

IT DEMAND & PORTFOLIO MANAGEMENT

A simple 3-day course on how organisations decide which technology work to do, and in what order.

Course at a Glance

Day 1	Understanding the Basics	What IT demand and portfolio management mean, and who is involved
Day 2	Handling and Ranking Requests	How requests are collected, checked and put in priority order
Day 3	Running the Portfolio	Choosing, tracking and improving the work, plus a final practice case

Who this course is for

Anyone who works with, or around, IT teams and wants to understand how technology investments are chosen and managed. No technical background is needed. Every idea is explained in plain words with everyday examples.

DAY 1 | Understanding the Basics

Goal for the day: *Understand what IT demand and portfolio management mean and who does what.*

Module 1: What is IT Demand?

- **What it is:** Demand is every request the business makes to IT: a new app, a fix, a report, an upgrade.
- **Why demand exceeds capacity:** There are always more requests than people, time and money. Choosing wisely is the real job.
- **Staying aligned:** Business and IT work towards the same goals. Requests should help the organisation, not just look useful.

Module 2: What is Portfolio Management?

- **Projects, programmes, portfolios:** A project is one piece of work. A programme is a group of related projects. A portfolio is everything the organisation has chosen to invest in.
- **Why do it:** Spend money on the right things, avoid duplicate work and show the value of IT.
- **Maturity:** Organisations grow from ad-hoc (no real process) to well-managed (clear, repeatable steps).

Module 3: Who Does What?

- **Business relationship manager:** Connects the business with IT and brings requests in.
- **Portfolio manager:** Looks after the whole list of projects and keeps it balanced.
- **Sponsor:** Senior person who backs a project and is responsible for its results.
- **Decision makers:** A governance board makes the big decisions. The Portfolio Management Office (PMO) supports them with data and process.

Everyday example: Think of a family with a monthly budget. Everyone asks for something (a phone, a holiday, a repair). The family cannot afford everything, so they talk it through and decide together. That is demand and portfolio management on a small scale.

Activity: Match five job titles to their responsibilities in a short worksheet, then discuss as a group.

Key takeaway: Demand is what people ask for. Portfolio management is how we choose and manage it.

DAY 2 | Handling and Ranking Requests

Goal for the day: *Learn how requests are collected, checked and placed in priority order.*

Module 4: Collecting Requests

- **Capture and log:** Every request is written down in one place so nothing gets lost.
- **Three types of demand:** Strategic (helps reach company goals), operational (keeps things running) and regulatory (required by law or rules).
- **Intake process:** A simple, fixed way for people to submit a request, with the same questions every time.

Module 5: Checking Requests

- **Triage:** A quick first look to sort requests: do now, look at later, or say no.
- **Business case:** A short explanation of the problem, the expected benefit, the rough cost and the risks.
- **Estimating:** Make a sensible guess of the time, money and people needed, then refine it as you learn more.

Module 6: Putting Requests in Order

- **Scoring model:** Give each request points against a few criteria, such as value, urgency and cost, then add them up.
- **MoSCoW:** Must have, Should have, Could have, Won't have this time.
- **Value vs effort:** Do high-value, low-effort items first.
- **Simple money measures:** ROI asks how much we gain compared with what we spend. Payback period asks how long until we earn the money back.
- **Capacity check:** Compare what you can do (capacity) against what is asked (demand), and look ahead to expected requests.

Everyday example: A shop owner has five ideas: a new sign, a website, extra shelves, a card machine and a delivery bike. She scores each on cost and benefit and does the best-scoring ones first.

Hands-on: Build a simple demand register in Excel, list five sample requests and score them.

Key takeaway: Write every request down, check it fairly and rank it with a clear method.

DAY 3 | Running the Portfolio

Goal for the day: *Choose the right mix of work, track it, and finish with a practice case.*

Module 7: Choosing and Balancing the Portfolio

- **Run, Grow, Transform:** Run keeps current systems working. Grow expands what the business does. Transform changes how the business works.
- **Balance:** A good portfolio mixes safe and ambitious work and fits the people and money available.
- **Resources and roadmap:** Share people across projects and note which tasks depend on each other. A roadmap shows the plan on one page.

Module 8: Tracking Progress and Benefits

- **KPIs and health signs:** Simple measures such as on time, on budget and on scope, shown as green, amber or red.
- **Reviews and dashboards:** Regular check-points where leaders decide to continue, change or stop a project. A simple dashboard in Power BI makes this easy to see.
- **Risks, benefits, stopping:** Look at risks across all projects, check that promised benefits are delivered and be ready to stop or reduce a project that is not working.

Module 9: Tools, Trends and Wrap-Up

- **Keeping things tidy:** Old applications can be retired or merged to save money and effort. A service catalogue lists what IT offers.
- **Agile thinking:** Smaller steps and regular funding let organisations change direction quickly.
- **Tools and AI:** Portfolio tools and AI can help sort data and spot problems faster, but people still make the decisions.

Everyday example: Planning a wedding: you balance big costs and small ones, track each booking, and drop an idea that is too expensive.

Final case study: In small groups, take a list of sample requests from intake to a ranked portfolio, then present your choices and give feedback.

Key takeaway: Choose wisely, track often, and be willing to stop work that no longer adds value.