



Boosting Organizational Value through Portfolio Management

An intense face-to-face seminar that provides learning, techniques and tools on how to design, introduce and leverage a portfolio management framework that assists in more balanced opex and capex management and control.

Research indicates that most strategies fail to deliver. Other research states that implementation of programs of work and projects have an alarmingly high failure rate when compared to their business objectives. Portfolio management at a mature level is the solution especially when it is integrated with a value management framework and becomes a cultural roadmap for how to do business.

This Portfolio Management workshop goes beyond just a capex focus that is process and rule bound. It is based on a portfolio management framework outlined in the *'The Business of Portfolio Management- boosting organizational value through portfolio management'* book that has been recently released. The workshop covers a structured approach to the development and implementation of portfolios that is integrated with a value management framework. This done whilst developing the strategic direction and plan of the organization.

Your seminar experience will cover

This workshop is made up of a number modules across five (5) sections that provide; clarity on design, a roadmap for success, plus key techniques and tools. The workshop covers:

Introduction - Objectives, schedule, overview, and HSE.

Section 1 - Organizational context, comparisons, and value.

Section 2 - Portfolio management – building portfolios, success factors, benefits, process groups, and more.

Section 3 - Portfolio delivery via programs of work, projects, tools & techniques, benefits and value.

Section 4 - Leadership, change, roles, professional development, and EPMO/PMO management.

Section 5 - Key Learnings & Summary.

Exercises and a case study are blended through the seminar that allow participants to apply their learning to a simulated situation. Documentation includes appendices that contain checklists plus other supporting information.

How will I benefit?

Attendance and participation will allow you to gain new knowledge on portfolio management and on value management. Those will enable you to contribute towards improved strategic implementation management. Gain insight and learning techniques to create better strategic goals with fully integrated implementation plans will see you making a significant value addition to your organization.

Enhance the contributions you make to your organization by being able to:

- Discover and adopt an approach to portfolio management. Understand the purpose, benefits, characteristics and processes of portfolio management and its differences from program of work and project management.



- Integrate with business objectives – Understand the organizational context, improve organizational maturity level, and leverage strategic impact that portfolio management offers.
- Identify, relate and select appropriate portfolio models that use program of work and project management to implement each portfolio across both opex and capex investments.
- Understand leadership needs along with change management, value management and the role of a portfolio management office (EPMO/PMO) that all support portfolio management.

What will be used?

Lecture, examples, discussion/debate, case study, and group exercises are blended through the seminar duration. You will receive a comprehensive seminar manual for ongoing reference.

Who should attend?

This is a business strategy and implementation orientated workshop that will be of benefit to those that seek higher value from investments, less wastage, and sustained organizational performance. Specifically this workshop will attract directors, VP's, GM's, C-suite leaders, heads of portfolio/program management, EPMO/PMO leaders, and consultants who wish to gain a comprehensive insight, knowledge and tools associated with the mature use of portfolio management.

Professional Credits

Successful completion of this workshop allows claiming of 14 PDU's and/or 1.4 CEU's.

Instructor Bio

Iain Fraser, Dip PPC, PMP, MoP, P3M3, PMI Fellow, Fellow PMINZ

Iain is globally recognised as an expert in modern business, portfolio, program and project management practices. For 30 years he has worked around the world in the Banking/Finance, Defence, Engineering, Government, Oil & Gas, Power and Telecommunications sectors. He is a sought after trusted advisor on portfolio, program and project management and related PMO's. He is also recognised as a public speaker and keynotes many business events. He is the author of the best-selling book *'The Business of Portfolio Management – Boosting Organisational Value'*. Additionally many of his whitepapers have been published globally in various business media including The Telegraph and The Times of the UK.

Recently retired as CEO of Project Plus Ltd, a professional services organisation he founded, grew, and took global, he now consults to organisations embracing change. Iain holds a Certificate in Company Direction from the Institute of Directors amongst other professional qualifications.

During 2006 he was Chairman of the global Board of Directors of the Project Management Institute (PMI) and Vice-Chair in 2005 where he oversaw a period of considerable growth and global expansion for PMI.

His specialties include: Organisational Governance; Portfolio, Program & Project Consultancy; Program/Project Rescue; Portfolio/Program Governance; EPMO/PMO's; Change Management; Value Management; and Business Benefits Realisation.