

Strategic Technology and Innovation Management Programme 2016

Visualising portfolios

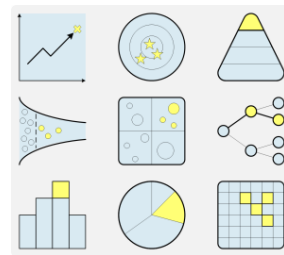


Dr Clive Kerr
civk2@cam.ac.uk

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 prototypical 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 2016 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.

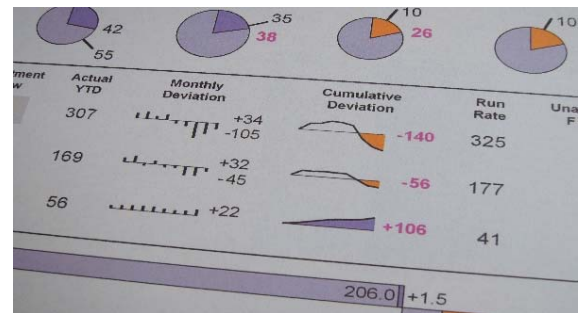


- Approach:** Case studies
- Portfolio – Pipeline
 - Stages – Filters
 - Audience – Intent
 - Selecting – Balancing
 - Data – Message
 - Dimensions – Attributes
 - Structure – Utility

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 critique sessions to elicit user feedback on positive / negative visual features.
- Implemented design improvements and suggestions to refine the visualisations.



Deliverable

- An illustrative case study depicting a portfolio of S&T projects within a TRL-based pipeline. Visual objects included:
 - Total budget and SBU contributions.
 - FY-share of budget (i.e. spend).
 - Project KPIs.
 - Degree of difficulty / effort to advance along the TRL steps.
 - Confidence of delivery.

