

Introduction to Project Portfolio Management

Course length: 2 days

Course Description

Course Objective: You will apply generally recognized practices of portfolio management acknowledged by the PMI® and identify the portfolio management processes and knowledge areas to manage portfolios effectively.

Target Student: Managers interested in gaining a basic understanding of portfolio management or developing portfolio management skills relating to business requirements.

Prerequisites: A good understanding or work background in project management.

- Suggested course: Project Management Fundamentals (Second Edition)
- Suggested but not required: Project Management Professional (PMP®) Certification: Fourth Edition - Comprehensive

Course Objectives

Upon successful completion of this course, students will be able to:

- Identify the fundamentals of portfolio management.
- Identify the various stages in the portfolio management process.
- Select and prioritize portfolio components.
- Perform risk analysis and develop portfolio risk responses.
- Balance portfolios and authorize portfolio components.
- Monitor and control portfolios.
- Identify the key components of portfolio management implementation in the organization.

Course Content

Lesson 1: Getting Started with Portfolio Management

Topic 1A: Portfolio Management Overview

Topic 1B: Identify the Need for Portfolio Management

Topic 1C: Describe Portfolio Management's Relationship Within the Organization

Lesson 2: Understanding the Portfolio Management Processes

Topic 2A: Describe Organizational Influences

Topic 2B: Processes in the Portfolio Management Life Cycle

Lesson 3: Selecting and Prioritizing Portfolio Components

Topic 3A: Identify Portfolio Components

Topic 3B: Categorize Portfolio Components

Topic 3C: Evaluate Portfolio Components

Topic 3D: Select Portfolio Components

Topic 3E: Prioritize Portfolio Components

Lesson 4: Performing Risk Analysis and Developing Risk Responses

Topic 4A: Identify the Portfolio Risk Management Processes

Topic 4B: Identify Portfolio Risks

Topic 4C: Analyze Portfolio Risks

Topic 4D: Develop Portfolio Risk Responses



Lesson 5: Balancing and Authorizing Portfolio Components

Topic 5A: Balance a Portfolio

Topic 5B: Communicate Portfolio Adjustments

Topic 5C: Authorize Portfolio Components

Lesson 6: Monitoring and Controlling Portfolios

Topic 6A: Monitor and Control Portfolio Risks

Topic 6B: Review and Report Portfolio Performance

Topic 6C: Monitor Business Strategy Changes

Lesson 7: Examining Portfolio Management Implementation

Topic 7A: Define the PMO's Relationship with Portfolio Management

Topic 7B: Describe PMO Establishment and Operational Methods

Topic 7C: Describe the Portfolio Management Implementation Process

