

Course overview

Management of Portfolios (MoP) is a co-ordinated collection of strategic processes and decisions that together enable the most effective balance of organizational change and Business As Usual.

Portfolio Management includes ensuring the organization invests (and continues to invest) in the 'right' initiatives and delivers them the 'right' way which:

- » Focuses on delivery at a collective level in the wider interests of the portfolio
- » Encompasses not just completion on time and to budget, but also in terms of benefits realization.

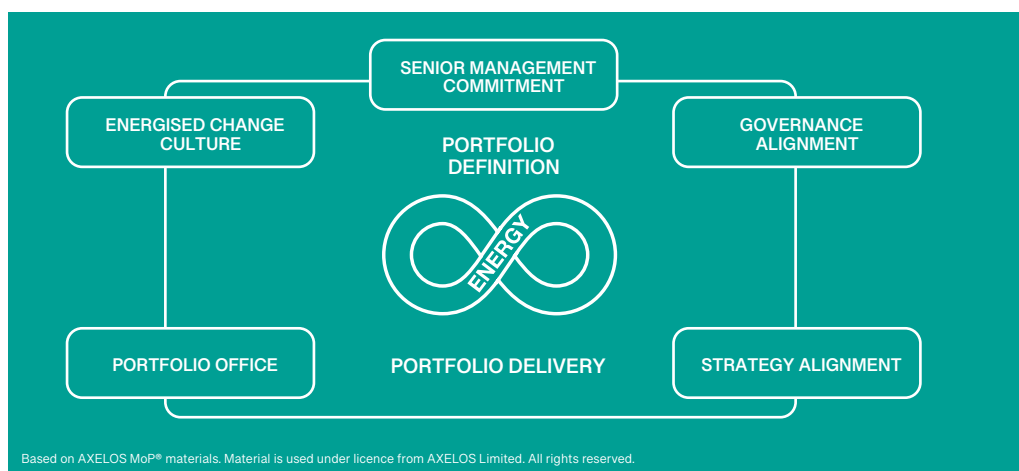
The Portfolio Management model is defined by:

- » five principles that represent the foundations upon which effective Portfolio Management is built. These are generic principles – the way in which they are applied must be tailored to suit the organizational circumstances.
- » two Portfolio Cycles
 - Definition – deciding where to invest and continue to invest
 - Delivery – of the Change Portfolio at a collective level

Course Objectives

On completion of this course you are expected to be able to:

- » Define the characteristics of a portfolio



- » Understand the context of portfolio management and how it relates to strategic planning, programmes and projects, and organizational change
- » Understand how portfolio management relates to business as usual (BAU) functions and processes such as strategic planning, risk, finance, and resource management;
- » Understand the benefits of portfolio management;
- » Understand the principles of portfolio management;
- » Understand and apply the two portfolio management cycles, Define and Deliver, their key practices and deliverables;
- » Understand the different approaches to the implementation of portfolio management and when each approach is likely to be the most successful.
- » Understand the roles and responsibilities associated with portfolio management;
- » Prepare for, and sit the MoP® Foundation Examination.



Topics Covered

The following topics will be covered:

- » Introduction to MoP
- » Strategic and Organizational Context of Portfolio Management
- » Portfolio Management Principles
- » How to implement portfolio management
- » Sustaining progress of implementation
- » Assessing portfolio management maturity
- » Assessing the impact of portfolio management
- » Performance metrics
- » The Portfolio Management Cycles
 - Portfolio Definition Cycle
 - Understand
 - Categorize
 - Prioritize
 - Balance
 - Plan Portfolio Delivery Cycle
 - Management Control
 - Benefits Management
 - Financial management
 - Risk Management
 - Stakeholder Management
 - Organization Governance
 - Resource Management
- » Roles and Documentation
- » Management of Portfolios
- Foundation Exam

Delegate Participation

You will be involved in discussions throughout the course that will allow you to consider how portfolio management can best be applied in practice. Case studies will provide practical exercises that serve to reinforce lecture sessions and provide an opportunity to apply the theory to your work environment.

Course Prerequisites

There are no specific prerequisites for this course however if delegates have a clear idea of the expected outcomes from implementing portfolio management, they are likely to gain more value from the discussions and case studies and be better placed to apply portfolio management pragmatically within their organizations.

Access and equity

As a Registered Training Organisation (RTO), Tanner James strives to provide the optimum access and equity for candidates to its training services. To this end, it is important that clients notify Tanner James as early as possible when a participant may need to take advantage of these services.

Exam format

- » Duration: 40 minutes (no pre-reading time)
- » Format: Multiple Choice (Single Answer)
- » Open Book: No
- » Number of Questions: 50
- » Required Pass Mark: 50% (25 out of 50)

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For further information or to book a place on this course

call 1300 774 623

Course overview

Management of Portfolios (MoP) provides advice and examples of how to apply principles, practices, and techniques that together enable the most effective balance of organisational change and business as usual

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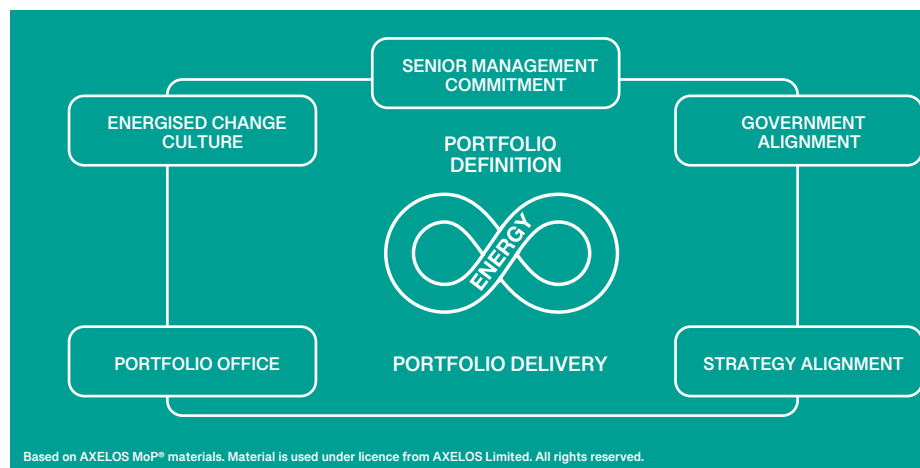
Delivered by fully accredited trainers with extensive experience of portfolio management, the course engages with the students to ensure that theory is embedded and delegates feel confident in the practical application of MoP.

Course Objectives

The MoP Practitioner qualification is aimed at those involved in a range of formal and informal portfolio management roles encompassing investment decision making, project and programme delivery, and benefits realisation.

It is relevant to all those involved in the selection and delivery of business change initiatives including:

- » Members of management boards and Directors of Change
- » Senior Responsible Owners (SROs)
- » Portfolio, Programme, Project, Business Change, and Benefits Managers
- » Business Case writers and project appraisers.



Topics Covered

Examination Overview

- » An overview of the MoP Practitioner exam - length, number and type of questions, etc

Implement, sustain and measure

- » Identify appropriate approaches when implementing, sustaining, and measuring portfolio management for a given scenario
- » Analyse whether recommended approaches to implementing, sustaining, and measuring portfolio management have been undertaken appropriately in the context of a given scenario, with reasons

Portfolio definition cycle

- » Apply and tailor the practices and techniques of the portfolio definition cycle to a scenario
- » Identify appropriate practices and techniques within the portfolio definition cycle
- » Identify, analyse and distinguish between appropriate and inappropriate application of portfolio definition practices and techniques to a scenario



Portfolio delivery cycle

- » Apply and tailor the practices, techniques and responsibilities of the portfolio delivery cycle to a scenario
- » Identify appropriate practices and techniques within the portfolio delivery cycle
- » Identify, analyse and distinguish between appropriate and inappropriate application of portfolio delivery practices to a scenario
- » Analyse whether the approaches adopted are appropriate, with reasons, in a given scenario

Roles and documentation

- » Apply and tailor MoP to a scenario.
- » Identify appropriate application of the main portfolio management roles identified in MoP
- » Identify, analyse and distinguish between appropriate and inappropriate application of the syllabus area to a scenario.
- » Analyse whether, the specified roles have been involved appropriately, with reasons
- » Identify appropriate information, using typical contents, for inclusion in the relevant portfolio documentation
- » Analyse whether the portfolio documentation is fit for purpose, with reasons

Delegate Participation

Candidates will have to have passed the Foundation exam before attempting the Practitioner exam.

Whilst there is no prescribed reading list for the qualification, it is assumed that delegates are familiar with the AXELOS Best Practice Guidance.

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Exam format

The MoP Practitioner exam consists of:

- » 80 multiple choice questions
- » 3 hours
- » Open-book (official MoP Best Practice Guidance only)
- » Candidates require a minimum of 40 correct answers (50%) to pass.

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