

# Course : Program and project portfolio management

**Practical course - 2d - 14h - Ref. GPF**

**Price : 1610 CHF E.T.**

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On completion of this module, participants will have mastered the skills needed to address a program or portfolio of projects.

## Teaching objectives

At the end of the training, the participant will be able to:

- ✓ Draw up a portfolio to implement a corporate strategy
- ✓ Balancing portfolio projects by adapting lists to changes and strategic orientations
- ✓ Measure and monitor portfolio performance through financial analysis and project profitability
- ✓ Managing program stakeholders
- ✓ Define and manage a program using quality, cost and deadline indicators

## Intended audience

Anyone involved in or managing a project.

## Prerequisites

Completion of the "Operational Project Management" training course or equivalent qualifications.

## Practical details

### Hands-on work

Theoretical input and practical exercises.

### Teaching methods

This highly interactive course is based on an alternation of theoretical input, practical work, discussions, workshops and contextualized case studies.

## Course schedule

### PARTICIPANTS

Anyone involved in or managing a project.

### PREREQUISITES

Completion of the "Operational Project Management" training course or equivalent qualifications.

### TRAINER QUALIFICATIONS

The experts leading the training are specialists in the covered subjects. They have been approved by our instructional teams for both their professional knowledge and their teaching ability, for each course they teach. They have at least five to ten years of experience in their field and hold (or have held) decision-making positions in companies.

### ASSESSMENT TERMS

The trainer evaluates each participant's academic progress throughout the training using multiple choice, scenarios, hands-on work and more.

Participants also complete a placement test before and after the course to measure the skills they've developed.

## 1 The specifics of program management

- Differentiate between program and project concepts.
- Understand specific management concepts and styles.
- Identify the interrelationships between projects and programs and their place in the company.
- Distinguish between different types of program, innovation, decommissioning...
- Clarify the posture of the program manager: cross-functional management, ability to present, convince...
- Understand current program management standards: MSP, PMI, P2M, ICB3, ISO standards...

### Exercise

Exemples d'organisation de programme. Exercice sur les distinctions entre projets, programme et portefeuille.

## 2 Program management processes and rules

- Calculate program value: identify expected benefits, ROI and performance indicators.
- Document program requirements, allocate them to projects and monitor their implementation.
- Defining architectural rules for a program, studies and their validation.
- Program budget management: consolidation of project estimates, budget allocation to projects.
- Taking stakeholders into account in the program: identification, communication methods, best practices.
- Clarify the specific roles of the program manager: managing contractors and the communication plan.

### Case study

Case study based on a real company situation.

## 3 Program project management

- Managing multi-project resource allocation: market rules and tools.
- Manage program planning and schedule coordination.
- Maîtriser les risques : processus et tableaux de bord communs au programme, décisions de maîtrise des risques...
- Organize and coordinate project working methods: common processes, documentation standards, etc.
- Operational monitoring of projects: program reporting, budget monitoring, integration of deliverables, etc.

### Hands-on work

Creation of steering and reporting tools.

## TEACHING AIDS AND TECHNICAL RESOURCES

- The main teaching aids and instructional methods used in the training are audiovisual aids, documentation and course material, hands-on application exercises and corrected exercises for practical training courses, case studies and coverage of real cases for training seminars.
- At the end of each course or seminar, ORSYS provides participants with a course evaluation questionnaire that is analysed by our instructional teams.
- A check-in sheet for each half-day of attendance is provided at the end of the training, along with a course completion certificate if the trainee attended the entire session.

## TERMS AND DEADLINES

Registration must be completed 24 hours before the start of the training.

## ACCESSIBILITY FOR PEOPLE WITH DISABILITIES

Do you need special accessibility accommodations? Contact Mrs. Fosse, Disability Manager, at [psh-accueil@orsys.fr](mailto:psh-accueil@orsys.fr) to review your request and its feasibility.

## 4 Project portfolio management, state of the art

- Define concepts and notions: portfolio, program, project, strategic alignment, investment and value.
- Use ISO and PMI standards.
- Mastering portfolio management tools: tool surveys, current trends, open-source software...

### Exercise

Retour d'expérience des entreprises : les différents types d'organisation, les invariants, les enseignements des enquêtes et les perspectives ouvertes aujourd'hui.

## 5 The project portfolio management process

- Identify the projects to be included in the portfolio: admission criteria, rules and procedures...
- Project data collection: how to collect data, information by life cycle and events.
- Evaluating projects. Use scoring matrix and multidimensional evaluations.
- Balancing a portfolio: balancing objectives and rules, related techniques.
- Monitor adherence to the strategic plan, capacity management and risk balancing.
- Define portfolio decision-making procedures: decision-making circuits, dispute management, etc.
- Mastering project portfolio communication: communicating decisions, project training...

### Exercise

Practical exercise in portfolio sizing.

## 6 Project governance and portfolio building

- Defining the strategic alignment of a portfolio. Detailed definition of objectives and associated indicators.
- Distinguish between investment categories.
- Obtain from management a quantitative breakdown of the different categories.
- Define or identify the players in portfolio management.
- Identify the steps involved in setting up a project portfolio within a company.

### Case study

Case study of a real-life business situation.

## Dates and locations

### REMOTE CLASS

2026: 30 Mar., 11 June, 21 Sep., 26 Nov.