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Strategic Technology and Innovation Management Programme

Visualising portfolios

Portfolios are a fundamental tool for managers and their common visual depiction is a basic 'bubble' (area) chart. Typically, the execution of such visuals 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 information comprehension, this research project has started the process of developing prototypal visual representations for depicting different types and aspects of portfolios.

Aims

The aim was to collaborate with STIM 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 other partners.
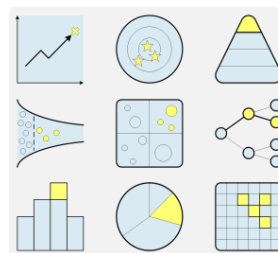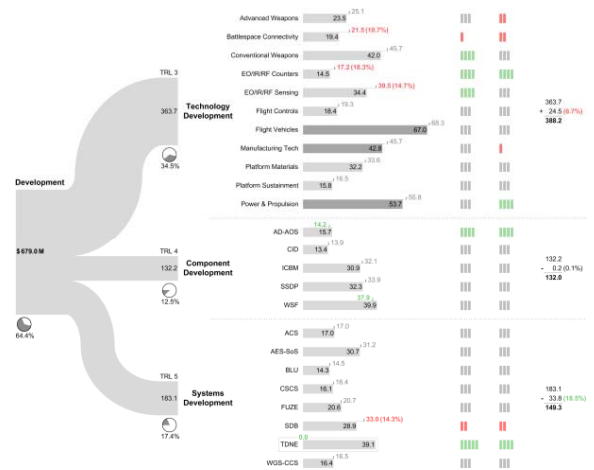

Progress

- Designed a visual representation for depicting R&D budget spends/requests across project domains.
- Developed a visual template-based tool for supporting the identification and depiction of 'pain' within product families.
- Design practice engagements conducted with industry and on-going design support.

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

Deliverables

Two different forms of deliverables were produced through this research project, namely:

(i) One-to-one design guidance, clinics, workshops and pilots with STIM industrial partners;

(ii) Final project report outlining the visual representations developed through the case studies and industrial interactions.