PORTFOLIO MONDAYS · STEALABLE ONE-PAGER

One-Page Portfolio Scorecard

Four fixed blocks, with hard caps, so an executive can find the decision in ninety seconds. Report only what moved since the last review.

From *The Portfolio Scorecard Executives Actually Read*, a Portfolio Mondays episode on Portfolio Intelligence. Watch on YouTube.
Pairs with the Stop, Defer, or Resequence Capacity Card and the Commitment Reset Card.

PORTFOLIO _____ REVIEW DATE _____ PLANNING WINDOW _____ PORTFOLIO LEAD _____

WHAT CHANGED SINCE LAST REVIEW (ONE SENTENCE)

1 Capacity Truth

One bottleneck role first, not a blended average across the whole portfolio. If the reserve is not visible, it will get spent.

BOTTLENECK ROLE _____ PEOPLE IN THE ROLE THIS WINDOW _____

Line	FTE in window	Person-weeks	Status Reserve: Intact / At risk
Gross capacity			
BAU, support, and incident reserve protected, not a pool			
Leave, training, and required admin			
Net capacity for funded initiatives			
Kept funded demand			
Planned slack			

2 Commitment Health

Deltas since the last review only. Status is On track, Watch, or Reset Needed. Cap the active rows. Recently stopped or deferred items collapse to one line underneath, not full history.

Initiative	Sponsor	Load FTE or person-weeks	Status	Current commitment	Delta since last review

CLOSED, STOPPED, OR DEFERRED SINCE LAST REVIEW (ONE LINE)

SILENT EXCEPTIONS STRIP

Work or scope that showed up, but is not on the funded list. Flag peak-week impact, not just the window average.

Item	Estimated load include peak-week impact	Source	Disposition

3 Top Cross-Portfolio Risks and Dependencies

Hard cap: three. Name the risk, the provider and the consumer, the trigger date, and the owner. Everything else stays in the backup log.

Risk or dependency	Provider and consumer	Trigger date	Confidence High / Medium / Low	Owner

4 Decisions Needed Today

Hard cap: three. Each decision is a real choice, with the tradeoff named in one line, and a person who has to make the call. If a scorecard has no decision on it, it is not ready for the room.

Decision	Tradeoff or cost	Owner	Call due

No percent-complete bars. No ticket counts. No activity log. Strictly one page. Report deltas since last review, never full history.

Worked example (fictional)

Illustrative fictional snapshot. Not a real organization. Same platform engineering portfolio, two weeks later, at the next monthly review.

PORTFOLIO	REVIEW	WINDOW	PORTFOLIO LEAD
Fictional IT Digital Portfolio	Next monthly review, two weeks later	Current 12-week window	Portfolio lead

What changed: Gateway cutover moved to Watch on a 5-day partner sandbox slip. One silent exception caught before it ate peak slack.

1 Capacity Truth

Bottleneck: Platform Engineering (6 platform engineers).

Line	FTE in window	Person-weeks	Status
Gross capacity (6 platform engineers)	6.0	72	Fixed for window
BAU, support, and incident reserve	1.5	18	Protected, intact
Leave, training, and required admin	0.5	6	Protected
Net capacity for funded initiatives	**4.0**	**48**	Baseline
Kept funded demand (3 active items)	**3.5**	**42**	Fits net
Planned slack	**0.5**	**6**	Guarded for peak cutover

Check: 6.0 minus 1.5 minus 0.5 = 4.0 net (48 person-weeks). Kept demand: 1.5 + 1.0 + 1.0 = 3.5 FTE (42 person-weeks). Planned slack: 4.0 minus 3.5 = 0.5 FTE (6 person-weeks).

2 Commitment Health

Initiative	Sponsor	Load	Status	Current commitment	Delta since last review
Identity platform hardening	Identity lead	1.5 FTE	On track	Reconfirmed external assurance date holds	Schema freeze locked on time
Partner API gateway cutover	Gateway sponsor	1.0 FTE	Watch	Reconfirmed cutover window	Partner sandbox sign-off slipped 5 days
Security patch window	Security lead	1.0 FTE	On track	Reconfirmed remediation window holds	No change

Closed from the prior cycle: Customer self-serve portal rebuild withdrawn (1.5 FTE released, old dates cleared). Customer analytics lake upgrade deferred to the next window, pending a fresh capacity check (1.0 FTE released).

SILENT EXCEPTIONS STRIP (1 FLAGGED)

Item	Estimated load and peak-week impact	Source	Disposition
Unapproved reporting connector added to gateway cutover scope	0.5 FTE x 6 peak cutover weeks = 3.0 person-weeks. 12-week average: 0.25 FTE, looks harmless. During the 6 peak weeks: eats 100 percent of the 0.5 FTE planned slack. Peak slack remaining: 0.0 FTE.	Side email. No intake check. No sponsor sign-off.	Decision 1: decline and route to next-window intake

3 Top Cross-Portfolio Risks and Dependencies

Risk or dependency	Provider and consumer	Trigger date	Confidence	Owner
Partner sandbox sign-off slip (5 days)	External partner readiness to Partner API gateway cutover	End of this week	Medium	Gateway sponsor
Identity schema freeze handoff	Identity platform hardening to Partner API gateway cutover	Locked	High	Identity lead

4 Decisions Needed Today

Both decisions are due today.

Decision	Tradeoff or cost	Owner	Call due
1. Decline the unapproved reporting connector from gateway scope and route it to next-window intake	Reporting stakeholder waits for the next cycle. Keeps 0.5 FTE peak slack intact for the gateway cutover.	Gateway sponsor and portfolio lead	Today
2. Escalate partner sandbox sign-off this week. If the trigger date slips, hold the gateway cutover by two weeks. Do not pull platform engineers off identity hardening, and do not raid the protected 1.5 FTE BAU reserve.	Downstream launch shifts two weeks if the trigger misses. Protects the identity assurance date and the 1.5 FTE BAU reserve.	Executive sponsor	Today

The scorecard does not pick a softer status, hide a slip, accept a silent exception, or make the tradeoff. The portfolio lead owns the page. Sponsors own the calls.

Optional: AI Evidence-Pack Prompt

Paste this with your latest capacity card, commitment reset card, dependency log, and project notes. AI drafts the four blocks and flags what moved. The portfolio lead edits it down to one honest page. Sponsors own the calls.

You are drafting a one-page portfolio scorecard for an executive review. Using the capacity card, commitment reset card, dependency log, and project notes pasted below, fill the four fixed blocks. Block 1, Capacity Truth: put the bottleneck role first and show gross capacity, the protected BAU and support reserve, leave and admin, net capacity for funded work, kept funded demand, planned slack, and whether the reserve is intact or at risk. Block 2, Commitment Health: list only what moved since the last review (On track, Watch, or Reset Needed), plus a Silent Exceptions strip for any work or scope in the updates that is not on the funded list, with estimated load and peak-week impact. Block 3, Top Cross-Portfolio Risks and Dependencies: cap at three, each with provider and consumer, trigger date, confidence, and owner. Block 4, Decisions Needed Today: cap at three, each a real choice with the tradeoff in one line, an owner, and a call due date. Do not add percent-complete bars, ticket counts, or an activity log. Do not pick a softer status, hide a slip, accept a silent exception, or make the tradeoff. The portfolio lead edits this to one honest page and owns every status. Sponsors own the calls.

[paste the latest capacity card, commitment reset card, dependency log, and project notes here]