SmartSuite

Project & Portfolio Management › Portfolio & Financial Management · Datasheet

Portfolio Management

Prioritize investments, align initiatives to strategy, and optimize outcomes with real-time visibility across your portfolio.

Specification

SKU	PPM-PFM-PRT
Solution area	Project & Portfolio Management
Works with	Program Management, Project Management, Strategy & OKR Management, Resource Management, Project Financial Management
Updated	Sep 26, 2026
Datasheet	v1.0

What it is

Portfolio Management is the process of selecting, prioritizing, and managing projects and programs to achieve strategic objectives. It enables organizations to allocate resources effectively, balance investments, and ensure that work delivers measurable business value.

SmartSuite’s Portfolio Management software provides a structured, scalable system to prioritize initiatives, allocate resources, and ensure that work across the organization aligns with strategic objectives. It enables leadership teams to move from fragmented project tracking to a unified, data-driven view of all investments.

With a centralized system of record, leadership gains visibility into all projects and programs, enabling better prioritization and decision-making.

Core capabilities

Portfolio Planning & Prioritization

Evaluate and prioritize projects based on strategic value and impact.

Investment & Funding Management

Track budgets, funding allocations, and financial performance.

Portfolio-Level Dashboards

Monitor performance, risks, and outcomes across all initiatives.

Strategic Alignment Tracking

Link projects and programs to OKRs and business objectives.

Resource Allocation & Optimization

Align resources across initiatives to maximize efficiency.

Risk & Performance Visibility

Identify risks and monitor performance across the portfolio.

Scenario Planning & Decision Support

Evaluate different investment scenarios and outcomes.

Cross-Portfolio Reporting

Provide executive-level insights into performance and value.

Workflow Integration

Connect portfolio decisions to execution workflows.

The Portfolio Management Lifecycle

Step 1
Define Strategic Objectives
Establish goals and investment priorities.

Step 2
Evaluate & Prioritize Initiatives
Select projects and programs based on value and impact.

Step 3
Allocate Resources & Funding
Distribute resources across initiatives.

Step 4
Monitor Performance & Risks
Track progress and identify issues.

Step 5
Optimize Portfolio Continuously
Adjust priorities and investments based on outcomes.

Who it is for

Executive Leadership (CIO, COO, CFO)
Oversees strategic investments and outcomes.

Portfolio Manager
Manages prioritization and performance across initiatives.

Program Manager
Coordinates execution across programs.

Finance Leader
Tracks budgets and investment performance.

Strategy Leader
Aligns initiatives with business objectives.

Operations Leader
Ensures execution aligns with operational goals.

Works with

Program Management
Coordinates execution across initiatives.

Project Management
Provides task-level visibility.

Strategy & OKR Management
Aligns execution with business goals.

Resource Management
Ensures optimal allocation of resources.

Project Financial Management
Tracks budgets and financial outcomes.

Built differently. Portfolio Management runs on the same relational platform as every other SmartSuite product, so its records link to the risks, controls, issues and evidence they affect, and every report reflects the current state rather than a copy.

See it working with your data
Ask your SmartSuite account team for a demo of Portfolio Management configured for your organization, or read the full product entry at smartsuite.com/products/portfolio-management.

Schedule a demo