



## Agenda

Click [here](#) for additional training and schedules.

## Strategic Project Portfolio Management and Organizational Change

**Instructor(s):** Joyce Brown  
Thomas McCabe

**Length:** 3 days  
**CEUs:** 2.1/21 PDUs

**Prework:** None

**Level:** Intermediate

**Training Topic:** Strategic Planning and Implementation

**Subtopics:** Project Management/Process Integration, Portfolio Management

### Training 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 nondiscretionary.

This 3-day training 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 return on investment (ROI), net present value (NPV), internal rate of return (IRR), etc. A multipart case study and group exercises will demonstrate key issues and concepts. Techniques for creating a balanced and optimized project-portfolio mix will be demonstrated. Training will include a review of portfolio performance, stakeholder engagement, communications management, and the role of the project management office (PMO) in validating benefits realization.

### Learning Objectives:

*Upon completion of this training, learners will be able to:*

- Identify the principles of strategic planning and establishing 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 Standards and the Role of Project Portfolio Management
- Optimizing the Project-Portfolio Mix
- Portfolio Stakeholder Management and Communications
- Portfolio Risk Versus Program Risk Versus Project Risk
- Program Management and Performance Tracking
- Role of the PMO in Validating Benefits Realization

**Professional development units (PDUs)** are 1-hour blocks of time spent learning, teaching others, or volunteering. By attending this training, 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
<b>CAPM® / PMP® / PgMP®</b>	9	7	5	21.00
<b>PMI-ACP® / Agile*</b>	0	7	5	12.00
<b>PMI-SP®</b>	0	7	5	12.00
<b>PMI-RMP®</b>	0	7	5	12.00
<b>PfMP®</b>	9	7	5	21.00
<b>PMI-PBA®</b>	0	7	5	12.00

*\*Please note that the asterisked row above applies to the PMI® Agile Certification Journey and includes DASM™, DASSM™, DAC™, and DAVSC™ certifications.*