

PRACTICAL PORTFOLIO MANAGEMENT

... Selecting and Managing The Right Projects

Facilitated by:

Jamal Moustafaev MBA, PMP, Internationally acclaimed expert and speaker in the areas of project/portfolio management, process improvement and requirements engineering

Author of the book

["Delivering Exceptional Project Results: A Practical Guide to Project Selection, Scoping, Estimation and Management"](#)

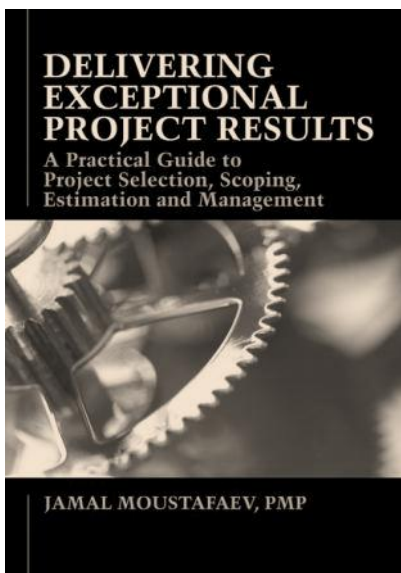
About the book:

Book Title:

"Delivering Exceptional Project Results: A Practical Guide to Project Selection, Scoping, Estimation and Management"

Book Description:

This unique how-to implementation guide unifies project management, portfolio management, and requirements engineering into one proven, comprehensive best practice framework to help organizations deliver exceptional project results on a consistent basis. Delivering Exceptional Project Results transcends differences in the various "types" of project management, such as traditional or agile, and focuses on economic principles, methodologies, skills, tools, and techniques that can be applied successfully at companies in any industry



Book Reviews:

"Delivering Exceptional Project Results offers a glimpse into the future role of the project manager. If your company believes that project failure is an option, then perhaps you should not read this book."
Harold Kerzner, Ph.D. Best-selling Author, Professor Emeritus, Baldwin-Wallace College

"I really enjoyed reading this book. The chapters, full of valuable insights well beyond the typical project management presentations, are introduced with diverse and engaging historic case examples. Executives faced with project portfolio management, or who are venturing into the area for the first time, will find the latter part of the book particularly valuable as new solutions are offered for those seemingly intractable problems of project portfolio management."

R. Max Wideman, PMI Fellow, Co-author of the first PMBOK, AEW Services and Management Consulting

"Delivering Exceptional Project Results" is a definite must read for any executive, functional director or project manager. The author clearly demonstrates how to deliver successful products and services by employing proper project selection, scoping and management techniques. This book provides you with practical, hands-on tools and techniques that can be deployed on your own projects right away."
Matt Walters, Director of Technology, Tyze Personal Networks

Course Outline - Day 1

Course Overview and Introductions

Why do companies like Apple, Microsoft, Procter & Gamble and Johnson & Johnson manage to deliver successful products to the markets year after year? And why do the majority of other organizations can't replicate their success no matter how hard they try? This workshop is dedicated to the complicated and somewhat enigmatic topic of delivering successful products and services to the marketplace by selecting the best projects for implementation, proper assessment of the company's throughput capacity and having a good grasp on project management.

- Tell us about yourselves
- What is the target audience for this workshop?
- What to expect from the course?

How To Deliver Exceptional Project Results?

In this module we will assess the overall success rate of the projects in the industry and try to explain the high failure rate of the endeavors undertaken by various companies. In the process of this session we will derive a formula for the delivery of exceptional project results and conduct a high-level overview of project and portfolio management.

- **Historical Case Study** – “The Virgin Lands Project in USSR”
- How to deliver exceptional project results?
- Project management vs. portfolio management
- **Group Case Study** – “Mobile Phone Company”
- Why bad things happen without PPM?

How to Maximize Portfolio Value?

The first pillar of project portfolio management - we will examine several project value assessment models including financial methods (NPV, Bang-for-Buck, etc.) as well as the scoring techniques (DuPont scoring model, EXFO scoring model, best practices scoring model, etc.). Advantages and shortcoming of each approach will also be discussed in this session.

- **Historical Case Study** – “The South Sea Bubble”
- Overview of the project portfolio management process
- Who should participate in portfolio reviews?
- Financial methods – descriptions, advantages and concerns
- Scoring models – descriptions, advantages and concerns
- **Discussion** - points to ponder about the value of the projects at your organization

Why You Should Attend?

Recent studies indicate that only 32% of our projects can be considered successful, while 44% are challenged (i.e. grossly over the budget and/or late) and 24% are outright failures (i.e. cancelled by the customers before they are even completed). Further research shows that the lion's share of this lack of success can be attributed to poor requirements elicitation, insufficient planning and inadequate project control.

This course will demonstrate to the participants how to perform these tasks properly and efficiently by teaching them skills, tools, techniques and economic principles that transcend various company structures, environments and project management philosophies.

How To Balance The Project Mix?

The second pillar of project portfolio management - why should a company seek a balanced portfolio? What dimensions should be considered? How can bubble diagrams assist the management in assessing the health of their project portfolios? These and several other important topics will be examined in this module.

- **Historical Case Study** – “The Battle of Crecy”
- Why seek balanced portfolio?
- What dimensions should you consider?
- What types of bubble diagrams are used in the industry?
- What are the most popular bubble diagram dimensions?
- **Discussion** - points to ponder about balancing your portfolio mix

How To Link Portfolio To Strategy?

The third pillar of project portfolio management – can we link all of our company projects back to the overall strategy? Can our executives answer a seemingly simple question, “Why are you doing this project?” We will examine top-down and bottom up approaches of linking project to strategy as well as their strengths and weaknesses.

- **Historical Case Study** – “The Aswan Dam Project”
- What are the prime goals of the market leaders?
- What is strategic linkage?
- What are the linking approaches?
- **Discussion** - points to ponder about your company's strategy and linkage to projects

How To Implement Project Portfolio Management?

This capstone section of the workshop will be dedicated to summarizing all of the information learned in this course and providing the attendees with hands-on practical steps that should be undertaken when implementing project portfolio management at a given company. We will also discuss potential implementation-related dangers, issues and possible solutions to these problems.

- **Historical Case Study** – “The British Navy in the Age of Sail”
- What are the market leaders doing?
- Where do we start?
- How to estimate your firm's resource capacity?
- What are the key steps in implementing project portfolio management?
- **Discussion** – what are the next steps?

Who Should Attend?

Senior executives, project management and marketing professionals including:

- CEOs, COOs, CTOs, CIOs etc.
- Vice-presidents
- Project and program managers
- Functional department directors and managers
- Sales and Marketing people
- Account executives
- Directors of PMO
- Directors of Project Management,
- Portfolio Managers, etc.

About the Trainer



Jamal Moustafaev, MBA, PMP – president and founder of Thinktank Consulting, is an internationally acclaimed expert and speaker in the areas of project/portfolio management, scope definition, process improvement and corporate training. He has done work for private-sector companies and government organizations in Canada and the US.

Mr. Moustafaev is an author of the book titled [*“Delivering Exceptional Project Results: A Practical Guide to Project Selection, Scoping, Estimation and Management”*](#) (released by J. Ross Publishing in September 2010). He is also a contributor to various project management publications and a frequent speaker at *Project World*, *Business Analyst World* and *Society of PM Professionals* conferences.

In addition to teaching a highly acclaimed *“Project Management Essentials”* course at British Columbia Institute of Technology (Vancouver, Canada), Jamal also offers the following corporate seminars through his company:

- *“Practical Portfolio Management - Selecting & Managing The Right Projects”*
- *“Successful Hands-On Management of Modern-Day Projects”*
- *“From Waterfall to Agile - Practical Requirements Engineering”*

Mr. Moustafaev holds a PMP certification, an MBA in Finance (Derivative Securities) and a BBA (Finance and Management Science) from Simon Fraser University (Vancouver, Canada).

Some of the Clients Jamal Has Worked With

Software/Technology

Elastic Path Software
Software Productivity Center
Accenture
Kodak
Genologics Software
OneLight Technologies
Faronics Software

Energy/Utilities

BC Hydro

Telecommunications

Telus
Rogers
Verizon

Financial/Insurance

ICBC
Central1 Credit Union
HSBC Bank
Wolters Kluwer Financial Group
Standard Life Insurance

Healthcare

Fraser Health Authority
Kaiser Permanente

Education

British Columbia Institute of
Technology
Simon Fraser University
Thompson Rivers University

Retail

Best Buy

Canadian Federal and Provincial government agencies

Port Authority - Metro Vancouver
British Columbia Lottery
British Columbia Liquor Distribution
Indian and Northern Affairs Canada

Course Attendee Feedback

“Very good and deep course, well planned, clear and witty”

“Great examples and explanations”

“Interesting (very) and great lessons for real project management”

“Very good, interesting and entertaining”

“Gave some great new perspectives on project management”

“Fun and informative. Well presented”

“Very knowledgeable speaker”

“I have attended several of Jamal’s presentations and seminars dedicated to project and portfolio management and I have to confess these were one of the most entertaining and yet informative lectures I have ever seen”

“Jamal is a very knowledgeable speaker who possesses deep understanding of the theory and is capable of “translating” that theory into hands-on practical application of project management. These seminars gave me some great new perspectives on how to manage my projects – small or large – successfully and efficiently”