

# R&D Portfolio Instructions



What's in your execution pipeline?

## How to use this template?

Use this template in workshops or decision-making sessions to get a complete overview of your R&D portfolio. Quickly identify imbalances between resource allocation and strategic objectives, orphaned or duplicate initiatives, or projects not progressing fast enough.

Invite collaborative input to determine where to map projects on the template:

- 1. Strategic focus fields:** What objectives does the project contribute to?

*\*Before downloading this template, you can customize the strategic focus fields on the next page.*

- 2. Project size:** What is the potential impact of the technology on your business?



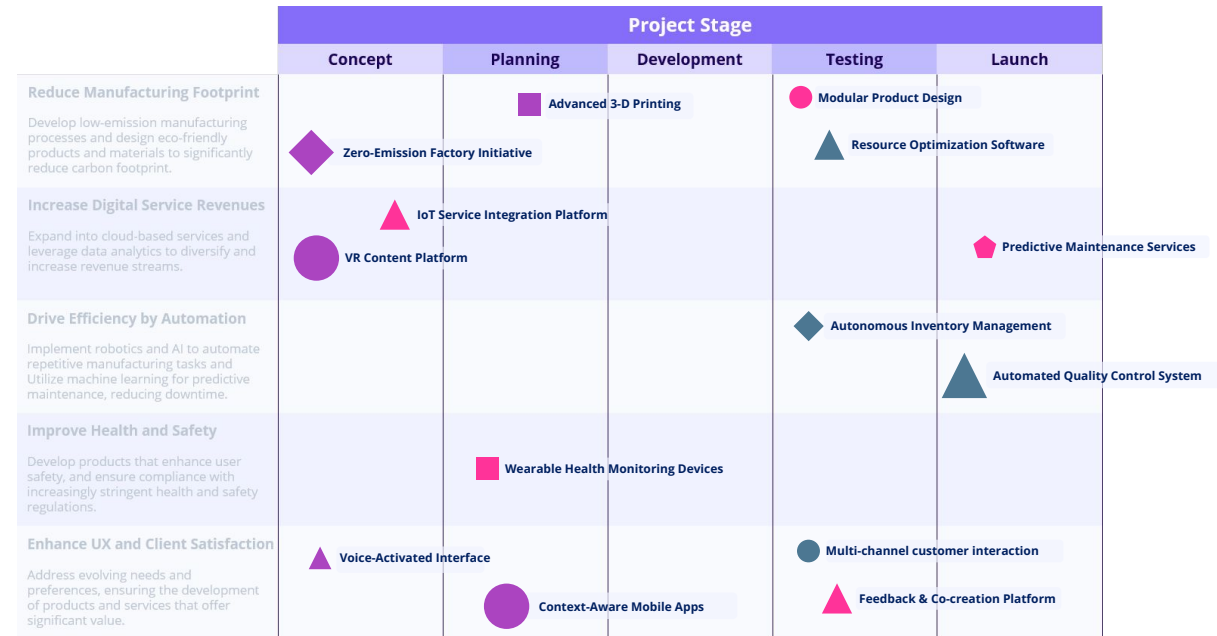
- 3. Degree of novelty:** Is the project aiming at a mere improvement to existing solutions or a true disruption?

- Radical / new-to-the-market
- Incremental / new-to-the-firm
- Continuous improvement

- 4. Consider other information,** such as project type, project health, or internal know-how. For example:

**Project type:** What is the intended outcome?

- Basic research
- Hardware development
- ▲ Software development
- ◆ Process improvement
- ◆ Service development



## What's next?

**Digitize:** Once you've mapped your company's project landscape on the radar template, capture the results in the accompanying [sheet](#).

Import this sheet into the [ITONICS Innovation OS](#) to bring your portfolio to life in a dynamic, interactive visualization.

**Analyze:** Analyze your R&D projects in context alongside market trends, customer needs, and competitive action to uncover new insights.

**Report:** Share your R&D portfolio and analysis with stakeholders in your company to inform decision-making strategy development.

## Get started

- 1. Customize** the strategic focus fields on the template on page 2 to align with your company's objectives.

- 2. Download** and print the template on page 2 (recommended in size A3 or larger to make it easy to use in your workshop).

Download the accompanying sheet for digitizing your results.

- 3. Try** ITONICS Innovation OS for free to see the portfolio matrix in action!

[See in Action](#)

# R&D Portfolio Template

What's in your execution pipeline?



**Tip:** Customize the rows to align with your strategic priorities.

**Tip:** Use shapes, colors, and sizes to represent different project categories.

	Project Stage				
	Concept	Planning	Development	Testing	Launch
<b>Reduce Manufacturing Footprint</b> Develop low-emission manufacturing processes and design eco-friendly products and materials to significantly reduce carbon footprint.					
<b>Increase Digital Service Revenues</b> Expand into cloud-based services and leverage data analytics to diversify and increase revenue streams.					
<b>Drive Efficiency by Automation</b> Implement robotics and AI to automate repetitive manufacturing tasks and Utilize machine learning for predictive maintenance, reducing downtime.					
<b>Improve Health and Safety</b> Develop products that enhance user safety, and ensure compliance with increasingly stringent health and safety regulations.					
<b>Enhance UX and Client Satisfaction</b> Address evolving needs and preferences, ensuring the development of products and services that offer significant value.					

**Project Size**

- Small-scale (< €100k)
- Medium-scale (€100k - €1M)
- Large-scale (€1M - €10M)
- Mega-scale (>10M€)

**Degree of Novelty**

- Radical / new-to-the-world
- Incremental / new-to-the-firm
- Continuous improvement

**Project Type**

- Basic research
- Hardware development
- Software development
- Process improvement
- Service development