



Portfolio and Product Excellence

Category Description

This award recognizes organizations that have leveraged TBM, strategic portfolio management (SPM), and Agile delivery at scale to continuously plan and deliver business value. It is designed to highlight organizations that have successfully applied TBM insights to enable robust SPM guardrails, conduct scenario planning, and perform product-based TCO analyses that incorporate P and L, revenue, Agile value streams, and labor. Submissions should focus on how TBM was used to drive more effective decision-making, align portfolio and product roadmaps with corporate strategy, and deliver measurable outcomes that accelerate business value.

Application Questions

1. What challenges did your organization face in implementing strategic portfolio management, scaling Agile delivery, or achieving product-based financial transparency before using TBM?
 2. What specific actions did your organization take, using TBM, to address each challenge?
 3. What was the outcome of these actions?
 4. How will your TBM practice evolve over the next 12 months to further strengthen portfolio and product decision-making?
 5. What technical modifications or enhancements were made to your TBM model to support SPM guardrails, scenario planning, product-based TCO, or Agile scaling?
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Question #1 Guidance & Scoring Criteria

What challenges did your organization face in implementing strategic portfolio management, scaling Agile delivery, or achieving product-based financial transparency before using TBM?

Expert Guidance: Provide a clear and detailed explanation of the specific challenges your organization encountered prior to leveraging TBM. These may include difficulties in applying SPM guardrails, limitations with scenario planning, insufficient visibility into labor costs within Agile value streams, or the lack of P and L and revenue data in total cost of ownership (TCO) analyses. Be sure to describe how these challenges negatively impacted your ability to continuously plan and deliver business value. Avoid broad or vague statements – each challenge should be well-defined and closely tied to barriers in portfolio and product excellence.

Judging Criteria

- **Exceptional:** Clearly defined actions that directly map to each challenge listed, demonstrating a structured execution plan and strategic alignment with SPM and product-value objectives. The response shows innovative or best-practice uses of TBM and provides evidence of stakeholder engagement.
- **Strong:** Well-defined actions with clear links to the challenges but lacking some depth in execution details or innovation. The connection between TBM principles and actions taken could be more deeply explored.
- **Moderate:** Actions are mentioned but loosely connected to TBM principles or fail to clearly address the specific SPM or product-based financial challenges. Minimal evidence of direct mapping to challenges.
- **Weak:** Insufficient explanation of actions taken; vague, missing, or weakly justified response. Little to no clear link between actions and challenges.



Question #2 Guidance & Scoring Criteria

What specific actions did your organization take, using TBM, to address each challenge?

Expert Guidance: For every challenge listed above, explain in a clear and direct narrative how TBM was used to tackle it. Highlight the steps taken to integrate or refine SPM guardrails, incorporate scenario planning techniques, address labor cost modeling for Agile teams, or embed P and L and revenue data into product TCO. Illustrate how these actions improved transparency, guided investment trade-offs, or accelerated the delivery of business value at scale.

Avoid generalities – show how each step was executed, what specific TBM tools or methods were employed, and how they directly solved the identified challenges.

Judging Criteria

- **Exceptional:** Clearly defined actions that directly map to each challenge listed in the previous question, demonstrating a structured execution plan and strategic alignment with SPM and product-value objectives. The response shows innovative or best-practice uses of TBM and provides evidence of stakeholder engagement.
- **Strong:** Well-defined actions with a clear link to the challenges but lacking some depth in execution details or innovation. The connection between TBM principles and the actions taken could be more deeply explored.
- **Moderate:** Actions are mentioned but are loosely connected to TBM principles or fail to clearly address the specific SPM or product-based financial challenges. Minimal evidence of direct mapping to challenges.
- **Weak:** Insufficient explanation of actions taken; vague, missing, or weakly justified response. Little to no clear link between actions and challenges.

Question #3 Guidance & Scoring Criteria

What was the outcome of these actions?

Expert Guidance: Describe the outcomes that emerged from each action, ensuring a clear connection back to the specific challenges. Outcomes could involve improved scenario planning, more effective SPM guardrails, enhanced insight into product profitability, or refined labor cost models for Agile delivery. Include any quantitative or qualitative evidence of success (e.g., cost savings, reduced time-to-market, better P and L performance, or more accurate portfolio forecasting). If the outcomes differed from expectations, explain why and how your organization adapted.

Focus on real impacts that demonstrate how TBM contributed to achieving portfolio and product excellence. Avoid broad success statements – each outcome should be clearly tied to an action taken and should reflect real impacts, whether they were positive, negative, or a learning experience.



Judging Criteria

- **Exceptional:** Clearly articulated outcomes that directly tie to both the challenges and actions taken, demonstrating a structured approach with strong evidence, including quantitative data where applicable. The response provides compelling examples of measurable improvements in strategic portfolio decisions, product profitability, or Agile scalability with clear business impact.
- **Strong:** Good outcomes described with some evidence of business value but possibly lacking comprehensive metrics or a detailed cause-and-effect explanation. The mapping between challenges, actions, and outcomes is present but not fully developed.
- **Moderate:** Outcomes are general, anecdotal, or not convincingly tied to TBM usage. The response may lack specificity in demonstrating the business impact or a direct connection to the challenges.
- **Weak:** No clear outcomes presented; vague or unsupported claims of success with little measurable impact. No discernible link between challenges, actions, and outcomes.

Question #4 Guidance & Scoring Criteria

How will your TBM practice evolve over the next 12 months to further strengthen portfolio and product decision-making?

Expert Guidance: Describe the priorities your organization has identified for the coming year as your TBM practice continues to mature. Focus on the new capabilities, use cases, or outcomes you plan to pursue to further improve strategic portfolio management, product investment decisions, and business value delivery.

Your response should clearly build on the successes and lessons learned from your current implementation. This may include expanding your TBM model to additional portfolios or products, enhancing scenario planning, improving labor and value-stream financials, integrating new data sources, refining governance guardrails, or enabling more dynamic investment trade-offs.

Be specific about what you plan to develop over the next 12 months, why these areas are important to your organization's strategy, and how TBM will continue to support more informed, outcome-driven decisions across your portfolio and product landscape.

Judging Criteria

- **Exceptional:** The response presents a clear, strategic roadmap for advancing the TBM practice over the next 12 months. Planned initiatives demonstrate strong alignment to portfolio governance, product strategy, and business value delivery, with clear linkage to prior achievements.
- **Strong:** The response outlines logical next steps for evolving TBM capabilities that support portfolio and product excellence. Future plans are relevant and connected to current efforts but may lack depth, prioritization, or measurable targets.
- **Moderate:** Future plans are mentioned but remain high-level or loosely defined. The connection between current TBM success and planned improvements to portfolio or product decision-making is weak or unclear.
- **Weak:** The response provides minimal insight into future direction. It focuses primarily on past accomplishments or suggests limited ongoing evolution of the TBM practice.



Question #5 Guidance & Scoring Criteria

What technical modifications or enhancements were made to your TBM model to support SPM guardrails, scenario planning, product-based TCO, or Agile scaling?

Expert Guidance: Explain in detail any technical modifications or refinements to the TBM model that enabled your organization to support strategic portfolio management, product-level analysis, or the scaling of Agile delivery. This may involve integrating P and L and revenue data into TCO, automating scenario planning, refining labor financials for Agile value streams, or implementing guardrails for portfolio investment decisions.

Be specific about why these changes were needed and how they improved the ability to continuously plan and deliver business value. Focus on technical execution, data modeling, and any tool or process automations that support your objectives.

Judging Criteria

- **Exceptional:** Thoroughly documented technical modifications that clearly address SPM or product-based challenges. The response includes strong evidence of improvements in cost modeling, scenario planning, or overall alignment with business outcomes.
- **Strong:** Clear description of technical modifications with reasonable evidence of effectiveness but potentially lacking depth in implementation details or quantifiable business impact. The connection to TBM principles and optimization goals is present but could be expanded.
- **Moderate:** Some modifications are mentioned, but they are loosely tied to TBM principles or do not clearly illustrate improvements in portfolio management or product-based cost transparency. Weak linkage to optimization objectives.
- **Weak:** No clear explanation of how the TBM model was adapted or leveraged; vague or missing response. No discernible connection between modifications and portfolio or product-focused outcomes.