



## Portfolio and Benefits Management – Masterclass Series (2 days)

### Turning Enterprise Strategies into realized benefits

Getting the best return from the total investment in strategic change has always been a challenge. Our 2-day portfolio and benefits management masterclass provides you with everything you need to know to select the best mix of projects to achieve your strategy, and to identify, measure and realize the full benefits from your portfolio of projects.

Spend two very practical, classroom or virtual classroom, days equipping yourself with expert level knowledge to apply portfolio management and benefits management within your organization.

#### WHAT IS

Portfolios represent the totality of an organization's investment in the changes required to achieve its strategic objectives. Portfolio Management is a co-ordinated collection of strategic processes and decisions that together enable a more effective balance of organizational change and business as usual. Portfolio Management provides senior management with reliable evidence enabling more informed investment decisions about where to invest in new initiatives.

Reports from professional bodies, along with academic research shows that organizations struggle to demonstrate the return on investment from projects. Benefits management addresses the rationale for the investment in change initiatives, and ensures that organizations can identify, quantify measure and realize the value from projects and the overall portfolio of change initiatives. Through benefits management, project sponsors can compile excellent and convincing business cases for change and show the value in the company financials.

Snap Tech's PORTFOLIO AND BENEFITS MANAGEMENT MASTERCLASS is a facilitated, interactive engagement structured around principles, techniques and practices upon which successful portfolio management and benefits management depends.

#### TARGET AUDIENCE

This course is aimed at those involved in a range of portfolio management roles encompassing investment decision making, the selection and delivery of business change initiatives, project and programme delivery and benefits realization. It is a vital knowledge and practice area for any manager who needs to justify an initiative or project with a well thought through business case that validates the required spend to achieve a better operational state or strategic objective.

**This course is relevant to all those involved in the selection and delivery of business change initiatives including:**

- ✓ Members of Management Boards and Directors of Change
- ✓ Project and programme sponsors
- ✓ Senior Responsible Owners (SRO's)
- ✓ Portfolio, programme, project, business change and benefits managers
- ✓ Business case writers
- ✓ Portfolio analysts
- ✓ Local and provincial government committee members
- ✓ EPMO/PMO/PMU managers
- ✓ Line Managers
- ✓ Strategy Specialists
- ✓ Business Change Managers

## APPROACH & DURATION

This is a two day classroom or virtual online event facilitated by one of Snap Tech's most experienced trainers. You'll find a ready-to-learn atmosphere where you'll receive expert instruction and guidance, interact with your peers, and gain the real-world skills that matter.

## BENEFITS

Whatever an organization's current level of project maturity is, this event will provide advice and insights to assist the design of an appropriate Portfolio Management and Benefits Management approach reflecting accepted good practice, applying the experience of those who have successfully adopted Portfolio and Benefits Management.

**The potential benefits are real and significant; research from the public and private sectors has identified that organizations that adopt a Portfolio and Benefits Management approach can anticipate the following benefits:**

- ✓ More of the "right" projects being undertaken
- ✓ Removal of redundant, duplicate and poorly performing projects
- ✓ Improved dependency management
- ✓ More efficient resource utilization
- ✓ Better management of risk at a collective level
- ✓ Greater benefits realization and return on investment
- ✓ Enhanced transparency, accountability and corporate governance
- ✓ Improved engagement and communication between senior management and staff
- ✓ Developing a value driven culture

## CONTENT

- ✓ Overview
- ✓ Strategic and Organizational Context
- ✓ Portfolio Management Principles
- ✓ Portfolio Management Cycle
- ✓ Benefits Management Framework
- ✓ Benefits from all perspectives
- ✓ Roles and Documentation
- ✓ Planning for, and realizing Benefits
- ✓ Implementing Portfolio and Benefits Management
- ✓ Portfolio and Benefits health checks
- ✓ Quantifying and maximizing monetary and nonmonetary benefits

## / OUTCOMES

This event will show you how to prioritize and manage your portfolio of change, to evaluate the overall risk profile and identify and engage your stakeholders. You will be able to build your benefits and portfolio framework and apply the principles of portfolio and benefits management across the practices and cycles of portfolio management and project management. You will learn how benefits management can be integrated at portfolio level in addition to project and programme levels.