

Creating Portfolios and Programs



Portfolio/Program Manager



Portfolios

Instructions: Use this lab work sheet to complete a set of short and meaningful tasks at your own time and pace to complement your formal learning of the platform in the classroom. While the examples used herein may be different from (or not available) in your organisation's the platform instance, you can populate the system with your own data and follow the exercises. Ensure that you are already an enabled user in the platform.


Please note the Job Aid for **Creating Portfolios and Programs** within the Learning section compliments the following lab sets, each of which contains two sets of data; Set A and Set B.

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|------------------------|--------------------------------|
| Lab Exercise 1. | Document Portfolio Charter |
| Lab Exercise 2. | Document Program Business Case |
| Lab Exercise 3. | Capture Key Dates |
| Lab Exercise 4. | Identifying Stakeholders |

1. Document Portfolio Charter

Set A


Portfolio

Name	Customer Retention Portfolio
Description	Customer retention for new customers is slipping. Significant changes will be required to reverse this trend.
Department	Select from the list 
Investment Category	Transform
Location	Sydney NSW

Charter

Justification	Cost of finding new customers is very expensive, we need to invest more money retaining short term customers and making them long term
Vision	Reliable customer base to drive long term sales targets
Scope	Customer retention for the 6-12-month range customers
Benefits Strategy	Continued Executive commitment to all projects
Resources Needed	Each project must include 3-5 resources committed at 75%. Other project resources need to be committed 20-40%
Stakeholder Considerations	Stakeholders are composed of the Engineering Development leaders at Director and above level

Header

Sponsor	Select your name or another user from the list 
Status	Active

Set B

Portfolio

Name	Environmental Initiative
Description	Find ways to reduce the environmental footprint of our manufacturing and operations facilities using methods that will provide meaningful progress at reasonable cost.

Department Select from the list 🔍

Investment Category Transform

Location Phoenix, AZ

Charter

Justification Global environmental change is real, and we have a responsibility to help protect our planet for future generations

Vision Become a carbon-neutral organisation by 2030 and demonstrate to other organisations that being environmentally friendly while making a profit

Scope All manufacturing facilities and operations centres

Benefits Strategy Make use of government grants and tax incentives to make modifications to our manufacturing and operations facilities

Resources Needed Environmental consultants, engineering, operations analysts, and grant writers

Stakeholder Considerations Stakeholders include manufacturing and operations managers and financial analysts.




Header

Sponsor Select your name or another user from the list 🔍

Status Active

2. Document Program Business Case


Set A

Name	Staff Retention
Description	Retain knowledgeable staff members to increase corporate knowledge and reduce turnover
Start Date	Select a date from the date picker 
Finish Date	Select a date from the date picker 
Department	Select from the list 
Investment Category	Grow
Location	New York, NY

Business Case





Overview	Currently, employee turnover is causing a loss in corporate knowledge and decreased revenues due to having to train new staff
Options	Provide incentives to retain knowledgeable staff members. Increase employee morale. Provide better benefit package
Benefits and Disbenefits	By retaining and increasing corporate knowledge, the organisation will be better able to increase productivity due to working smarter and staff will be better able to contribute new ideas
Justification	We currently have an average employee tenure of 2.5 years. This decreases corporate knowledge and productivity. There is also the cost of training new staff members to be able to replace lost staff members
Major Risks and Opportunities	By retaining staff, we can increase corporate knowledge and be able to provide training that enhances the skill set our current employees

Header

Sponsor	Select your name or another user from the list 
Status	Active


Set B


Program


Name	Employee Digital Experience
Description	Employees need updated equipment
Start Date	Select a date from the date picker 
Finish Date	Select a date from the date picker 
Department	Select from the list 
Investment Category	Transform
Location	Melbourne, Vic
Business Case	
Overview	Current employee technology does not allow for remote flexibility
Options	Re-purpose existing technology or buy new, expand operations into the cloud
Benefits and Disbenefits	A more mobile work opportunity will increase employee retention and attract new employees; productivity will initially need to be monitored
Justification	More and more we are finding the need to have our employees work in a remote setting rather than being tied to a facility
Major Risks and Opportunities	Loss of company property included intellectual and physical; lower productivity; increased productivity; increased revenue
Header	
Sponsor	Select your name or another user from the list 
Status	Active

3. Capture Key Dates


Set A


Name	Baseline Survey Results Completed
Date	Select a date from the date picker 
Description	Results of baseline employee survey is completed, and results compiled
Status	◆ High Risk

Name	Development Staff Identified
Date	Select a date from the date picker 
Description	Semi-annual financial review and reallocation of portfolio finances
Status	● On Track


Name	Develop Benefits Package Complete
Date	Select a date from the date picker 
Description	Development of a new benefits package has been completed
Status	● On Track

Set B

Name	Training Materials Completed
Date	Select a date from the date picker 
Description	Job aides regarding remove connectivity, troubleshooting, and helpdesk contact information
Status	◆ High Risk

Name	Deploy Survey
Date	Select a date from the date picker 
Description	Deploy the survey app
Status	● On Track

Name	Vendor Selected
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Date	Select a date from the date picker 
Description	Technology vendors for end user technology selected
Status	<div><div></div> On Track</div>

4. Identifying Stakeholders

Set A

Name	Angelina Jolie
Description	Director of Human Resources
Role on Project	Oversees Human Resources
Communications Requirements	Status, Issues, Schedule
Communications Frequency	Bi-weekly

Name	Gregory Peck
Description	Manager of Employee Training
Role on Project	Oversees all aspects of Employee Training
Communications Requirements	Oversees all aspects of Employee Training
Communications Frequency	Weekly

Set B

Name	Vivien Leigh
Description	Budget Coordinator
Role on Project	Response for acquiring funding, allocating resources, and ensuring overall success of this initiative
Communications Requirements	Receive all status updates, escalation of all high-level risks and issues, communicate to all of IT and peers on project status
Communications Frequency	Formally weekly; informally as needed

Name	James Kirk
Description	Senior HR Recruiter
Role on Project	Responsible for managing the recruiting and hiring process to build out the services team

Communications requirements	Reporting from the HRIS system, status updates to the leadership, collaboration on hiring requirements
Communications Frequency	Weekly