

# Project Portfolio Management

## 3-day Workshop

### MAXIMIZE RETURN ON ORGNIZATIONAL INVESTMENT IN PROJECTS

Most organizations need to carefully balance the money and time they invest in the array of opportunities for their businesses. To remain vibrant, an organization generally needs to invest in its infrastructure, maintain existing systems and service capability, and develop new products and/or services. Key to getting the best return on its investment is a comprehensive approach to portfolio management, with ongoing monitoring to the objectives.

#### Description:

As they manage the effort of their people and the investment money of their organization, most leaders track the work done to some set of overall objectives and strategies. Mechanisms range from simple lists of products and services available and projects underway, to layers of investment programs and portfolios that are specific to certain divisions or that cover the entire enterprise. Depending on the size and complexity of the organization, different levels of structure and governance are appropriate.

In this workshop, participants learn the essentials of managing a project portfolio so that resources are deployed for the best benefit of an organization. They identify portfolio management roles and responsibilities that fit specific types and sizes of organizations, examine common structures in use, and review governance processes for effective resource tracking and management. Working with industry best practices for portfolio management from the Project Management Institute, the Government Accountability Office, and other sources, participants learn how to establish portfolio strategies, define the types of investments in the portfolio (varieties of projects, programs, etc.), identify candidates for the portfolio, prioritize areas of investment and provide resources for them, monitor and control the progress of the investments, and evaluate the results of those investments. Depending on the organization and its business focus, the investments may be individual projects, programs composed of multiple projects, and/or various types of infrastructure change.

#### Topics:

- Sources of Portfolio Management Guidance
- Portfolio Management Governance
- Roles and Responsibilities of Executives, Portfolio Committees, and PMO's
- identifying Candidates for the Portfolio
- Setting Portfolio Strategies
- Selecting Investment Projects/Programs
- Monitoring Projects/Programs in Progress
- Evaluating Portfolio Results
- Maturing Portfolio Management Practices

#### Competencies for Those Who Attend:

Defining strategies and project selection criteria, monitoring work in progress, reporting results; roles generally involved are executives, portfolio management teams and PMO members.

#### Professional Development Credits:

2.1 Continuing Education Units (CEU)  
21 Professional Development Units (PDU)

**Maximum class size: 15**

