

PfM² Portfolio Management Training Syllabus



PM²
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PfM² Portfolio Management Training – 8 hrs

COURSE DESCRIPTION

As organisations set out to achieve their strategic objectives via the implementation of various types of investments, it is important to be able to optimise these efforts by maintaining an ongoing connection with the desired strategic outcomes and benefits of the work performed and the deliverables produced.

Portfolios are constructs that group together these organisational investments which can be programmes or projects, but also relate to investments required to operationally support and exploit the results of these programmes and projects. Portfolio components are managed individually and independently through appropriate programme, project, service, or product management practices and processes.

However, an additional layer of management (i.e. portfolio management) provides better strategic, financial and value creation focus for the portfolio as a whole. Portfolio management allows organisations to prioritise these investments, allocate resources effectively, and maximize their value creation potential. This way, organisations can ensure that they are working on the right projects at the right time, which can help them achieve their strategic goals more efficiently and effectively.

The course is designed to help participants learn more about portfolio management and help them understand how they can incorporate the PfM² Portfolio Management best practices into their organisation.

The course presents the portfolio management processes, governance, artefacts and techniques and helps participants start their integration into the organization's management culture while preparing them to set-up their first portfolios.

BENEFITS AND EXPECTED OUTCOMES

Course participants will learn important Portfolio Management concepts and appreciate the benefits of developing a portfolio orientation and mindset. Participants will also:

- differentiate portfolio management from multi-project management
- become familiar with the PfM² Governance model and its roles, responsibilities, processes, templates and mindsets.
- understand portfolio composition and realisation techniques with a reference to ROI, risk, time frame, resource demand, resource capacity and capabilities.
- effectively organize portfolios, understand their life cycle, link realistic objectives to organisational needs and apply effective portfolio monitoring and evaluation policies.

With the completion of this course, participants will be in a position to start implementing the PfM² Portfolio Management best practices, tools and techniques and be more effective at being part of a portfolio management team.

ATTENDEES PROFILE

This course is suitable for anyone who wants to learn more about Portfolio Management and how to apply it in their organisation.

COURSE AGENDA

- About Portfolios and Portfolio Management



- Portfolio Orientation
- Agile Portfolio Management
- Portfolio Management Maturity
- Portfolio Management Competences
- Critical Success Factors in Portfolio Management
- Overview of PfM²
 - The PfM² Model
 - The PfM² Mindsets
 - PfM² Quick Start Tips
- Portfolio Governance—Roles & Responsibilities
 - Portfolio Directing Group (PFDG)
 - Portfolio Manager (PfM)
 - Portfolio Advisory Committee (PfAC)
 - Portfolio (Support) Office (PfSO)
 - Local Support Office (LSO)
 - Component Representatives (CRs)
 - Assigning Responsibilities—RAM/ARSCI
- Portfolio Management Processes
 - Framework Definition
 - Define Portfolio Objectives & Characteristics
 - Define Portfolio Management Approach
 - Review Portfolio Framework
 - Composition
 - Identify Components
 - Evaluate Components
 - Plan Portfolio Capacity
 - Compose Portfolio
 - Approve Portfolio
 - Portfolio Realisation
 - Manage Strategic Alignment
 - Manage Portfolio Value
 - Manage Portfolio Change
 - Manage Portfolio Risk
 - Manage Portfolio Issues
 - Portfolio Monitoring & Controlling
 - Monitor Portfolio Performance
 - Control Portfolio Performance
 - Manage Portfolio Quality
 - Manage Portfolio Lessons
 - Report Portfolio Performance
 - Stakeholder Engagement & Communication
 - Manage Portfolio Stakeholders
 - Manage Portfolio Communications
- Portfolio Artefacts
 - Portfolio Handbook
 - Portfolio Communications Plan
 - Portfolio Composition & Analysis Report
 - Benefits Matrix



- Portfolio Logs

- Portfolio Management Tools & Techniques
- Understand how to integrate Portfolio practices in your organisation

COURSE MATERIALS

- The PfM² Portfolio Management Methodology Guide (<http://www.pfm2.webiste>)
- Workbook (PowerPoint slides)
- PfM² Quiz (online)
- E-learning space on the PM²Foundation website with a collection of online resources



PfM²
CERTIFIED

Demonstrates understanding of Portfolio Management best practices and the PfM² Methodology.

<https://pfm2.website/pfm2-certification/>

The PfM² Certification confirms a candidate understands of Portfolio Management best practices and the PfM² Methodology.

- Portfolio Governance
- Portfolio Management Processes and Activities
- Portfolio Orientation and Mindsets
- Portfolio Artefacts

The statistical **success rate** of this exam is 87.5%.

Study material:

- The PfM² Guide from <http://www.pfm2.webiste>
- PfM² Artefacts (Handbook, Logs, Analysis Report)
- Training Notes
- Free Exam preparation Quizzes