



## Agenda

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## Aligning the Organization Through Portfolio Management

**Instructor(s):** Mohamed Khalifa Hassan, PMI-ACP, PMI-PBA, PMI-RMP, PMI-SP, PMP, PgMP, PfMP

**Length:** 2 days

**CEUs:** 1.4/see below for PDU breakdown

**Prework:** None

**Level:** Intermediate

**Training Topic:** Strategic Application and Governance

**Subtopics:** Portfolio Management, Resource Management

### Training Description:

Organizations that adopt projects as a means to achieving change and delivering results often find it difficult to prioritize projects and make the best use of their resources. Additionally, many recent surveys have demonstrated that the project backlog is a major issue for organizations. Portfolio management is a management approach that aims to align project efforts with the corporate strategy and optimize the efficient use of resources throughout the organization.

This training focuses on three major pillars of portfolio management:

- Prioritizing projects and other activities, based on their contribution to organizational benefits and their achievability;
- Allocating and prioritizing resources between those projects and activities that have been chosen so they can deliver the expected benefits; and
- Monitoring and controlling the components of your portfolio, based on the construction and evolution of a consolidated risk profile.

This training is designed for experienced project managers, portfolio managers, chief project officers, project directors, and senior managers who need to assign resources to projects to deliver corporate strategies.

### Learning Objectives:

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

- Understand alignment with organizational objectives and strategic goals.
- Demonstrate their capability to analyze and select organizational initiatives.
- Assign resources to these initiatives in an organized way.
- Optimize the use of resources to ensure corporate benefits delivery.
- Take responsibility for change and decisions to realize strategic and business objectives.
- Actively manage business value within a governance framework.
- Recognize why, when, and how to use portfolio management.
- Support the development of a portfolio framework and culture.

## AGENDA

### Day 1

- Introduction
- Context of Portfolio Management
  - Differences between projects, programs, and portfolios
  - Uncertainty, ambiguity, and complexity
  - The portfolio management governance model
  - The organizational context of portfolio management
  - Various perspectives of portfolio management
- The First Pillar: Organizational Agility
  - What is organizational agility?
  - Organizational inertia
  - Factors of inertia

- How can we overcome organizational inertia?
- Triggering a collaborative mindset within the organization
- The role of the project management office (PMO) in portfolio management and organizational agility
- The Second Pillar: Your Organization's Strategy
  - Defining your strategic horizon
  - Constructing your strategic vision
  - Constructing your portfolio's strategy: Building the opportunity chain
  - Integrating the opportunity chain throughout the organization

### Day 2

- The Third Pillar: Risk
  - Specificities of risk management at the portfolio level
  - Consolidating the portfolio risk profile
  - Exploiting opportunities or the deadly trap of threat mitigation: A matter of mindset
- The Fourth Pillar: Resource Demand Planning
- Managing Your Portfolio

- Evolutions and future developments of portfolio management
- Conclusions
  - Portfolio management as an organizational maturity and agility trigger
  - Developing the appropriate mindsets
  - Benefits of portfolio management
  - Portfolio management implementation, success factors, and prerequisites

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
CAPM® / PMP® / PgMP®	8	0	6	14.00
PMI-ACP® / Agile*	0	0	6	6.00
PMI-SP®	0	0	6	6.00
PMI-RMP®	0	0	6	6.00
PfMP®	8	0	6	14.00
PMI-PBA®	0	0	6	6.00

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