



IT Portfolio Management Case Study BridgeView Partners

February 2020



PROJECT: IT Portfolio Management

COMPANY SIZE: 1,200 Employees

COMPANY INDUSTRY: Healthcare Services

CLIENT

Client is a leader in the secure, compliant and efficient exchange of Personal Health Information (PHI) services.

BACKGROUND

Client was seeking strategic guidance in readying an IT Portfolio for Board of Directors (BOD) review, approval and funding. Challenges included:

- Quickly growing organization required more advanced and mature solutions to adequately support their business expansion
- Leadership team transitioning from entrepreneurial mindset to growing corporation sought coaching to establish successful IT investment planning process

To address these issues, BVP provided a strategic program leadership consultant to facilitate an IT strategic portfolio planning cycle and establish an ongoing portfolio management process.

THE SOLUTION

BridgeView Partners collaborated with the CIO and IT leadership team to establish a baseline of projects required to stabilize operations and prepare the organization for agile product management, growth and innovation.

BridgeView Partners partnered with the IT leadership team and facilitated the following:

- Define the strategic vision and identify the portfolio of IT projects
- Define the initial business cases, including investment, benefits and resources
- Facilitate the prioritization of projects and definition of project dependencies
- Establish a baseline of roles and resource capacity
- Prepare and co-deliver a 12-month portfolio management plan aligned with priorities and resource capacity for BOD approval
- Establish on-going process for IT Portfolio and Resource Management

THE OUTCOME

- 12 months of prioritized, approved, funded and resourced IT portfolio of projects
- Defined process for IT Portfolio and Resource Management
- Ongoing management of the IT Portfolio to track progress and outcomes

BENEFITS

- Defined, approved and achievable IT Project Portfolio aligned for business success
- Modeled and established ongoing process for IT Portfolio planning
- Modeled and established ongoing process for IT Resource planning
- Established IT Portfolio planning and resource management as a core leadership competency