

# Course Description



## Course Title

Programme and Portfolio Management

## Overview

Businesses across the globe are increasingly achieving their business objectives through programmes and portfolios of business change. Managing a programme is often the next step up for an experienced project manager, and the change in focus needed to do so often requires specific retraining such as offered here. As well as giving a broad overview of both programme and portfolio management, this course aims to give the student a working knowledge of the concepts, terminology and issues involved in both disciplines. Upon completion, delegates should be equipped to manage a programme or a portfolio, and thus ensure that their organisations can benefit from the advantages that they bring.

## What You Will Learn from This Course:

- What is a programme
- What is a portfolio
- The difference between a project, a programme and a portfolio
- How to deliver benefit from programmes and portfolios
- The Programme management lifecycle
- The Portfolio management process
- Planning and control in programme and portfolio management
- How to manage risk in programmes and portfolios
- How to apply communications and stakeholder management to programmes and portfolios
- Assurance for programmes and portfolios
- About the Programme Management Office (PMO)

## Why Should You Attend this Course?

Whilst projects are typically used to deliver particular products or outcomes in an organisation, programmes are vehicles for delivering benefit to an organisation from business change. They typically involve several projects plus other business change initiatives, and the skills required to manage them successfully are different than those need to manage projects.

Portfolios are collections of programmes, projects and business change, and they require a distinct process and skills to implement them well.

Great benefit can be derived by an organisation from a well-run programme or well chosen portfolio and in many cases, these vehicles are the only way in which change can be successfully implemented.

# Course Description



This course will ground the attendees in both of the above. Not only will we look at the tools, techniques and processes needed to manage programmes and processes, we will examine the skills required and the qualities of the personnel. Although there are many similarities, the approach to risk, project control, programme change and many other aspects is distinct from those needed in a project. In this course, we will see how these differ and look at how to apply them successfully.

Looking more widely, the skills needed by programme sponsors are also different, as are the functions of the programme management office. Stakeholder management can become more complex, and communications and management require a different approach. Planning is different, as is changes made to the programme, where quite a different mindset is needed to that used in projects. Assurance and governance are done in a different way, and this course will examine this as well.

Finally, programme managers are less common, partly because the skills are different. We will look at how to develop the experience, skills and style needed.

Not only will programme teams benefit from this course, but other related disciplines, such as assurance personnel will gain a deeper understanding of all that is involved in programme and portfolio management, thus helping them to perform better in their own role.

The course is full of practical techniques and examples, with the intention of turning knowledge into practical benefit and the worked examples, case studies and exercises are intended to make applying the knowledge gained much easier.

Finally, the instructor will include opportunities to discuss the real-world problems and issues and questions that are affecting delegates in their own programmes and working lives, so that improvements and solutions can be implemented as soon as delegates return to their desks. Often, helpful advice can be gained from the experience of other delegates, and the course setting provides opportunities to do this.

## **Who Should Attend This Course?**

- Programme Managers
- Portfolio Managers
- Project Managers
- Programme Controls Staff
- Programme Management Office Staff
- Programme Team Members
- Programme Sponsors
- Project Consultants
- Assurance, quality and governance team members

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## Outcome of this Course

By the end of this intensive 5-day course, attendees will be able to:

- Identify a programme and a portfolio and how they differ from a project
- Selection the best components for a successful programme
- Define and measure benefits and give the best chance of delivery
- Understand the programme management process
- Know how to manage and control a programme
- Understand a typical portfolio management process
- Know how to govern and assure a programme
- Understand what skills are required in a programme manager and how to develop them

## Course Length

5 days

## Course Content

An interactive mix of lecture, case studies, group discussion and activities will be used to illustrate and apply the methods, tools and techniques needed to manage programmes and portfolios. The following topics will be covered:

Definitions of, and differences between, a project, a programme and a portfolio

- Definitions of programmes, portfolios and projects
- Differences between programmes, portfolios and projects
- Types of programmes
- Relationship between programmes and corporate strategy
- Ownership of programmes

How to select the right projects and programmes

- Importance of selecting the right projects and programmes
- Methods of selection

Programme Benefits and Outcomes

- Defining, managing and realising benefits
- Defining and realising value
- Identifying and managing outcomes

The Programme Management Process

- Overview/lifecycle
- Concept
- Definition
- Delivery

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- Closure
- Programme design
- Business justification
- Roles and responsibilities

## How to Manage a Portfolio

- Portfolio management model
- Roles and responsibilities

## Programme Monitoring and Control

- Schedule management
- Cost management
- Resource management
- Risk management
- Change control (and contrast with change management)
- Tools
- Documentation

## Change Management, Stakeholder Management and Communications

- Communications and reporting
- Stakeholder management
- Change management

## Programme Assurance

- Governance
- Relationships – corporate, programme and project governance
- Methodologies
- Sponsorship and disclosure
- Reviews

## Programme Management Office (PMO)

- PMO defined
- Variants of a PMO
- Roles and responsibilities
- Setting up a PMO
- Running a PMO
- Growing and maturing a PMO

## Skills and Competences

- Typical skills and competences required
- Developing programme managers

## Case Studies

- Presentation of real-life examples and case studies of a variety of programmes and portfolios

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## Practical Exercises

- Worked examples, where delegates participate in groups or teams to manage fictitious but realistic programmes and portfolios.

## Summary And Next Steps

- Summary
- Things you can do next
- Reference Material