ZALBA$IR

EPPM

Decision Making Credibility

Project Portfolio Management Model

The Methodology

How To Build Your Portfolio Management Model? (2 of 4)

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

The Authority Matrix Clarity?

Position \ Responsibilities	Portfolio	Program	Project
Portfolio Manager	Manage Portfolio	Live Monitoring	Live Monitoring
Program Manager	Live Reporting	Manage Program	Live Monitoring
Project Manager	Live Reporting	Live Reporting	Manage Project

Portfolio Manager

Portfolio Manager

Program Manager

Project Manager

Program Manager

Project Manager

Project Manager

Project Manager

Strategy and Goals Matrix Clarity?

Position \ Responsibilities	Portfolio	Program	Project
Portfolio Strategy and Goals	➢ Portfolio Business Case. ➢ Manage Stakeholders ➢ Manage Budget. ➢ Manage Resources. ➢ Manage Risk. ➢ Portfolio KPIs. ➢ Biweekly Reports.	➢ Program Business Case. ➢ Manage Stakeholders ➢ Manage Budget. ➢ Manage Resources. ➢ Report Risks. ➢ Program KPIs. ➢ Live Reports.	➢ Project Business Case. ➢ Manage Stakeholders. ➢ Manage Budget. ➢ Manage Resources. ➢ Report Risks. ➢ Project KPIs. ➢ Live Reports

Portfolio Strategy and Goals

- Portfolio Strategy and Goals
- Program Strategy and Goals
- Project Strategy and Goals
- Program Strategy and Goals
- Project Strategy and Goals
- Project Strategy and Goals
- Project Strategy and Goals

Selection and Prioritizing Methodology?

- Define the criteria of the portfolio, program and project (ongoing projects, future projects, total budget, life span, total numbers, resource constrains..Etc).

- Based on the criteria, categorize the programs and projects, then balance the distribution among the portfolios.

- Define the importance of each program and project. Hint, based on type, the delivery time window (urgent, ongoing, future), the location, then on others factors as needed. The importance of the previous factors are flexible based on the needs. But it should be locked for selection and priorities study.

- Submit and approve the business case.

- Manage portfolio, program or project.

- Monitor and report the portfolio, program or project.

- Close portfolio, program or project.

- Provide lesson learnt as you go.

What is The Business Case Content?

- The approved strategy and goals.
- The approved budget and cash flow.
- The selection criteria.
- The prioritizing criteria.
- The final selected projects.
- The final project ranking list.
- The resource balance chart.
- The stakeholders.
- The communication Plan.
- The applicable adopted delivery methodology tailored to fit the organization and the portfolio requirements.

What is The Communication Plan?

- Communication plan within program or project.

- Communication plan to the portfolio.

- External stakeholders communications responsibilities matrix.

- Communication platform.

- Reports types, names and delivery period.

- Reports formats.

- Reports approvals and comments implementation.

- Live system implementation plan.

Conclusion

- The provided methodology is applicable to all portfolios formations.

- The next video are detailing the portfolio management Selection and Prioritizing Criteria Examples.

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