

# Certified Courses



# Portfolio Project Management Professional

## INTRODUCTION

- Any organizational Executive needs to have access to, and understand how to make high quality project portfolio decision support analytics and data visuals. Whether you work in a Project Management Office, engage in Business Development or manage a project portfolio, this course equips you with the essential knowledge and practical tools that you need to succeed in the practice of Portfolio Project Management (PPM).
- This Portfolio Project Management Professional training course on introduces the concept of a portfolio approach to possible future projects and investments to help reach or maintain strategy targets. This Project Management training course also considers the crucial role of risk management, including a risk management framework and sources of risk to meeting and maintaining a successful portfolio.

### This training course will highlight:

- Defining the business case to get senior management approval for portfolio management
- Planning the implementation of portfolio management
- Selecting and adapt Management of Portfolio (MoP) principles, practices and techniques to suit different organisational environments
- Evaluating examples of MoP information (including documents and role descriptions)
- Analysing the solutions adopted in relation to a given scenario

## OBJECTIVES

- The objective of this Portfolio Project Management Professional training course is to prepare students for both the MoP Foundation and Practitioner level examinations. To confirm understanding of the MoP principles, cycles, practices, techniques, roles and documentation. This will enable them to work as an informed member of a Portfolio Office or in a range of Portfolio Management.

**At the end of this training course, you will learn to understand the:**

- Scope and objectives of portfolio management and how it differs from programme and project management
- Benefits from applying portfolio management
- Context within which it operates
- Principles upon which successful portfolio management is based
- Approaches to implementation, the factors to consider in maintaining progress, and how to assess the success of portfolio management
- Purposes of the portfolio management definition and delivery cycles and their component practices, and relevant techniques applicable to each practice
- Purpose and key content of the major portfolio documents
- Scope of key portfolio management roles

## TRAINING METHODOLOGY

- Participants will receive a thorough training on the subjects covered with the tutor utilising a variety of proven adult learning teaching and facilitation techniques. Training course methodology is designed around a PMI® syllabus and includes an insight into appropriate methods as well as industry tools and processes used as practice examples.
- This Portfolio Project Management Professional training course includes teamwork around an applicable case study, with group discussion and critical analysis of portfolio stakeholders, processes and portfolio context.

## ORGANISATIONAL IMPACT

- This training course provides advice and examples of how to apply principles, practices, and techniques that together enable the most effective balance of organisational change and business as usual. Thus ensuring that the organisation benefits from a team of professionals with relevant awareness to make good decisions that will impact on the future of the organisation.

## PERSONAL IMPACT

- Having an understanding of scope and objectives of portfolio management
- Knowledge of benefits when applying portfolio management
- Understanding the context within which portfolio management operates well
- Learning the approaches to implementation, maintaining progress, and assessing successes
- Purpose and key content of the major portfolio documents
- The scope of key portfolio management roles
- Improved decision-making

## WHO SHOULD ATTEND?

This Portfolio Project Management Professional training course is aimed at those involved in a range of formal and informal portfolio management roles encompassing investment decision making, project and programme delivery, and benefits realisation. It is relevant to all those involved in the selection and delivery of business change initiatives including:

- Members of Management Boards and Directors of Change
- Senior Responsible Owners (SROs)
- Portfolio, Programme, Project, Business Change, and Benefits Managers
- Business Case Writers and Project Appraisers
- Manage or Perform a PMO Function
- Individuals who sponsor, manage or participate in projects
- Project Management Professionals

## Course Outline

### Introduction to Portfolio and Portfolio Management

- Key Definitions of Portfolio and Portfolio Management
- Portfolio Management Model
- Relationship between the Principles, Cycles, Practices and Relevant Techniques
- Differences between Portfolios, Programmes and Projects
- Differences between Portfolio, Programme and Project Management
- How Local Context can affect MoP Principles & Practices - How to adopt cost effective approaches?

### Portfolio Selection & Implementation

- The Need for A Portfolio Approach to Investment
- The Approaches to Implementing Relevant Portfolio Management
- Benefits of Assessing The Impact of Portfolio Management
- Factors Required to Sustain Progress
- Approaches to Assessing Portfolio Management Maturity

## Strategic and Organisation Context

- Six Key Functions / Activities that Portfolio Management needs to coordinate with to achieve Strategic Objectives
- Identify How Portfolio Management can:
- Coordinate with all other stratagems to deliver strategic objectives
- Support effective corporate governance

## Portfolio Management Governance

- The Principles upon which Effective Portfolio Management is Based
- Senior Management Commitment
- Governance Alignment
- Strategy Alignment
- Portfolio Office
- Energised Change Culture

## Portfolio Definition Cycle

- Terms & Concepts relating to The Portfolio Definition Cycle
- Three-point Estimating and Reference Class Forecasting
- What is involved and The Keys to Success

## Portfolio Risk Management

- Portfolio Risk Management Process
- An Enterprise View of Risk & Governance
- Risk Drivers & Metrics

## Portfolio Delivery Cycle

- Portfolio Delivery Practices
- Tried and Tested Techniques for Delivery Practice
- What is involved, The Main Elements, and Keys to Success

## Roles and Documentation

- Purposes and Responsibilities of The Main Portfolio Management Roles Identified in MoP
- Purposes of the Main Portfolio Management Documentation

## Portfolio Risk & Return

- Return Measures
- Risk Characteristics

## Applying the Portfolio Definition Cycle

- Apply and Tailor Practices and Techniques of The Portfolio Definition Cycle to A Scenario
- Identify Appropriate Practices and Techniques within The Portfolio Definition Cycle
- Identify, Analyse and Distinguish between Appropriate and Inappropriate Application of Portfolio Definition Practices and Techniques to A Scenario

## Portfolio Delivery Cycle Presentation

- Apply and Tailor The Practices, Techniques and Responsibilities of The Portfolio Delivery Cycle to A Scenario
  - Identify Appropriate Practices and Techniques within The Portfolio Delivery Cycle
  - Identify, Analyse and Distinguish between Appropriate and Inappropriate Application of Portfolio Delivery Practices to A Scenario
  - Analyse whether The Approaches Adopted are appropriate, with reasons, in a given scenario
  - Analyse whether The Portfolio Documentation is fit for purpose, with reason
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