IfM MANAGEMENT TECHNOLOGY POLICY

UNIVERSITY OF CAMBRIDGE

Strategic **T**echnology and **I**nnovation **M**anagement Programme 2015

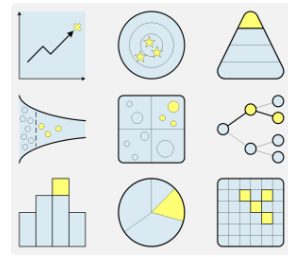
Visualising portfolios

Dr Clive Kerr
civk2@cam.ac.uk

Portfolios are a fundamental tool for managers and their visual format is generally a basic 'bubble' (area) chart. Typically, the execution of such visuals is relatively poor – lacking a robust approach to both 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?

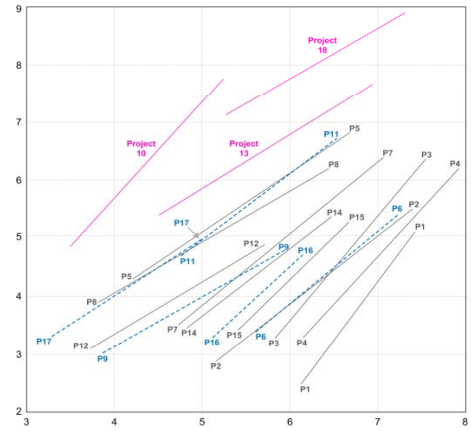
Aims

The general aims for the 2015 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. Based on expressions of interest, the aspect of how to visually report the outputs from project scoring/prioritization activities was highlighted as a key area in need of study. The specific aims were then to explore potential visual representations for depicting multi-factor scoring results across a set of projects within a defined portfolio.



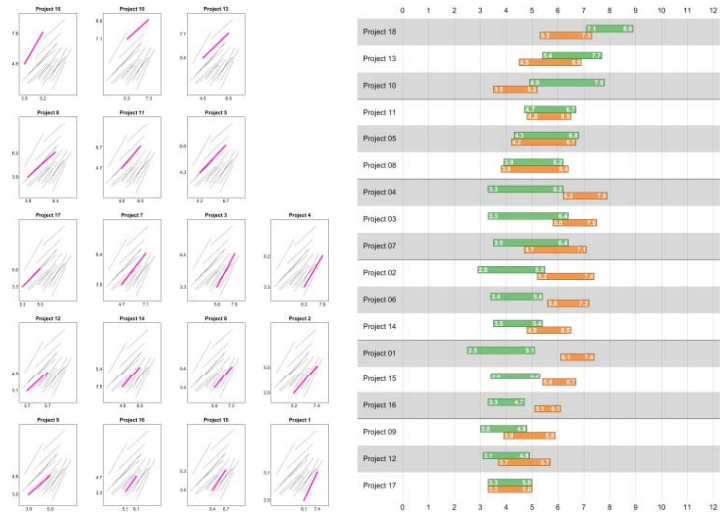
Approach: Case studies
- Portfolio – Pipeline
- Stages – Filters
- Audience – Intent
- Selecting – Balancing
- Data – Message
- Dimensions – Attributes
- Structure – Utility

How should portfolios be appropriately depicted?



Progress

- Designed a series of visual arrangements, and associated variants, for depicting project scoring results (deploying min-max ranges).
- Conducted critique sessions with both academic and industrial panels to elicit user feedback on positive and negative visual features.
- Implemented design improvements and suggestions to refine the preferred set of visual forms.



Deliverables

- An array of project scoring visualisation options, which can be tailored for given user needs.
- A recommended sequence of visual depictions that allow users to compare/contrast across multiple projects, and then prioritize/select within a portfolio.

Institute for Manufacturing, 17 Charles Babbage Road, Cambridge, UK, CB3 0FS
Tel: +44 (0)1223 766141 Fax: +44 (0)1223 464217 Email: ifm-enquiries@eng.cam.ac.uk Web: www.ifm.eng.cam.ac.uk