

# Managing Portfolios Training and Certification

## Overview

The Managing Portfolios Certification Provides comprehensive guidance for effective project portfolio management, ensuring organisations bridge the strategy-execution gap – by doing the 'right' projects, doing them 'right', and at the 'right' time. Based on the Managing Portfolios guidebook which represents a distillation of contemporary best practice from around the world, this certification helps professionals and practitioners master portfolio management principles, practices and techniques that have been proven to work in the real world. As a Practitioner, you'll not only solidify, broaden and deepen your understanding of portfolio management, but also demonstrate your ability to apply and analyse its application in real-world scenarios. Whether you're aiming to refine your expertise or seeking to influence high-level portfolio governance, the Practitioner Qualification provides a structured, comprehensive and accessible framework to elevate your career and impact.

## Background

Portfolio management originated in the 1950s in the finance sector and the management of share portfolios. Since then it has expanded into areas including ICT management, strategic supplier management, and new product development. More recently, the last 20 years have seen its adoption in the world of project and program management – where it is endorsed by professional bodies such as the PMI and APM.

Steve Jenner is a thought leader in the fields of project portfolio and benefits management. He's the author and chief examiner of the companion guide 'Managing Benefits' as well as having authored several other books in the field. Steve is a qualified management accountant, with a finance MBA and a Master of Studies degree from Cambridge University.

## Why should I choose the Managing Portfolios course and certification?

- ▶ **Optimizing Strategic contribution:** Learn how to invest in the 'right' projects and programs (via effective project prioritisation and portfolio optimisation), deliver them 'right' (by addressing the constraints, risks and dependencies that too often derail delivery and benefits realisation) and at the "right" time (by managing the flow of portfolio activity ensuring that it is deliverable and the business change impact is manageable).
- ▶ **Comprehensive Framework:** The certification offers in-depth guidance on effective portfolio management, bridging the gap between theoretical knowledge and practical strategy execution and benefits realization.
- ▶ **Essential Skills for Modern Challenges:** Equip yourself with the skills needed to manage project portfolios in today's fast-paced, complex environment, helping organizations overcome common pitfalls like cost overruns, delays, and unrealized benefits.
- ▶ **Industry Recognition:** Validate your expertise in project portfolio management with a qualification that is recognized and respected across industries, helping you influence high-level portfolio governance and improve project outcomes and strategy delivery.
- ▶ **Valid for life:** This certification is valid for life with no mandatory re-certification requirements to maintain certification.
- ▶ **Online and Classroom Learning:** Candidates have the autonomy to learn at their own pace without pressure or deadlines.
- ▶ **Qualify sooner:** The course has been specifically designed to focus on the key learning outcomes and consequently it is delivered in around half the time of similar qualifications. Additionally there is a single 90 minute exam.

## Prerequisites

There are no prerequisites. Managing Portfolios is a complete program that covers the fundamentals through to advanced use applications, resulting in the Managing Portfolios exam and professional qualification.

## Target Audience

This qualification is aimed at individuals involved or interested in the role of portfolio management in strategy execution. This includes portfolio directors, portfolio managers, and portfolio management office (PfMO) staff. In addition:

- ▶ Senior managers/executives participating in portfolio governance boards.
- ▶ Strategic planners aiming to optimize portfolio contribution to strategic objectives.
- ▶ Initiative sponsors accountable for project and program outcomes within a portfolio context.
- ▶ Benefit owners responsible for agreeing benefit forecasts and managing their realization.
- ▶ Project and program managers looking to optimize strategic contribution through successful delivery.
- ▶ Assurance advisors and capability assessors providing guidance on portfolio management.
- ▶ Academics and students researching strategy execution and portfolio management.
- ▶ Trainers and consultants advising on portfolio management implementation and sustainability.

## Exam information

- ▶ Online multiple-choice paper – Closed book
- ▶ 6 questions (each question consisting of 2-6 parts)
- ▶ 45 marks required to pass out of 75 available - (60%)
- ▶ 90-minute duration
- ▶ Languages: English
- ▶ Digital badges will be issued to successful candidates:

## Course durations

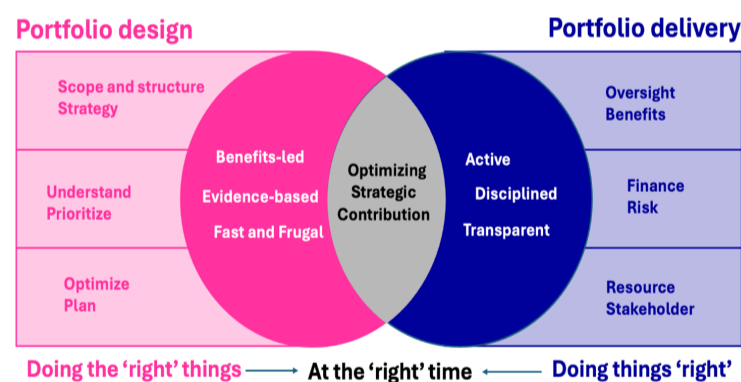
Practitioner courses are delivered over 2-3 days. The single examination is completed at the end of the course. Various course formats are available from our accredited providers.

## Individual benefits and & learning outcome

- ▶ Demonstrate to your current employer (and prospective employers) that you can manage project portfolios efficiently and effectively.
- ▶ Gain a comprehensive understanding of Managing Portfolios and its principles, practices, techniques and key success characteristics.
- ▶ Know how to apply and tailor the Managing Portfolios principles, practices, techniques and key success characteristics to given scenario settings.
- ▶ Analyse and distinguish between appropriate and inappropriate application of the Managing Portfolios principles, practices, techniques and key success characteristics in given scenario settings.
- ▶ Receive a globally recognised certification.

## Benefits for organizations

- ▶ Formally trained and certified staff – with verifiable evidence of improved competence.
- ▶ Improved workflows enterprise-wide – delivering more projects successfully.
- ▶ Increased operational efficiencies enterprise-wide – delivering more strategic 'bang' for your 'buck'.
- ▶ Enhanced portfolio strategies to achieve better results – where the performance matches the promise.



## Candidate Testimonials

- ▶ "In a growing project economy, the publication of Managing Portfolios has come at exactly the right time, particularly when only one third of organizations achieve even two-thirds of their strategic objectives. For anyone who cares whether their project portfolio succeeds, we finally have a guide that closes the knowing-doing gap to strategy execution that too often resembles a broken trophy cabinet." **Milvio DiBartolomeo, Strategy Implementation Institute Professional & Managing Benefits Practitioner**
- ▶ "This book will transform how organisations manage their portfolios. Written by the world's leading expert on both benefits and portfolio management, it is essential reading for anyone serious about extracting the greatest value from their organisations' investments in projects and programmes." **Ross Garland, coauthor of Project, Programme and Portfolio Governance**
- ▶ "Few areas of transformation management are more challenging than portfolio management - with its complex mix of senior stakeholder management and programme balancing. Yet Steve has somehow managed to boil down a lifetime of learning into easy to understand principles and practices for Portfolio Management success. An absolute must-read for portfolio beginners, journeymen, and professionals alike." **Adam Skinner, Lead APM Portfolio Management Specific Interest Group**

Discover more at:

<https://apmg-international.com/product/managing-portfolios-certification>