



# Creating High Portfolio Value: A Six-Step Program

Value-Based Portfolio Management concentrates attention on the critical factors that drive value and on how risk and uncertainty affect these values. Portfolio Navigator™, a web-based software system, makes this information readily available to help decision-makers determine:

- The best projects to select for development and commercialization
- Where to add resources to create additional value
- When to kill or redirect projects
- How to manage the business value of project/portfolios over time

Our six-step program provides measurable value at each step. The program enables you to be up and running quickly and economically.

## STEP ONE: Frame the Opportunity

- During a teleconference or web meeting we explore your needs and requirements.
- **Deliverables:** written assessment of needs and requirements; response to feedback

## STEP TWO

### Option A: Value-Based Project Demonstration

- Based on findings in Step One, we facilitate one to three meetings to evaluate several projects and produce a set of business model templates. Meetings may be web-based or on-site.
- **Deliverable:** business model templates

### Option B: Value-Based Portfolio Demonstration

- Evaluate a set of projects in a mini-portfolio of three to six projects (“portfolio sweep”)
- **Deliverable:** a snapshot of portfolio value and definition of portfolio value-based management needs

## STEP THREE: Develop System Requirements

- Propose a system that fulfills the needs identified in the above steps
- **Deliverables:** organizational process flow; definition of the template set and system requirements

## STEP FOUR: Implement a Trial (Pilot) System

- Host the system and pilot with users; fine tune the system.
- **Deliverable:** live system accessible by customer’s users; respond to findings and tune the system as required

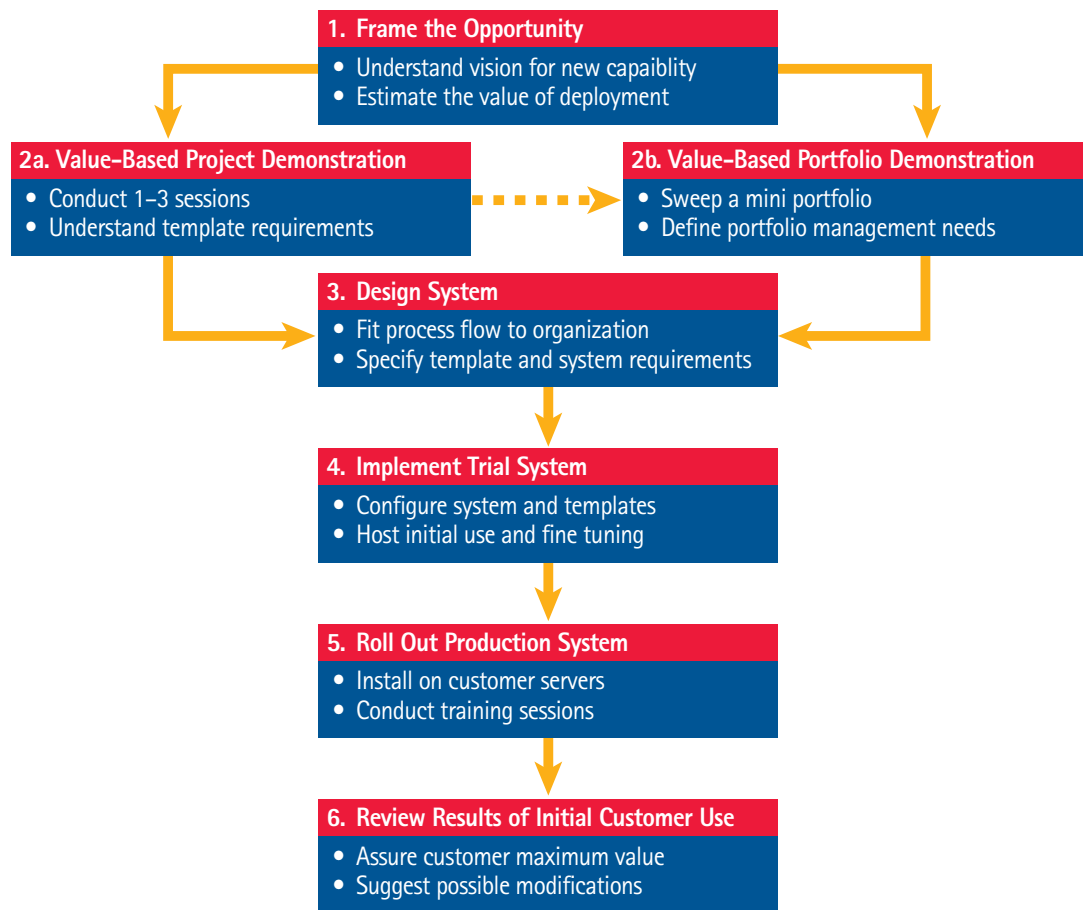
## STEP FIVE: Roll Out Production System

- Install on your servers or host on SmartOrg secure servers
- Train and educate users and management
- **Deliverables:** training, education and operational system

## STEP SIX: Review Results of Initial Customer Use

- Meet with users to review user-experience
- Make modifications, if required
- Provide technical and business process support

# Value-Based Portfolio Management A Six-Step Deployment Process



## About SmartOrg

SmartOrg is a business consulting and services provider specializing in Value-Based Management Systems. Value-Based Management Systems are comprised of decision processes, analytic tools, and software that help companies drive growth and profitability by managing the impact of risk and uncertainty on business value. We focus on new business strategies with emphasis on optimizing the economic value created by R&D, New Product Development, and other business opportunities.

© 2005-2007 All rights reserved. SmartOrg is a service mark. Decision Advisor is a registered trademark and Project Navigator, Portfolio Navigator and Value Maps are trademarks of SmartOrg Inc. Patents are pending on various Value-Based Management processes and software. 0807

**SMARTORG**  
VALUE-BASED MANAGEMENT SOFTWARE

+1 650 470 0188  
www.smartorg.com  
info@smartorg.com