XCELERATE TRAINING INSTITUTE

your learning & development partner

PROJECT MANAGEMENT

Portfolio Management

DURATION	LANGUAGE	FORMAT
5 days	**English**	**Classroom / Online**

Upcoming dates

Dates	Venue	Format	Fee
26 – 30 Apr 2027	Live online	Online (live)	**€1,200**
3 – 7 May 2027	Berlin	Classroom	**€3,600**
4 – 8 Oct 2027	Live online	Online (live)	**€1,200**

Register or ask a question

Online: x8ti.com/course/portfolio-management/

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Portfolio Management

Introduction

The portfolio is a collection and assortment of projects, programs, subsidiary portfolios, and operations that are managed as a group to accomplish strategic objectives. Portfolio management is aligned with organizational strategies.

Portfolio Management is very critical for an organization and has objectives to achieve:

- Monitor organizational investment decisions
- opt for the ideal mix of programs and projects to meet strategic objectives
- Enhance the possibility of achieving the desired return on investment
- Consolidate the management of the aggregate risk profile of all components

This Xcelerate training course will enhance your knowledge about Portfolio Management related to projects. This course is designed to cover all the facets of projects and project management from the beginning to closing out of the project.

Learning Objectives

The key objective of this Portfolio Management training course is —

- Familiarize with the concepts of a Portfolio
- The relevance of a Portfolio to the strategic objective of the organization
- Acquire the knowledge areas related to Portfolio Management
- Portfolio management assures that there is no gap between the strategy and the implementation
- Proficiencies to realistically steer the portfolio management discipline, including all domains, concepts, processes
- Introducing best practice portfolio management tools and techniques which can be applied in their organizations
- Portfolio Manager’s capabilities to manage multiple portfolios to help their organization achieve its strategic goals and vision
- Methods of Forecasting the Portfolio and Project cost
- Discovering the methods of identifying risks, analyzing them, and managing the same

Training Methodology

Xcelerate Training Institute appoints highly proficient trainers from relevant spheres to deliver the training through audiovisual presentations.

Participation in group activities and assignments, role-plays, and case study discussions is integral to the training program.

Xcelerate Training Institute follows the Do–Review–Learn–Apply Model.

Benefits for Your Organisation

- A clear understanding of the strategic importance of the portfolio
- The team will be more focused on working towards meeting the organization's strategic objective
- Adherence to all the portfolio management domains and concepts
- Better and effective cost management which would enhance the administration and management of finance
- Alignment of the portfolio management towards enhancement of return on investment
- Risk management would be centralized and better managed

Benefits for You

Participants will gain:

- Understanding the strategic goals of an organization
- Clarified concepts on portfolios
- Clean plan of the importance of the portfolio to the organization's strategy
- Increased knowledge of Portfolio management concepts and domains
- Better management of the stakeholders
- Will be able to have better communication with the teams involved
- Boosted skillset and capabilities to identify, analyze, and manage risks

Who Should Attend

- Executive or senior-level professional who is managing a portfolio of projects and programs aligned with organizational strategy
- Senior members of the organization who want to learn about Portfolios in more detail

Course Outline

Introduction to Portfolio

- Introduction to Portfolio
- Link of Portfolio, Program, and Project
- Portfolio Life cycle
- Importance of Portfolios in the Strategic objective of the organization
- Role of a Portfolio Manager

Overview of Portfolio Management

- What does Portfolio Management constitute?
- Portfolio management and Organizational strategy
- Portfolio Management Implementation Process
- Stakeholder involvement in Stakeholder Management
- Impact of Organization on Types of Portfolio Management

Portfolio and Strategic Alignment

- Evaluate organizational strategic goals

- Identify criteria for prioritization
- Developing a Road Map for the Portfolio to meet the strategic goals
- Managing the impact on portfolio
- Managing Portfolio components reacting to strategic goals and objectives.
- Recommendation for different Portfolio Scenarios

Governance-Portfolio Management

- Establishing a governance model
- Determining and monitoring portfolio management standards, protocols, rules, and best practices, using organizational assets
- Development of a Portfolio Management Plan
- Monitoring, Managing, and Making recommendations regarding portfolio decisions

Performance-Portfolio Management

- Understanding of Portfolio Performance Management Plan
- Development of Portfolio Performance Management Plan
- Developing Key Performance metrics and various techniques of measuring Portfolio Health
- Managing Portfolio management by generating reports, conversations, dashboards, and auditing techniques to make sure it is aligned with strategic objectives
- Managing portfolio changes to ensure its strategically aligned by using change management techniques

Risk-Portfolio Management

- Understanding of the Portfolio Risk Management Plan
- Development of a Portfolio Risk Management Plan
- Implementing Risk Management Plan
- Developing, monitoring, and maintaining portfolio-level risk registers that are impacting strategic goals and objectives
- Managing Risks

Communication-Portfolio Management

- Understanding of Portfolio Communication Management Plan
- Development of Portfolio Communication Management Plan
- Implementing Communication Management Plan
- Managing communication and information sharing

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Registration Form

Portfolio Management

Preferred dates: ..... Venue or online: .....

Duration: 5 days Language: .....

Please complete and email this form to us, or register online. We confirm your place and send the invoice within one working day.

Delegate information

Full name (Mr / Ms / Dr / Eng): .....

Position: ..... Telephone / mobile: .....

Official email: ..... Personal email: .....

Company information

Company name: .....

Address: .....

City / country: ..... VAT / tax number: .....

Person responsible for training & development

Full name (Mr / Ms / Dr / Eng): .....

Position: ..... Telephone / mobile: .....

Email: .....

Payment

☐ Please invoice me ☐ Please invoice my company

Signature: ..... Date: .....

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Email this form
info@x8ti.com

Register online
Open the course page