

SeminarsWorld® Course Agenda

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Strategic Project-Portfolio Management and Organizational Change

Instructor(s): Joyce Brown
Thomas McCabe

Length: 3 days
CEUs: 2.1 / 21 PDUs

Pre-work: None

Level: Intermediate

Primary Topic: Strategic Planning and Execution

Subtopics: Organizational change, Project Portfolio Management

Course Description:

Project-portfolio management is a critical topic in today's ever-changing business environment. Once an organization defines strategic goals and objectives, determining the optimal mix of initiatives to fund and resource can be a difficult process. The key challenge is to select the potential projects or programs that bring the most value: some transformative, some growth-oriented, some compliance and others non-discretionary.

This 3-day course begins with a discussion of Organizational Project Management (OPM) and how mature organizations create vision and mission statements linked to strategies, goals, and objectives. The class goes on to review change life cycles and will walk through a change readiness assessment. Discussions will center on the ways that practitioners can better leverage the change management practices that are inherently embedded within project, program and portfolio management.

A review of business case development follows. Discussion topics include: the estimating process; the role of assumptions and risks; types of benefits; and financial analysis techniques such as ROI, NPV, IRR, etc. A multi-part case study and group exercises will demonstrate key issues and concepts. Techniques for creating a balanced and optimized project-portfolio mix will be demonstrated. Coursework will include a review of portfolio performance, stakeholder engagement, communications management, and the role of the PMO in validating benefits realization.

Learning Objectives:

Upon completion of this course, participants will be able to:

- Identify principles of strategic planning and establishment of goals and objectives
- Define and describe business case components and key financial formulas
- Demonstrate how to create a clear and compelling business case by using a group case study exercise
- Show how to create a balanced project-portfolio by using real spreadsheets based on figures from *The Standard for Portfolio Management*— Fourth Edition
- Use the tools demonstrated in class to make decisions regarding the case study project portfolio example

AGENDA

- Organizational Project Management (OPM)
- Change Life cycle
- Change Readiness Assessment
- External and Internal Drivers of Change
- Organizational Strategy, Goals, and Objectives
- Strategic Planning- Gap Analysis, SWOT -> TOWs, Balanced Scorecard
- Business Case Principles
- OPEX, CAPEX, and FTE Budgeting

- Overview of Harvard Business Review ROI Spreadsheets
- PMI Global Standard and the Role of Project-Portfolio Management
- Optimizing the Project-Portfolio Mix
- Portfolio Stakeholder Management and Communications
- Portfolio Risk vs. Program Risk vs. Project Risk
- Program Management and Performance Tracking
- Role of the PMO in Validating Benefits Realization

Professional Development Units (PDUS) are one-hour blocks of time spent learning, teaching others, or volunteering. By attending this SeminarsWorld course, you will be able to achieve the following PDUs as learning hours to apply for PMI certification or to maintain your certification status with PMI. [View](#) how your PDUs align with the PMI Talent Triangle®.

	Technical	Leadership	Strategic	Total
CAPM / PMP / PgMP	9	7	5	21.00
PMI-ACP	0	7	5	12.00
PMI-SP	0	7	5	12.00
PMI-RMP	0	7	5	12.00
PfMP	9	7	5	21.00
PMI-PBA	0	7	5	12.00

