ZALBA$IR
EPPM
Decision Making Credibility

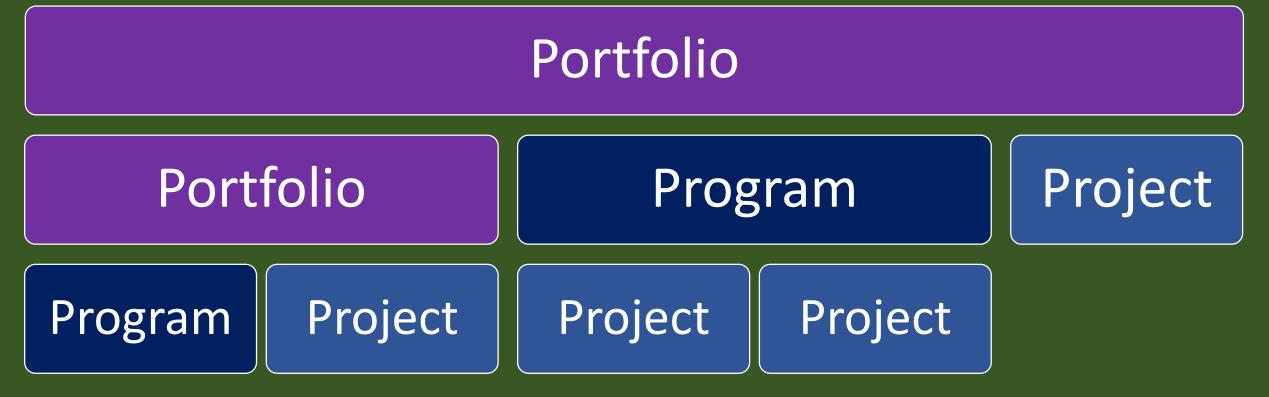**Project Portfolio Management Model (1 of 4)**

Model Basics

How To Build Your Portfolio Management Model? (1 of 4)

Step by Step Easy Guide To Build A Successful Portfolio Management (ZAlbasirEPPM Portfolio Formation Model)

What is A Portfolio?

- The portfolio is new organization contains number of programs or projects or mix of programs and projects to achieve predefined strategy and goals.

Portfolio		
Portfolio	Program	Project
Program	Project	Project	Project

What Are The Top Portfolio Properties?

- It contains programs or projects or mix of programs and projects. In some cases it includes smaller portfolios within it.

- It has no end date. When program and projects ended, new ones included. The portfolio might be ended when achieving or (failing to achieve) the goals.

- The portfolio business case roadmap.

- The portfolios programs or projects might be linked together or independent.

- Its strategic goals must be quantifiable and can be measured even for the goals which has social, environmental, long term and strategic decisions.

- It has a methodology for (communication, selection, prioritizing and balance demands (funds and resources), KPIs, Risks threshold and operation reporting and others as needed).

Strategy and Goals

More Depends on Portfolio Type

Portfolios/programs/ projects (linked or Independent)

Portfolios Properties

Approved Methodology

No End Date and Flexible Budget

Ongoing Business Case Review

What is A Portfolio Management?

- The portfolio management is the developed methodology to select, priorities and manage the portfolio (programs and projects) to achieve the predefined strategy and goals.

Portfolio Organizational Structure Formation?

Portfolio Manager Approval	• Knowledge , Skills, responsibilities and authority.
Portfolio Initial Business Case Approval	• The Portfolio Initial Plan, budget and benefits.
Portfolio Starting Team Assignments	• Temporary Staff to establish the Portfolio.
Portfolio Initial Programs and Projects Selection and Prioritizing Approval.	• Project and programs selection.
Portfolio Periodic Business Case Approval	• The first Business Case Submittal and approval.
Portfolio Budget Approval	• Budget approval
Portfolio Final Team Approval	• Permanent staff to manage the portfolio.
Handing Over Finalized	• Handing over responsibilities of programs and projects operations to the portfolio Manager.

Conclusion

- The provided process is applicable to all portfolios formations.

- The next three videos are detailing the portfolio management methodology requirements and management.

- To help you to form your portfolios, please contact us on info@zalbasireppm.com.