KOENIG SOLUTIONS · COURSE OUTLINE

Portfolio Management: MoP Definition & Delivery

Learn to define, govern and deliver a portfolio using MoP principles, cycles, practices and key roles and documentation.

5 Days	5	42
DURATION	MODULES	TOPICS

COURSE OVERVIEW

This course covers the definitions, models and principles underpinning portfolio management, distinguishing portfolios, programmes and projects, and the approaches used to implement and assess maturity. It examines the strategic and organisational context, including the key functions, principles and governance and strategy alignment that portfolio management must coordinate with. It then addresses the Portfolio Definition Cycle, covering estimating techniques, risk management and delivery practices, followed by the roles and documentation used in portfolio management. Scenario-based work applies and tailors the practices, techniques and responsibilities of both the Definition and Delivery Cycles.

WHO THIS COURSE IS FOR

- **Portfolio Managers**
- **Programme Managers**
- **Project Managers**
- **Portfolio Office Staff**
- **Senior Managers**
- **Change Managers**

LEARNING OBJECTIVES

- Explain key definitions and the portfolio management model
- Compare portfolios, programmes and projects and their management
- Describe the principles underpinning effective portfolio management
- Identify the six key functions portfolio management coordinates with
- Apply estimating and risk management techniques within the Definition Cycle
- Identify roles and documentation used in portfolio management
- Apply and tailor Definition Cycle practices to a given scenario
- Analyse the appropriateness of Delivery Cycle approaches and documentation

COURSE SYLLABUS

5 Modules, 42 Topics

DAY 1

01

Introduction to Portfolio and Portfolio Management

TOPICS

- 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

02

Strategic and Organisation Context

TOPICS

- 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

03

Portfolio Definition Cycle

TOPICS

- 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

04

Roles and Documentation

TOPICS

- 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

05

Portfolio Delivery Cycle Presentation

TOPICS

- 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

WHAT IS INCLUDED

Everything You Need to Succeed

- Koenig course material for every module
- Delivery by certified instructors and subject matter experts
- Hands-on exercises throughout the course
- Course completion certificate from Koenig

ABOUT KOENIG

Who We Are

Established in 1993, Koenig Solutions is a globally recognised training provider with 35+ technology partnerships, 5,000+ training programmes and a network of certified instructors and subject matter experts, supporting individuals and enterprise teams worldwide.

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