

## FUNDAMENTALS OF PORTFOLIO MANAGEMENT

PFM00.10

No company has the resources to meet all of its business needs. This is true in the best of times. It certainly is even truer when times are tough. Portfolio management is a process to ensure that your company spends its scarce resources on the work that is of the most value to your company, and work that is most closely aligned to your business goals and strategies. You apply the techniques you use to manage your financial portfolio to your portfolio of work as well.

This class shows students the many aspects of portfolio management that must be understood before the concepts can be successfully deployed. The class focuses on the process of prioritizing and authorizing work, as well as the ongoing management of the portfolio. Students will learn a comprehensive ten-stage model for implementing portfolio management that is consistent with the Project Management Institute Standard for Portfolio Management.

### PREREQUISITES

- None, this class provides a basic overview of all aspects of establishing and managing portfolios of work

### LEARNING OBJECTIVES

At the end of this class, participants will be able to:

- Understand the basic concepts and benefits of portfolio management
- Establish a work effort to define and lay the foundation for portfolio management
- Create an overall model for selecting, balancing, prioritizing and authorizing work
- Understand how to run and report on the resulting portfolio of work

### WHO SHOULD ATTEND

- Senior managers that will sponsor the establishment and management of portfolios
- All managers that must help implement portfolios
- Candidates for the Portfolio Managers
- All other senior staff members that need to understand these important concepts

### COURSE OUTLINE

- Portfolio concepts, terms and benefits
- Categorization and identification of the portfolio structure
- Evaluation and selection potential work
- Prioritize and balance the work of the portfolio
- Authorize, activate and manage the portfolio on an ongoing basis
- Review and report on portfolio work throughout the year
- Update the portfolio work when organizational strategy changes

### CLASS LENGTH

- One day (8 PDUs - 4 Technical / 2 Leadership / 2 Strategic)