

COMMUNITY OF PRACTICE

REALISING STRATEGIC VALUE

Hosted & facilitated by Sally Mainsbridge & Jo Rappolt

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PROUDLY INCORPORATING THESE SPECIALIST BRANDS



Doll
Martin
Associates



- 01** WELCOME AND INTRODUCTIONS
- 02** FOCUS TOPIC: PORTFOLIO PRIORITISATION
- 03** GENERAL DISCUSSION
- 04** WRAP UP AND NEXT MEETING

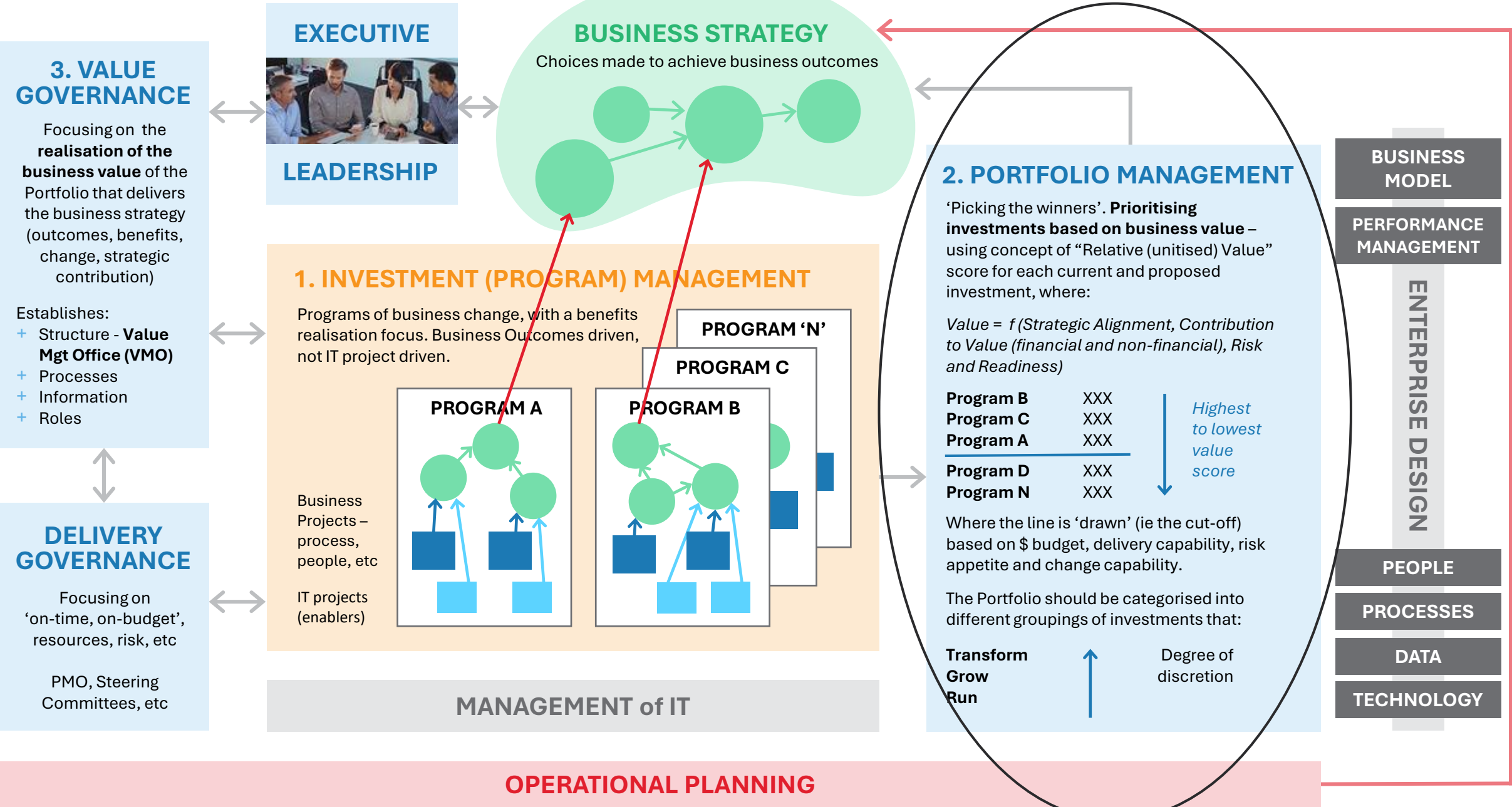
RECAP: REALISING STRATEGIC VALUE COMMUNITY OF PRACTICE: VISION

Bringing together practitioners, program and project professionals and stakeholders together in a learning partnership to share knowledge, develop capability, and promote best practice in realising strategic value.

Why a community of practice?

- + Foster a collaborative environment to **enhance your professional development** and **develop your knowledge and capabilities** for effective **value and benefits management** across your organisation's projects, programs and portfolios
- + **Share experiences, success stories, case studies** and **learnings** with peers the real life operational aspects of value and benefits management from across industry
- + Hear from **expert guest speakers**

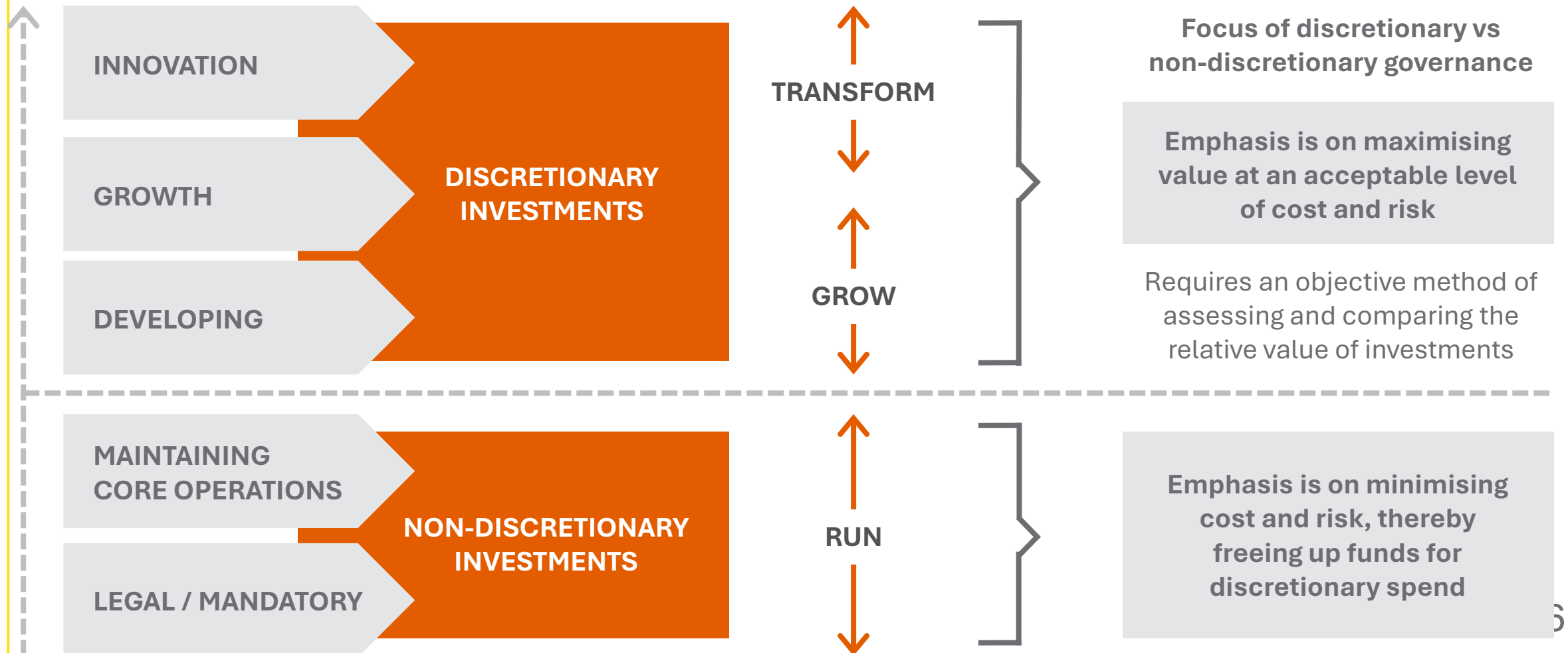
RECAP: OUR STRATEGIC GOVERNANCE THINKING



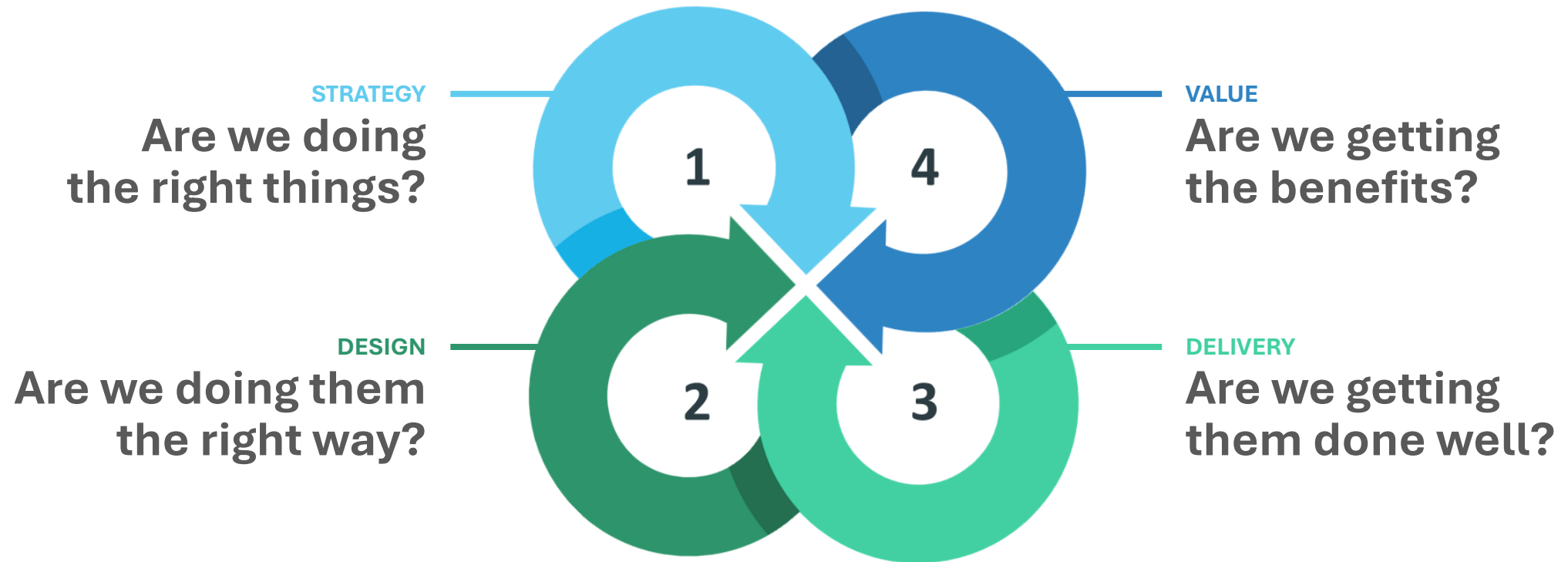
RECAP: A SUMMARY - OUR STRATEGIC GOVERNANCE FRAMEWORK



RECAP: PORTFOLIO CATEGORISATION - ENABLES BALANCING THE INVESTMENT PORTFOLIO AND FOCUSING ON WHAT IS IMPORTANT



RECAP: WHERE TO START - BALANCING VALUE AND DELIVERY IN PORTFOLIO DECISIONS



The role of value governance

Driving a culture of focusing on what matters for success for all **stakeholders**

DISCUSSION: YOUR EXPERIENCES

+ Process

What prioritisation mechanisms do you have in place?

- Formal/informal?
- Who is involved?
- Frequency? (annual, quarterly, monthly)
- Categories?

If not, why not?

+ Outcomes

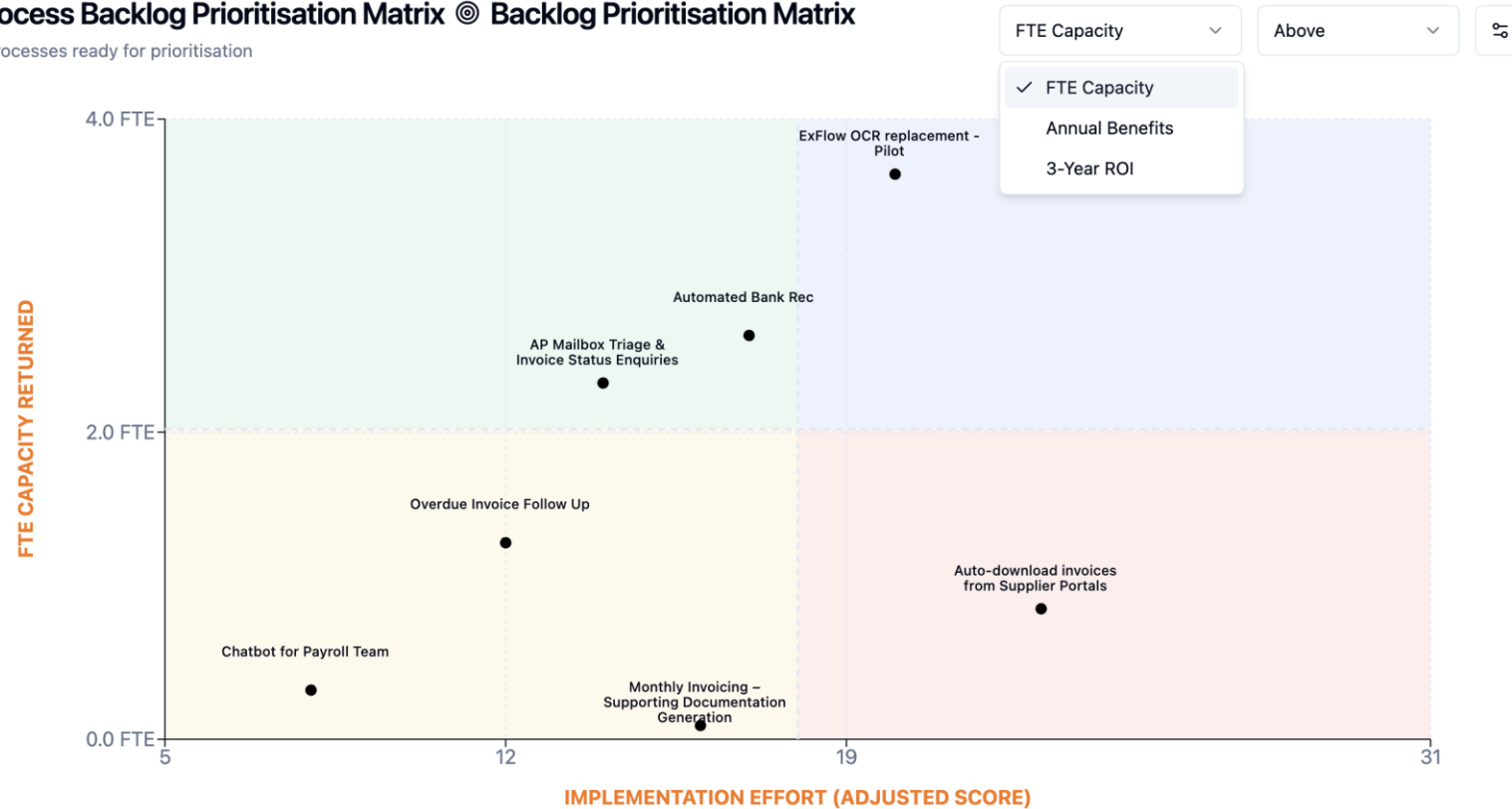
How well did initiatives align with organisational strategy?

- Were there outliers?
- What strategic decisions did (the prioritisation) inform

PRIORITISATION TOOL: AN APPLIED EXAMPLE

Process Backlog Prioritisation Matrix © Backlog Prioritisation Matrix

7 processes ready for prioritisation



● Immediate Wins
High benefit, Low effort

● Strategic
High benefit, High effort

● Low-hanging Fruit
Low benefit, Low effort

● Difficult Wins / For Further Review
Low benefit, High effort

PRIORITISATION TOOL: AN APPLIED EXAMPLE

Rolled-Up Backlog Automation Projects ROI Overview

7 projects

Executive summary of backlog automation projects performance

Backlog Portfolio 3-Year ROI

705.8%

Backlog Projects Net Annual Benefit

\$470,347

Backlog Portfolio Payback Period

8.3 months

Backlog Projects 3-Year Net Benefit

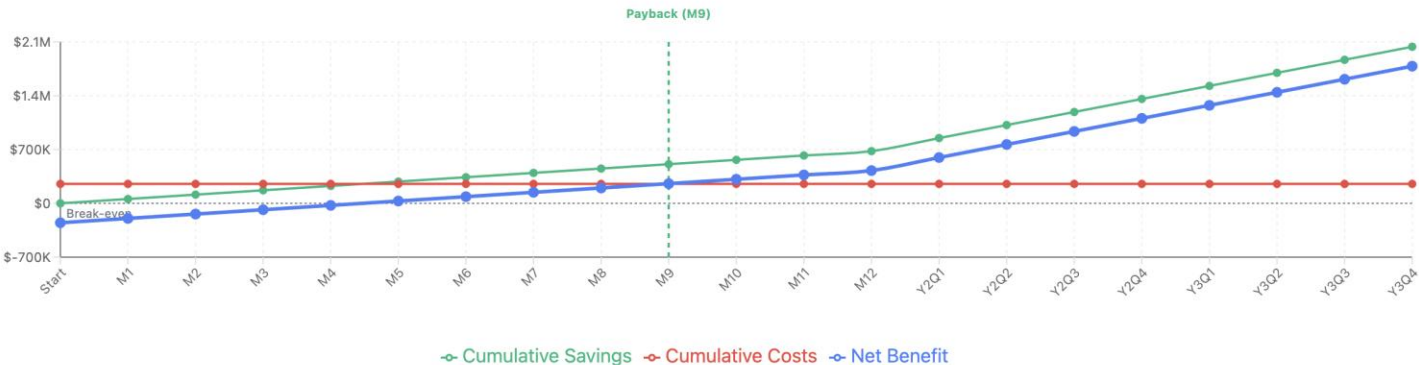
\$1,783,541

Backlog Portfolio 3-Year Financial Projection

Comprehensive financial outlook for all backlog automation projects

3-Year Financial Projection

Break-even: Month 9



Payback Analysis: Break-even achieved at month 9, after which all savings contribute directly to ROI.

Backlog Projects Benefits Breakdown

Hard Benefits	\$92,121
Soft Benefits	\$586,626
Total	\$678,747

Backlog Projects FTE Capacity Returned

11.2 FTE

Equivalent to \$678,747 annually

PRIORITISATION TOOL: AN APPLIED EXAMPLE

Net Present Value Analysis

Time value adjusted returns at 10% discount rate over 3 years

 NPV (3Y)

\$102,281

Present value of all cash flows

 IRR

183.6%

Internal rate of return

 Profitability Index

7.84

Creates value

 Discounted Payback

8mo

Time to recover (discounted)

NPV by Time Horizon - Discount Rate Sensitivity Analysis

Period	8% Lower	10% Current	12% Higher	vs. Nominal
2 Years	\$64,001	\$62,152	\$60,356	24%
3 Years	\$106,200	\$102,281	\$98,521	51%
5 Years	\$181,145	\$171,489	\$162,447	26%
10 Years	\$323,670	\$294,651	\$268,989	22%
15 Years	\$419,334	\$369,508	\$327,635	19%
20 Years	\$483,545	\$415,005	\$359,916	16%

Shows how NPV changes with $\pm 2\%$ discount rate variance. Higher NPV values indicate the project is more valuable.

NEXT MEETING: FEBRUARY 2027



Portfolio benefits
management



Effective governance:
stakeholder



Investment
Management:
Embedding value
metrics



Planning for success



Executive reporting



Tools and templates

Monitoring and Evaluation
KPIs: outputs and outcomes

THANK YOU

Bringing your customer and digital vision to life.