



### 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.

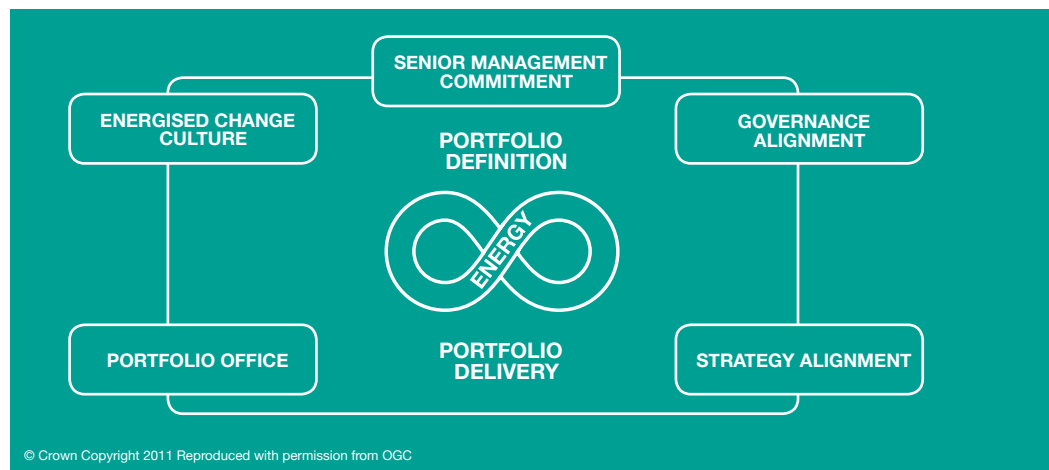
The Portfolio Management model is defined by:

- » 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 MoPTM
- » 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. Most delegates find time spent revising material during the evenings of the course helps to prepare them for the examination. Time required would not be expected to exceed one hour per evening.

## 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)

...Enhancing Your  
Programme and Project  
Management Capability

For further information or to book a place on this course

**call 1300 774 623**