

PORTFOLIO AND PROJECT MANAGEMENT EDUCATION SERIES

PfM302 course syllabus

Title:	PfM Budget and Resource Allocation
Audience:	Portfolio, programme, project, finance and IT managers
Level:	Advanced
Duration:	1 day
Prerequisite(s):	Portfolio Management Overview (course PfM101)

Summary

This course focuses on the Portfolio Management (PfM) processes, governance structures and tools used in relation to the Budget and Resource Allocation elements of the overall PfM process.

Capacity Planning and Resource Allocation are among the most challenging areas of Portfolio Management as organisations seek to match cash and people resources both in terms of schedule, capability and availability.

The course is interactive, highly practical and uses customer case studies to illustrate key points and issues. Delegates are encouraged to bring sanitised organisational documents for use in workshop sessions.

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Course Topics

At the completion of this course, delegates will be able to...

- understand the importance and options for cash allocation and reallocation and budgeting techniques for the portfolio as a whole and for component parts
- understand the importance and options for the allocation and reallocation of manpower to projects and allocation techniques for the portfolio and individual components
- understand the various methods of portfolio allocation, their strengths, weaknesses and effect on upstream and downstream processes within the portfolio management framework
- understand the role played by the portfolio manager in balancing portfolio resources (cash and manpower) to ensure the relationship between flight projects and new project mobilisation is maintained
- identify the most common tools that assist in the automation and effective support of these vital processes