

# PROJECT PRIORITIZATION AND PORTFOLIO MANAGEMENT

December 4-5, 2018

Hilton Garden Inn Arlington/Courthouse Plaza  
Washington D.C.



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EUCI is authorized by IACET to offer 1.2 CEUs for the course

At the date of this posting, IACET is approved by the Society for Human Resources Management (SHRM) for continuing education.

## OVERVIEW

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Many organizations struggle with limited resources and too many projects in the “pipeline” based on resource capacity. Project portfolio management is a set of business practices and a process that allows organizations to select the right projects at the right time and manage them as an investment in a strategic portfolio of projects and programs. It includes prioritization of projects and programs within the portfolio, managing and optimizing the portfolio’s projects and resources and measuring the results and business value of the portfolio.

The benefits of implementing project portfolio management are:

- Selection of the right mix of projects to achieve organizational strategies and business objectives
- Alignment of resources to work on the right projects at the right time at the right pacing based on resource capacity
- Better throughput across all projects due to clear priorities and less sub-optimization
- Improved decision making on individual projects with the understanding of downstream impacts to the entire portfolio

**Important note:**

**Attendees will need to bring a laptop that includes Microsoft Excel.**

## LEARNING OUTCOMES

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- Review definitions and the similarities and differences associated with managing an individual project, a program (set of related projects) and a portfolio of projects and programs
- Evaluate various methods to rank and score projects based on business value and risk and then use analysis techniques to ensure the portfolio contains the right mix of projects to meet organizational strategies and business objectives
- Apply the techniques of scoring, weighting and ranking to prioritize and select projects through a table team exercise using Microsoft Excel
- Evaluate the importance of resource management techniques of supply/demand to ensure projects are selected and paced appropriately within resource capacity
- Recognize the value of managing and re-balancing the portfolio on an on-going basis so that new projects aren’t added to the portfolio without re-assessing resource capacity
- Define the portfolio measures to assess project portfolio performance and value
- Implement project management software tools and strategies

## WHO SHOULD ATTEND

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- New and experienced project managers
- Project team leaders who plan and manage projects
- Project team members who are interested in enhancing their careers
- Professionals interested in understanding a broader perspective of project management to help them in their project management roles



*“Barbara did a great job! Would definitely take any of her other courses!”*

Attendee, EKPC

# AGENDA

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TUESDAY, DECEMBER 4, 2018

**7:30 – 8:00 am                      Registration and Continental Breakfast**

**8:00 am – 5:00 pm                Course Timing**

**12:00 – 1:00 pm                  Group Luncheon**

**Overview of all Project Management Disciplines**

- Identify current project management issues in your organization and how to improve through program and/or portfolio management (table team exercise)
- Definitions and similarities/differences in project, program and portfolio management
- Skills and competencies necessary for project, program and portfolio managers
- Key project management deliverables necessary to implement project portfolio management
- One strategic portfolio or multiple business portfolios? When to use which method?

**Table Team Exercise to Prioritize and Select the Projects Within a Program, Using Microsoft Excel Spreadsheets and Employing the Same Prioritization Techniques for an Entire Portfolio**

- Assign scoring metrics and weighting values to the ranking criteria
- Review the business cases and assign a score to each of the ranking criteria
- Select projects to be included in the program, balancing against resource capacity constraints
- Present each table team's results

**Stakeholder Engagement**

- Review various stakeholder analysis tools
  - o Discuss stakeholder engagement challenges, including a table team exercise to identify tips and techniques to address the challenges

WEDNESDAY, DECEMBER 5, 2018

**7:30 – 8:00 am                      Continental Breakfast**

**8:00 am – 12:00 pm                Course Timing**

**Detailed Project Portfolio Management Process**

- Integration with strategic/business planning and budgeting processes
- Prioritizing the projects and programs to be included in the portfolio
  - o Ranking criteria examples for business value and risk
  - o Various prioritization models, including discussion of pros and cons of each
  - o Tools and techniques to ensure the correct mix of projects within the portfolio
  - o Resource capacity and resource management (resource supply vs project resource demand) and optimal pacing of the projects within the portfolio
  - o Types of portfolio pipeline and investment mix reports to gain approval of portfolio
- Managing (re-balancing) the project portfolio
  - o Techniques to re-balance the portfolio when new projects are requested and/or when current projects are not progressing as planned (plus table team exercise)
  - o Types of portfolio dashboard reports
- Measuring the portfolio; techniques to measure the portfolio performance and value

**Governance**

- Approval of the initial project portfolio and the re-balanced portfolio
- How to engage executives in strategic decisions related to approving the project portfolio and committing to the project priorities

# COURSE INSTRUCTOR



## Barbara Schrage PMP, MCPM, President, Practical Project Management, LLC

Barbara has over 25 years of experience in all aspects of project management, program management and project portfolio management, culminating in the role of Asst. Vice President of a centralized Project Management Office (PMO) in a Fortune 500 Financial Services organization. As leader of the PMO, she had accountabilities for project portfolio management, project prioritization, project approvals, project methodology, and project metrics. In addition, she was accountable for results of projects led by the Project & Program Managers within the PMO. She mentored and developed leadership skills in project and program managers.

Barbara owns a consulting business called Practical Project Management, LLC. She helps her clients mature their project management practices in various ways, such as implementing Project Management Offices, implementing Project Portfolio Management and standardizing and improving their project management processes. She teaches on-site Project Management courses on-site, within organizations, and also coaches and mentors leaders of PMOs and Project, Program and Portfolio Managers. Besides her experience in the Financial Services industry, her clients have spanned various industries, such as health care, energy/utility, engineering, consumer goods, education, manufacturing, biotech research, government, retail, and market research.

Specifically, within the Energy/Utility industry:

1. 2005-2011; Developed and implemented Project Portfolio Management processes and tools. Taught 34 Project Management classes to a total of 480 attendees.
2. 2011 – current; Taught 18 Project Management classes to a total of 279 attendees.
3. 2014 – current; Developed and implemented standard Project Management processes, templates and tools, and incorporated them into the Project Management training materials. Taught 11 Project Management classes to a total of 237 attendees.



*“Barb is an amazing instructor and very knowledgeable. Her teaching style is adaptive for all learning types.”*

Project Control Specialist, City of Fort Worth

## REQUIREMENTS FOR SUCCESSFUL COMPLETION OF PROGRAM

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Participants must sign in/out each day and be in attendance for the entirety of the course to be eligible for continuing education credit.

## INSTRUCTIONAL METHODS

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PowerPoint presentations, demonstrations, group exercises and classroom discussion will be used in this course for all learning outcomes.

## IACET CREDITS

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EUCI has been accredited as an Authorized Provider by the International Association for Continuing Education and Training (IACET). In obtaining this accreditation, EUCI has demonstrated that it complies with the ANSI/IACET Standard which is recognized internationally as a standard of good practice. As a result of their Authorized Provider status, EUCI is authorized to offer IACET CEUs for its programs that qualify under the ANSI/IACET Standard.

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## EVENT LOCATION

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A room block has been reserved at the Hilton Garden Inn Arlington/Courthouse Plaza, 1333 North Courthouse Road, Arlington, VA 22201, for the nights of December 3 - 4, 2018. Room rates are \$149 plus applicable tax. Call **1-703-528-4444** for reservations and mention the EUCI event to get the group rate. The cutoff date to receive the group rate is November 3, 2018 but as there are a limited number of rooms available at this rate, the room block may close sooner. ***Please make your reservations early.***

## REGISTER 3, SEND THE 4TH FREE

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Any organization wishing to send multiple attendees to these conferences may send 1 FREE for every 3 delegates registered. Please note that all registrations must be made at the same time to qualify.



Please make checks payable to "PMA"

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## PLEASE REGISTER

### PROJECT PRIORITIZATION AND PORTFOLIO MANAGEMENT COURSE

DECEMBER 4-5, 2018: US \$1395,

Early bird on or before November 16, 2018: US \$1195

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

Print Name Job Title

Company

What name do you prefer on your name badge?

Address

City State/Province Zip/Postal Code Country

Phone Email

List any dietary or accessibility needs here

### CREDIT CARD INFORMATION

Name on Card Billing Address

Account Number 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 November 2, 2018 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 at (201) 871-0474