



Strategic Technology and Innovation Management Programme 2015

## **Portfolio Balancing**

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## Aims

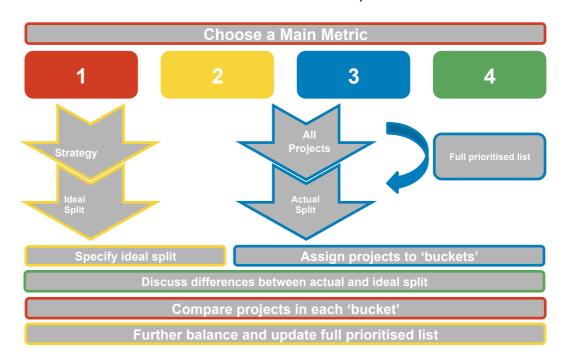
- 1. To identify parameters commonly used for balance
- 2. To identify methods of managing dependencies
- 3. To identify methods for visualising the portfolios

## **Progress**

The project took place over a 6 week period and started with a literature review of portfolio balancing methods. It was found that there is limited literature on portfolio balancing specifically, which is often restricted to a paragraph or chapter in wider portfolio management literature. To determine the methods currently in practice, a variety of manufacturing firms and consultants were interviewed. Using the literature review and conversations with companies and consultants, a conceptual framework was created as a basis for developing a portfolio selection and balancing process.

## **Deliverables**

The project report details the information gathered from the literature review and interviews. A conceptual framework for portfolio selection and balancing was developed.



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