

Questionnaire for Portfolio Management

Briefly describe your business.

- 1 Specify a name, industry or branch, purpose, business idea, mission, the number of customers, and time since the establishment

How many persons are directly involved in your business, both operational and development?

- 1 Number of employees and long-term consultants

Briefly describe the person or persons who have the business-responsibility for your portfolio?

- 1 Number of persons, roles, authority, etcetera

Briefly describe the person or persons who own the business relation with major vendors and have control of the incentive model for vendors?

- 1 Number of persons, roles, authority, etcetera

Is there a portfolio strategy, tactics, and objectives for your portfolio?

- 1 Yes or No

Do you do a continuous evaluation of the life span of your products when it comes to market shares and market growth?

- 1 Yes and the model you use, or No

What is the normal time frame for your business plans?

- 1 Numer of Weeks

Are you using OKR, SMART, or any other template to define measurable objectives?

- 1 Yes or No

What is the average lead time for getting a Business Initiative out in the market?

- 1 Number of Weeks

What is the average lead time between full technical integrations of your solutions?

1 Number of Weeks

Is your business dependent on any strategic alliances with external partners?

1 Yes or No

What kind of business benefits are you measuring?

1 Cost of Delay, Return On Investment, Net Present Value, Internal Rate of Return, Satisfaction indexes, Market Share, Time to Market, Internal Process Metrics, etcetera

What is the current distribution of means for your investment horizons?

1 The percentage for current business, next-generation solutions 1-3 years, and future businesses > 3 years

Is it within your control to fund any separate organization to develop your future business and have you taken any such initiative?

1: Yes or No 2: Yes or No