



# Management of Portfolios - Foundation

**Certificate:** Course Completion Certificate  
**Duration:** 3-Day  
**Course Delivery:** Classroom/ Virtual

**Language:** English  
**Credits:** 24 PDUs

## Course Description:

In this MoP Foundation course, participants will acquire the sufficient knowledge and understanding of the principles, cycles, practices, techniques, roles, responsibilities, documents, and organizational context within which portfolio management operates. MoP helps organizations ensure if the investments are done in the right change initiatives and implementing them correctly. This is achieved by:

- Prioritizing the programs and projects in terms of their contribution to the organization's strategic objectives and overall level of risk.
- Managing the programs and projects consistently to ensure efficient and effective delivery.
- Maximizing the benefit by providing the greatest return from the investment made.

## Course Outline:

- Introduction
- Background of the methodology
- The MoP Principles:

- Senior Management Commitment
- Governance Alignment
- Strategy Alignment
- Portfolio Office
- Energized Change Culture
- The MoP definition cycle
- Recap
- Roles and responsibilities
- The MoP Delivery cycle:
- Management control
- Benefits management
- Financial management
- Risk management
- Stakeholder engagement
- Organizational governance
- Resource management
- The MoP framework
- Sample Foundation exam

## **Learning Objectives:**

- Define the scope and objectives of portfolio management and how it differs from program and project management.
- List the benefits of applying portfolio management.
- Explain the context it operates in.
- List the principles upon which successful portfolio management is based on.
- List the different approaches to implement MoP.
- List the factors required to maintain the progress and assess the success of portfolio management.
- State the purpose and key content of the major portfolio documents.
- Define the scope of key portfolio management roles.

## Course Agenda:

Pre-Course Reading

MoP Scenario

### Day 1

- MSP® Introduction & Overview
- MSP® Framework and Concepts
- Vision
- Identifying a Programme
- Blueprint Design and Delivery
- Defining a Programme
- Planning and Control
- Benefits Realization Management

### Day 2

- Recap
- Roles and responsibilities
- The MoP Delivery cycle:
- Management control
- Benefits management
- Financial management
- Risk management
- Stakeholder engagement
- Organizational governance
- Resource management
- The MoP framework
- Sample Foundation exam

### Day 3

- Recap

- Designing and setting up the Portfolio office
- Overview of P3O and P3M3, including smaller case studies
- Implementing and customizing the MoP model
- Sample Practitioner exam

## **Target Audience:**

MoP Foundation qualification is targeted for professionals:

- Involved in a range of formal and informal portfolio management roles encompassing investment decision making, project and program delivery, and benefits realization.
- Involved in the selection and delivery of business change initiatives.
- Acting as experienced portfolio managers, managing large and complex portfolios of change initiatives.
- Members of portfolio offices and senior managers such as, financial managers, quality managers involved in setting strategic goals and giving direction to the organization's portfolio of changes.