Enterprise Planning Portfolio

Decision Lens Training

Maintaining your Portfolio

Strategy and Investment Management (SIM)
Office of Information Technology
Training Agenda

- Introduction
- Enterprise Planning Process (EPP) Overview
- Decision Lens Overview
- Maintaining Your Portfolio
Enterprise Planning Portfolio (EPP)

- The Strategy and Investment Management Division within the Office of Information Technology (OIT) facilitates the EPP process
- The State of Ohio EPP contains 30 separate agency portfolios
- Information submitted by the agencies is used to support statewide strategic alignment
EPP Process Overview

• Collect agency initiatives at the beginning of every Fiscal Year and Quarterly Portfolio updates
• Perform analysis to identify opportunities for shared services, agency collaboration, standardization & volume purchases
• Integration with Agency, DAS & OBM Governance processes
Decision Making Framework

• Provides guidance to the agency to determine which initiatives should be added to the Portfolio
• Covers a wide range coverage of initiatives from agency specific, mission critical to business transformation, technology innovation, and integration with enterprise services
Decision Lens

- Decision Lens is the technology enabler for the State of Ohio EPP process
- Beyond Strategic Planning, this tool enables prioritizing initiatives for critical decision making as part of the agency governance process
Decision Lens Software
Maintaining Your Portfolio
Log In to Decision Lens

• Use your state email and password that you setup:
  https://ohocio-dl3.decisionlens.com

• Email Strategy and Investment Team if you have problems:
  DAS.State.ITPlanning.Manager@das.ohio.gov
Add New Initiative

- Access the Alternatives screen in your Portfolio: after the Agency POC logs in, navigate to the Alternatives screen.
Add New Initiative

• From within the Alternatives screen, select “Add Alternative” from the drop-down. This will open a new, blank Alternative page.
Add New Initiative

- Enter Project Data: Populate all of the data fields. Click Save when you are done. The project will be added to the Portfolio and ready to rate during the ratings period.
Update Existing Initiative

- If you are updating data for an existing project, select the Edit (pencil) icon to the right of the project name. This will open up a sidecar editor. Updates will automatically save to the project and the sidecar will close when you close or click off the sidecar.
Thank You from
The Strategy and Investment Management Team
Appendix
Strategy and Investment Management (SIM)
Enterprise Strategic Alignment Process

**Ongoing**
- Agency strategic initiatives intake through Enterprise Planning Portfolio
- SIM team performs initial review and seeks agency input to obtain clarifications
- Map initiatives to Strategic Priorities (e.g. AI, process automation, mobile, security, cloud, etc.)
- Perform analysis and document recommendations collaborating with Architecture team(s)

**Quarterly**
- Conduct Joint Analysis with Service Delivery Teams and identify opportunities for:
  - Shared Services
  - Agency collaboration
  - Technology Standardization
  - Volume Purchases
- Bi-directional Communication between Agencies and Service Delivery Teams
  - Agency initiatives forecast to incorporate into Service Roadmaps
  - New OIT initiatives in flight/roadmap to help agency planning efforts

**Quarterly**
- State Leadership
  - SIM team will provide Collaboration Opportunity Reports & Recommendations to State CIO & Senior Leadership
- Publish Results
  - Publish Collaboration Opportunity Reports to Agencies through Lines of Business and other established forums

**Communication Plan**
Portfolio Analysis Reports for Service Owners and Agencies

**Input:**
- Enterprise Planning Portfolio, RFPs, RTP’s, R&P Requests
- Opportunity Analysis & Recommendations

**Output:**
1. Updated Analysis Reports / Supporting Documentation
2. Opportunities & Analysis Recommendations

**Communication Plan:**
- Review Collaboration Reports with State CIO & Tech Board; Upon approval, socialize in LOB and Agency feedback loop meetings.
- Identified Opportunities; Convey opportunities to Enterprise Architecture team to form Customer Centric working groups

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*Ohio Department of Administrative Services*
## Strategy and Investment Management (SIM)
### Enterprise Planning Portfolio (EPP) Decision Making Framework

<table>
<thead>
<tr>
<th>Initiative Attributes</th>
<th>Action</th>
<th>Major Project</th>
<th>Strategy and Investment Management (SIM)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project/Initiative prioritized or sponsored by (any of):</td>
<td>Include in Portfolio</td>
<td>If Planned Budget is &gt;= 2.5 M,</td>
<td>Enterprise Planning Portfolio Portfolio</td>
</tr>
<tr>
<td>The Office of the Governor</td>
<td></td>
<td>select “Major Project” factor</td>
<td>Planning Portfolio</td>
</tr>
<tr>
<td>Executive Orders</td>
<td></td>
<td>If Planned Budget is =/&gt; 2.5 M,</td>
<td>Planning Portfolio</td>
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<tr>
<td>Innovate Ohio</td>
<td></td>
<td>select “Major Project” factor</td>
<td>Planning Portfolio</td>
</tr>
<tr>
<td>The Director of OBM</td>
<td></td>
<td>If Planned Budget is =/&gt; 5 M,</td>
<td>Planning Portfolio</td>
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<tr>
<td>Legislation</td>
<td></td>
<td>select “Major Project” factor</td>
<td>Planning Portfolio</td>
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<tr>
<td>as a State strategic priority.</td>
<td></td>
<td>If Planned Budget is =/&gt; 2.5 M,</td>
<td>Planning Portfolio</td>
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<td></td>
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<td>select “Major Project” factor</td>
<td>Planning Portfolio</td>
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<td>If Planned Budget is =/&gt; 1 M,</td>
<td>Planning Portfolio</td>
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<td></td>
<td></td>
<td>select “Major Project” factor</td>
<td>Planning Portfolio</td>
</tr>
</tbody>
</table>

**Guidelines to enable Agencies to determine whether an Initiative/Idea/Project belongs in the Portfolio**