

## Portfolio Management: Aligning Projects and Strategy

Class Length: 1 day

“How do I ...  
... use scarce resources in the best way?  
... align projects and initiatives with strategy?  
... deliver more value with less investment?”

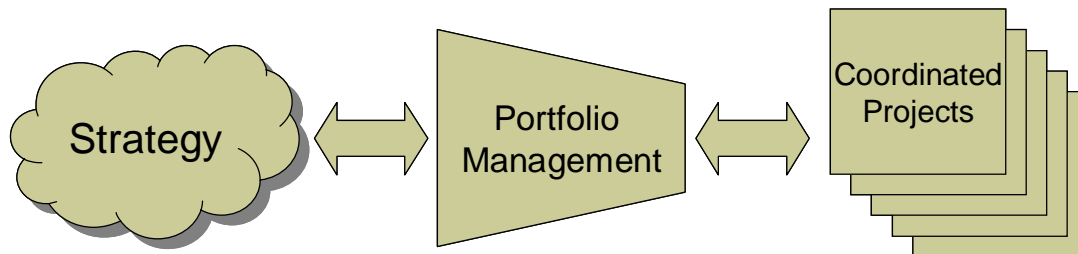


These are burning issues for many management teams today. Organizations as diverse as Intel, Hershey, and the US Government have found that portfolio management is an essential part of the answer. This class shows how portfolio management works, both in theory and in the real world.

Every organization has too many projects clamoring for too few resources. Worse yet, precious resources are spent on the wrong projects - projects that are not aligned with strategy or with each other. The organization tries to do too much with too little, wastes resources on the wrong projects, and suffers from unbalanced risks and myopic horizons.

Portfolio management is a proven method of looking across functions to select the right projects and coordinate their execution. Portfolio management aligns projects with strategic direction and makes the best use of limited resources.

This class looks at current techniques and best practices for managing project portfolios in real companies. It has a definite real world slant. The class includes valuable templates, tools, and insights that will give you a jump-start when you return to your business.



### Who Should Attend

This class is designed for managers, executives, program and portfolio managers who want to:

- Systematically prioritize and select the right projects, maximizing their return on investment in resources
- Apply to their business today's best practices in portfolio management of projects
- Compare real-world experiences with other leaders

Current usage of portfolio management is not a prerequisite.

## Learning Objectives

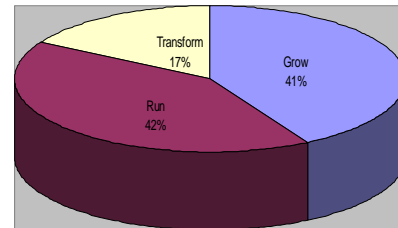
- Understand the business value of portfolio management
- Understand the essential concepts of portfolio management and how they are implemented in the real world by the most successful companies
- Learn how to link portfolio management both to strategy and to project execution
- Develop an action plan for implementing portfolio management techniques in your business situation

## Topics

Using a variety of tools and techniques, you will learn real-world best practices in project portfolio management. Your instructor will also identify typical gaps in portfolio management and show how you can deal with them. You will participate in hands-on exercises as well as plenty of interaction with the instructors and other class participants.

The class covers these key topics in portfolio management:

- Introduction to portfolio management for projects
- Maximizing portfolio value
- Balancing the portfolio
- Linking portfolio management to strategy implementation
- Linking portfolio management to project execution
- Implementing portfolio management techniques in your company



## Instructor

Jeff Oltmann, PMP, is an experienced portfolio manager and instructor. In addition to running the Program Management Office (PMO) and project portfolio for IBM's development facility in Oregon, he has managed large product development programs. Jeff teaches portfolio and project management topics at the graduate level.

## Availability

Synergy offers this class to the public in partnership with the OGI School of Science and Engineering at Oregon Health and Science University. Synergy will also teach it in-house at your organization or customize it to fit your specific needs. Contact Jeff Oltmann, [jeff@spspro.com](mailto:jeff@spspro.com), (503) 644-6433, for information.