



**COURSE OVERVIEW PM0508**  
**Portfolio Management Professional (PMI-PfMP)**  
*PMI Exam Preparatory Course*

**Course Title**

Portfolio Management Professional (PMI-PfMP):  
PMI Exam Preparatory Course

**Course Date/Venue**

Session 1: August 11-15, 2024/Boardroom 1,  
Elite Byblos Hotel Al Barsha, Sheikh  
Zayed Road, Dubai, UAE  
Session 2: November 11-15, 2024/Fujairah  
Meeting Room, Grand Millennium Al  
Wahda Hotel, Abu Dhabi, UAE



**Course Reference**

PM0508



**Course Duration/Credits**

Five days/3.5 CEUs/35 PDHs

**Course Description**



***This practical and highly-interactive course includes various practical sessions and exercises. Theory learnt will be applied using the state-of-the-art simulators.***



This course is designed to provide participants with a detailed and up-to-date overview of portfolio management. It covers the strategic alignment and organizational strategic goals and objectives; the portfolio scenarios, options analysis, risk analysis, SWOT analysis and financial analysis; the prioritization analysis/criteria, governance with a rationale for decision making and impact to portfolio and portfolio components due to changes in strategic goals and objectives; and the prioritization, interdependency analysis, organizational constraints, portfolio components sequencing, dependencies and strategic alignment.



Further, the course will also discuss the governance model and structure; the strategic goals, portfolio management standards, protocols, rules and best practices; the benefits realization planning, information management, performance and communication; the risk management and stakeholder engagement, resource and change management; the portfolio management plan, governance model, escalation procedures, risk tolerances and governance thresholds; and the portfolio using the portfolio roadmap and supporting artifacts.





During this interactive course, participants will learn to monitor portfolio performance on an ongoing basis using reports, conversations, dashboards and auditing techniques; manage portfolio changes using change management techniques; improve portfolio performance and maintain strategic alignment; achieve strategic portfolio objectives as well as analyze and optimize the consolidated allocation/reallocation of capacity; update and refine the existing portfolio road maps using change analysis and maintain records by capturing portfolio artifacts; apply portfolio risk management, governance risk guidelines, processes, procedures and other organizational assets; employ communications management, communication strategy and plan; evaluate current communications capabilities; and identify gaps and documenting communications plan to meet stakeholder requirements.

### **Course Objectives**

Upon successful completion of this course, each participant will be able to:-

- Get prepared for the next PfMP exam and have enough knowledge and skills to pass such exam in order to get the PMI certification
- Discuss strategic alignment and evaluate organizational strategic goals and objectives
- Carryout portfolio scenarios (what-if analysis), options analysis, risk analysis, SWOT analysis and financial analysis
- Identify prioritization analysis/criteria, governance with a rationale for decision making and impact to portfolio and portfolio components due to changes in strategic goals and objectives
- Implement prioritization, interdependency analysis, organizational constraints, portfolio components sequencing, dependencies and strategic alignment
- Illustrate governance model and structure and discuss strategic goals, portfolio management standards, protocols, rules and best practices
- Carryout benefits realization planning, information management, performance and communication, risk management and stakeholder engagement, resource and change management
- Employ portfolio management plan, governance model, escalation procedures, risk tolerances and governance thresholds
- Initiate the portfolio using the portfolio roadmap and supporting artifacts
- Monitor the portfolio performance on an ongoing basis using reports, conversations, dashboards and auditing techniques
- Manage portfolio changes using change management techniques, improve portfolio performance and maintain strategic alignment
- Achieve strategic portfolio objectives as well as analyze and optimize the consolidated allocation/reallocation of capacity
- Update and refine existing portfolio road maps using change analysis and maintain records by capturing portfolio artifacts
- Apply portfolio risk management, governance risk guidelines, processes, procedures and other organizational assets
- Employ communications management, communication strategy and plan, evaluating current communications capabilities, identifying gaps and documenting communications plan to meet stakeholder requirements



### **PMI Recognition of Haward Courses**

The Project Management Institute (**PMI**) recognizes Haward's Certificates and Continuing Education Units (CEUs).

The recognition and acceptance of our PDUs/CEUs fall under Categories E, F and G of PMI's "Professional Education" section at the PMP Application. Hence, what the delegates simply need to do is to complete this section as part of the PMP Application and submit it to PMI upon the receipt of Haward's certificates and ANSI/IACET's CEUs. PMI will automatically accept the delegates with 35 Contract Honors as a fulfillment of the required Professional Education.

**Haward Technology**, being the first **Authorized Provider** of the International Association for Continuing Education & Training (**IACET-USA**) in the Middle East, is authorized to award ANSI/IACET **CEUs** that are automatically accepted and recognized by the Project Management Institute (**PMI**).

### **Exclusive Smart Training Kit - H-STK®**



Participants of this course will receive the exclusive "Haward Smart Training Kit" (**H-STK®**). The **H-STK®** consists of a comprehensive set of technical content which includes **electronic version** of the course materials, sample video clips of the instructor's actual lectures & practical sessions during the course conveniently saved in a **Tablet PC**.

### **Who Should Attend**

This course provides an overview of all significant aspects and considerations of portfolio management for executive or senior-level practitioner managing a portfolio of projects and programs aligned with organizational strategy and focused on doing the right work, then the PfMP is the right choice for you.

### **Exam Eligibility & Structure**

Exam Candidates shall have the following minimum prerequisites:-

- All applicants must possess a minimum of 96 months of professional business experience within the last 15 years  
AND
  - Secondary degree (high school) diploma, associate's degree or the global equivalent
  - 84 Months of portfolio management experience
- OR,**
- All applicants must possess a minimum of 96 months of professional business experience within the last 15 years  
AND
  - Four-year degree (bachelor's degree, global equivalent or higher degree)
  - 48 Months of portfolio management experience




**Course Certificate(s)**

Internationally recognized certificates will be issued to all participants of the course who completed a minimum of 80% of the total tuition hours.

**Certificate Accreditations**


Certificates are accredited by the following international accreditation organizations: -

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The International Accreditors for Continuing Education and Training (IACET- USA)

Haward Technology is an Authorized Training Provider by the International Accreditors for Continuing Education and Training (IACET), 2201 Cooperative Way, Suite 600, Herndon, VA 20171, USA. In obtaining this authority, Haward Technology has demonstrated that it complies with the **ANSI/IACET 2018-1 Standard** which is widely recognized as the standard of good practice internationally. As a result of our Authorized Provider membership status, Haward Technology is authorized to offer IACET CEUs for its programs that qualify under the **ANSI/IACET 2018-1 Standard**.

Haward Technology’s courses meet the professional certification and continuing education requirements for participants seeking **Continuing Education Units (CEUs)** in accordance with the rules & regulations of the International Accreditors for Continuing Education & Training (IACET). IACET is an international authority that evaluates programs according to strict, research-based criteria and guidelines. The CEU is an internationally accepted uniform unit of measurement in qualified courses of continuing education.

Haward Technology Middle East will award **3.5 CEUs** (Continuing Education Units) or **35 PDHs** (Professional Development Hours) for participants who completed the total tuition hours of this program. One CEU is equivalent to ten Professional Development Hours (PDHs) or ten contact hours of the participation in and completion of Haward Technology programs. A permanent record of a participant’s involvement and awarding of CEU will be maintained by Haward Technology. Haward Technology will provide a copy of the participant’s CEU and PDH Transcript of Records upon request.

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British Accreditation Council (BAC)

Haward Technology is accredited by the **British Accreditation Council** for **Independent Further and Higher Education** as an **International Centre**. BAC is the British accrediting body responsible for setting standards within independent further and higher education sector in the UK and overseas. As a BAC-accredited international centre, Haward Technology meets all of the international higher education criteria and standards set by BAC.

**Training Fee**

**US\$ 5,500** per Delegate + **VAT**. This rate includes H-STK® (Haward Smart Training Kit), buffet lunch, coffee/tea on arrival, morning & afternoon of each day.

**Exam Fee**

**US\$ 1,335** per Delegate + **VAT**.





**Course Instructor(s)**

This course will be conducted by the following instructor(s). However, we have the right to change the course instructor(s) prior to the course date and inform participants accordingly:



**Dr. Chris Le Roux**, PhD, MSc, BSc, PMI-PMP, PMI-CAPM is a **Senior Project & Management Consultant** with over **45 years** of teaching, training and industrial experience. His expertise lies extensively in the areas of **Project & Contracts Management Skills, Project & Construction Management, Project Planning, Scheduling & Control, Project Management, Project Delivery & Governance Framework, Project Management Practices, Project Management Disciplines, Project Risk Management, Risk Identification Tools & Techniques, Project Life Cycle, Project Stakeholder & Governance, Project Management Processes, Project Integration Management, Project Management Plan,**

**Project Work Monitoring & Control, Project Scope Management, Project Time Management, Project Cost Management, Project Quality Management, Quality Assurance, Project Human Resource Management, Project Communications Management, Contract Management, Tender Development, Contract Standards & Laws, Dispute Resolution & Risk Identification, Myers-Briggs Type Indicator (MBTI), Organization Development Consultation, Advanced Debriefing of Emotional Trauma, Interpersonal Motivation, Model Based Interviewing, Leadership Orientation Programme, Coaching & Motivation, Creative Thinking & Problem-Solving Techniques, Emotional Intelligence, Presentation Skills, Communication & Interpersonal Skills, Effective Communication & Influencing Skills, Effective Business Writing Skills, Writing Business Documents, Business Writing (Memo & Report Writing), Leadership & Team Building, Psychology of Leadership, Interpersonal Skills & Teamwork, Coaching & Mentoring, Innovation & Creativity, Office Management & Administration Skills, Controlling Your Time & Managing Stress, Crisis Management, Strategic Human Resources Management, Change Management, Negotiation Skills, Strategic Planning, Risk Analysis & Risk Management, Global Diverse & Virtual Teams Operation, Exceeding Customer Expectations, Corporate Governance Best Practice, Business Performance Management & Improvement, Building Environment of Trust & Commitment, Win-Win Negotiation Strategies, Quality Improvement & Resource Optimization, Neuro Linguistic Programming (NLP), Personal Resilience Developing, Effective Role Modelling & Development, Managing Dynamic Work Environments, Organizational Development, Career Management, Situation & Behaviour Analysis, Interpersonal Motivation Skills, Inventory Management and Financial Administration. Further, he is also well-versed in Water Supply System Security, Vulnerability & Terrorism, Integrated Security Systems, Incident Threat Characterization & Analysis, Physical Security Systems, Security Crisis, Security Emergency Plan, Command & Control System, Preventive Actions and Situation Analysis. He was the **Psychologist & Project Manager** wherein he was responsible in the project management and private psychology practices.**

During his career life, Dr. Le Roux has gained his academic and field experience through his various significant positions and dedication as the **Director, Medico Legal Assessor Psychologist, Training & Development General Manager, Project Manager, Account Manager, Commercial Sales Manager, Manager, Sales Engineer, Project Specialist, Psychology Practitioner, Senior HR Consultant, Senior Lecturer, Senior Consultant/Trainer, Business Consultant, Assistant Chief Education Specialist, ASI Coordinator, Part-time Lecturer/Trainer, PMP & Scrum Trainer, Assessor & Moderator, Team Leader, Departmental Head, Technical Instructor/Qualifying Technician, Apprentice Electrician: Signals and Part-Time Electrician** from various companies and universities such as the South African Railway (SAR), Department of Education & Culture, **ESKOM**, Logistic Technologies (Pty. Ltd), Human Development: Consulting Psychologies (HDCP) & IFS, Mincon, Eagle Support Africa, Sprout Consulting, UKZN, Grey Campus, Classis Seminars, CBM Training, just to name a few.

Dr. Le Roux has a **PhD in Commerce Major in Leadership in Performance & Change**, a **Master's degree in Human Resource Management**, a **Bachelor's degree (with Honours) in Industrial Psychology**, a National Higher Diploma and a National Technical Diploma in **Electrical & Mechanical Engineering**. Further, he is a **Certified Project Management Professional (PMI-PMP)**, a **Certified Associate in Project Management (PMI-CAPM)**, a **Certified Scrum Master Trainer** by the VMedu, a **Certified Instructor/Trainer** and a **Certified Internal Verifier/Assessor/Trainer** by the **Institute of Leadership & Management (ILM)**. Moreover, he is a **Registered Industrial Psychologist** by the Health Professions Council of South Africa (HPCSA), a **Registered Educator** by the South African Council for Educators (SACE) and a **Registered Facilitator, Assessor & Moderator** with Education, Training and Development Practices (ETDP) SETA. He has further delivered numerous trainings, courses, seminars, conferences and workshops globally.





**Accommodation**

Accommodation is not included in the course fees. However, any accommodation required can be arranged at the time of booking.

**Course Program**

The following program is planned for this course. However, the course instructor(s) may modify this program before or during the course for technical reasons with no prior notice to participants. Nevertheless, the course objectives will always be met:

**Day 1**

0730 – 0800	Registration & Coffee
0800 – 0815	Welcome & Introduction
0815 – 0830	<b>PRE-TEST</b>
0830 – 0930	<b>Strategic Alignment</b> Evaluate Organizational Strategic Goals & Objectives • Strategic Priorities • Prioritization Criteria • Decision Making • Strategic Priorities
0930 – 0945	Break
0945 – 1200	<b>Strategic Alignment (cont'd)</b> Guiding Framework to Operationalize the Organizational Strategic Goals & Objectives • Existing & Potential Portfolio Components • Portfolio Scenarios • Create Portfolio Scenarios (What-If Analysis) • Options Analysis
1200 – 1300	Lunch
1300 – 1400	<b>Strategic Alignment (cont'd)</b> Risk Analysis • SWOT Analysis • Financial Analysis • Evaluate & Select Viable Options • Recommend Portfolio Scenario(s) & Related Components
1400 – 1415	Break
1415 – 1550	<b>Strategic Alignment (cont'd)</b> Prioritization Analysis/Criteria • Governance with a Rationale for Decision Making • Impact to Portfolio & Portfolio Components Due to Changes in Strategic Goals & Objectives • Sustain Strategic Alignment • Create High Level Portfolio Roadmap Working with Key Stakeholders
1550 – 1600	<b>Recap</b>
1600	End of Day One

**Day 2**

0730 - 0800	<b>Strategic Alignment (cont'd)</b> Prioritization • Interdependency Analysis • Organizational Constraints • Portfolio Components Sequencing, Dependencies & Strategic Alignment
0800 – 0930	<b>Governance</b> Governance Model & Structure • Steering Committees • Governance Boards • Policies & Decision-Making Roles, Responsibilities, Rights & Authorities • Effective Decision-Making • Strategic Goals • Portfolio Management Standards, Protocols, Rules & Best Practices
0930 – 0945	Break
0945 – 1200	<b>Governance (cont'd)</b> Organizational Assets • Consistent Portfolio Management Practices • Portfolio Processes & Procedures • Benefits Realization Planning • Information Management • Performance & Communication
1200 – 1300	Lunch





1300 – 1400	<b>Governance (cont'd)</b> Risk Management & Stakeholder Engagement • Resource & Change Management • Portfolio Management Plan • Governance Model • Escalation Procedures • Risk Tolerances
1400 – 1415	Break
1415 – 1550	<b>Governance (cont'd)</b> Governance Thresholds • Change Control & Management • Key Performance Indicators • Prioritization Model & Communication Procedures • Recommendations & Approval Regarding Portfolio Decisions • Authorize the Execution of the Portfolio
1550 – 1600	<b>Recap</b>
1600	End of Day Two

**Day 3**

0730 – 0830	<b>Portfolio Performance</b> Initiate the Portfolio using the Portfolio Roadmap & Supporting Artifacts • Authorize the Portfolio Structure & Activate the Components • Key Performance Metric Data • Measure the Health of the Portfolio • Monitor the Portfolio Performance on an Ongoing Basis, Using Reports, Conversations, Dashboards & Auditing Techniques
0830– 0930	<b>Portfolio Performance (cont'd)</b> Portfolio Effectiveness, Efficiency & Strategic Alignment • Manage & Escalate Issues • Communicating Recommended Actions • Approval & Implementation of Proposed Solution(s)
0930 – 0945	Break
0945 – 1200	<b>Portfolio Performance (cont'd)</b> Manage Portfolio Changes Using Change Management Techniques • Improve Portfolio Performance & Maintain Strategic Alignment • Balance Portfolio & Prioritize Portfolio Components • Optimize Resource Utilization
1200 – 1300	Lunch
1300 – 1400	<b>Portfolio Performance (cont'd)</b> Achieve Strategic Portfolio Objectives • Analyze & Optimize the Consolidated Allocation/Reallocation of Capacity • Supply/Demand Management & Scenario Analysis Techniques • Portfolio Efficiency & Effectiveness
1400 – 1415	Break
1415 – 1550	<b>Portfolio Performance (cont'd)</b> Update & Refine Existing Portfolio Road Maps, Using Change Analysis • Facilitate Re-Allocation of Organizational Resources to the Portfolio • Measure the Aggregated Portfolio Performance Results Against the Defined Business or Strategic Goals & Objectives • Progress Toward the Achievement of Business & Strategic Goals
1550 – 1600	<b>Recap</b>
1600	End of Day Three

**Day 4**

0730 – 0800	<b>Portfolio Performance (cont'd)</b> Maintain Records by Capturing Portfolio Artifacts such as Approvals, Prioritizations & Other Decisions • Organizational Policies • Regulatory Requirements • Portfolio Management Standards
0800 - 0930	<b>Portfolio Risk Management</b> Acceptable Level of Risk for the Portfolio • Organizational & Stakeholder Risk Tolerances • Portfolio Risk Management Plan • Governance Risk Guidelines, Processes & Procedures & Other Organizational Assets • Capitalize on Opportunities & Respond to Risks





0930 – 0945	Break
0945 - 1200	<b>Portfolio Risk Management (cont'd)</b> Dependency Analysis • Risks Related to the Interdependencies & Intradependencies within or Across Portfolios • Portfolio-Level Risk Register • Risks to Strategic Goals & Objectives, To Business Value & Escalated from Portfolio Components • Risk Management Processes
1200 – 1300	Lunch
1300 -1330	<b>Portfolio Risk Management (cont'd)</b> Stakeholder Ownership of Portfolio Risks • Risk Response • Portfolio Management Reserve • Aggregate Portfolio Risk Exposure • Optimize Portfolio Strategic Goals & Objectives
1330 – 1345	Break
1345 – 1550	<b>Communications Management</b> Internal & External Stakeholders • Meetings • Interviews • Surveys/Questionnaires • Identify Stakeholder Expectations, Interests & Influence on the Success of the Portfolio • Aggregate Communication Strategy & Plan • Effective Communication to Stakeholders
1550 – 1600	<b>Recap</b>
1600	End of Day Four

**Day 5**

0730 – 0830	<b>Communications Management (cont'd)</b> Engage Stakeholders, Through Oral & Written Communication, to Ensure Awareness, Manage Expectations, Foster Support & Build Relationships & Collaboration for the Success of the Portfolio Roadmap • Maintain the Communication Strategy & Plan
0830 - 0930	<b>Communications Management (cont'd)</b> Evaluating Current Communications Capabilities • Identifying Gaps
0930 – 0945	Break
0945 – 1100	<b>Communications Management (cont'd)</b> Documenting Communications Plan to Meet Stakeholder Requirements • Stakeholder Understanding of Portfolio Management Related Processes, Procedures & Protocols
1100 – 1245	<b>Communications Management (cont'd)</b> Information Systems • Training Delivery Methods
1245 - 1400	<b>Communications Management (cont'd)</b> Promote Common Understanding & Application of the Portfolio Management Process • Accuracy, Consistency & Completeness of Portfolio Communication
1400 - 1415	Break
1415 – 1515	<b>Communications Management (cont'd)</b> Governance Guidelines • Maintain Credibility & Satisfaction with all Stakeholders
1515 – 1530	<b>Course Conclusion</b>
1530 – 1545	<b>POST-TEST</b>
1545 – 1600	Presentation of Course Certificates
1600	End of the Course

**MOCK Exam**

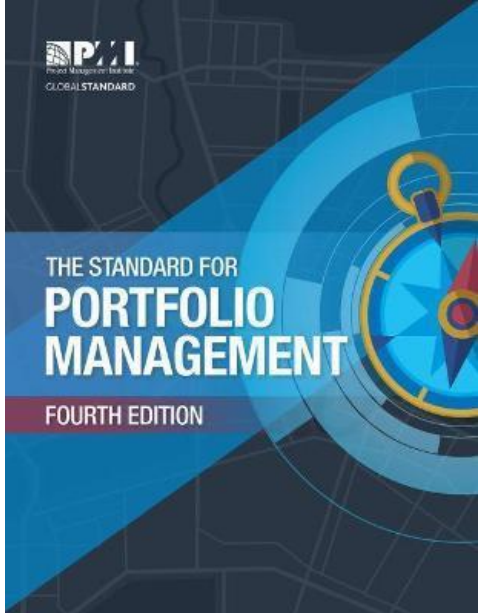
Upon the completion of the course, participants have to sit for a MOCK Examination similar to the exam of the Certification Body through Haward’s Portal. Each participant will be given a username and password to log in Haward’s Portal for the MOCK Exam during the 7 days following the course completion. Each participant has only one trial for the MOCK exam within this 7-day examination window. Hence, you have to prepare yourself very well before starting your MOCK exam as this exam is a simulation to the one of the Certification Body.





## Book(s)

As part of the course kit, the following e-books will be given to all participants: -



**Title:** The Standard for Portfolio Management

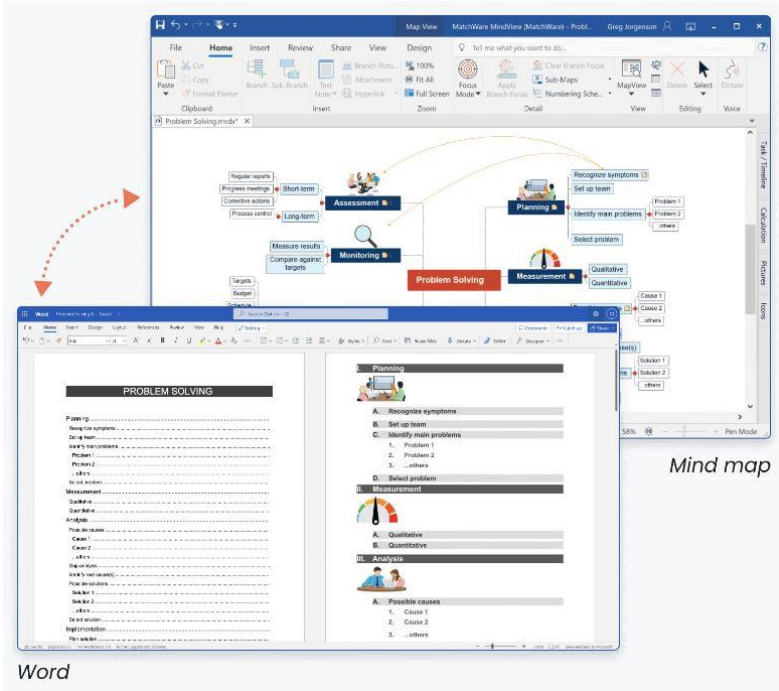
**ISBN:** 978-1628251975

**Author:** Project Management Institute

**Publisher:** Project Management Institute

## Simulator (Hands-on Practical Sessions)

Practical sessions will be organized during the course for delegates to practice the theory learnt. Delegates will be provided with an opportunity to carryout various exercises using the “Mindview Software” and “Raidlog Simulator”.



*Mind map*

*Word*

**Mindview Software**



FREE RAID Log Template + RAID Analysis

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RAID ANALYSIS					
	RISKS	ASSUMPTIONS	ISSUES	DEPENDENCIES	
Critical	1	0	1	1	3
High	0	0	0	1	1
Moderate	1	1	0	0	2
Low	0	0	1	0	1
Negligible	0	0	0	0	0
<b>Total</b>	<b>2</b>	<b>1</b>	<b>2</b>	<b>2</b>	

PM-TRAINING

RAID LOG					
ID	Title	Description	Type	Classification	Comments
1	Example 1		Assumption	Moderate	
2	Example 2		Risk	Critical	
3	Example 3		Risk	Moderate	
4	Example 4		Issue	Low	
5	Example 5		Dependency	High	
6	Example 6		Dependency	Critical	
7	Example 7		Issue	Critical	
8					
9					
10					
11					

**Raidlog Simulator**

**Course Coordinator**

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