



# SE Portfolio

## Portfolio Management

### The road to Portfolio Excellence

#### Overview

To effectively manage the organization's portfolios, executives need access to consistent and comparable information associated with all of the company's investment opportunities, whether ideas, projects, products, etc. However, ideas and projects are generally spread throughout different departments, hindering decision making, primarily that related to investments. Consequently, the decisions are always subjective.

SE Portfolio was designed to help the company find a balance when it comes to identifying and managing the mix of initiatives that offers the greatest contribution and added value for its strategic interests.

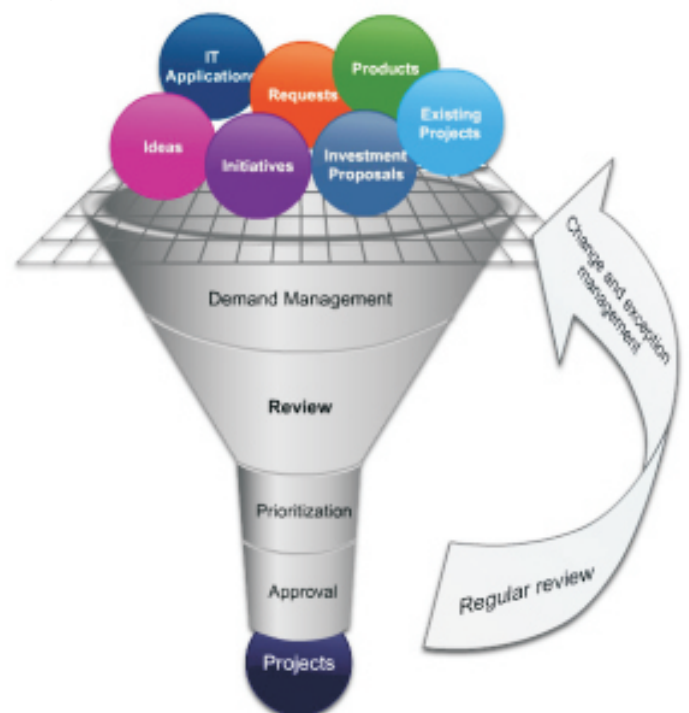
SE Portfolio expands the vision of all the organization's portfolios: the progress of the initiatives, the new proposals and those that have yet to be launched. With the solution, the company can use a ranking to identify the most important proposal for the company and optimize the application of resources and management of high value opportunities.

SE Portfolio allows managers to administer their investment opportunities through evaluations, prioritizations, balancing and approvals, both of the initiatives for new projects as well as those already underway. The system allows the user to analyze different scenarios through simulations and ensure alignment with the organizational strategy and available resources. The system integrates strategy, finances, operationalization and technology to maximize productivity and assertiveness.

SE Portfolio gives the manager a complete overview of indicator performance in terms of the return on investment (ROI), thereby helping him or her choose the best investment considering the cost-benefit-deadline relationship. The ROI can be calculated in different ways, allowing the user to adjust the tool to the company's reality. Quantitative and qualitative methods are used based on the evaluation criteria defined by the managers.

SE Portfolio features financial tables that clearly demonstrate how managers can maximize gains and cut costs. Checklists are applied in the evaluation to boost the level of confidence and quality of the results. The tables can be customized to adjust them to the portfolio, based on the organization's needs. In this way, the user can simulate the results in different scenarios, primarily for regions in which taxes and laws for charges are different.

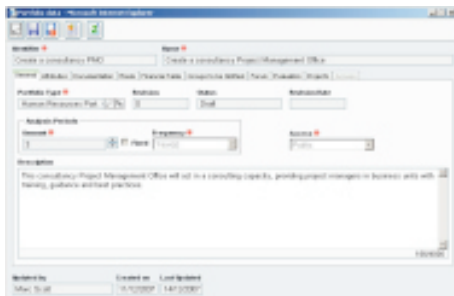
SE Portfolio organizes all the portfolios in a single environment. It offers a significant amount of information through reports and customizable graphics (bubble, Pareto, pizza, etc.), considering the following: objectives, costs, deadlines, results, resources and risks, among other critical success factors. This way, executives can regularly revise the portfolios, allocate resources appropriately and adjust them to generate increased return for the organization.



**Screenshots**

**Demand Management**

Capture, classify and evaluate all sources of demand so you can appropriately prioritize work and allocate resources to the highest value opportunities. Define project, application and product portfolio types for better organizing in planning phase.

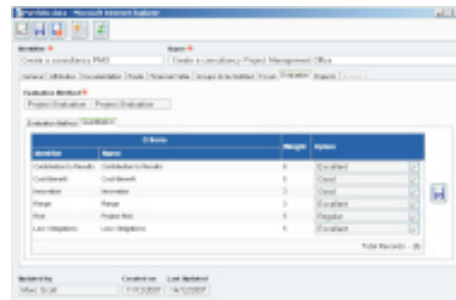


**Review**

Produce a sound business case by capturing all of the expected and actual financial values of the initiative, in different scenarios.

Identify strategic decisions criteria, defining business objectives.

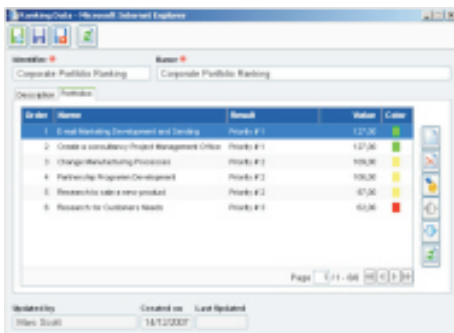
Assess how well a new proposal is aligned to the business goals using scorecards.



**Prioritization**

Compose the organization's portfolio based on business objective, risk, and other criteria.

Analyze your portfolio of projects along multiple dimensions using several chart types.



**Approval**

Formalize and drive proposal submission, assessment, and approval processes, preventing incomplete information and manual handoffs, and accelerating the decision-making process.

**Projects**

The business case documentation of assumptions around benefits, timing, and costs helps the initial project rationale.

Institute an analytical project decision process, increase visibility across your organization, improve project outcomes.

