Portfolio360 – “It All Started with a Spreadsheet”

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Background

Prior State
- Scattered, disconnected, and sometimes unavailable access to manage trial portfolios and clinical trials operation.
- Hours spent each month for Managers to pull, splice together data in Excel, and then review data.

Now
- A unified dashboard (built in PowerBI) that provides one stop shop for screening, consenting, accrual, financial, and scientific impact data for each disease program.
- Overall Trial Portfolio metrics available on demand for Senior Leadership as well.

Goals
- Build a single dashboard to measure daily Key Performance Indicators (KPIs) (accrual, financials, scientific impact)
- Provide visibility to leadership, Principal Investigators and CRMDs at any given time.
- Align KPIs and tracking of institutional/CCSG goals.

Portfolio360 in Review

Solutions and Methods
- Reports now synched in One Dashboard.
- Filters allow for review by Fiscal Year (FY) or calendar year, along with numerous filters for deeper drill down and analysis.

Refinements and Next Steps
- Portfolio360 is continuously validated to ensure accurate data reported.
- Refinements made as identified by CRMDs and Administrative Leaders.
- Currently accessing Moffit’s data warehouse as source and bringing in data from systems beyond our CTMS.
- Finding new ways to share best practices in the use of the tool.