

## Concepts for Planning, Establishing & Monitoring Project Portfolios

Portfolio Management is learning to establish criteria to select the right projects to work on at the right time. Included are both monitoring and evaluating results as the project wraps up.

Learn how to build your unique experience in portfolio management to earn your PfMP Certification from PMI.

You will be able to summarize:

- How you have operationalized portfolio management concepts.
- How the concepts were applied.
- Why these concepts were implemented and how to document the results of the portfolio.

See what Project Portfolio Management can do for your organization for both traditional, hybrid, and agile portfolios for optimal business value. Gain a strong basis to springboard your study for PMI's PfMP Certification.

### Key Concepts

- Creating success criteria with multiple portfolios strategies.
- Defining benefits for Portfolios, such as risk vs. return.
- Identifying, selecting, and forming the right projects to put into your Portfolio.
- Working hands-on with the Portfolio concepts, understanding each step of a basic cycle: planning, executing, and monitoring.
- Building and communicating measures for steady progress and successful throughput of projects in the different types of portfolios.
- Key items to train and incentivize project managers of the project within the portfolio.

### Designed for

Program managers, Directors, PMOs, VPs, any C-suite leaders focused on goals and objectives, working to grow their organization successfully for the long term.

### Outline

Introduction to Portfolio Management

Definition and importance of portfolio management

Key terms and concepts from PMI.org

Process of Portfolio management: Planning, executing, and monitoring

Steps to assess current Portfolio maturity, gathering data

Types and Goals of Portfolios

Projects vs. Products

Investment improvement and stability over time  
Working with Stakeholders initially and ongoing.

#### Portfolio Diversification

- Concept and benefits of diversification
- Possible attributes to include for shaping powerful criteria
- Risks associated with lack of diversification
- Strategic and Tactical Levels and how to balance both

#### Portfolio Risk Management

- Understanding risk and return
- Risk assessment techniques
- Risk mitigation strategies for long term stability and return

#### Portfolio Performance Evaluation during execution and feedback

- Performance metrics
- Benchmarking
- Performance improvement strategies

#### Portfolio Optimization

- Modern portfolio theory
- Asset allocation strategies including resources
- Portfolio rebalancing isn't just for investment portfolios

#### Communication

- Methods, recipients, vehicles, & frequencies for effective communication to stakeholders
- Engage Stakeholders and maintain communication
- Verify accuracy, consistency, and completeness of portfolio communication

#### Governance of Portfolio

- Input from different roles: BA, CIO, CISO, CFO, PMS, and Resource Manager
- Build and tach the Governance for your environment
- Pitfalls to avoid on Governance, especially nonvalue added activities

#### Case Studies and Practical Applications

- Real-world examples of successful portfolio management
- Hands-on exercises for portfolio creation and management
- Preparing your Project and Resource Managers to contribute fully
- Code of Ethics & Professional Conduct

#### Future Trends in Portfolio Management

- Impact of technology on portfolio management including AI
- Emerging trends and challenges
- Preparing for the future of portfolio management

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