

Portfolio Business Performance and Growth Worksheet

Be prepared to discuss the below items. This worksheet is for your preparation only.

Portfolio:				
Assigned Objectives				
Objective Type <small>(e.g. Revenue, New Customer Adds, etc.)</small>	Objective Detail <small>(e.g. \$1M Net License Revenue, \$30M Consumption Revenue, 5 New Banking Customers, etc.)</small>			
<p>1 <i>Can he/she articulate the goals he/she is working towards?</i> KEY QUESTION: N/A</p>				
Portfolio Partners				
Partner Name	Expected Run Rate Revenue <small>(How much will this partner produce without you?)</small>	Notes on Current Ability, Future Potential, and Commitment to Growth	Engagement Strategy Chosen	Allocated Objectives <small>(How much do you intend for this partnership to produce?)</small>
<p>2 <i>Can he/she briefly describe each partner and has he/she thought through how much revenue the partner would likely produce without his/her assistance.</i></p> <p>KEY QUESTION: What are you basing your run rate estimation on?</p>		<p>3 <i>Can he/she articulate and defend the engagement strategy chosen for each partner based on a reasonable assessment of their current ability, future potential and commitment to growth</i></p> <p>KEY QUESTION: Why? (e.g. "Why is this partner a Grow parnter?")</p>		<p>4 <i>Can he/she articulate the reasoning used to allocate parts of their assigned objectives to each partner?</i></p> <p>KEY QUESTION: Why? (e.g. "Why did you assign this partner so much more than another?")</p>

Portfolio Business Performance and Growth Worksheet

Be prepared to discuss the below items. This worksheet is for your preparation only.

Achievement Plan Highlights		
Evangelism <small>(What evangelism and solution/platform awareness efforts will you employ?)</small>	Development <small>(What partnership skills/capabilities development will you drive?)</small>	Sales & Marketing <small>(What cross-portfolio marketing & sales execution efforts will you employ; and what rules will you follow?)</small>
<p style="font-size: 2em; color: red; margin: 0;">5</p> <p style="color: red; margin: 0;"><i>Can he/she articulate specific evangelism strategies and tactics they will execute to drive awareness and potential adoption of specific solutions, platforms or technologies?</i></p> <p style="color: red; margin: 10px 0 0 20px;"><i>KEY QUESTION: What new releases or advances are coming that you need to prepare your entire portfolio for?</i></p>	<p style="font-size: 2em; color: red; margin: 0;">6</p> <p style="color: red; margin: 0;"><i>Can he/she articulate specific skill or capabilities enablement they intend to provide or coordinate across the portfolio?</i></p> <p style="color: red; margin: 10px 0 0 20px;"><i>KEY QUESTION: What lack of skills or capabilities in your portfolio is hurting your ability to achieve your objectives the most?</i></p>	<p style="font-size: 2em; color: red; margin: 0;">7</p> <p style="color: red; margin: 0;"><i>Can he/she articulate specific sales and marketing strategies and tactics they intend to deploy across the portfolio; and articulate their rules of engagement?</i></p> <p style="color: red; margin: 10px 0 0 20px;"><i>KEY QUESTION: How will you decide where and when to invest your sales and marketing resources (e.g. time, money, etc.)?</i></p>
Resource Leverage <small>(How will you build appropriate relationships with other teams?)</small>	Recruitment <small>(What new partnerships / solutions / practices do you need to grow your business and how will you capture them?)</small>	Personal Development <small>(What personal skills and abilities do you need to develop?)</small>
<p style="font-size: 2em; color: red; margin: 0;">8</p> <p style="color: red; margin: 0;"><i>Can he/she articulate relationship building strategies and tactics they will use to ensure they can get the help they need?</i></p> <p style="color: red; margin: 10px 0 0 20px;"><i>KEY QUESTION: What internal relationships require the most effort from you to get the support you need?</i></p>	<p style="font-size: 2em; color: red; margin: 0;">9</p> <p style="color: red; margin: 0;"><i>Can he/she articulate specific recruitment strategies and tactics that will help the entire portfolio?</i></p> <p style="color: red; margin: 10px 0 0 20px;"><i>KEY QUESTION: What new solutions, practices or partners do you need to achieve your objectives?</i></p>	<p style="font-size: 2em; color: red; margin: 0;">10</p> <p style="color: red; margin: 0;"><i>Can he/she articulate specific skill development they intend to pursue for themselves?</i></p> <p style="color: red; margin: 10px 0 0 20px;"><i>KEY QUESTION: Where do you need to grow in your own ability?</i></p>
Performance Metrics and Measures <small>(What metrics and/or measures will you use to track your progress besides overall license revenue production?)</small>		Review, Pipeline and Forecast Rhythm(s) <small>(What will be your review rhythm, and what pipeline and forecast disciplines will you drive to ensure performance?)</small>
<p style="font-size: 2em; color: red; margin: 0;">11</p> <p style="color: red; margin: 0;"><i>Can he/she articulate appropriate ways to measure progress against the key components of the plan?</i></p> <p style="color: red; margin: 10px 0 0 20px;"><i>KEY QUESTION: How will this metric help you know you are heading in the right direction towards success?</i></p>		<p style="font-size: 2em; color: red; margin: 0;">12</p> <p style="color: red; margin: 0;"><i>Can he/she articulate a reasonable review rhythm to check progress against the plan and make adjustments?</i></p> <p style="color: red; margin: 10px 0 0 20px;"><i>KEY QUESTION: How does this review rhythm help you manage the plan?</i></p> <p style="color: red; margin: 10px 0 0 20px;"><i>Can he/she articulate how pipeline analysis and management will help check progress against the plan and make adjustments?</i></p> <p style="color: red; margin: 10px 0 0 20px;"><i>KEY QUESTION: What factors will you be looking for in your pipeline review?</i></p> <p style="color: red; margin: 10px 0 0 20px;"><i>Can he/she articulate how a forecast rhythm will help check progress against the plan and make adjustments?</i></p> <p style="color: red; margin: 10px 0 0 20px;"><i>KEY QUESTION: What will be a part of your forecast rhythm?</i></p>

Portfolio Business Performance and Growth Worksheet

Be prepared to discuss the below items. This worksheet is for your preparation only.