Course Outline

Day 1
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?*
- Objectives and Benefits of Portfolio Management
- 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

Day 2
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
- The Principles upon which Effective Portfolio Management is Based
- Senior Management Commitment
- Governance Alignment

- Strategy Alignment
- Portfolio Office
- Energised Change Culture

Day 3
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 Process
- An Enterprise View of Risk & Governance
- Risk Drivers & Metrics

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

Day 4
Roles and Documentation

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

- Return Measures
- Risk Characteristics

- 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

Day 5
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