SERVICE VALUE PROPOSITION

Portfolio management & advisory

Fund the right work. Make capacity count.

When everything is a priority, investment can fragment across initiatives that compete for the same people. Leaders need a consistent basis for deciding what to start, sequence, reshape or stop.

The value we bring

- Organisation: align teams around fewer, clearer priorities.

- Cost control: expose duplicated spend and work that cannot be staffed realistically.

- Business value: redirect scarce capacity towards initiatives with a stronger value case.

How we work

- Build one view of initiatives, spend, capacity, benefits and dependencies.

- Agree decision criteria with sponsors, including strategic fit, risk and affordability.

- Compare investment scenarios and establish a recurring portfolio review.

Portfolio management & advisory

What you receive

- A prioritised portfolio with explicit trade-offs and decision owners.

- Capacity and investment scenarios with assumptions and constraints.

- A benefits register and concise executive decision pack.

How we measure progress

- Share of spend linked to agreed strategic objectives.

- Capacity demand versus available capacity by critical skill.

- Forecast portfolio cost and benefits versus approved baseline.

Agree the baseline, target, owner and review cadence at the start. Measures are selected to fit the engagement.

Explore the illustrated engagement

Too many priorities. One shared capacity pool.

Page 3 shows the situation, our entry point, the client decisions and the intended value. Illustrative scenario, not a client case study.

A practical starting point

Start with a portfolio diagnostic using the current initiative list, budgets and capacity view. Agree the decision criteria before recommending changes.

Benefits depend on reliable estimates and leaders acting on prioritisation decisions. We do not equate cancelled budget with realised cash savings.

Scope, availability, fees and expected outputs are agreed before engagement. Outcomes depend on context, adoption and decisions.

Discuss your situation: info@flockshift.com | flockshift.com/contact

ILLUSTRATIVE ENGAGEMENT / NOT A CLIENT CASE STUDY

Too many priorities. One shared capacity pool.

The vision: Give the most valuable initiatives a credible route to delivery.

The situation: A leadership team has approved overlapping initiatives. The same specialists appear in several plans, while budget reviews consider each project in isolation.

Where FlockShift steps in: The portfolio sponsor asks FlockShift to establish a shared view and facilitate investment trade-offs.

STARTING POINT		THE AMBITION
Competing commitments	→	**An owned investment sequence**

JOURNEY	FLOCKSHIFT INTERVENES	THE CLIENT OWNS	TANGIBLE OUTPUT
01 / Map reality	Reconcile initiatives, cost forecasts and critical skills.	Confirm strategic objectives and data owners.	One portfolio and capacity view.
02 / Compare options	Model sequencing, deferral and scope trade-offs.	Agree value, risk and affordability criteria.	Comparable investment scenarios.
03 / Make choices	Facilitate prioritisation and record consequences.	Approve what starts, changes or stops.	An owned decision and sequencing plan.
04 / Keep it live	Set a review cadence and benefits checkpoints.	Act on exceptions and refresh priorities.	A repeatable portfolio decision pack.

What better looks like: Fewer commitments competing for unavailable skills. Investment decisions tied to explicit value and risk. A review rhythm that catches renewed overcommitment.

What we would measure: Capacity demand against available critical skills. Spend tied to approved priorities. Forecast benefits with named business owners.

Fictional scenario, not achieved results. Scope, measures and responsibilities are agreed with the client. Outcomes are not guaranteed.