

# Applying Portfolio Management Best Practices to Education Services

CEdMA Innovation Award

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**The Computer Education Management Association**

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# Agenda

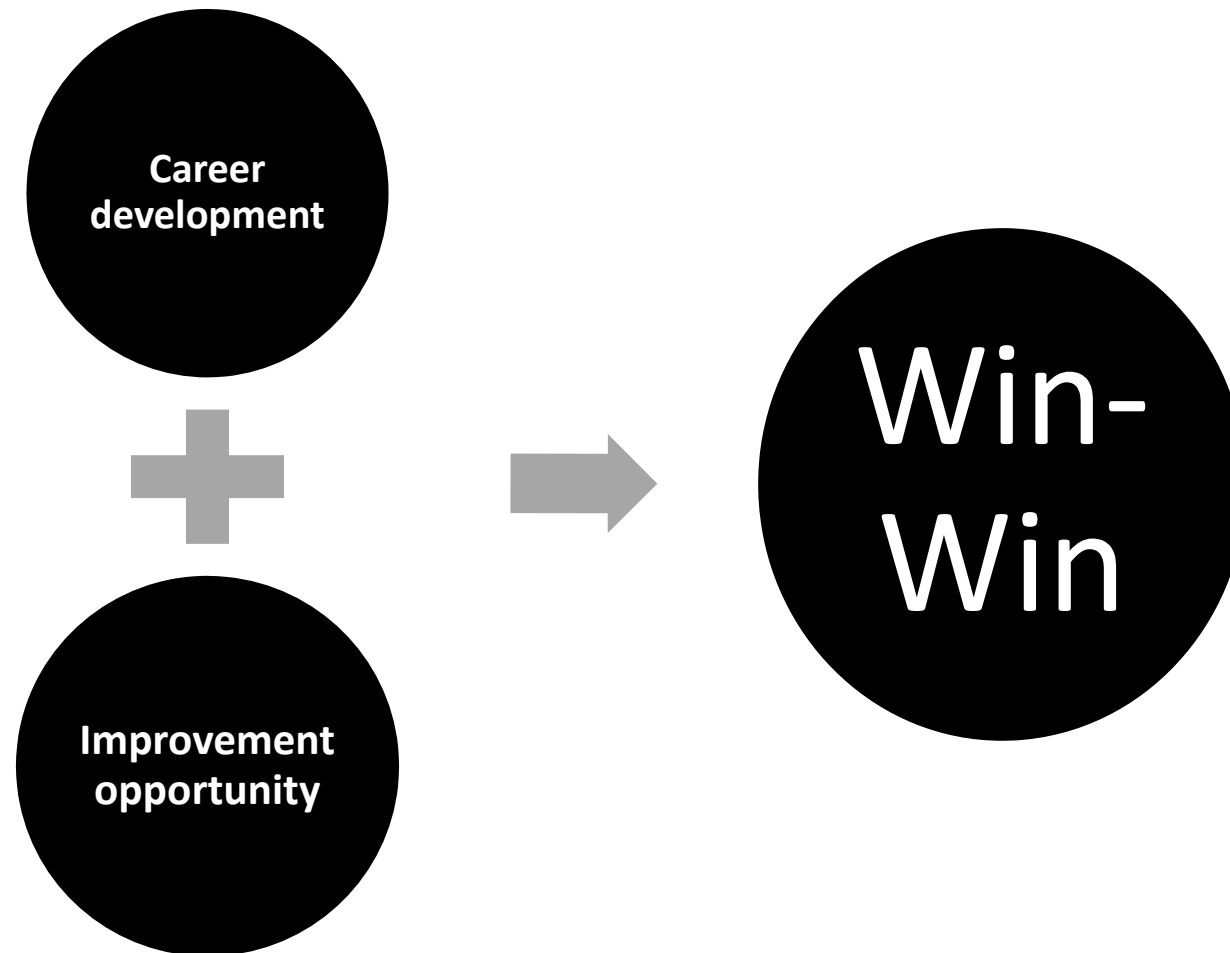
- Background
- Portfolio Overview
- Implementation
- Results
- Lessons Learned

# Wind River



- A world leader in embedded software for intelligent connected systems
- Acquired by Intel in 2009
- Headquarters in Alameda, CA
- 1,800 employees worldwide

# Background



# Content Development



## Problem

- Courses underperforming
- Decision power misaligned
- Employee dissatisfaction

## Opportunity

- Restructuring
- All Education functions reporting to one manager

# Desired Outcome

## Process

- Scalable
- Transferrable
- Actionable metrics

## Targets

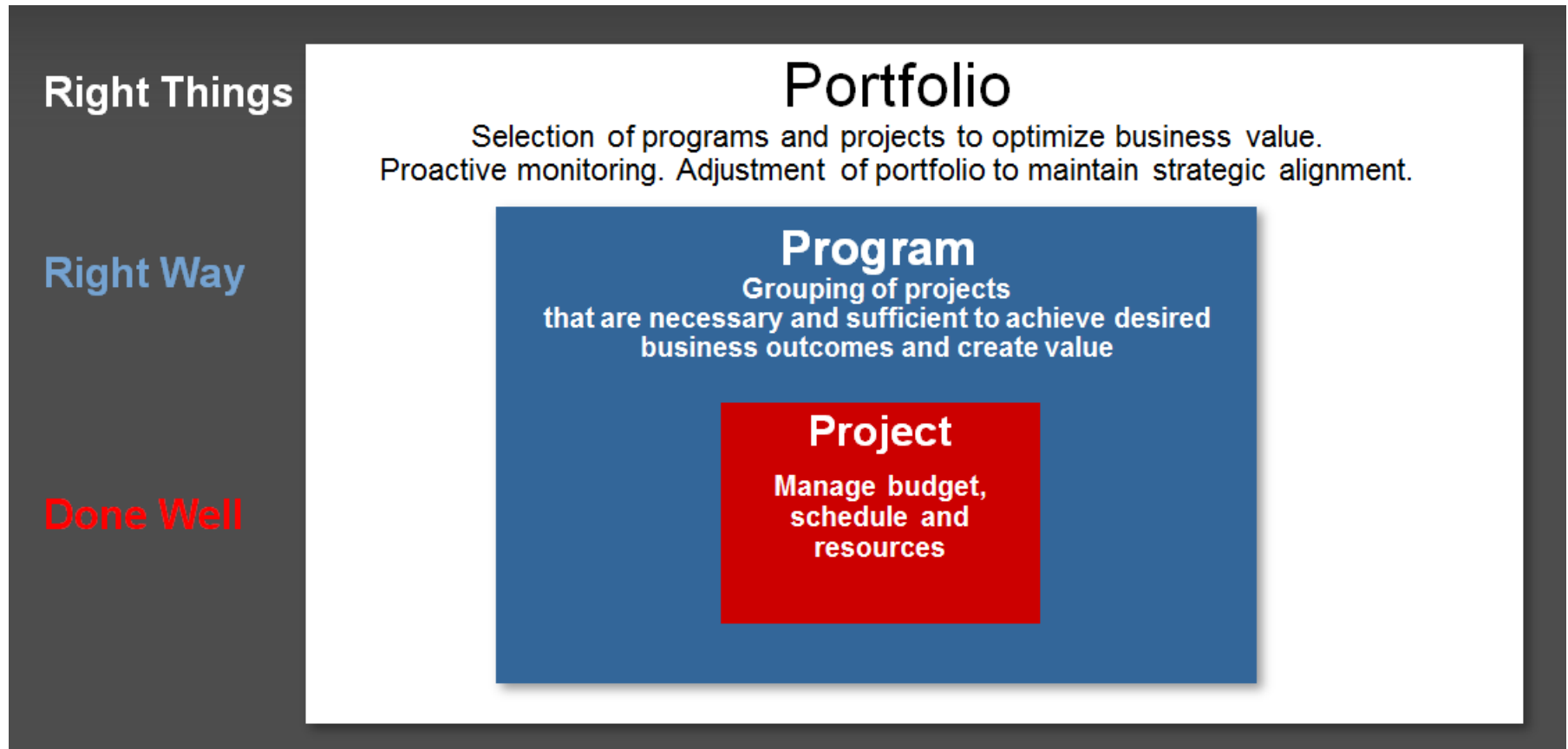
- Rigorous selection criteria
- 100% strategic alignment
- Low value offerings < 10%
- Automation
- Capture info once at source



# Portfolio Management

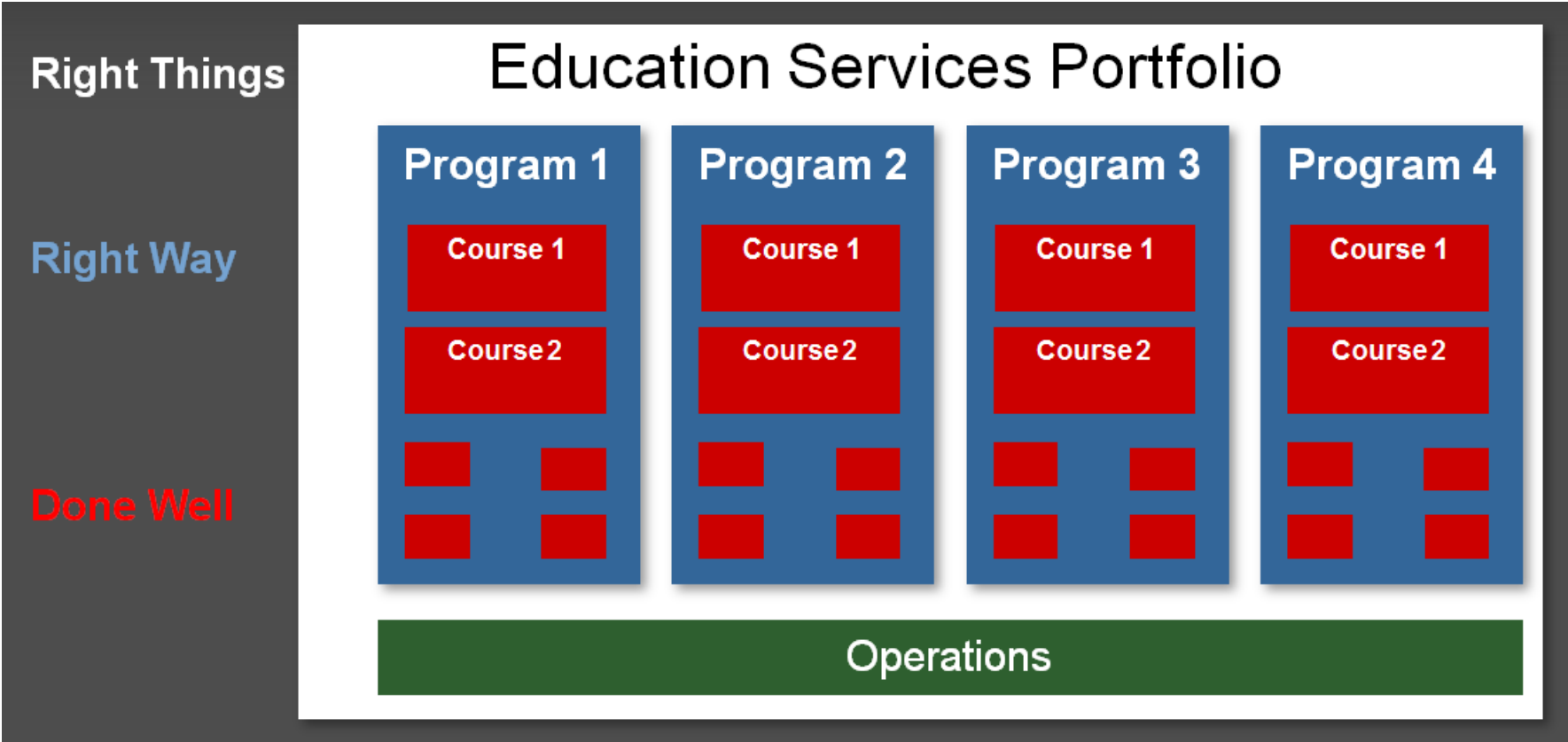
Framework  
Key Areas

# Portfolio Framework





# Education Services Portfolio



# Portfolio Management Key Areas



# Implementation at Wind River

Timeline

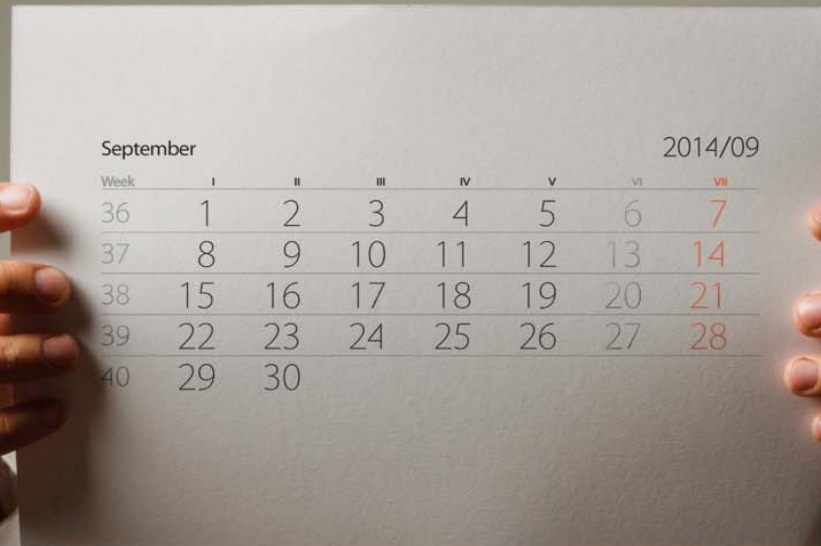
People and Resources

Change Obstacles

# How Project Unfolded

## 2014

- Interviews
- Pain points
- Best practices

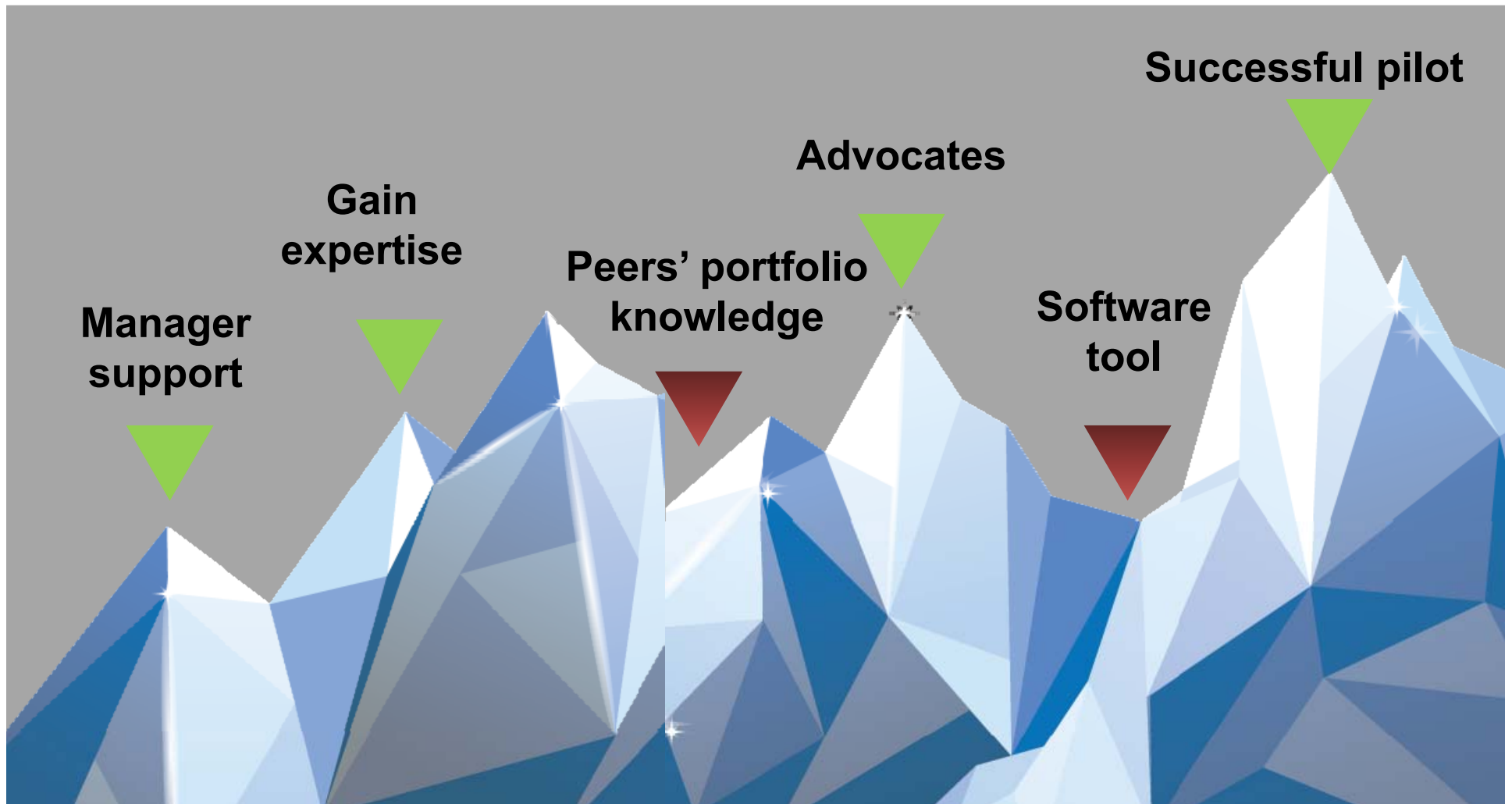


September							2014/09
Week	I	II	III	IV	V	VI	VII
36	1	2	3	4	5	6	7
37	8	9	10	11	12	13	14
38	15	16	17	18	19	20	21
39	22	23	24	25	26	27	28
40	29	30					

## 2015

- PfMP cert.
- Smartsheet
- POC
- Pilot
- Rollout

# People, Resources, Challenges



# Results

- Portfolio Prioritization Model and Process
- Scorecard
- Portfolio Framework

# Portfolio Prioritization Model



- Model
  - Select ranking criteria
  - Add weight
- Evaluation
  - Select evaluating committee
  - Team members score
  - Calculate total score
  - Compare with others
- Gate meeting
  - Make actionable decision

# Portfolio Prioritization Model



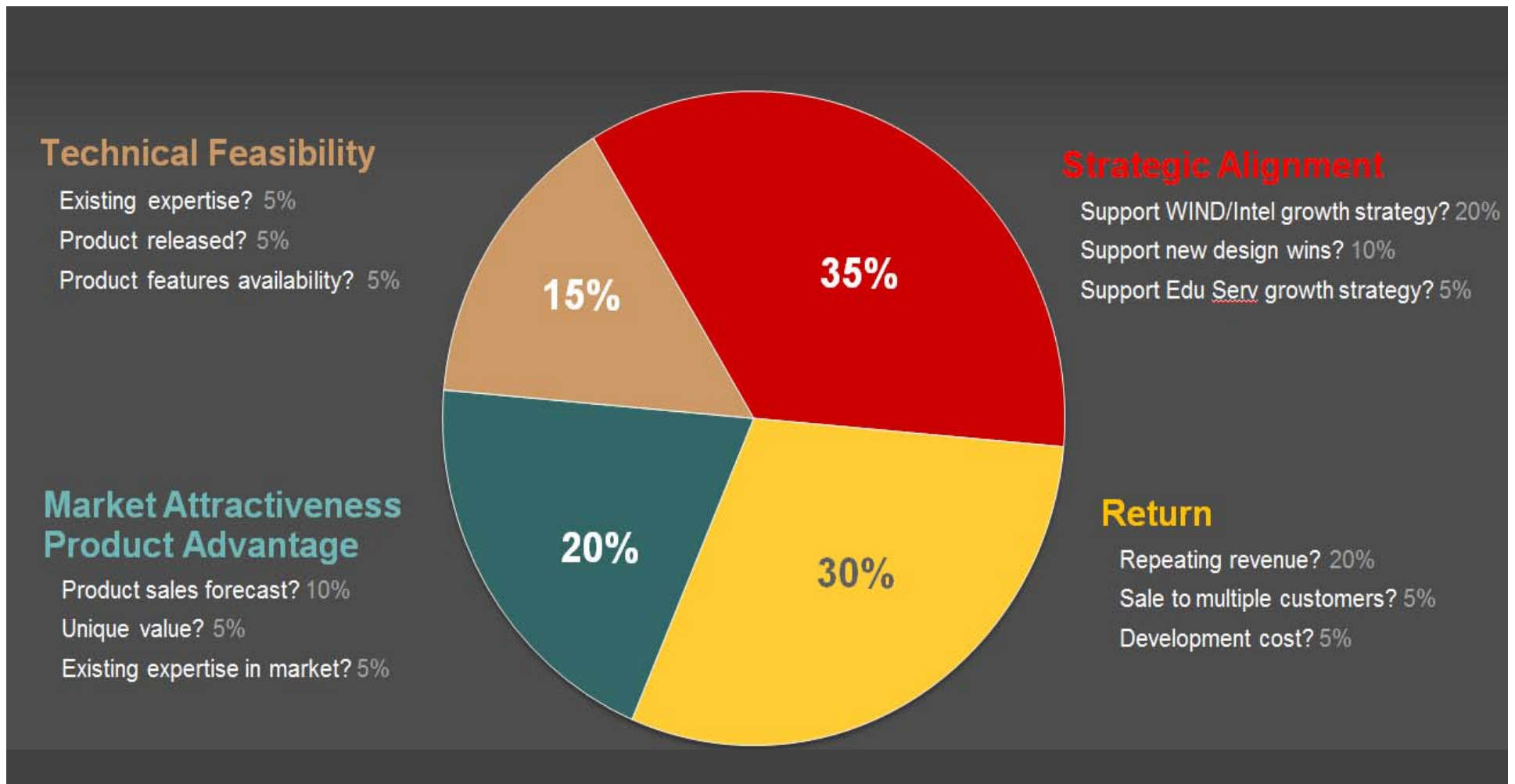
- Model
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[smartsheet.com](https://smartsheet.com)

Collaboration  
File sharing  
Web forms  
Spreadsheets  
Cell linking  
Gantt charts



# Ranking Criteria and Weighting



# Evaluators Score Project – 2 min

## 1. Business Development

- PM
- BDMs
- FAE Mgr (forward to SME)
- ES Mgr

## 2. Content Development

- CD Mgr (forward to SME)

## 3. Strategic Alignment

- Sr. Dir. Lifecycle Services

### STRATEGIC ALIGNMENT

Will this course help Wind River make a new design win?

- 1=Not likely  
4=One design win  
7=A few design wins  
10=Key to selling the product and supporting design wins in this area
- 1  2  3  4  5  6  7  8  9  10

### MARKET ATTRACTIVENESS / PRODUCT ADVANTAGE

Does this course provide a unique value to the market – that is, customers cannot get this training from other vendors?

- 1=Course is widely available from other vendors  
4=Other companies provide similar trainings. Course would be somewhat new.  
7=Subject matter is available but course has distinguishable attributes that could be a selling point  
10=Unique to Wind River. Customer cannot get it elsewhere
- 1  2  3  4  5  6  7  8  9  10

(Market need) Is this technology new to the market, and there's not a lot of existing expertise?

- 1=Technology is widely available  
4=Technology already exists. Limited # of vendors.  
7=Relatively new technology  
10=New technology - Wind River protected - Limited expertise
- 1  2  3  4  5  6  7  8  9  10

### RETURN

Compare the above to the cost of building it. Is there any additional cost to providing labs for this course?

- 1=2x more resources required than average  
4=Resource requirements about average  
7=Less resource requirements than average  
10=2x less resource requirements than average
- 1  2  3  4  5  6  7  8  9  10

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### TECHNICAL FEASIBILITY / RISKS

Enough product features are available to teach customers meaningful workflows

- 1=10%  
4=40%  
7=70%  
10=100%
- 1  2  3  4  5  6  7  8  9  10

### STRATEGIC ALIGNMENT

Will this course support the WIND/Intel growth strategy?

- 1=No relation.  
4=With work could be applied to Intel  
7=Could be used by some Intel engineers or ODMs  
10= Could be applied widely to Intel
- 1  2  3  4  5  6  7  8  9  10

Does this course support the Education Services business unit strategy?

- 1=Only peripheral fit with business strategy  
4=Modest fit, but not with a key element of the strategy  
7=Good fit with a key element of the strategy  
10=Strong fit with several elements of the strategy
- 1  2  3  4  5  6  7  8  9  10

### Pre-defined answers

- increased objectivity
- comparable responses

WIND

# Example: Web Form to Biz Dev

## Biz Dev - Wind River Linux 8 CLI Essentials

Update training contents & image from Linux 7 to Linux 8.

### STRATEGIC ALIGNMENT

Will this course help Wind River make a new design win?

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7=A few design wins

10=Key to selling the product and supporting design wins in this area

1  2  3  4  5  6  7  8  9  10

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What are the sales forecasts for this market over the next year?

1=<1M

4=1-5M

7=5-10M

10=>10M

1  2  3  4  5  6  7  8  9  10

## RETURN

We anticipate repeating revenue for this course – sales forecasts for the related product are satisfactory

1=<\$25,000

4= \$50,000

7= \$100,000

10=\$500,000

1  2  3  4  5  6  7  8  9  10

We anticipate selling this course to multiple customers (# of companies)

1=1

4=4

7=7

10=10

1  2  3  4  5  6  7  8  9  10

## REVIEWER INFORMATION

Name \*

Please enter your name.

Comment

Submitted on \*

Send me a copy of my responses

Submit

# Scorecard Demo

Project Status	Course Level	Type	Technology	Course Name	Evaluation Score	CD Mgr	Development Man-Weeks	Approx. Dev Cost	Revenue Needed to Meet Margin	Evaluator Comments	Approval Stage	Go / No Go Decision in Gate Meeting
<b>NOT STARTED</b>												
●	Upgrade	ILT			443	◀ Sadique	3	◀ \$9,900	\$24,750	Carrie: Linux 8 feeds into a	✔	Go: Positive ROI expected. Core product
●	Upgrade	ILT			473	◀ Sadique	3	◀ \$9,900	\$24,750	Carrie: Linux 8 will be a pre	✔	Go: Positive ROI expected. Core product
●	Upgrade	ILT			480	◀ Sadique	4	◀ \$13,200	\$33,000		✔	Go: Positive ROI expected. Modules are 1
●	Upgrade	ILT			695	◀ Brian	6	◀ \$19,800	\$49,500	Carrie: Could be used insid	✔	Go: Positive ROI expected. Product is ma
●	New	<a href="#">eLearn 3</a>			644	◀ Brian	9	◀ \$29,700	\$44,550	Brian: Assuming 4 day com	✔	Go: Product is mature. Foundational know
●	Upgrade	ILT			612	◀ Brian	7	◀ \$23,100	\$57,750	Carrie: Might find some use	✔	Go: Positive ROI expected. Product is ma
●	Upgrade	ILT			520	◀ Brian	6.5	◀ \$21,450	\$53,625	Brian: current course is lect	✔	Go: Positive ROI expected. 2-day course
●	Upgrade	ILT			801	Sadique	15	\$49,500	\$99,000		✔	Go: Key strategic growth product. Compli
●	New	ILT			403	◀ Alyce	4	◀ \$13,200	\$33,000	Terri: hits a potential pain p	⚠	On Hold: Wait and see if more customer r
●	New	ILT			653	◀ Alyce	5	◀ \$16,500	\$41,250	Brian: It's supporting Intel s	⚠	On Hold: If 4 more customer requests cor
●	New	ILT			498	◀ Assaf	10	◀ \$33,000	\$82,500	Carrie: Content is aligned w	⚠	On Hold: Evaluate w/Product Marketing a
<b>IN DEVELOPMENT</b>												
🌀	Upgrade	ILT			841	◀ Brian	5	◀ \$16,500	\$41,250	Assaf: Answers are for Sim	✔	Go: Positive ROI expected. Product is ma
🌀	New	ILT			801	◀ Sadique	60	\$198,000	\$396,000		✔	Go: Key strategic growth product. Compli
🌀	New	<a href="#">eLearn 3</a>			787	◀ Sadique	13	◀ \$42,900	\$64,350	Carrie: Intel needs this train	✔	Go: Pilot program for first real eLearning
🌀	New	<a href="#">eLearn 1</a>			773	◀ Brian	7	◀ \$23,100	\$34,650	Brian: No idea if man-week	✔	Go: Videos recorded by Intel employee fc
🌀	Upgrade	ILT			735	◀ Assaf	7	◀ \$23,100	\$57,750	Assaf: This training will go t	✔	Go: Key strategic growth product. Produc
🌀	Upgrade	ILT			695	◀ Assaf	9	◀ \$29,700	\$74,250	Assaf: This is a base traini	✔	Go: Supports WR strategy. Demand drive
🌀	New	<a href="#">eLearn 3</a>			695	Assaf	13	\$29,700	\$44,550	Assaf: This is a base traini	✔	Go: Supports WR strategy. Demand drive
🌀	Upgrade	ILT			613	◀ Sadique	8	◀ \$26,400	\$66,000	Carrie: Course has a good l	✔	Go: Positive ROI expected.
🌀	New	ILT			576	◀ Sadique		\$0	\$0		✔	Go: Needed for TiS training. No upfront c
<b>COMPLETED</b>												
●	Upgrade	ILT			795	◀ Alyce	8	\$26,400	\$66,000	Scott: This course will help	✔	Go: Positive ROI expected. Vx6.9 was ou
●	New	ILT			763	◀ Assaf		\$0	\$0		✔	Go: Supports Intel strategy.
●	Upgrade	ILT			636	◀ Sadique	5	◀ \$16,500	\$41,250	Carrie: WB essentials is fac	✔	Go: Positive ROI expected.
●	Upgrade	ILT			625	◀ Sadique	5	◀ \$16,500	\$41,250	Carrie: Emphasis on applic	✔	Go: Positive ROI expected.

# Investing Wisely and Saying “No”



- Collaborative decision-making
- Reduce biases
- Framework based
- Metrics based
- Suggest alternatives

# Decision Making

## Gate Meeting

### Before meeting, projects ...

- Are scored by evaluators
- Scores are compiled
- Dev cost/break even added

### This meeting ...

- Makes go/no go decisions
- Focuses on active and on hold projects
- Prioritizes and allocates resources
- 1x per month

**List of Projects:  
Active and On Hold**  
**Project Scores from Gates**

**Strategic Imperatives  
Prioritization Adjustments  
Gate Adjustments**

## Portfolio Review

### This meeting ...

- Identifies strategic imperatives (must do now)
- Checks project priorities
- Checks for portfolio balance
- Makes corrections to gating scheme
- Focus is more holistic based on entire portfolio
- 1x every 6 months

# Portfolio Framework

Key components stored in a central location for easy access to key stakeholders.

EDUCATION SERVICES PORTFOLIO				
Strategic Management	Governance	Performance Management	Communication Management	Risk Management
How to best align org strategies with Edu execution? What are the ideas worth investing in, now and in future? How to adjust and change course when necessary?	How to select and optimize projects? How to provide ongoing management of the portfolio?	What are the desired performance goals? How to best utilize available resources? How to measure, report on portfolio value?	Who should we communicate with? What is optimal communication plan? How to manage portfolio info – collection, storage, dissemination?	How to determine portfolio risks? How to manage them on a sustainable level?
<a href="#">Charter</a>	<a href="#">Portfolio Management Plan</a>	<a href="#">Portfolio Performance Plan</a>	<a href="#">Portfolio Communication Plan</a>	<a href="#">Portfolio Risk Mgmt Plan</a>
<a href="#">Strategic Plan</a>	<a href="#">Scorecard</a>	<a href="#">Reports - Value, Balance, Alignment</a>	<a href="#">Stakeholder Analysis</a>	<a href="#">Risk Register</a>
<a href="#">Roadmap</a>	<a href="#">Scorecard Process</a>	<a href="#">Reports - Customer Satisfaction</a>	<a href="#">Industry Trends</a>	
e-learning	<a href="#">Metrics - Go/NoGo Decisions</a>			
<a href="#">Subscriptions</a>	<a href="#">Course Requests</a>			
	<a href="#">Gate Meetings</a>			
	<a href="#">Portfolio Review Meetings</a>			

# Lessons Learned

Tips to Get Started  
Tips for Success



# Tips to Get Started



- Know your strengths
- Pain points
- Stakeholder interviews (Design thinking tools)
- Common themes
- Best practices inside and outside the industry
- Brainstorm with team members

# Tips for Success

- Get buy-in from your manager.
- Start small. Proof of concept.
- Find a few key advocates to help promote the idea.
- Enlist people's input.
- Show measurable results.
- Over-communicate.
- Have a central repository for reference.



# QUESTIONS & DISCUSSION

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**Thank you.**

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[cedma.org](http://cedma.org)



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