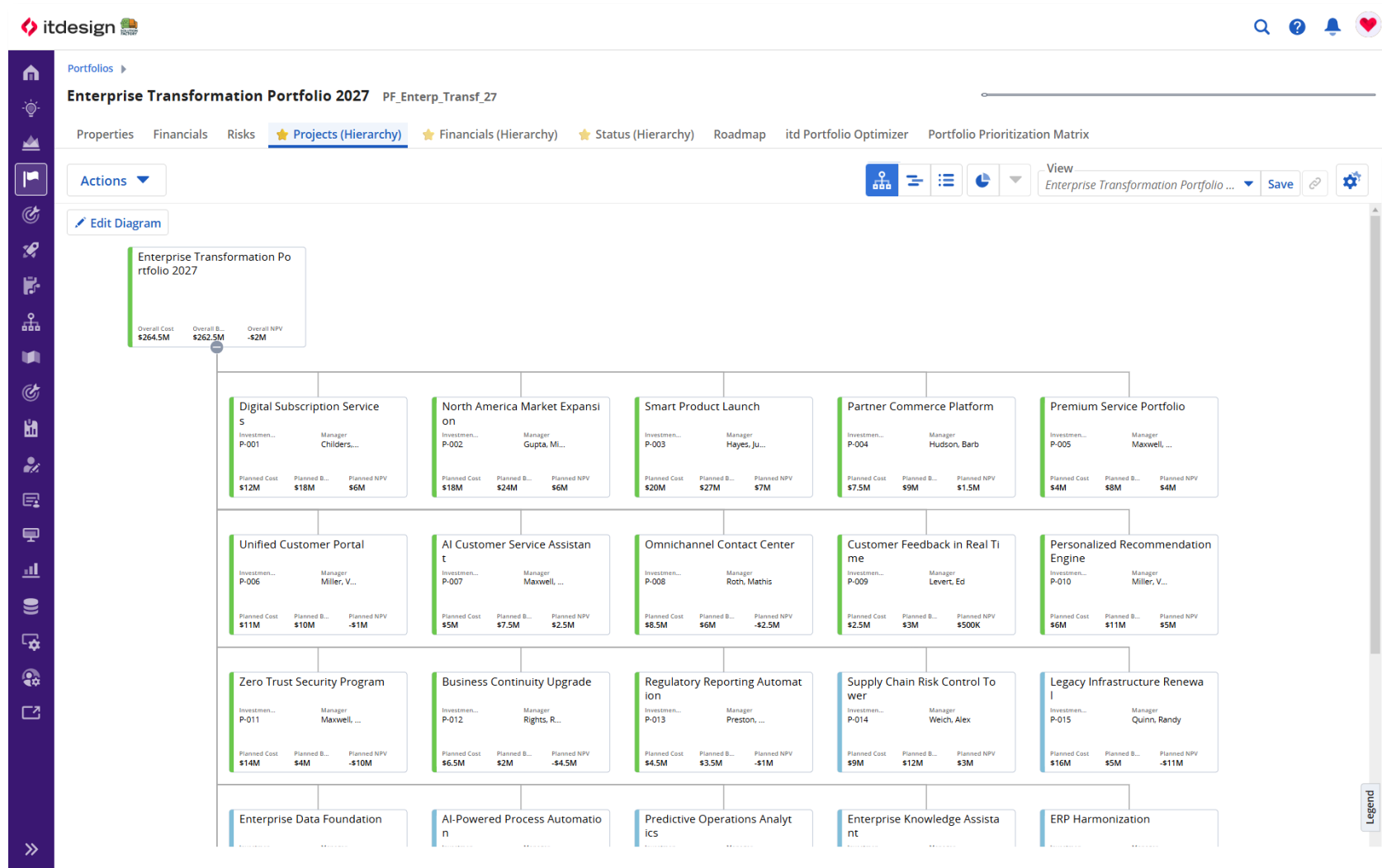
Standard Modules (e.g. Financials, Risks, Tasks, ...)

The screenshot displays the 'Enterprise Transformation Portfolio 2027' interface. The 'Risks' module is active, showing a table of risks. The table has columns for Name, Description, Assigned To, Category Type, Priority, Probability, Impact, and Calculated Risk. The 'Probability' column is highlighted. The interface includes a sidebar with navigation icons, a top navigation bar with tabs for Properties, Financials, Risks, Projects (Hierarchy), Financials (Hierarchy), Status (Hierarchy), Roadmap, itd Portfolio Optimizer, and Portfolio Prioritization Matrix. A search bar and view controls are also present.

	Name *	Description	Assigned To *	Category Type	Priority *	Probability	Impact	Calculated Risk
☐	RISK_01	Critical Resource Bottlenecks	Demand for Enterprise Architects and AI Engineers exceeds av...	Ava Carter (OP)	Resource Availability	High	High	High
☐	RISK_02	Budget Reduction Scenario	Economic uncertainty may result in mid-year portfolio budget ...	Fleming, Nicole	Funding	High	Medium	High
☐	RISK_03	Strategic Priority Changes	Market conditions may require shifts in strategic objectives, l...	Gaurand, Alicia	Objectives	Medium	Medium	High
☐	RISK_04	AI Adoption Resistance	Employees may resist adoption of AI-enabled processes, limiti...	Evans, Nick	Organizational Culture	Medium	Medium	Medium
☐	RISK_05	Data Quality Issues	Inconsistent and incomplete data may reduce decision quality...	Granger, Paula	Implementation	High	High	Low
☐	RISK_06	Cross-Project Dependency Delays	Delays in foundational projects could impact multiple depend...	Jill, Jack	Interdependencies	Medium	Low	Low
☐	RISK_07	Cybersecurity Compliance Gap	Security requirements may not be implemented consistently a...	Krishna, Sai	Implementation	Low	Medium	Low
☐	RISK_08	Executive Sponsorship Changes	Leadership turnover could reduce support for key strategic pr...	Fleming, Nicole	Organizational Culture	High	Low	High
☐	RISK_09	Benefits Realization Risk	Expected business outcomes may not materialize due to poor...	Gaurand, Alicia	Objectives	Low	Medium	High
☐	RISK_10	Vendor Delivery Constraints	Key technology partners may experience delivery delays affec...	Evans, Nick	Interdependencies	High	Medium	Medium

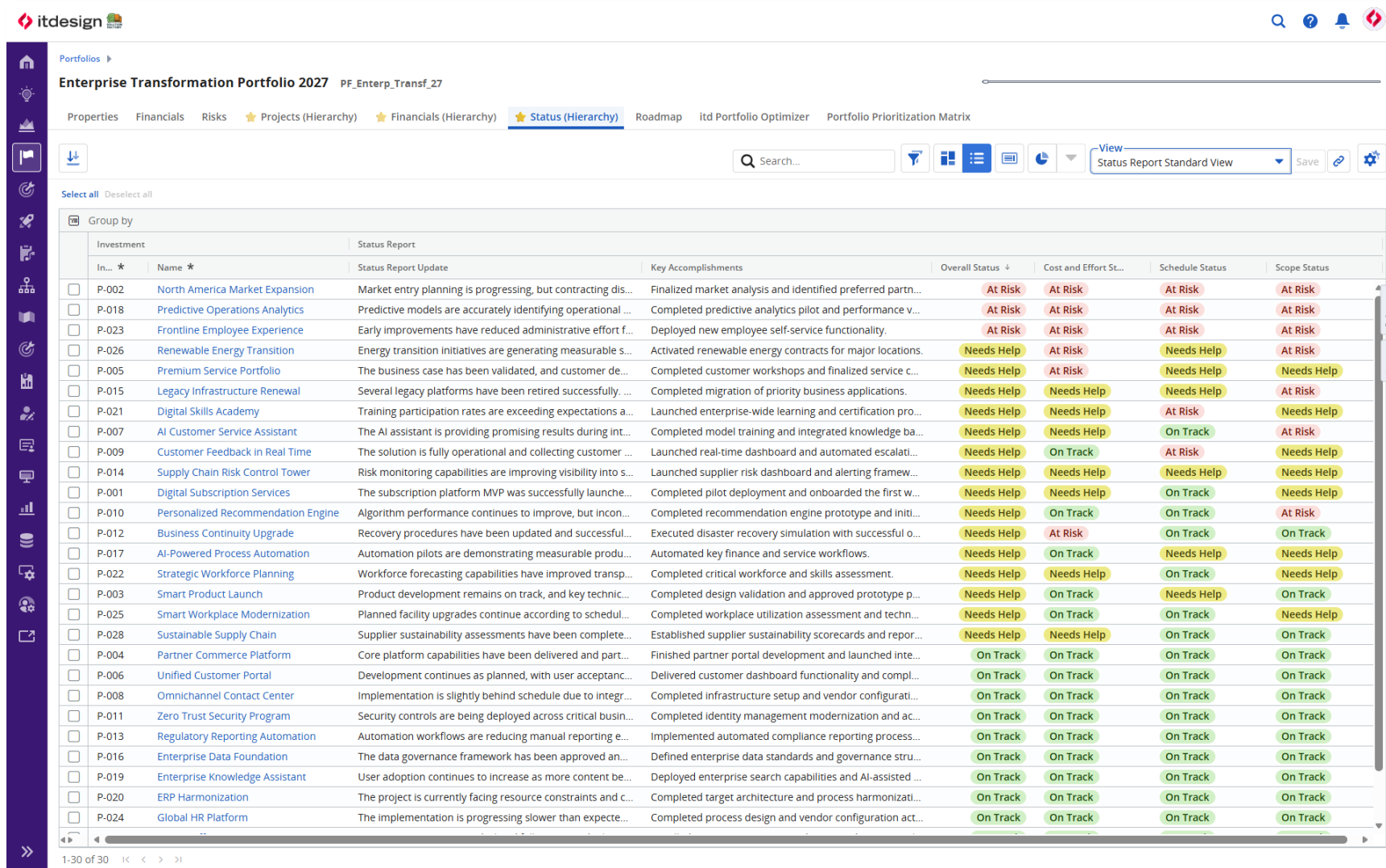
Integrate all Clarity features into one blueprint

Hierarchy



Integrate all Clarity features into one blueprint

Hierarchy

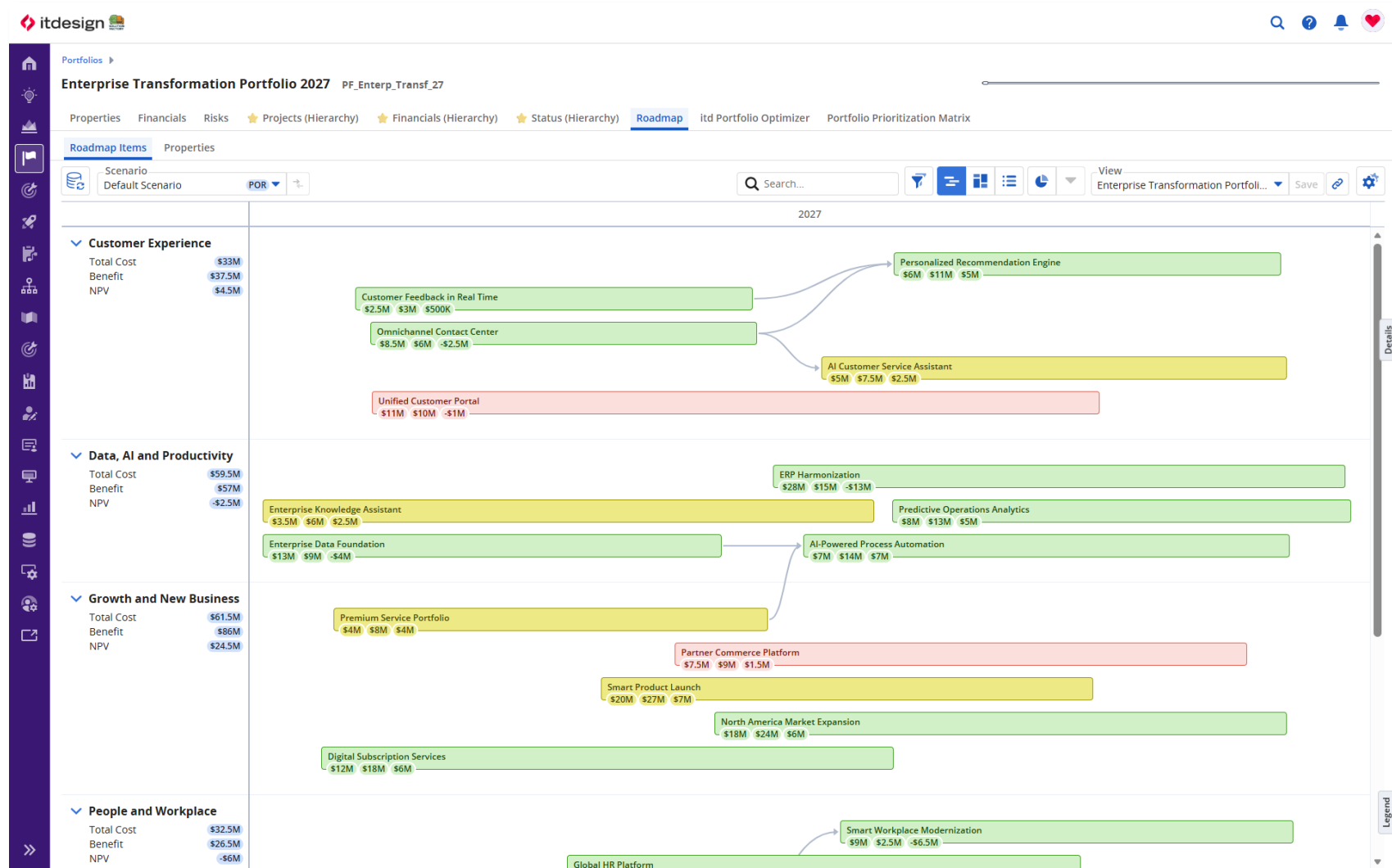


The screenshot displays the 'Enterprise Transformation Portfolio 2027' interface in the 'Status (Hierarchy)' view. The table lists 27 projects, each with a selection checkbox, an investment ID, a project name, a status report, key accomplishments, and four status columns: Overall Status, Cost and Effort, Schedule Status, and Scope Status. The projects are grouped by investment, with P-002 through P-024 listed. The status columns use color-coded labels: 'At Risk' (red), 'Needs Help' (yellow), and 'On Track' (green).

Group by		Investment	Name	Status Report	Key Accomplishments	Overall Status	Cost and Effort St...	Schedule Status	Scope Status
In...	*		*	Status Report Update					
☐	P-002		North America Market Expansion	Market entry planning is progressing, but contracting dis...	Finalized market analysis and identified preferred partn...	At Risk	At Risk	At Risk	At Risk
☐	P-018		Predictive Operations Analytics	Predictive models are accurately identifying operational ...	Completed predictive analytics pilot and performance v...	At Risk	At Risk	At Risk	At Risk
☐	P-023		Frontline Employee Experience	Early improvements have reduced administrative effort f...	Deployed new employee self-service functionality.	At Risk	At Risk	At Risk	At Risk
☐	P-026		Renewable Energy Transition	Energy transition initiatives are generating measurable s...	Activated renewable energy contracts for major locations.	Needs Help	At Risk	Needs Help	At Risk
☐	P-005		Premium Service Portfolio	The business case has been validated, and customer de...	Completed customer workshops and finalized service c...	Needs Help	At Risk	Needs Help	Needs Help
☐	P-015		Legacy Infrastructure Renewal	Several legacy platforms have been retired successfully. ...	Completed migration of priority business applications.	Needs Help	Needs Help	Needs Help	At Risk
☐	P-021		Digital Skills Academy	Training participation rates are exceeding expectations a...	Launched enterprise-wide learning and certification pro...	Needs Help	Needs Help	At Risk	Needs Help
☐	P-007		AI Customer Service Assistant	The AI assistant is providing promising results during int...	Completed model training and integrated knowledge ba...	Needs Help	Needs Help	On Track	At Risk
☐	P-009		Customer Feedback in Real Time	The solution is fully operational and collecting customer ...	Launched real-time dashboard and automated escalati...	Needs Help	On Track	At Risk	Needs Help
☐	P-014		Supply Chain Risk Control Tower	Risk monitoring capabilities are improving visibility into s...	Launched supplier risk dashboard and alerting framew...	Needs Help	Needs Help	Needs Help	Needs Help
☐	P-001		Digital Subscription Services	The subscription platform MVP was successfully launch...	Completed pilot deployment and onboarded the first w...	Needs Help	Needs Help	On Track	Needs Help
☐	P-010		Personalized Recommendation Engine	Algorithm performance continues to improve, but incon...	Completed recommendation engine prototype and initi...	Needs Help	On Track	On Track	At Risk
☐	P-012		Business Continuity Upgrade	Recovery procedures have been updated and successful...	Executed disaster recovery simulation with successful o...	Needs Help	At Risk	On Track	On Track
☐	P-017		AI-Powered Process Automation	Automation pilots are demonstrating measurable produ...	Automated key finance and service workflows.	Needs Help	On Track	Needs Help	Needs Help
☐	P-022		Strategic Workforce Planning	Workforce forecasting capabilities have improved transp...	Completed critical workforce and skills assessment.	Needs Help	Needs Help	On Track	Needs Help
☐	P-003		Smart Product Launch	Product development remains on track, and key technic...	Completed design validation and approved prototype p...	Needs Help	On Track	Needs Help	On Track
☐	P-025		Smart Workplace Modernization	Planned facility upgrades continue according to schedul...	Completed workplace utilization assessment and techn...	Needs Help	On Track	On Track	Needs Help
☐	P-028		Sustainable Supply Chain	Supplier sustainability assessments have been complete...	Established supplier sustainability scorecards and repor...	Needs Help	Needs Help	On Track	On Track
☐	P-004		Partner Commerce Platform	Core platform capabilities have been delivered and part...	Finished partner portal development and launched inte...	On Track	On Track	On Track	On Track
☐	P-006		Unified Customer Portal	Development continues as planned, with user acceptanc...	Delivered customer dashboard functionality and compl...	On Track	On Track	On Track	On Track
☐	P-008		Omni-channel Contact Center	Implementation is slightly behind schedule due to integr...	Completed infrastructure setup and vendor configurati...	On Track	On Track	On Track	On Track
☐	P-011		Zero Trust Security Program	Security controls are being deployed across critical busi...	Completed identity management modernization and ac...	On Track	On Track	On Track	On Track
☐	P-013		Regulatory Reporting Automation	Automation workflows are reducing manual reporting e...	Implemented automated compliance reporting process...	On Track	On Track	On Track	On Track
☐	P-016		Enterprise Data Foundation	The data governance framework has been approved an...	Defined enterprise data standards and governance stru...	On Track	On Track	On Track	On Track
☐	P-019		Enterprise Knowledge Assistant	User adoption continues to increase as more content be...	Deployed enterprise search capabilities and AI-assisted ...	On Track	On Track	On Track	On Track
☐	P-020		ERP Harmonization	The project is currently facing resource constraints and c...	Completed target architecture and process harmonizati...	On Track	On Track	On Track	On Track
☐	P-024		Global HR Platform	The implementation is progressing slower than expecte...	Completed process design and vendor configuration act...	On Track	On Track	On Track	On Track

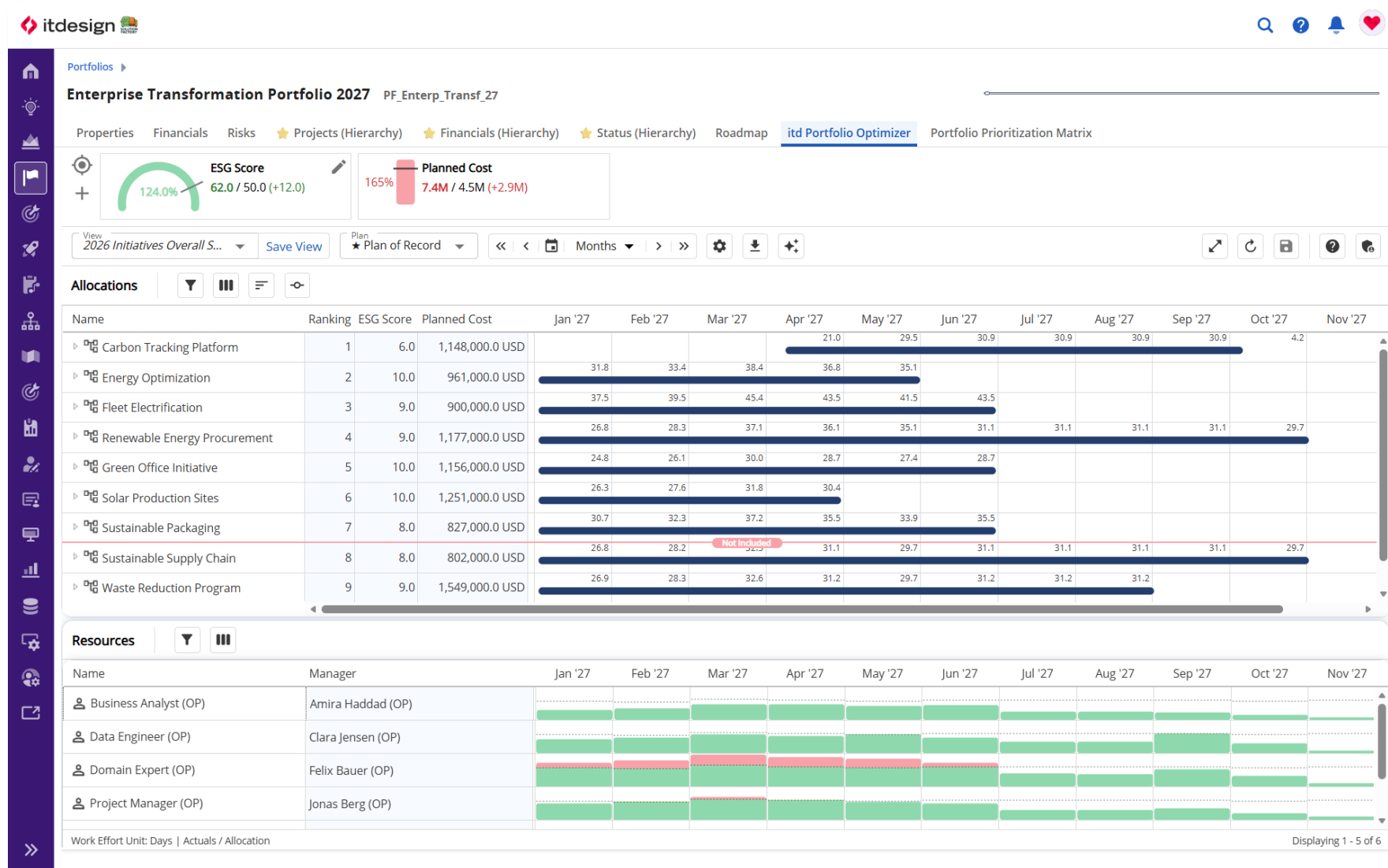
Integrate all Clarity features into one blueprint

Roadmap



Integrate all Clarity features into one blueprint

itd Portfolio Optimizer



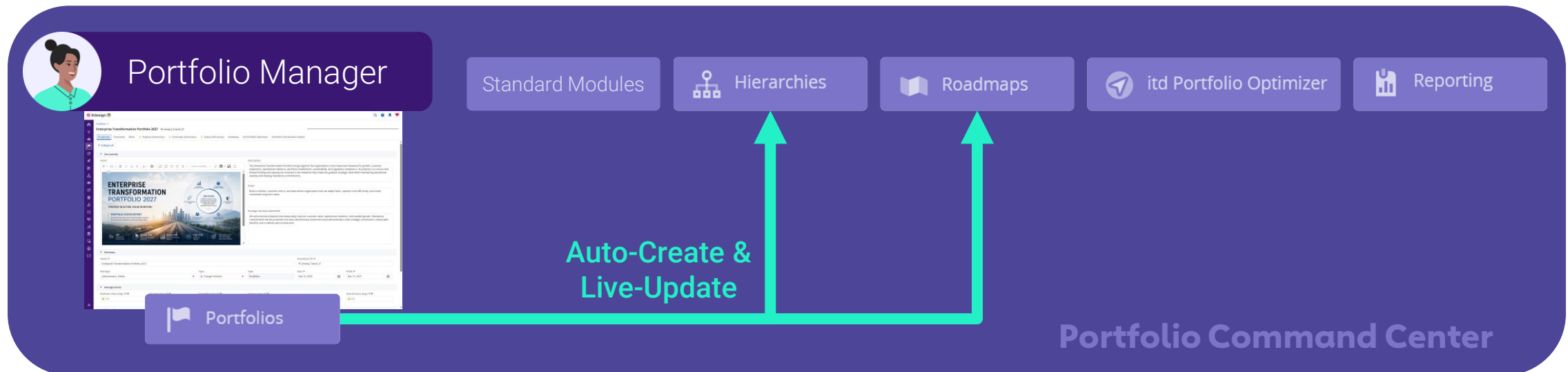
Integrate all Clarity features into one blueprint

Reports



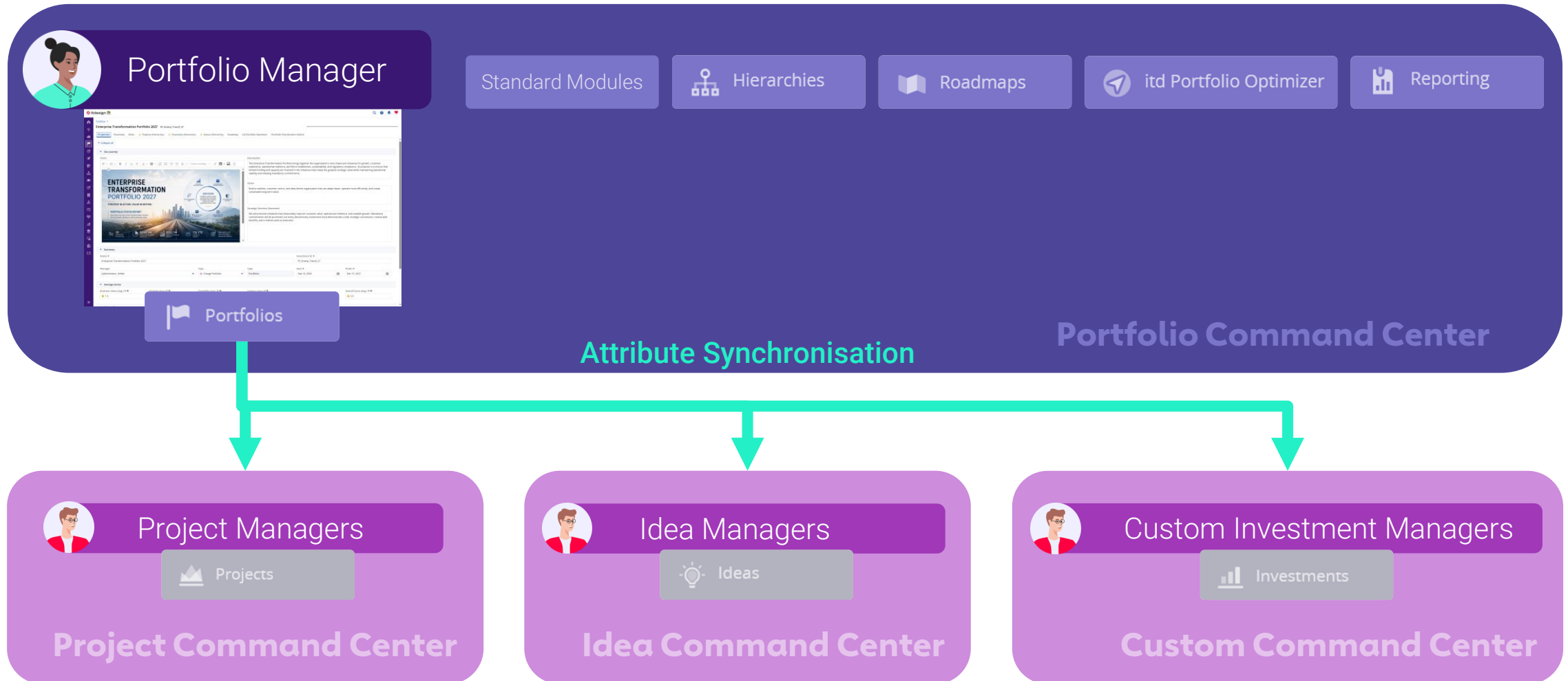
Automate data flows

Recommendation #3



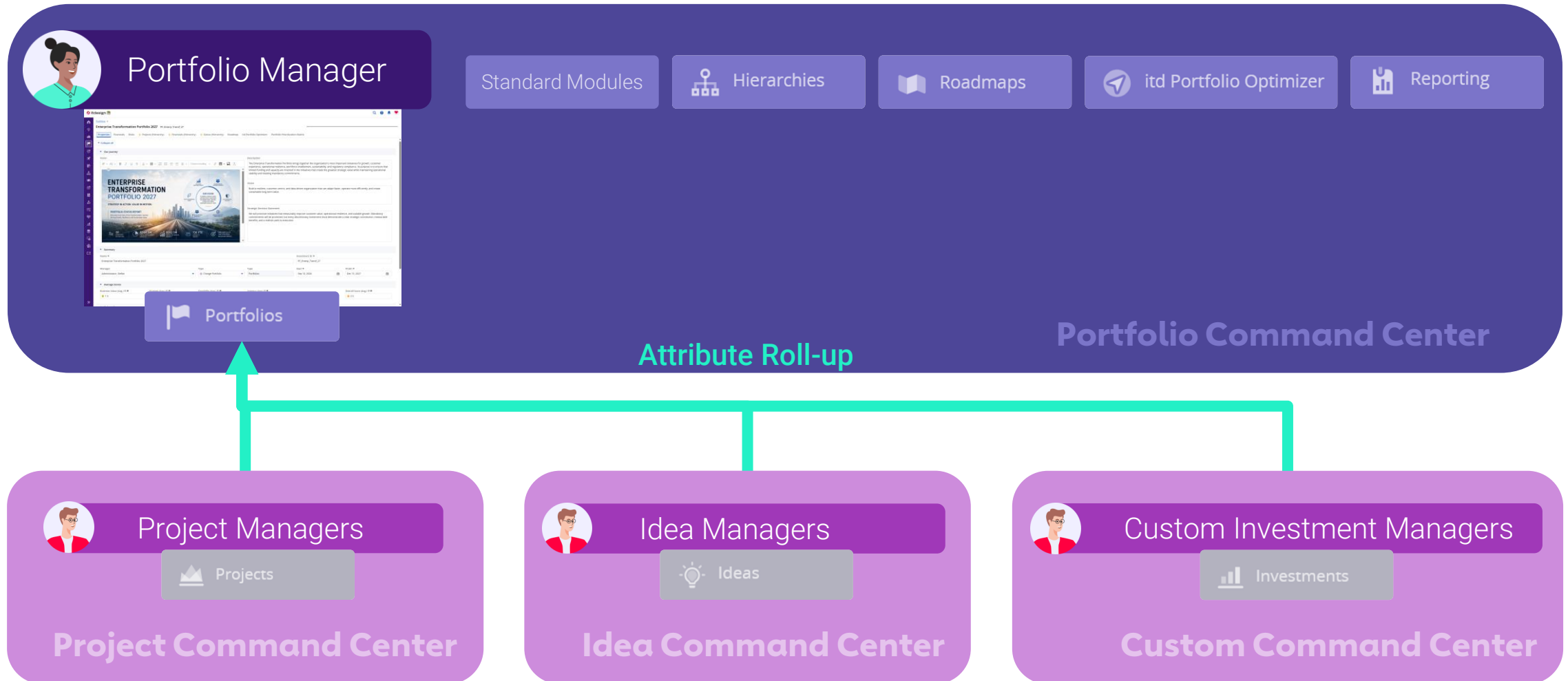
Automate data flows

Recommendation #3



Automate data flows

Recommendation #3

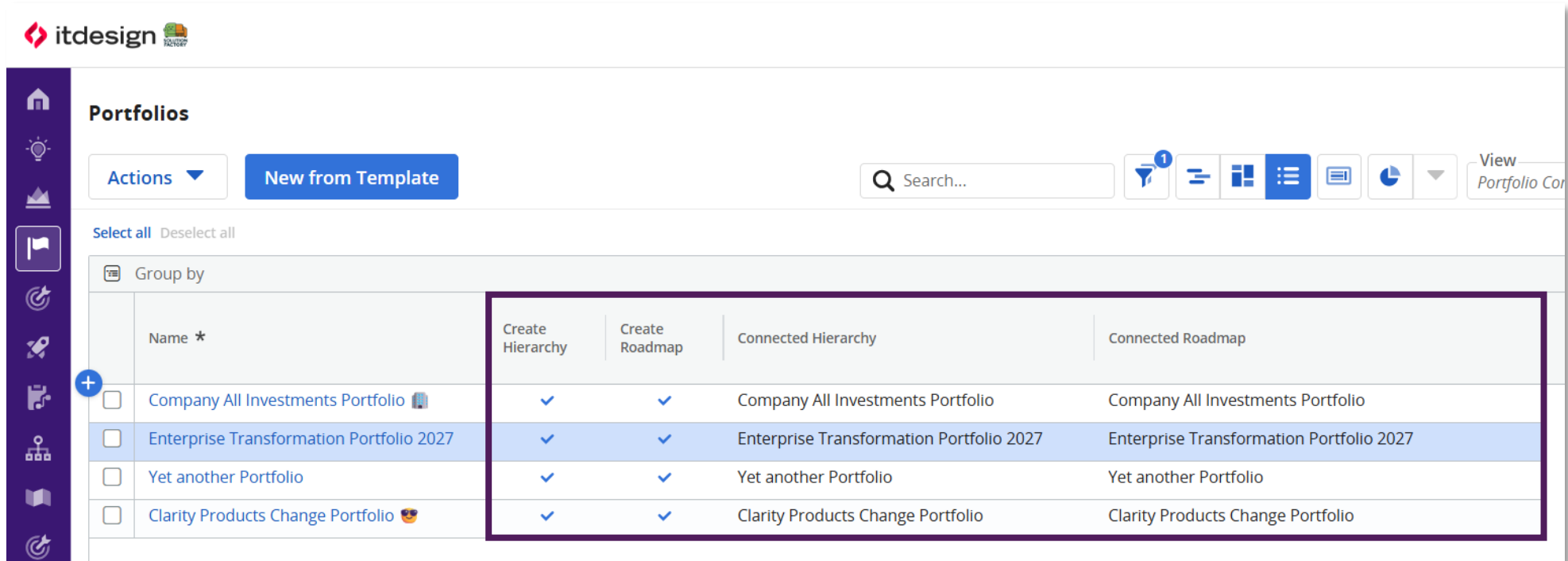




Live Demo

Automated Data flows

Let the system do the work for you



The screenshot displays the 'Portfolios' section of the itdesign software. The interface includes a sidebar with navigation icons, a top bar with the 'itdesign' logo, and a main content area. The 'Portfolios' table is highlighted with a purple border. The table has five columns: 'Name *', 'Create Hierarchy', 'Create Roadmap', 'Connected Hierarchy', and 'Connected Roadmap'. There are four rows of portfolio data, each with a checkbox in the 'Name' column and checkmarks in the 'Create Hierarchy' and 'Create Roadmap' columns. The 'Connected Hierarchy' and 'Connected Roadmap' columns show the names of the linked entities.

Name *	Create Hierarchy	Create Roadmap	Connected Hierarchy	Connected Roadmap
☐ Company All Investments Portfolio 📖	✓	✓	Company All Investments Portfolio	Company All Investments Portfolio
☐ Enterprise Transformation Portfolio 2027	✓	✓	Enterprise Transformation Portfolio 2027	Enterprise Transformation Portfolio 2027
☐ Yet another Portfolio	✓	✓	Yet another Portfolio	Yet another Portfolio
☐ Clarity Products Change Portfolio 😊	✓	✓	Clarity Products Change Portfolio	Clarity Products Change Portfolio

Automated **creation, synchronization, and linking** of a dedicated roadmap and hierarchy. The linked hierarchy and roadmap can then be integrated as a **channel** in the blueprint.

Automated Data flows

Synchronize information top-down and bottom-up

Portfolio

Enterprise Transformation Portfolio 2027

Properties Financials Risks Projects (Hierarchy) Financials (Hierarchy) Status (Hierarchy) Roadmap Itd Portfolio Optimizer Portfolio Prioritization Matrix

Our Journey

Vision

Build a resilient, customer-centric, and data-driven organization that can adapt faster, operate more efficiently, and create sustainable long-term value. Rego U rocks

Strategic Decision Statement

We will prioritize initiatives that measurably improve customer value, operational resilience, and scalable growth. Mandatory commitments will be protected, but every discretionary investment must demonstrate a clear strategic contribution, measurable benefits, and a realistic path to execution.

Project

North America Market Expansion P-002

Properties Tasks Itd Advanced Resource Planning Status Financials Risks Issues Changes Documents Staff Manual Actuals Entry Baselines Freeze Log Checklists Conversations Links Sales PI

Portfolio Vision

Parent

Enterprise Transformation Portfolio 2027

Vision

Build a resilient, customer-centric, and data-driven organization that can adapt faster, operate more efficiently, and create sustainable long-term value. Rego U rocks

Strategic Decision Statement

We will prioritize initiatives that measurably improve customer value, operational resilience, and scalable growth. Mandatory commitments will be protected, but every discretionary investment must demonstrate a clear strategic contribution, measurable benefits, and a realistic path to execution.

Overall Score

Overall Score

Gold Prio 3.8

Validation Range: The Scores can have values between 1-5

Calculation of Overall Score: Feasibility Score + Urgency Score + Business Value Score + Strategy Score

Additional Hint: When an evaluation criterion is empty, it is ignored in the scoring.

Feasibility

Estimated Effort: Medium (100-499PD)

Estimated Risk: Medium Risk

Estimated Duration: 1-2 years

Feasibility Score: Difficult 3.4

Persons working on project: 4-8 Persons

Affected departments: 1

Affected products: 1

Affected markets: 1

Urgency

Portfolios

Actions New from Template

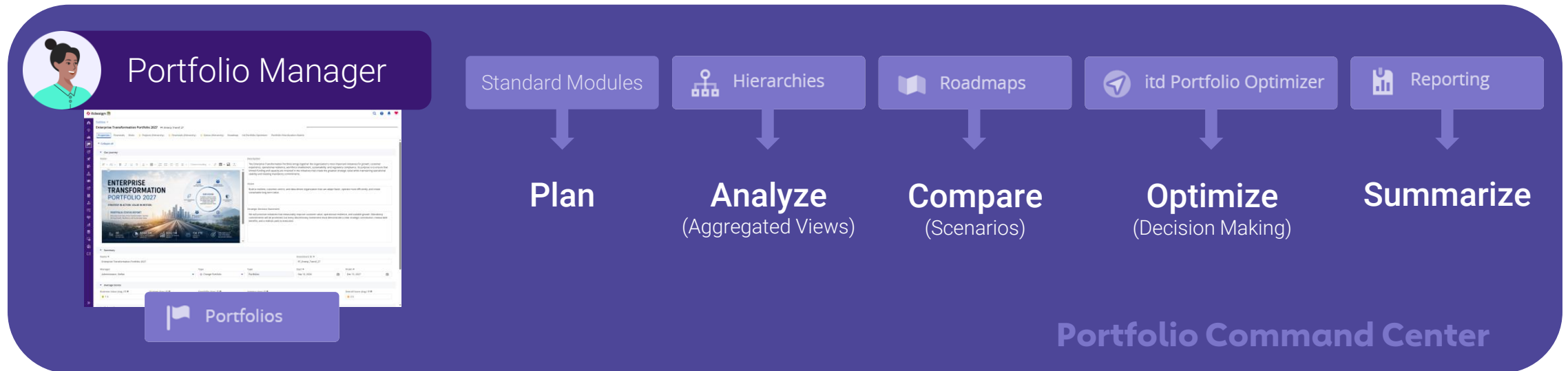
Search...

Group by

Name	Overall Score (Avg.)	Business Value (Avg.)	Feasibility (Avg.)	Strategy (Avg.)	Urgency (Avg.)
Company All Investments Portfolio	2.9	2.1	3.2	3.5	2.8
Enterprise Transformation Portfolio 2027	2.7	1.8	3.1	3.1	2.8
Yet another Portfolio	2.6	1.5	3.0	3.1	2.8
Clarity Products Change Portfolio	2.3	1.3	2.9	2.7	2.3

Summary

Enable better decisions through thoughtful configuration

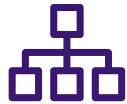


Summary

Our three Recommendations for building a Strategic Portfolio Command Center



One Custom Investment for Portfolios



One Blueprint with channels to all Clarity features



Processes to automate data flows

Questions? Ideas? Let's talk.



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