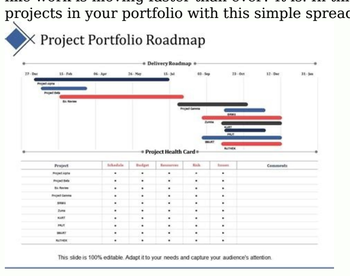


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Project portfolio roadmap template

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Download Project Portfolio Summary Template Microsoft Excel | Smartsheet This project portfolio template provides spreadsheet and dashboard views, as well as space to summarize details about specific projects and the overall health of your portfolio or project program. The spreadsheet includes columns for a project's health ratings, priority, status, summary description, budget, progress, and risks. Record the outcomes of any cost benefit analysis, and note any links or attachments associated with a given project. The dashboard display offers a snapshot of budgeted costs versus actual spending, as well as the distribution of projects across the health, status, and priority categories. Feel like work is moving faster than ever? It is. In this introduction to project and portfolio management (PPM), learn how to streamline your efforts and get multiple projects — or an entire portfolio — over the finish line, on time and on budget.Get the free e-book Download Project Portfolio Scorecard Template Microsoft Excel | Smartsheet Evaluate projects in your portfolio with this simple spreadsheet template.



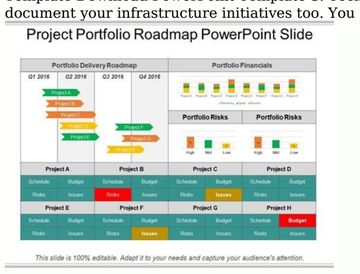
The project management office (PMO) section at the top of the template provides a summary review of your portfolio's progress and costs, as well as room for notes on the risks and cost benefit analysis. The template also includes a section for details about each project in the portfolio, with categories for the priority, status, planned versus actual costs, hours, and quality index rating. This template includes example commentary that illustrates how portfolio managers can use the template to expand on the numerical data. Download Project Portfolio Dashboard Template — Microsoft Excel Get a visual overview of portfolio KPIs with this Excel dashboard template, which includes a Gantt chart that shows the delivery timeline for each project, a pie chart that displays the portfolio's resource allocation, and bar charts that analyze each project's financials. The bar charts also include categories for risk analysis and open or pending actions. The project portfolio report section summarizes each project's schedule, budget, issues, and other details in a spreadsheet format. Download Project Portfolio Timeline Template Microsoft Excel | Google Sheets | Smartsheet This project portfolio planning template provides a visual timeline for multiple projects. The Gantt chart timeline allows you to easily differentiate between projects, and the template automatically generates each bar on the chart based on your start and end dates. The template also includes columns for notes on the schedule, budget, resources, risks, and issues for each project in your portfolio. Make strategic plans based on delivery timelines and ongoing performance. Download PowerPoint Project Portfolio Template — Microsoft PPT Create an in-depth project portfolio dashboard in PowerPoint.

Template slides include the portfolio's timeline, resource allocation, financial status, risk analysis, issues, and pending actions. There is also a slide that displays the duration of each project in days. The template also includes a table for compiling notes on each project. This thorough presentation template provides a broad overview of your portfolio as well as specific details about individual projects, and also includes sample data to illustrate the charts and graphs in each slide. Download Project Portfolio Tracker Template Microsoft Excel | Smartsheet Track multiple projects with this combined spreadsheet and timeline template. You'll find two tabs: an example template with color-coded options to highlight a project's status, priority, itemized costs and hours, duration, and timeline; and a blank template for easy data entry. This tracker template divides each project into activities or phases, with columns for assigned owners, deliverables, and percent complete. The timeline provides a weekly schedule based on the start date you enter at the top of the template. Add or remove columns to create a customized template based on the project information you want to track. Download Project Portfolio Budget Tracking Template — Microsoft Excel For each project in your portfolio, this budget tracking template provides a detailed breakdown of the costs, budgeted expenses, actual spending, and outstanding balance. Use the built-in Gantt chart for visual tracking and to summarize each project's budget versus actual costs. This template calculates subtotals and total costs as shown in the example template tab.

The template also lists the status as well as planned and actual start dates for each project phase. Download Project Portfolio Roadmap Template Microsoft Excel | Google Sheets Create a portfolio roadmap with milestone markers and color-coded bars that indicate a project's status: finished, in progress, scheduled, or proposed. The roadmap format makes it easy to manage a large portfolio, and offers clear timelines and visual status levels. The roadmap displays quarters and years and lists start and end dates next to each project name. Download Project Portfolio Status Report Template Microsoft Excel | Smartsheet This status template simplifies reporting with a 12-month roadmap, status summaries, and details on each individual project. The portfolio status overview uses green, yellow, and red to indicate whether items are on track, show signs of potential issues, or are otherwise of concern. The financial summary calculates budgeted costs, actual costs, a financial forecast, and variance. This PMO project portfolio template also lists individual project status updates, including time frames, progress, and descriptions of risks or concerns. A project portfolio management template allows you to evaluate, choose, and prioritize projects in order to maximize performance and meet organizational goals. The template may include one or more portfolios. You can use a PPM template to efficiently evaluate the benefits and risks associated with multiple projects (and possibly multiple portfolios). These templates also enable you to ensure that you've aligned your projects with overall business objectives. PPM templates support the process of prioritizing, scheduling, and tracking multiple projects, so you can use an organized, metric-driven approach when making strategic decisions. For a comprehensive look at the project portfolio management process, including additional templates (such as a project risk analysis) and PPM for IT projects, check out "Project Portfolio Management 101: Processes, Tools, and Examples." From simple task management and project planning to complex resource and portfolio management, Smartsheet helps you improve collaboration and increase work velocity -- empowering you to get more done. The Smartsheet platform makes it easy to plan, capture, manage, and report on work from anywhere, helping your team be more effective and get more done. Report on key metrics and get real-time visibility into work as it happens with roll-up reports, dashboards, and automated workflows built to keep your team connected and informed. When teams have clarity into the work getting done, there's no telling how much more they can accomplish in the same amount of time. Try Smartsheet for free, today.

Try Smartsheet for Free Get a Free Smartsheet Demo Save time with free roadmap templates for Excel and PowerPoint Roadmaps are excellent visual tools that help you articulate your business vision to your clients and executives. But as useful as they are, creating them is a long and challenging process. With our pre-built templates, you can spend less time creating your roadmap and more time managing your project. On this page you'll find six of the most common roadmap templates you can use in your next stakeholder meeting. We've developed each template in two versions for easy use with your usual MS Office tools: a roadmap template for Excel, where you can use standard Excel features like shapes and colors to build your roadmap manually; a roadmap template for PowerPoint, where you can use the free 14 days trial of the Office Timeline add-in to create your roadmap automatically or move the shapes by hand if you don't have Office Timeline yet. To find out more about how to create roadmaps with Excel, PowerPoint and other roadmap tools, have a quick look at our tutorials section. Top free roadmap templates Explore our series of roadmap templates for Excel and PowerPoint specially designed to save you time and get you started quickly: Choose from these most popular roadmap examples, download for free and customize them with a few clicks to make them suit your project. 1. Product roadmap template A product roadmap is a high-level overview of your product strategy and how that fits into your business vision. It can show both the strategic side and the practical side of your product offering, the reasoning, and the planning behind your implementation decisions. Your product roadmap template can include important aspects like product features, iterations, and the releases that are planned in the future, and you can represent them on the roadmap as key milestones, tasks or on different swimlanes. To help you fast-track your next product strategy meeting, here are two pre-populated templates that you can easily customize in Excel and PowerPoint (using the Office Timeline free trial). Download Excel Template Download PowerPoint Template 2. Project roadmap template When managing any kind of project, you'll probably need to create a project roadmap, which is a strategic outline of the project goals and the key deliverables.

When you build it, it's best if you present project tasks, milestones, and goals or initiatives grouped on various swimlanes. The project roadmap is an extremely useful tool for stakeholder buy-in and communication, since it helps create a common understanding on the strategic reasons for sponsoring a project. When all stakeholders are on the same page, you can overcome obstacles easier and deliver your project on time and within budget. Use the templates below to turn your project roadmap presentation into an effective meeting. Choose between Excel and PowerPoint (with the Office Timeline free trial) to create a project roadmap that would impress your stakeholders. Download Excel Template Download PowerPoint Template 3. Technology roadmap template A roadmap can be a useful tool when it comes to a product or project, but it can just as easily help you make strategic decisions regarding your technology investments. And since roadmaps are strategic planning instruments, it's useful to create a technology roadmap to document your infrastructure initiatives too. You can organize the swimlanes to include infrastructure solutions, tools, or processes that are in place today and what's envisioned for the future. Working with templates can make things a lot easier for you and save you hours of work.



Check out these examples of technology roadmap templates we've created for Excel and PowerPoint (and the Office Timeline free trial) to get started faster. Download Excel Template Download PowerPoint Template 4. IT roadmap template Another frequent type of roadmap you may be creating is an IT roadmap, which is basically an overview of the way your organization uses IT systems to achieve its business goals. For example, an IT roadmap can show the strategic plan created to migrate your organization's data or adopt a new tool. You can include various IT initiatives like apps, internal processes, or new technologies and you can use color-coded swimlanes to represent each initiative or goal.

You can use the IT roadmap to show current capabilities or the developments that are planned. Here's an example of an IT roadmap template that you can download and change the deliverables to make it work for you. There's an Excel version and a PowerPoint one (with the help of the Office Timeline free trial) so you can choose whichever suits you best. Download Excel Template Download PowerPoint Template 5. Strategy roadmap (or Business roadmap) template A visual representation of the key moments that mark your strategic business initiatives is extremely useful, especially if you need to include different themes and span across a longer time frame. Communication with stakeholders becomes easier if you show them a strategy roadmap, a more general plan that explains the overall vision for growing your business.



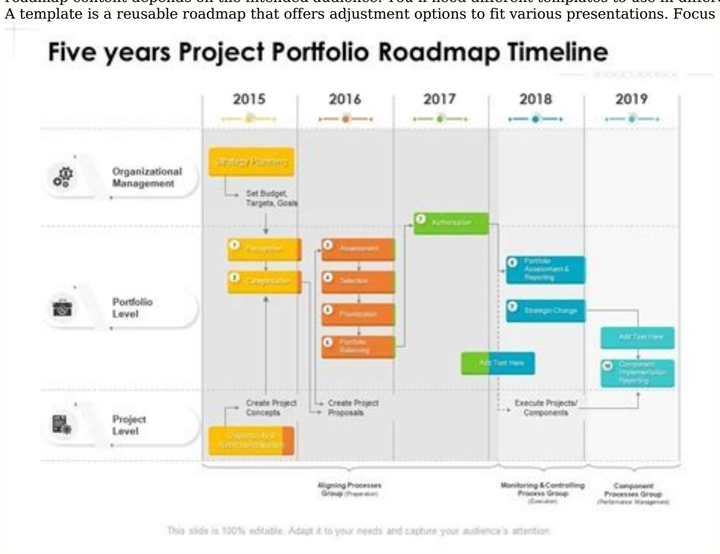
The strategy roadmap (or business roadmap, as it's sometimes called) can present your initiatives or themes on different swimlanes and include current state, long-term goals, and future steps needed to implement the business strategy. Discover the strategy roadmap templates we have built using Excel and PowerPoint (and the Office Timeline free trial). These will help you create a simple but clear strategy roadmap for your next stakeholder meeting and show off your presentation skills. Download Excel Template Download PowerPoint Template 6. Agile roadmap template As more companies embrace the lean and agile environment, creating an agile roadmap for your project or product can help you align your daily work to your long-term strategy, while remaining flexible enough to rapidly respond to any market changes. This agile roadmap is a high-level visual plan that displays what user stories your agile teams are focusing on over the course of one or several Scrum sprints and helps you see how this contributes to achieving the overall product vision.

It's also an excellent tool for communicating the product strategy to all the stakeholders, from every team member to clients or executives.

To give you an idea of how the agile roadmap can help you improve clarity and transparency in any project, download these templates – there's one for Excel and a similar one for PowerPoint that uses the Office Timeline free trial add-in and color codes to indicate team work and implementation of strategic goals. Download Excel Template Download PowerPoint Template If you need any help with choosing a roadmap software, check out our dedicated section on roadmap tools and discover useful tips and tricks on getting the best results with a dedicated roadmap maker. FAQ about roadmap templates A roadmap template is a predefined visual overview of a product, project, or process. A roadmap should show at a glance your product or project story at the highest level. You can use roadmap templates as guidance and inspiration to create a roadmap that matches your business' needs, or as a starting point for a highly customized roadmap. Templates should be built with customization options, so that you can reuse them as needed. A product roadmap template is a predefined map of the vision and strategy for your product. Product roadmap templates make it easy to communicate your plans and create product presentations. They can be reused after customization. Some of the key tenets of roadmaps include: Why – Vision and strategy. Vision: Why a product is created, who it serves. Strategy: The process and initiatives needed in order for the vision to be achieved. What - Goals and features.

What you are looking to accomplish with your product. What the product functionalities are and the benefits they bring to the user. How - Details on the processes and initiatives that are needed in order to achieve your goals. When - Dates or time periods. The timeline of the pathway of your product goals or features from start to finish. First of all, a roadmap content depends on the intended audience. You'll need different templates to use in different presentations for stakeholders and teams. Then, the content of a roadmap depends on what you want to focus on and the intended level of detail.

A template is a reusable roadmap that offers adjustment options to fit various presentations. Focus only on the key elements to include in a roadmap template, so that you can keep them unchanged if you need to update the content for your next presentation and make adjustments only to the details and secondary items.



For example, start with the product vision and goals, then work your way into the details that make up the roadmap. There are some common elements that you can use in all types of roadmap templates: Strategy processes and initiatives Goals Features Time reference Yes, you can find several basic roadmap templates in PowerPoint, in the online library. The templates can be downloaded, customized, and used in your presentation as needed. If you want to save time with customization or need higher functionality and improved design when creating and updating roadmaps in PowerPoint, try the Office Timeline add-in for PowerPoint for free.