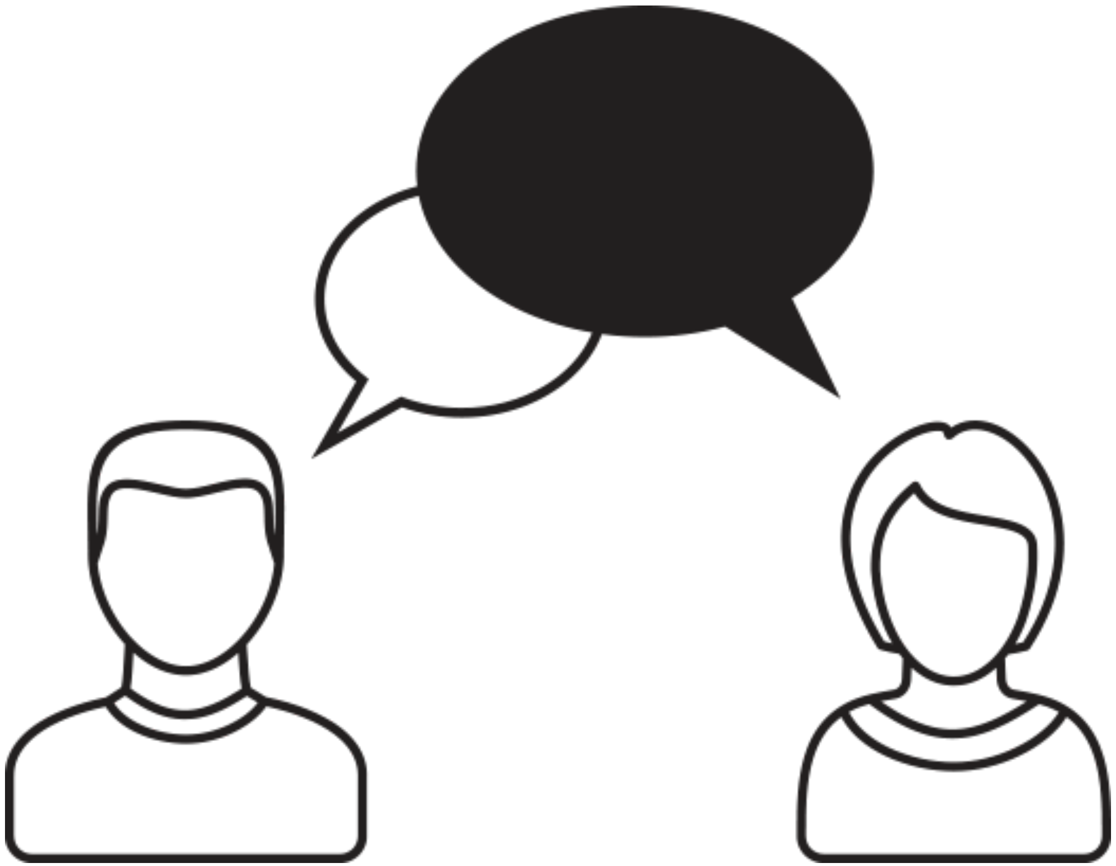
regoUniversity 2017

Portfolio Management | Roundtable

Introductions

- Take 5 Minutes
- Turn to a Person Near You
- Introduce Yourself



Round Table Approach

The following slides outline a series of topics to support our discussion. We are not limited by these topics, as their purpose is to ‘spark’ the conversation.

Please:

- Participate and share your insight
- If there are questions very specific to your organization, we can discuss directly within the labs
- Take this as an opportunity to meet your peers

Possible Topics

- What are some of the best practices that your company is following when building portfolio contents?
- What roadblocks does the organization have to implementing Portfolio Management?
- How are portfolios used in support of Annual Planning?
- How is your company utilizing Portfolio Management to track resource constraints?
- What is your company doing to ensure that the data at the investment level is up to date and accurate?
- What practices are you utilizing to prioritize investments?
- How are you utilizing scenario planning within Portfolio Management and how do you communicate changes down to the Project Manager/Investment level?
- What type of reporting is being used to provide additional functionality to Portfolios?
    - For example Cost Plan Details, etc.
- How does your company setup portfolios for financial roll-ups to ensure there is no double counting?

Thank You For Attending regoUniversity

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Phone
888.813.0444

Email
info@regouniversity.com

Website
www.regouniversity.com