As organizations reach higher levels of maturity in managing projects individually, they shift their focus to managing them collectively as project portfolios using project portfolio management (PPM) process. This transition seems to occur when the organization realizes that projects are investments—not expenditures—requiring justification that they are aligned with organizational goals and will create value for the owners and other stakeholders of the organization. Managing project investments collectively brings coherence to implementing the strategic as well as operational initiatives and helps the organization create sustainable value in the long run.

This workshop provides you with tools, techniques, and best practices for managing project portfolios. It offers a “how to” methodology to design, build, and manage a portfolio.

**You Will Receive:**
- A copy of Dr. Kodukula’s new book *Organizational Portfolio Management: A Practitioner’s Guide*
- A CD containing the slides from the workshop, case study exercises, and exercise solutions
- A participant Guide with workshop slides case study exercises, and exercise solutions
- 30 PDU’s

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### Learning Objectives

- **Illustrate** the role of a project portfolio in translating strategy into desired results.
- **Delineate** an overall project portfolio management (PPM) methodology.
- **Align** projects with organizational goals and strategy.
- **Discuss** the key design requirements of a portfolio.
- **Allocate** organizational resources efficiently.
- **Present** quantitative techniques to assess a project for its own merit as well as its relative merit against other projects.
- **Illustrate** the use of weighted scoring models to quantify intangible benefits of projects.
- **Evaluate** decision techniques that clarify choices involving both threats and opportunities.
- **Identify**, analyze, and manage portfolio risks.
- **Apply** various techniques to prioritize projects.
- **Build** a business case for a project.
- **Delineate** criteria to determine when a project no longer serves its purpose and needs to be terminated.
- **Discuss** practical challenges and how to overcome them in executing PPM.
- **Present** a practical methodology to create and manage a project portfolio that will maximize business value and return on investment.

### Who Should Attend...

- Portfolio Managers
- Program Managers
- Project Managers
- Project Management Professionals (PMP®s)
- Program Management Professionals (PgMP®s)
- Portfolio Management Professionals (PfMP®s)
- Managers responsible for evaluation, selection, and termination of projects
- PMO staff responsible for initiating or streamlining portfolio management processes
- Decision makers involved in authorizing projects or phases of projects
- Other relevant managers and executives
PROJECT PORTFOLIO MANAGEMENT MASTER CLASS
How to Design, Build, and Manage a Portfolio

11TH THROUGH 14TH MAY 2015, HILTON HOTEL SANDTON, JOHANNESBURG, SOUTH AFRICA

DAY ONE

Course Opening
- Course Objectives, Outline, and Agenda
- Personal Introductions
- Ground Rules

Portfolio Management Basics
- Definitions: Project, Program, and Portfolio
- Differences between a Project, Program, and a Portfolio
- Portfolio Triple Constraint
- Why Project Portfolio Management?
- PPM Discipline Today
- Practical Challenges in Executing PPM

PPM Methodology
- Funnel & Filters℠: A Portfolio Model
- Project Portfolio vs. Financial Portfolio
- PPM Methodology: Phases and Processes

Portfolio Foundation
- Organizational Strategic Framework
- Balanced Scorecard
- Portfolio Infrastructure
- Portfolio Governance
- Portfolio Team Roles & Responsibilities

DAY TWO

Portfolio Monitoring & Control
- Selection of New Projects
- Project Business Plan
- Levels 1, 2, 3 Evaluations
- Why Terminate a Project?
- Sunk Cost Fallacy & Dilemma
- Portfolio Balancing
- Portfolio Assessment

Project Prioritization Tools
- Efficient Frontier
- Weighted Scoring Models
- Forced Ranking
- Paired Comparison

Project Assessment Tools
- Cost of Capital
- Benefit/Cost Analysis
- Net Present Value
- Payback Period
- Return on Investment
- Measuring Non-Financial Benefits
- Data Visualization Tools

DAY THREE

Portfolio Design
- Portfolio Benchmarks
- Portfolio Contingencies
- Portfolio Design Requirements
- Portfolio Balance

Portfolio Construction
- Building New Portfolio
- Portfolio Calibration
- Portfolio Construction Processes

DAY FOUR

Portfolio Measurements & Metrics
- Success Measurements
- Outcome & Performance Measures
- Portfolio Metrics
- Project Metrics

Portfolio Risk Management
- Uncertainty vs. Risk
- Portfolio Risks
- Decision Trees
- Monte-Carlo Simulation
- Sensitivity Analysis
- Real Options Analysis

Course Closing
- Lessons Learned
- Personal Action Plan

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Project Portfolio Management Master Class

11th – 14th May 2015 at Hilton Hotel Sandton, Johannesburg, RSA

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