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our sales team to book a demo!

[www.thinkingportfolio.com](http://www.thinkingportfolio.com)



# Thinking Portfolio AI Wizard

**A Secure and User-Friendly  
AI Solution for Portfolio  
Management**



Imagine all that you do every day, only faster. All your data searches, summaries, and analyses. Our new AI can help with that – and more features are coming.

## How can AI help me?

The onset of AI and the wide range of tools now available to professionals can feel overwhelming. That is why we are introducing AI into our platform in steps.

In this first phase, we will be introducing AI Search, AI Summary, and AI Chat, each with great use cases for your business.

Here are some tasks our new AI can help you with:

- Deviation detection and management
- Identify interesting trends and recurring patterns
- Reach better situation awareness
- Summarize lessons learned
- Find synergies across the organization
- Remove of overlapping actions
- Risk detection
- Strategic alignment and prioritization

## How do I use it?

The process of interacting with an AI tool can feel a bit strange at first. But once you get a hang of it, it can become a powerful companion in your daily work. Read on to find some examples of questions, or “prompts”, that you can write to our AI to get the information you need.

### Portfolio Performance

Which projects are currently off-track regarding scope, schedule, or budget, and why?

Are there any projects with consistent delays or cost overruns? What trends can we identify?

### Risk and Issue Management

Which projects are at the highest risk of failure, and what can we do to turn them around?

Are there any dependencies between projects that could create portfolio-wide risks?

### Strategic Alignment

Which projects contribute the most to our strategic objectives, and are they adequately prioritized?

Are there projects in the portfolio that no longer align with our updated strategy?

### Forecasting and Scenario Planning

How are current trends in project performance likely to impact future portfolio outcomes?

What scenarios should we plan for to prepare for external changes?

## The Implementation Process

We will never force AI features on any of our customers. Our AI solution is implemented on a case by case basis, through a collaborative process between our dedicated team and the customer.

During the planning phase, we define the data contents from the portfolio's data model, which will be utilized in the AI solution. Our AI complies with the existing access rights of the portfolio. This allows the portfolio's data model to be used only partially, as input for the AI, and we can exclude data that needs to be restricted from AI processing from a data security and privacy perspective.

In addition to general restrictions, the end-user can select which data is transmitted to the AI for their specific use case. The end-user can always review and modify the response received from the AI before the response is saved to the database.

## Data Privacy and Security

Thinking Portfolio AI Wizard is based on the Microsoft Azure OpenAI language model, and is located within the EU/EEA region. Each iteration of our AI is created specifically for that customer.

This way, we can ensure that the customer's data is not used for further training of the language model and that data is not transferred between customers. Queries sent to the AI and its responses are logged in the customer's database. These logs are used for error correction, detecting malicious use, and further development.

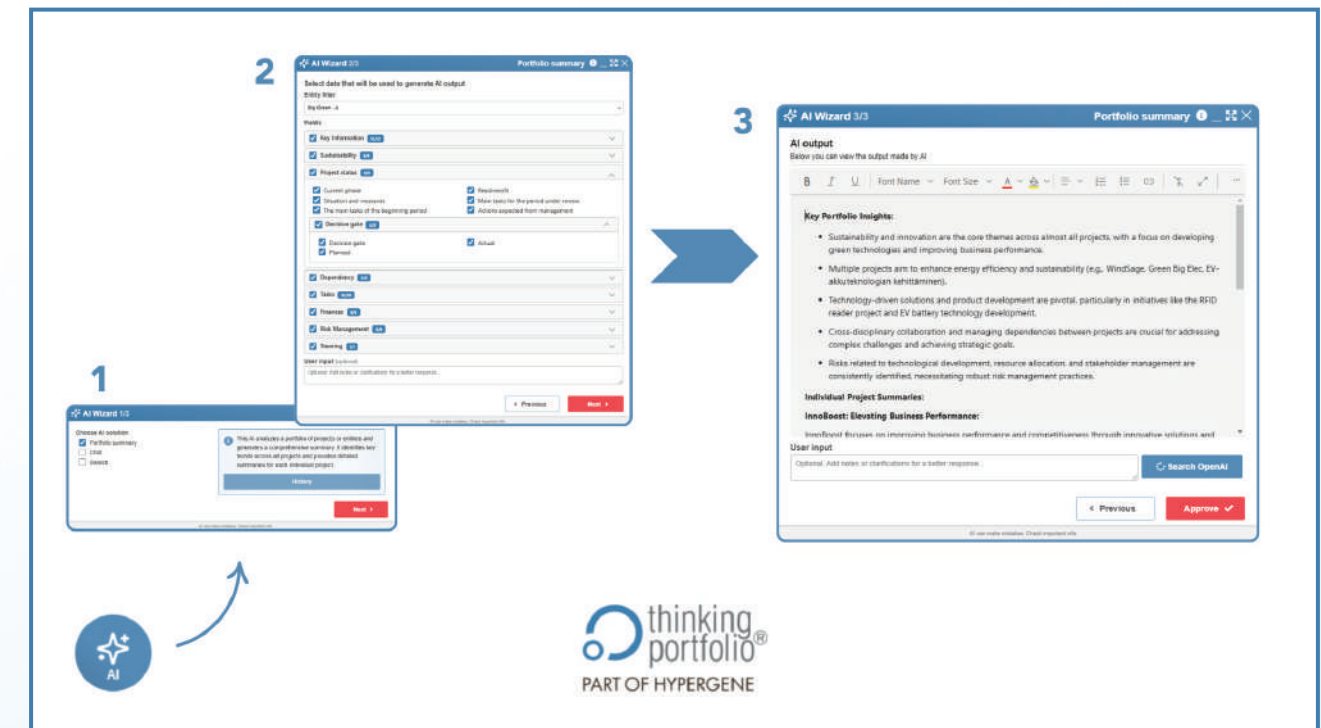
We are happy to provide more details on how AI can be implemented to support your work. Our entire staff is trained to implement our AI in a safe and secure way, with data privacy as our highest priority.

## First Steps

Here is how the UI will look once you have implemented our AI into your portfolio. If you want more examples of how the AI Wizard works, don't hesitate to ask!

## AI Summary

1. Launch the AI Wizard from the bubble icon, then select summary
2. Pick which data to include or exclude, and type in your prompt
3. Your AI summary is ready! You can always add more instructions to get exactly the information you need.



## AI Chat

1. Launch the AI Wizard from the bubble icon, then select chat
2. Head into the chat window and start interacting with the AI! You can define some default questions so it's easy to get started.

