

Portfolio View

Purpose. Provide the investment board a single, legible summary of every initiative and its stage.

What it captures. Each initiative's stage, latest evidence, last decision, funding tranche, owner, top risk, status, and next checkpoint.

When to use it. At each portfolio review, so that funding follows evidence.

Common mistake. Filling rows with activity updates instead of the latest evidence and the last decision. Project Swift's row stated its dated evidence, its last decision (scale, Month 10), and the trigger for the next tranche.

Decision rule. Every row carries a dated last decision and a next checkpoint. An initiative whose checkpoint has passed without a scale, hold, or stop decision goes on the agenda of the next portfolio review.

Portfolio or Board

Review Date

Initiatives *one row per initiative; dated evidence, a dated last decision, and a next checkpoint; no activity updates*

Initiative	Stage	Latest evidence	Last decision	Funding tranche	Owner	Top risk	Status	Next checkpoint