

Portfolio Management | Round Table

Your Guides: Jacob Cancelliere, Jerry Dolak and
Rob Greca

Introductions

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



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 do you set resource targets within portfolios?
- 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?
- How does your company setup portfolios for financial roll-ups to ensure there is no double counting – programs, projects in multiple portfolios?
- Are you looking at or using other connected systems for portfolio management?

Thank You For Attending regoUniversity

Instructions for PMI credits

- Access your account at pmi.org
- Click on **Certifications**
- Click on **Maintain My Certification**
- Click on **Visit CCR's** button under the **Report PDU's**
- Click on **Report PDU's**
- Click on **Course or Training**
- Class Name = **regoUniversity**
- Course Number = **Session Number**
- Date Started = **Today's Date**
- Date Completed = **Today's Date**
- Hours Completed = **1 PDU per hour of class time**
- Training classes = **Technical**
- Click on **I agree** and **Submit**



Let us know how we can improve!
Don't forget to fill out the class survey.



Phone

888.813.0444



Email

info@regouniversity.com



Website

www.regouniversity.com