

# ENERGY PROJECT PORTFOLIO MANAGEMENT



September 29-30, 2020  
Online | Central Time

*Related Program:*

## **Remote Project Management**

**September 28, 2020**

**9:00 AM-1:15 PM Central Time**

**TUESDAY, SEPTEMBER 29, 2020 9:00 - 12:00 PM CENTRAL**

### **Portfolio Management Overview**

*Identify what project management and portfolio management look like at your organizations today and what opportunities exist for improvement. Why are both forms of management necessary?*

*Discuss stakeholders engaged in the process. Who are they, what do they contribute into the process and what deliverables do they need in return from the process?*

*Review strategic initiatives specific to your organization and others for consideration in portfolio planning going forward.*

*Identify inputs and information needed to successfully analyze projects and programs within a portfolio.*

*Review resource limitations-what items need to be considered?*

### **Project Prioritization, Portfolio Building and Metrics**

*Discuss techniques to score and weight projects in alignment with initiatives.*

*Complete exercise to explore the prioritization process using Excel. Review resource constraints and modify portfolio accordingly.*

*What defines the success of different initiatives? What measures are tracked on individual projects to demonstrate progress towards the initiatives?*

**WEDNESDAY, SEPTEMBER 30, 2020 9:00 - 12:00 PM CENTRAL**

### **Process Governance, Communication and Approvals**

#### **Develop channels for identification.**

*Identify information needed from stakeholders to facilitate portfolio process.*

*Discuss feedback loops – who needs to know and when? How often should portfolio be reviewed and adjusted?*

*Develop approval process and timelines.*

#### **Review**

*What is one action that you can take leaving today to help your organization make progress in the portfolio management space?*

#### **Questions**

Utilities have an abundance of projects with varying needs vying for resources. Portfolio Management is the practice of identifying the highest value projects for execution at the right time in order to promote the strategic initiatives of a corporation. It allows for comparison and prioritization of investments, while monitoring and measuring individual project effectiveness and contribution to the overall portfolio goals.

## LEARNING OUTCOMES

- Identify the major tenants of Portfolio Management and the similarities and differences between project management and portfolio management
- Evaluate basis for project identification in alignment with business objectives or strategic initiatives
- Explore techniques for project prioritization, evaluating projects against one another to determine the appropriate portfolio for execution
- Recognize resource and schedule limitations and incorporate resource management techniques into portfolio management
- Determine appropriate measures for identifying portfolio success
- Discuss the need for governance, communication, and review processes to establish peer and leadership buy-in

## INSTRUCTOR

### **Jackie A. Becker**

*Director, Transmission Portfolio Management, Planning and Project Controls, Ameren Services Company*

## COURSE RECORDING

A recording of this program will be available for three days from either the end of the program (or three days from the date of purchase, if you purchase the recording after the session ends). It is presented in four-hour sessions and can be watched an unlimited number of times for three days (for the registrant). There is no additional cost beyond the registration fee.

# REMOTE PROJECT MANAGEMENT

September 28, 2020 9 am - 4:30 PM

## AGENDA

**The Project Planning Process** – What you need to pay extra attention to

- Building the WBS; scope agreement
- Performing remote risk reviews

**Monitoring and Control of the Project – Keeping tabs on your project, remotely**

**Communications – Getting the message across**

- Team Charter
- Essentials of good teamwork
- Meetings
- Problem escalation
- Personality styles for remote work
- Meetings
- Roles and responsibilities; stakeholders
- Tracking issues

**Tools/Technologies – Consideration for a virtual team**

**Types of Technology – Zoom, MS Teams, computers, etc.**

**Best Practices for Conducting Meetings – Conference calls/video calls**

**Leadership**

- Decision making – How will this occur? What is the process?
- Managing expectations
- Building trust – An integral part of integrity
- Rewards system – Based on milestones
- Cultural aspects and sensitivities
- Environment – Professionalism
- Conflict resolution
- Escalating problems
- Meetings – Group and individual

**Virtual Teams – Building and nurturing a highly engaged and productive team**

**Managing Individual Performance – Hiring and developing people to be successful in virtual setting**

**The Paradigm Shift – Closing thoughts on the workplace of the future and the role of project managers in its success**

Although managing projects remotely is not a new concept, the process became a requirement in 2020, therefore leading countless people and organizations into what could potentially be unfamiliar territory. Through this course, attendees will understand how to successfully initiate, manage, and complete projects from home, as well as how the process differs compared to face-to-face management systems and styles. Attendees will be walked through everything from how to communicate online effectively, how to manage both teams and individuals from afar, and how to become or continue to be an approachable and successful project manager or participant whose leadership transcends from project to project.

## LEARNING OUTCOMES

- Review the project planning process, including how to build a Work Breakdown Structure and reviewing potential risks
- Discuss the different tools teams can use while developing and executing a project, as well as the communications tactics to employ
- Review best practices for conducting meetings, as well as leadership tactics that will help to streamline productivity, expectations, and communication
- Explain how to manage individual and group success and how to monitor towards a successful project completion

## INSTRUCTOR

**David Tennant**

*Windward Consulting Group LLC*

EUCI is authorized by IACET to offer 0.7 CEUs for the course. Participants must log on each day and be in attendance for the entirety of the course to be eligible for continuing education credit.

To Register Click Here, or

**Mail Directly To:**

PMA Conference Management  
405 Highview Rd  
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# ONLINE DELIVERY & PARTICIPATION DETAILS

EUCI will use Microsoft Teams to facilitate participation in the upcoming event. Attendees do not need to have an existing Teams account to participate in the broadcast. The course will play in attendee's browser. When attendees sign on, their microphones are typically muted. Attendees should keep their mic muted until such time as it's needed to ask a question. During the event, participants will have the option of using a microphone to speak with the room and ask questions, or type in any questions via the chat window and our online administrator will relay your question to the instructor.

- Each attendee will receive an event invitation by e-mail, which will include one link to sign on for each half-day of the event (i.e., three links for a 1 ½ day event). The appropriate link must be used to join each half-day event segment at the appropriate time.
- The remote meeting connection will open approximately 30 minutes before the start of the course. We encourage attendees to connect as early as possible in case of unforeseen problems.

## PLEASE SELECT

**ENERGY PROJECT PORTFOLIO MANAGEMENT ONLINE COURSE**

SEPTEMBER 29-30, 2020: US \$1195 (Single Connection)

**REMOTE PROJECT MANAGEMENT**

SEPTEMBER 28, 2020 \$795 (Single Connection)

How did you hear about this event? (direct e-mail, colleague, speaker(s), etc.)

Print Name

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Address

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### CREDIT CARD INFORMATION

Name on Card

Billing Address

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Billing City

Billing State

Exp. Date

Security Code (last 3 digits on the back of Visa and MC or 4 digits on front of AmEx)

Billing Zip Code/Postal Code

**OR** Enclosed is a check for \$ \_\_\_\_\_ to cover \_\_\_\_\_ registrations.

#### Substitutions & Cancellations

Your registration may be transferred to a member of your organization up to 24 hours in advance of the event. Cancellations must be received on or before August 14, 2020 in order to be refunded and will be subject to a US \$195.00 processing fee per registrant. No refunds will be made after this date. Cancellations received after this date will create a credit of the tuition (less processing fee) good toward any other EUCI event. This credit will be good for six months from the cancellation date. In the event of non-attendance, all registration fees will be forfeited. In case of course cancellation, EUCI's liability is limited to refund of the event registration fee only. For more information regarding administrative policies, such as complaints and refunds, please contact our offices. EUCI reserves the right to alter this program without prior notice.