Strategic Technology and Innovation Management Programme 2019

Visualising portfolios

Dr Clive Kerr
civk2@cam.ac.uk

Portfolio perspectives are fundamental for managers. However, the execution of portfolio-related visualisations is relatively poor and lacks a robust approach to presentational style and information content. Taking a pragmatic stance that attempts to balance data provision with the needs of users for comprehension and insight, this area of research continues the process of developing prototypal visual representations for depicting different types and aspects of portfolios (including pipeline and platform perspectives). The underlying research question is: how should portfolios be appropriately depicted?

Aims

The general aims for the 2019 programme were to continue the ongoing collaboration with industrial partners on a number of deep dive case studies, utilising available data sets and generating worked examples informed by in-company piloting. The resultant learning is shared through the wider consortium and captured as illustrative reference cases for potential adoption/adaptation by industry.
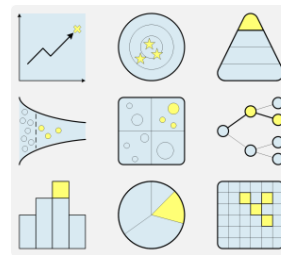

Approach: Case studies
- Portfolio – Pipeline
- Stages – Filters
- Audience – Intent
- Selecting – Balancing
- Data – Message
- Dimensions – Attributes
- Structure – Utility

How should portfolios be appropriately depicted?

Progress

- Designed a number of company-specific visuals (structured representations/layouts/configured templates) and provided follow-on design support.
- Conducted portfolio reviews and data analysis to extract key insights, pertinent patterns/trends and overlooked deviations/anomalies (including non-compliance).
- Performed eye tracking and usability testing.
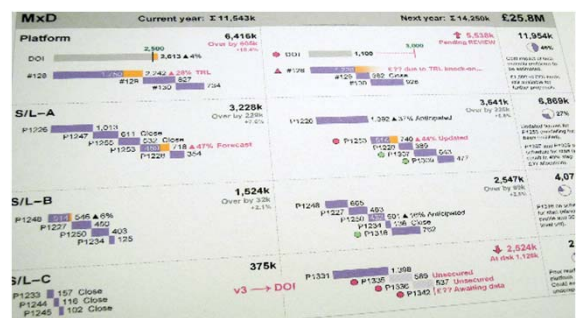
Deliverable

An illustrative case study depicting committed spend and deferments. Visual objects included:

- Current year actuals and secured funding for next year.
- Cost overruns and updated estimates.
- Platform investments and development projects.
- Specific line organisation projects.
- Pertinent issues and key concerns.