Commonwealth of Massachusetts

Executive Office of Technology Services and Security (TSS)

Operational Efficiency

From Manual Reporting to Portfolio Intelligence

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EXECUTIVE SUMMARY

Beginning in June 2024, the Executive Office of Technology Services and Security (EOTSS) Portfolio Management Office launched a phased effort to modernize how project and portfolio information was collected, managed, and shared across the organization.

At the time, project reporting relied heavily on manually assembled PowerPoint status decks and recurring requests for updates from project teams. While effective for point-in-time reporting, the process was time-intensive, difficult to scale, and limited the organization's ability to maintain a consistent view of project health, risks, milestones, and reporting trends across active work.

As the Portfolio Management Office worked to improve reporting consistency and portfolio insight, each phase of the effort created the foundation for the next. The initiative began with standardized reporting expectations and a SharePoint-based project inventory designed to improve accountability and create a more structured source of project information. Once that foundation was established, the team used Power BI to expand access to project and portfolio information through centralized, self-service dashboard views. The adoption of shared reporting practices, standardized data, and reusable dashboard views then created the operational readiness needed to support EOTSS's transition to Strategic Portfolio Management (SPM).

Today, the reporting model supports visibility across 89 active projects and nine portfolio groupings, including eight internal TSS portfolios and external/non-TSS project work. Approximately 200 users have access to dashboard views, while approximately 150 project managers, status reporters, and related stakeholders participate in maintaining the project information that supports portfolio reporting and oversight.

The dashboards provide insight into project health, lifecycle stages, milestone activity, reporting quality, update frequency, and projects requiring attention. These capabilities help the Portfolio Management Office identify trends earlier, strengthen accountability for project updates, and support more informed leadership discussions across portfolios.

By replacing manually assembled PowerPoint updates with reusable dashboard views and standardized reporting practices, the Portfolio Management Office reduced the effort required to prepare recurring status materials while creating a more sustainable approach to portfolio oversight, transparency, and decision-making.

IDEA

The Challenge

The Executive Office of Technology Services and Security (EOTSS) Portfolio Management Office recognized that traditional project reporting methods were becoming increasingly difficult to scale as the organization's portfolio management needs evolved. Project status information was largely collected through recurring requests and manually assembled PowerPoint reporting materials designed for specific meetings or audiences. While these processes supported leadership reporting, they also created significant administrative effort and limited the organization's ability to maintain a consistent view of project and portfolio health across active work.

The reporting model also made it difficult to maintain a common view of information across teams and portfolios. Updates were often prepared for a specific reporting need, resulting in point-in-time visibility rather than a more actionable source of portfolio insight that could support ongoing follow-up, portfolio oversight, and leadership discussions.

Why It Mattered

As the number and complexity of projects increased, EOTSS recognized the need for a more sustainable and scalable approach to project reporting and portfolio insight. The organization needed a way to improve reporting consistency, strengthen accountability for project updates, reduce manual reporting effort, and provide leaders with broader awareness of active work across portfolios.

The challenge was not simply about improving status reporting. It was about improving how project and portfolio information was collected, maintained, reviewed, and shared across the organization. Leadership and portfolio stakeholders needed more than static reporting artifacts; the organization needed a common operating picture that could support more informed discussions about project health, risks, milestones, priorities, and areas requiring follow-up.

The Opportunity

Rather than approaching the effort as a single large-scale transformation initiative, the Portfolio Management Office focused on practical improvements that could mature over time. The opportunity was not simply to replace PowerPoint updates with dashboards. The larger goal was to move from project-by-project reporting toward a more centralized and reusable view of portfolio information that could support leadership reporting, operational review, and portfolio oversight activities across the organization.

This iterative approach allowed each phase of the effort to create the foundation for the next. As reporting practices became more standardized and project data became more consistent, EOTSS was able to gradually expand visibility across portfolios, reduce reporting silos, strengthen transparency, and support more proactive oversight.

A Scalable Approach for Government

The initiative addressed challenges common across government technology organizations, where multiple portfolios, stakeholders, and reporting structures can make it difficult to maintain a shared understanding of project health and portfolio priorities.

EOTSS demonstrated that meaningful portfolio modernization does not require a disruptive enterprise transformation from the outset. By focusing first on consistency, transparency, accountability, and adoption, the organization established a scalable model for improving portfolio oversight and supporting more informed operational and leadership discussions over time.

IMPLEMENTATION

Building the Foundation

The Executive Office of Technology Services and Security (EOTSS) Portfolio Management Office approached the initiative as a phased operational improvement effort designed to mature over time. Rather than attempting a large-scale portfolio management transformation all at once, the organization focused first on creating more consistent reporting practices and establishing a stronger framework for portfolio insight.

The effort began by standardizing reporting expectations and defining common reporting fields for active projects. The Portfolio Management Office established a recurring biweekly reporting cadence and created a SharePoint-based project inventory that served as a centralized source of project information. Each project maintained its own record, allowing updates to be captured in a more structured and reusable format than the previous slide-based reporting process.

The reporting model also improved accountability for project data maintenance. Project managers, status reporters, and related stakeholders were responsible for maintaining project information, while update history and modification tracking provided greater transparency into reporting timeliness and data maintenance activities.

Expanding Visibility Through Dashboards

Once a more structured source of project data was established, the Portfolio Management Office used Power BI to create centralized dashboard views that expanded access to project and portfolio information across the organization.

The dashboards were designed to support more than point-in-time status reporting. In addition to project health reporting, they provided insight into lifecycle stages, milestone activity, projects requiring attention, update frequency, reporting completeness, and risk and issue trends. These reusable dashboard views allowed leadership and portfolio stakeholders to move beyond static reporting artifacts and use more consistent information during operational reviews and leadership discussions.

Adoption and Operational Support

The Portfolio Management Office recognized that successful adoption required more than implementing reporting tools and dashboards. The organization introduced the effort iteratively and focused on building shared reporting practices across project teams and portfolio stakeholders over time.

To support adoption, the Portfolio Management Office established a layered support model that included a dedicated reporting point of contact, Portfolio Partners aligned to TSS portfolios, recurring reminders, process documentation, and ongoing engagement with teams and stakeholders. The organization also created recurring Open Door Q&A/CIP Project Reporting meetings with Secretariat portfolio partners to provide a forum for questions, clarification, and continuous feedback.

This engagement model helped reinforce reporting consistency while allowing the Portfolio Management Office to refine reporting practices, dashboard views, and follow-up processes as portfolio management needs evolved.

Preparing for Strategic Portfolio Management

As reporting practices became more standardized and dashboard visibility expanded, EOTSS established a stronger framework for broader portfolio management maturity. Shared reporting expectations, centralized project data, and reusable dashboard views helped position the organization to continue advancing its Strategic Portfolio Management (SPM) capabilities over time.

Rather than representing a separate initiative, the transition to SPM builds on the reporting standards, portfolio insight, and operational practices established through the earlier phases of the effort.

IMPACT

Expanding Portfolio Visibility at Scale

The initiative significantly expanded EOTSS's ability to manage portfolio information in a more centralized, scalable, and sustainable way. As the organization's portfolio management needs grew, the reporting model scaled with them. Between July 2025 and May 2026, the number of active projects tracked increased from 28 to 89, while tracked programs increased from 4 to 9 and portfolio groupings increased from 7 to 9.

This growth reinforced the need for more structured and reusable reporting capabilities. The operational model established by the Portfolio Management Office allowed EOTSS to expand portfolio insight without relying on increasingly complex and manually assembled reporting processes. By tracking more than three times as many active projects through a centralized portfolio management framework, EOTSS has strengthened its ability to identify emerging risks, escalate issues earlier, and understand cross-project dependencies. This broader enterprise view enables more informed decision-making and more proactive management of project delivery across portfolios.

Today, the reporting model supports 89 active projects across nine portfolio groupings, including internal TSS portfolios and external/non-TSS project work. Approximately 200 users have access to dashboard views, while approximately 150 project managers, status reporters, and related stakeholders participate in maintaining the project information that supports portfolio reporting and oversight.

Moving Beyond Static Reporting

Prior to the initiative, project information was largely communicated through manually assembled PowerPoint status updates created for specific meetings or reporting needs. While those reports supported leadership discussions, they also required recurring manual effort and produced largely point-in-time reporting views.

The new reporting model created a more reusable and actionable source of portfolio information. By replacing manually assembled PowerPoint updates with centralized dashboard views and standardized reporting practices, the Portfolio Management Office reduced the effort required to prepare recurring status materials while improving the organization's ability to monitor project health, reporting quality, milestone activity, lifecycle status, and projects requiring attention.

Rather than focusing primarily on assembling reporting artifacts, the organization gained a stronger ability to review trends, identify reporting gaps, monitor update timeliness, and focus follow-up activities on areas requiring attention.

Strengthening Accountability and Oversight

The initiative improved accountability for project reporting by establishing clearer expectations for project data maintenance and creating more transparent reporting practices across portfolios. Dashboard and heat map views helped the Portfolio Management Office identify stale updates, missing information, milestone gaps, reporting inconsistencies, and projects trending at risk.

The dashboards also provided visibility into reporting quality itself. Views for update frequency and mandatory field quality checks reinforced reporting consistency and allowed the Portfolio Management Office to follow up more proactively on incomplete or outdated project information.

This shifted portfolio reporting from a recurring administrative exercise toward a more sustainable management capability that could support portfolio oversight, leadership discussions, and ongoing follow-up activities across the organization.

Building a More Connected Portfolio Management Model

Prior to the initiative, project reporting practices varied across portfolios and teams, with updates often managed independently through portfolio-specific reporting processes. Leadership visibility depended heavily on individually prepared updates and portfolio-specific discussions, making it more difficult to maintain a shared understanding of project health, reporting quality, risks, milestones, and areas requiring follow-up across the organization.

The initiative helped shift EOTSS from fragmented reporting practices toward a more connected portfolio management model built on shared visibility and reusable portfolio insight. Leadership, portfolio managers, project managers, status reporters, and stakeholders gained access to a more common operating picture that supported more informed decision-making, more consistent discussions across portfolios, and improved visibility into trends, reporting gaps, stale updates, and projects requiring attention.

The Portfolio Management Office also established a support structure that included Portfolio Partners, reporting support contacts, recurring engagement sessions, and ongoing collaboration with teams and stakeholders. Rather than introducing disruptive change all at once, the organization gradually expanded reporting maturity, strengthened accountability across portfolios, and helped teams adopt more consistent portfolio management practices over time.

These efforts positioned EOTSS to continue advancing its Strategic Portfolio Management (SPM) capabilities using a more connected, transparent, and sustainable approach to portfolio oversight.