

# **Certified Professional in Portfolio Management (CPPM)**

**Duration:** 3 days (24 Hours)

## **Course Outline:**

### **Module 1 - Portfolio Management Fundamentals**

- Introduction to Portfolio Management and Enterprise Value
- Relationship Between Portfolio, Program, and Project Management
- Portfolio Management Lifecycle and Key Processes
- Portfolio Components, Structures, and Categorization
- Roles and Responsibilities in Portfolio Management
- Portfolio Management Offices (PfMO/PMO) and Their Functions
- Principles, Standards, and Best Practices in Portfolio Management

### **Module 2 - Strategic Alignment and Investment Selection**

- Organizational Strategy and Portfolio Alignment
- Demand Management and Initiative Intake Processes
- Business Case Development and Evaluation Techniques
- Investment Prioritization Models and Scoring Techniques
- Financial Evaluation Methods (NPV, IRR, ROI, Payback)
- Portfolio Balancing for Strategic Objectives
- Decision-Making Frameworks for Investment Selection

### **Module 3 - Portfolio Governance and Risk Management**

- Portfolio Governance Structures and Decision Authorities
- Policies, Standards, and Control Mechanisms
- Escalation Mechanisms and Issue Resolution
- Portfolio-Level Risk Identification and Assessment
- Risk Response Planning and Mitigation Strategies
- Compliance, Audit, and Regulatory Considerations
- Stakeholder Management and Governance Communication

### **Module 4 - Resource, Financial, and Capacity Management**

- Portfolio Resource Management Concepts and Challenges
- Capacity Planning and Resource Allocation Techniques

- Financial Planning, Budgeting, and Funding Models
- Cost Control, Forecasting, and Financial Tracking
- Dependency Management Across Portfolio Components
- Tools and Techniques for Resource Optimization
- Managing Constraints and Competing Priorities

#### **Module 5 - Performance Measurement and Benefits Realization**

- Portfolio Performance Management Frameworks
- Key Performance Indicators (KPIs) and Metrics Definition
- Portfolio Reporting, Dashboards, and Visualization
- Benefits Identification, Planning, and Ownership
- Benefits Tracking and Realization Management
- Value Delivery and Performance Reviews
- Continuous Monitoring and Corrective Actions

#### **Module 6 - Portfolio Optimization and Continuous Improvement**

- Portfolio Review Cycles and Optimization Techniques
- Portfolio Balancing for Risk, Value, and Strategic Fit
- Change Management at the Portfolio Level
- Managing Portfolio Complexity and Uncertainty
- Portfolio Maturity Models and Capability Assessment
- Lessons Learned and Knowledge Management
- Continuous Improvement and Adaptive Portfolio Management