



# Advanced Portfolio Forecasting

Project costs and simplify portfolio planning and forecasting to support multifaceted strategic space planning requirements

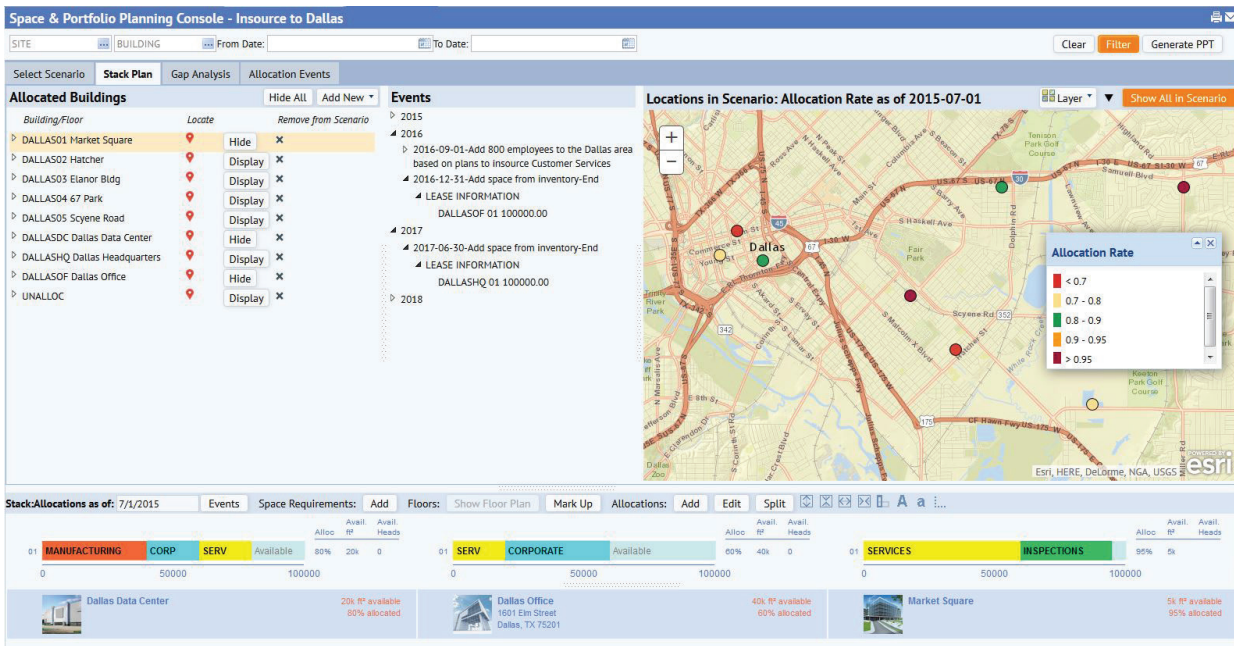
Real estate and portfolio planning professionals find it challenging to simplify the complex portfolio planning process, analyze proposed plans, and coordinate the intensive multidimensional review of those plans by stakeholders and senior leadership. ARCHIBUS Advanced Portfolio Forecasting provides the capabilities needed for assessing baseline conditions, forecasting need, proposing alternative planning scenarios, and evaluating complex tradeoffs over the short-, medium-, and long-term portfolio planning periods. These tools are especially critical for enterprise-scale initiatives that include expanding or reducing lines of business, and other activities that have enterprise-wide financial ramifications from a portfolio perspective.

## Key Reports, Metrics, Analyses

- Portfolio Scenarios
- Stack Plan
- Portfolio Forecast Department Analysis
- Portfolio Forecast Building Analysis
- Cost Forecast Department Analysis
- Cost Forecast Building Analysis
- Gap Analysis
- Allocation Events by Location, Organization and Date
- Portfolio Scenario Comparison, by Gap Analyses and by Requirement Costs and Headcounts
- Headcount Projection Chart
- Proposed Moves
- **Plus Many More...**

## Benefits

- **Align multiyear strategic portfolio plan with overall business plan objectives**
- **Project costs for advanced portfolio forecasting of space requirements**
- **Optimize the strategic space plan at all levels—from the portfolio, city, site/campus, to the building and room levels**
- **Plan short-, medium-, and long-term “what-if” scenarios for organizations of all sizes**
- **Enable key stakeholders to envision and optimize requirements using detailed event-driven scenarios including space configuration/allocation, leased/owned properties, and projects**



Get a top-down view of your portfolio and proposed scenarios with the Space & Portfolio Planning Console. Access all owned and leased space details, floor plans, headcounts, comparative costs, and utilization. Use the Business Events tab (not shown here) to see how your figures change as you acquire, allocate, and dispose of space in each time frame.



### Provide a Common Operating Picture for Key Stakeholders

Portfolio planners are keenly aware of the need to keep all lines of business operating continuously at peak productivity. They need to work with key stakeholders and optimize capacity at each point in time to achieve a high return on what is often millions of dollars per year in capital investment in the portfolio.

- *Unify complex planning and review processes by integrating key stakeholders with a common operating picture of planning requirements, forecasts, scenarios, and available spaces*
- *Improve portfolio decisions using what-if scenarios based on defensible data*
- *Assess baseline conditions and historical cost-allocation data*
- *Forecast needs and propose alternative planning scenarios*
- *Balance the tradeoffs involved with various portfolio scenarios over different time periods*

### Integrate Strategic and Tactical Planning

Advanced Portfolio Forecasting lets you work seamlessly from the portfolio scale, through the city and campus scales, all the way down to the room level. The portfolio-level planning features merge smoothly with the building- and floor-scale planning features. These features work within the Space & Portfolio Planning Console on the same data set, smoothly bridging the gap between strategic planning and tactical execution.

- *Flow strategic plans directly into design and execution processes*
- *Roll up detailed requirements and business needs to present practical concerns and constraints to senior leadership*
- *Deliver complete data/scenario integration to support a coordinated vision shared by stakeholders who have a strategic perspective and those who have an operations perspective*
- *Align strategic and tactical perspectives, roles, objectives, and processes so portfolio planners can identify and mitigate risk factors*

### Optimize Strategic Space Plan for the Portfolio

ARCHIBUS Advanced Portfolio Forecasting supports real estate and portfolio planning professionals in effectively executing the core business mission. It streamlines planning processes and ensures that the portfolio is right-sized and ready for business in every time frame.

- *Reduce end-to-end costs and execution risks by enabling proactive approaches to portfolio planning*
- *Deliver structured information and decision support required for high-level space planning and master planning*
- *Provide multiyear forecasts of space allocation in a single, consistent, intuitive graphical format*
- *Project annual costs by building and prorate them efficiently to departments/cost centers based on the space allocation forecast*

### Leverage Other Integrated ARCHIBUS Applications

While ARCHIBUS Advanced Portfolio Forecasting can be deployed on a standalone basis, other applications to optimize your configuration include:

- **Portfolio Management or Lease Administration** – for managing owned or leased properties or locations and developing portfolio or lease data
- **Space Inventory & Performance** – for managing space usage and developing space data for all rooms/groups
- **Personnel & Occupancy** – for managing space occupancy, availability, and vacancies, and assigning and reassigning people to rooms
- **Enterprise Move Management** – for executing group moves required by portfolio changes
- **Enterprise Asset Management** – for working with key strategic and tactical stakeholders to manage all assets enterprise-wide and plan what-if enterprise asset use scenarios
- **Project Management** – for executing proposed portfolio projects and tracking their work packages and tasks to completion

For more information, visit [www.archibus.com/apf](http://www.archibus.com/apf)

