

PROJECT PORTFOLIO EVALUATION COURSE

OVERVIEW

Implementing an organisation's strategy most effectively is achieved through a well-curated mix of projects. Business leaders need this optimal project mix to differentiate their organisations from competitors.

The Project Portfolio Evaluation course focuses on translating strategy into this optimal project mix. In this course, you will learn methods, including theory and practical tools, to evaluate current or proposed projects within a logical decision-making framework governed by identified constraints.

The course delves into the psychology of portfolio decision-making and provides a holistic view of the factors that influence decisions. It empowers you with the theory, terminology, tools, and skills to apply a mathematical approach to portfolio management; Enabling you to select, organise, and manage projects that align to the organisation's business strategy.

SYLLABUS

The course consists of two modules:

PF01 module covers the fundamentals of project numerical evaluation. It covers the calculation of financial evaluation parameters such as payback period, ROI, NPV, IRR etc.

PF02 module covers the portfolio management process, selection models, decision making, and portfolio balancing. This includes an assignment that should be presented 2 weeks after the initial 2-days training.

CLASSROOM BASED



DURATION

3.5 DAYS

Classroom-based course

WHAT IS INCLUDED

- Course file with all the course presentations, the course workbook, exercises, and handouts
- Notebook and pen
- A Certificate of Attendance on successful completion
- Light breakfast, lunch, & refreshments

WHO SHOULD ATTEND?

- PMO managers
- Financial managers
- Project managers
- Portfolio managers
- Business unit managers
- Techno-economists
- Functional managers
- Any interested party wanting to understand higher level decision making within organisations

FORMAT

This course is split into two modules:

PF01 (1 day) is aimed at people with a limited financial background around ROI, NPV and IRR type of calculation required for PF02. Delegates will complete several short in-class assignments.

PF02 (2.5 days) covers the theory of portfolio management with a few short in-class assignments.

The last 0.5 days of PF02 is done two weeks later where you will present your results of a typical real scenario.

The aim of the final session is to discuss everyone's findings and to compare learnings and the different approaches followed. Upon successful completion of the course you will receive a Certificate of Attendance.

BENEFITS

- Highly recommended for those involved in capital decision-making.
- This course equips you with a practical portfolio framework to:
 - Translate strategies into actionable projects.
 - Analyse projects both quantitatively and qualitatively.
 - Develop and apply numerical selection models.
 - Implement basic portfolio decision-making models.
 - Understand the psychology behind decision-making.
 - Create optimised and balanced portfolio scenarios.
 - Measure and track portfolio performance.
- Provides clarity on how strategies are executed and measured over time.
- Earn 7 formal Project Management Education hours.