

CA PPM Education Portfolio Management

PPM EDUCATION COURSE DESCRIPTION



ABSTRACT

These sessions will be an opportunity for your organization to gain a deeper understanding of industry standards around Portfolio management and how to use CA PPM to build and optimize portfolios to align investments and resources to corporate goals.

The agenda is organized into a logical sequence of modules designed to enable participants to be able to create and analyze portfolios in CA PPM. The agenda also enables participants to optimize their portfolios through “What if” planning, and finally to communicate the results of the portfolio to the organization.

OBJECTIVES

This is a 2 day instructor led course that enables CA PPM end users to understand the context of Portfolio Management and utilize CA PMM to build, optimize, and communicate portfolios.

The objectives of this course are to:

- Provide industry context for Portfolio Management concepts and processes.
- Provide basic knowledge and skills in using CA PPM to create, define, and, prioritize Portfolios.
- Provide basic knowledge and skills in using CA PPM to optimize and communicate Portfolios.

KEY TAKE AWAYS

The key benefits provided to you through this training course are:

- Understand the inventory of investments in portfolios in your organization.
- Align investments (projects, products, applications, etc.) and resources with corporate goals.
- Provide a structured environment for deciding which investments and initiatives to fund, which to sustain, and which to eliminate.



COURSE CODE

EXCERS201608

PREREQUISITES

The pre-requisites for effective attendance on this course are:
CA PPM Fundamentals

COURSE PRESENTED BY:



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TOPICS

Introduction and Review of Portfolio Management Concepts

- What is Portfolio Management?
- Industry Context and Concepts
- Best Practice Standards and Definitions
- Link Between Projects and Strategic Objectives

Reviewing Portfolio Management Processes

- Understanding Portfolio Strategic Management processes
- Understanding Portfolio Governance Management processes
- Understanding Portfolio Performance Management processes
- Understanding Portfolio Communication Management processes
- Understanding Portfolio Risk Management processes

Creating Portfolios in CA PPM

- Define the structure of Portfolios in your organization
- Verify the Portfolio prerequisites
- Define the Portfolio properties
- Define the Portfolio Sync properties
- Build the Portfolio Content
- Define detailed planning targets
- Define role targets

Analyze Portfolios with the Waterline View

- Define and Apply ranking rules
- Verify your Waterlines view selections
- Adjust the waterlines view

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Analyze Portfolios – Portfolio views

- Review Portfolio Analysis views
- Review Capacity views
- Review Financial views

Explore Alternative Plans

- Generate Versions of the Plan or Scenarios
- Compare the Plans or Scenarios
- Designate the Plan of Record

Resource Capacity Planning

- Resource Management Processes
- Resource Management Best Practices
- Defining Key roles
- Determining Role Capacity
- Determine Role Demand
- Analyze your Portfolio to balance Capacity and Demand

Communicate the Portfolio Plan

- Approve the Portfolio plan
- Communicate the Portfolio plan
- Execute the Portfolio plan
- Monitor the Portfolio plan