

WORKSHOP PORTFOLIO MANAGEMENT PRINCIPLES & PRACTICES



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TRAINING CENTER



Introduction

Effective portfolio management is essential for aligning projects, programs, and investments with organizational strategy. This workshop, delivered by Gentex Training Center, provides participants with the tools and techniques to manage portfolios effectively, prioritize initiatives, allocate resources, and monitor value delivery. Participants will learn practical methods to balance risk, return, and performance while ensuring strategic alignment.

Objectives of the Workshop

By the end of this workshop, participants will be able to:

- Understand the core principles of portfolio management.
- Differentiate between portfolio, program, and project management.
- Develop portfolio selection and prioritization criteria.
- Apply resource allocation strategies to maximize organizational value.
- Monitor, evaluate, and report portfolio performance using KPIs.
- Align portfolio governance with strategic objectives.

Workshop Methodology

The workshop uses interactive lectures, case studies, group discussions, and practical exercises. Participants will work on real-life scenarios and apply portfolio management frameworks to ensure direct workplace application.

Who Should Attend

- Portfolio managers and analysts
- Program and project managers
- Strategy and planning professionals

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- Executives involved in investment decision-making
- PMO staff and governance officers

Workshop Content

Day 1: Foundations of Portfolio Management

- Understanding portfolio vs. program vs. project management
- Strategic alignment and organizational value creation
- Governance structures and decision-making models

Day 2: Portfolio Selection and Prioritization

- Defining selection criteria and prioritization frameworks
- Balancing strategic, financial, and risk-based objectives
- Tools for portfolio scoring and decision support

Day 3: Resource Allocation and Capacity Planning

- Optimizing resource allocation across initiatives
- Identifying capacity constraints and trade-offs
- Practical techniques for resource optimization

Day 4: Monitoring and Performance Measurement

- Establishing portfolio KPIs and dashboards
- Measuring value realization and benefits tracking
- Performance reporting and stakeholder communication





Day 5: Governance and Best Practices

- Portfolio governance structures and policies
- Risk management and ethical considerations
- Case studies and global best practices in portfolio management

Conclusion

By successfully completing the Portfolio Management Principles & Practices Workshop with Gentex Training Center, participants will gain practical knowledge and skills to design, govern, and optimize portfolios that drive organizational success and long-term value creation.