Portfolio rationalisation



We rank 15 existing offers and recommend which to retain, combine, reposition or retire.

Who it helps

Founders and managing directors

The problem to solve

A large portfolio can spread sales attention and delivery capacity across offers that customers struggle to distinguish.

Working through the brief

1. **Inventory fifteen offers**

   Gather the agreed inputs. Current offers, selling prices, buyer evidence and delivery constraints.

2. **Rank them on agreed evidence**

   Track “Existing offer” and “Evidence for its ranking” together so the reviewer can connect the source information to the result.

3. **Recommend portfolio changes**

   Use the ranked recommendations to decide where to retain a clear offer and where to combine or reposition work.

4. **Check the scope at handover**

   Third-party data and work beyond the agreed business unit or market are separate.

Worked example

An offer sells infrequently but supports an important account. Record that dependency before proposing its removal.

Read the service scope / STR-011

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