



**COURSE OVERVIEW PM0508**  
**Portfolio Management Professional (PMI-PfMP)**  
*PMI Exam Preparatory Course*

**Course Title**

Portfolio Management Professional (PMI-PfMP):  
*PMI Exam Preparatory Course*

**Course Date/Venue**

November 11-15, 2024/Fujairah Meeting Room,  
Grand Millennium Al Wahda Hotel, Abu Dhabi,  
UAE

**Course Reference**  
PM0508



**Course Duration/Credits**

Five days/3.5 CEUs/35 PDHs

**Course Description**



***This practical and highly-interactive course includes various practical sessions and exercises. Theory learnt will be applied using the state-of-the-art simulators.***



This course is designed to provide participants with a detailed and up-to-date overview of Portfolio Management Professional (PfMP). It covers the relationships among portfolio management, organizational strategy, strategic business execution and organizational project management; the portfolio components and their interrelationships; the role of the portfolio manager and other roles in portfolio management; and the portfolio life cycle consisting of initiation, planning, execution, optimization, monitor and control.



Further, the course will also discuss the portfolio management information system (PMIS) and governance within the portfolio life cycle; the portfolio strategic management; developing portfolio strategic objectives; the strategic risk appetite, portfolio charter, portfolio roadmap, key portfolio components and portfolio optimization; the strategic alignment management, portfolio governance and effective portfolio governance design factors; the portfolio governance roles, portfolio capacity and capability management; and the supply and demand management and optimization.





During this interactive course, participants will learn the capability assessment and development; the performance reporting and analytics as well balance capacity and capability; the portfolio stakeholders' identification and analysis, stakeholder engagement planning and identifying communications management approaches; and the portfolio communications management, portfolio value management and portfolio risk management.

### **Course Objectives**

Upon successful completion of this course, each participant will be able to:-

- Get prepared for the next PfMP exam and have enough knowledge and skills to pass such exam in order to get the Portfolio Management Professional (PfMP) certification from the Project Management Institute (PMI)
- Define portfolio and discuss the relationships among portfolio management, organizational strategy, strategic business execution and organizational project management
- Identify the portfolio components and their interrelationships as well as identify the role of the portfolio manager and other roles in portfolio management
- Illustrate portfolio life cycle consisting of initiation, planning, execution, optimization, monitor and control
- Discuss portfolio management information system (PMIS) and governance within the portfolio life cycle
- Carryout portfolio strategic management, develop portfolio strategic objectives and describe strategic risk appetite
- Explain portfolio charter, portfolio roadmap, key portfolio components and portfolio optimization
- Manage strategic alignment and discuss portfolio governance and the effective portfolio governance design factors
- Identify portfolio governance roles and apply portfolio capacity and capability management
- Carryout supply and demand management and optimization including capability assessment and development
- Apply performance reporting and analytics as well balance capacity and capability
- Employ portfolio stakeholders' identification and analysis, stakeholder engagement planning and identifying communications management approaches
- Apply portfolio communications management, portfolio value management and portfolio risk management

### **PMI Recognition of Haward Courses**

The Project Management Institute (**PMI**) recognizes Haward's Certificates and Continuing Education Units (CEUs).

The recognition and acceptance of our PDUs/CEUs fall under Categories E, F and G of PMI's "Professional Education" section at the PMP Application. Hence, what the delegates simply need to do is to complete this section as part of the PMP Application and submit it to PMI upon the receipt of Haward's certificates and ANSI/IACET's CEUs. PMI will automatically accept the delegates with 35 Contract Honors as a fulfillment of the required Professional Education.

**Haward Technology**, being the first **Authorized Provider** of the International Association for Continuing Education & Training (**IACET-USA**) in the Middle East, is authorized to award ANSI/IACET **CEUs** that are automatically accepted and recognized by the Project Management Institute (**PMI**).





**Exclusive Smart Training Kit - H-STK®**



Participants of this course will receive the exclusive “Haward Smart Training Kit” (H-STK®). The H-STK® consists of a comprehensive set of technical content which includes **electronic version** of the course materials, sample video clips of the instructor’s actual lectures & practical sessions during the course conveniently saved in a **Tablet PC**.

**Who Should Attend**

This course provides an overview of all significant aspects and considerations of portfolio management for executive or senior-level practitioner managing a portfolio of projects and programs aligned with organizational strategy and focused on doing the right work, then the PfMP is the right choice for you.

**PfMP Eligibility Requirements**

To be eligible for the PfMP certification, you must meet certain educational and professional experience requirements. All portfolio management experience must have been accrued over the last 15 consecutive years.

Educational Background	Professional Business Experience	Portfolio Management Experience
Secondary diploma (high school diploma, associate’s degree or global equivalent)	Minimum 96 months (8 years) of professional business experience	Minimum 84 months (7 years) of unique non-overlapping professional portfolio management experience
<b>OR</b>		
Educational Background	Professional Business Experience	Portfolio Management Experience
Four-year degree (bachelor’s degree, global equivalent or higher degree)	Minimum 96 months (8 years) of professional business experience.	Minimum 48 months (4 years) of unique non-overlapping professional portfolio management experience
<b>OR</b>		
Educational Background	Professional Business Experience	Portfolio Management Experience
Bachelor’s or postgraduate degree from a GAC accredited program (bachelor’s or master’s degree or global equivalent)	Minimum 96 months (8 years) of professional business experience.	Minimum 36 months (3 years) of unique non-overlapping professional portfolio management experience

Note: If you are a graduate of a GAC accredited degree program you will receive a 12-month credit towards the work experience requirement. Also, you can use the GAC course work to fulfill the 35 education contact hour requirement.

**Training Fee**

**US\$ 5,500** per Delegate + **VAT**. This rate includes H-STK® (Haward Smart Training Kit), buffet lunch, coffee/tea on arrival, morning & afternoon of each day.

**Exam Fee**

**US\$ 1,335** per Delegate + **VAT**.



**PMI-PfMP Certificate(s)**

PMI-PfMP certificates will be issued to participants who have successfully passed the PMI-PfMP examination.



- (2) Official Transcript of Records will be provided to the successful delegates with the equivalent number of ANSI/IACET accredited Continuing Education Units (CEUs) earned during the course.

*\* Howard Technology \* CEUs \* Howard Technology \* CEUs \* Howard Technology \* CEUs \* Howard Technology \**

**CEUs**

**Howard Technology Middle East**  
Continuing Professional Development (CPD)

**CEU Official Transcript of Records**

TOR Issuance Date: 15-Nov-23  
HTME No. 74891  
Participant Name: Waleed Al Habeeb


Program Ref.	Program Title	Program Date	No. of Contact Hours	CEU's
PM0508	Portfolio Management Professional (PfMP) PMI Exam Preparatory Course	November 11-15, 2023	35	3.5

Total No. of CEU's Earned as of TOR Issuance Date: **3.5**

**TRUE COPY**

*Jaryf Castillo*  
Jaryf Castillo  
Academic Director

Howard Technology has been approved as an Accredited Provider by the International Association for Continuing Education and Training (IACET) for the 2018-2021 period. The IACET Accredited Provider status is a result of their Accredited Provider membership status. Howard Technology is authorized to offer IACET CEUs for programs that qualify under the ANSI/IACET 2018 Standard. Howard Technology's courses meet the professional contribution and continuing education requirements for participants seeking continuing education credit. IACET is an international authority that evaluates programs according to strict, research-based criteria and guidelines. The CEU is an internationally accepted unit of measurement in quality courses of continuing education.


Howard Technology is accredited by: 

P.O. Box 28070, Abu Dhabi, United Arab Emirates | Tel.: +971 2 2091 714 | Email: info@haward.org | Website: www.haward.org



**Certificate Accreditations**


Certificates are accredited by the following international accreditation organizations: -

- 
The International Accreditors for Continuing Education and Training (IACET- USA)

Haward Technology is an Authorized Training Provider by the International Accreditors for Continuing Education and Training (IACET), 2201 Cooperative Way, Suite 600, Herndon, VA 20171, USA. In obtaining this authority, Haward Technology has demonstrated that it complies with the **ANSI/IACET 2018-1 Standard** which is widely recognized as the standard of good practice internationally. As a result of our Authorized Provider membership status, Haward Technology is authorized to offer IACET CEUs for its programs that qualify under the **ANSI/IACET 2018-1 Standard**.

Haward Technology’s courses meet the professional certification and continuing education requirements for participants seeking **Continuing Education Units (CEUs)** in accordance with the rules & regulations of the International Accreditors for Continuing Education & Training (IACET). IACET is an international authority that evaluates programs according to strict, research-based criteria and guidelines. The CEU is an internationally accepted uniform unit of measurement in qualified courses of continuing education.

Haward Technology Middle East will award **3.5 CEUs** (Continuing Education Units) or **35 PDHs** (Professional Development Hours) for participants who completed the total tuition hours of this program. One CEU is equivalent to ten Professional Development Hours (PDHs) or ten contact hours of the participation in and completion of Haward Technology programs. A permanent record of a participant’s involvement and awarding of CEU will be maintained by Haward Technology. Haward Technology will provide a copy of the participant’s CEU and PDH Transcript of Records upon request.

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British Accreditation Council (BAC)

Haward Technology is accredited by the **British Accreditation Council for Independent Further and Higher Education** as an **International Centre**. BAC is the British accrediting body responsible for setting standards within independent further and higher education sector in the UK and overseas. As a BAC-accredited international centre, Haward Technology meets all of the international higher education criteria and standards set by BAC.

**Accommodation**

Accommodation is not included in the course fees. However, any accommodation required can be arranged at the time of booking.





**Course Instructor(s)**

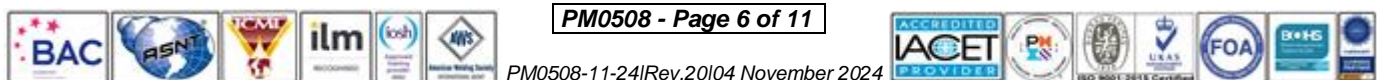
This course will be conducted by the following instructor(s). However, we have the right to change the course instructor(s) prior to the course date and inform participants accordingly:



**Dr. Chris Le Roux**, PhD, MSc, BSc, PMI-PMP, PMI-CAPM is a **Senior Project & Management Consultant** with over **45 years** of teaching, training and industrial experience. His expertise lies extensively in the areas of **Project & Contracts Management Skills, Project & Construction Management, Project Planning, Scheduling & Control, Project Management, Project Delivery & Governance Framework, Project Management Practices, Project Management Disciplines, Project Risk Management, Risk Identification Tools & Techniques, Project Life Cycle, Project Stakeholder & Governance, Project Management Processes, Project Integration Management, Project Management Plan, Project Work Monitoring & Control, Project Scope Management, Project Time Management, Project Cost Management, Project Quality Management, Quality Assurance, Project Human Resource Management, Project Communications Management, Contract Management, Tender Development, Contract Standards & Laws, Dispute Resolution & Risk Identification, Myers-Briggs Type Indicator (MBTI), Organization Development Consultation, Advanced Debriefing of Emotional Trauma, Interpersonal Motivation, Model Based Interviewing, Leadership Orientation Programme, Coaching & Motivation, Creative Thinking & Problem-Solving Techniques, Emotional Intelligence, Presentation Skills, Communication & Interpersonal Skills, Effective Communication & Influencing Skills, Effective Business Writing Skills, Writing Business Documents, Business Writing (Memo & Report Writing), Leadership & Team Building, Psychology of Leadership, Interpersonal Skills & Teamwork, Coaching & Mentoring, Innovation & Creativity, Office Management & Administration Skills, Controlling Your Time & Managing Stress, Crisis Management, Strategic Human Resources Management, Change Management, Negotiation Skills, Strategic Planning, Risk Analysis & Risk Management, Global Diverse & Virtual Teams Operation, Exceeding Customer Expectations, Corporate Governance Best Practice, Business Performance Management & Improvement, Building Environment of Trust & Commitment, Win-Win Negotiation Strategies, Quality Improvement & Resource Optimization, Neuro Linguistic Programming (NLP), Personal Resilience Developing, Effective Role Modelling & Development, Managing Dynamic Work Environments, Organizational Development, Career Management, Situation & Behaviour Analysis, Interpersonal Motivation Skills, Inventory Management and Financial Administration. Further, he is also well-versed in Water Supply System Security, Vulnerability & Terrorism, Integrated Security Systems, Incident Threat Characterization & Analysis, Physical Security Systems, Security Crisis, Security Emergency Plan, Command & Control System, Preventive Actions and Situation Analysis. He was the **Psychologist & Project Manager** wherein he was responsible in the project management and private psychology practices.**

During his career life, Dr. Le Roux has gained his academic and field experience through his various significant positions and dedication as the **Director, Medico Legal Assessor Psychologist, Training & Development General Manager, Project Manager, Account Manager, Commercial Sales Manager, Manager, Sales Engineer, Project Specialist, Psychology Practitioner, Senior HR Consultant, Senior Lecturer, Senior Consultant/Trainer, Business Consultant, Assistant Chief Education Specialist, ASI Coordinator, Part-time Lecturer/Trainer, PMP & Scrum Trainer, Assessor & Moderator, Team Leader, Departmental Head, Technical Instructor/Qualifying Technician, Apprentice Electrician: Signals and Part-Time Electrician** from various companies and universities such as the South African Railway (SAR), Department of Education & Culture, **ESKOM**, Logistic Technologies (Pty. Ltd), Human Development: Consulting Psychologies (HDCP) & IFS, Mincon, Eagle Support Africa, Sprout Consulting, UKZN, Grey Campus, Classis Seminars, CBM Training, just to name a few.

Dr. Le Roux has a **PhD in Commerce Major in Leadership in Performance & Change**, a **Master's degree in Human Resource Management**, a **Bachelor's degree (with Honours) in Industrial Psychology**, a National Higher Diploma and a National Technical Diploma in **Electrical & Mechanical Engineering**. Further, he is a **Certified Project Management Professional (PMI-PMP)**, a **Certified Associate in Project Management (PMI-CAPM)**, a **Certified Scrum Master Trainer** by the VMEdU, a **Certified Instructor/Trainer** and a **Certified Internal Verifier/Assessor/Trainer** by the **Institute of Leadership & Management (ILM)**. Moreover, he is a **Registered Industrial Psychologist** by the Health Professions Council of South Africa (HPCSA), a **Registered Educator** by the South African Council for Educators (SACE) and a **Registered Facilitator, Assessor & Moderator** with Education, Training and Development Practices (ETDP) SETA. He has further delivered numerous trainings, courses, seminars, conferences and workshops globally.







**Course Program**

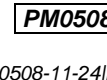
The following program is planned for this course. However, the course instructor(s) may modify this program before or during the course for technical reasons with no prior notice to participants. Nevertheless, the course objectives will always be met:

**Day 1: Monday, 11<sup>th</sup> of November 2024**

0730 – 0800	Registration & Coffee
0800 – 0815	Welcome & Introduction
0815 – 0830	<b>PRE-TEST</b>
0830 – 0930	<b>Introduction</b> Purpose of the Standard for Portfolio Management • Audience for the Standard for Portfolio Management • What is a Portfolio? • Relationships among Portfolios, Programs, Projects, and Operations • What is Portfolio Management? • Relationships among Portfolio Management, Program Management and Project Management • Principles of Portfolio Management • Relationships among Portfolio Management, Organizational Strategy, Strategic Business Execution, and Organizational Project Management (Portfolio Management and Organizational Strategy, Strategic Business Execution and Organizational Project Management) • Portfolio Components and their Interrelationships (Program Management, Project Management, Operations Management) • Role of the Portfolio Manager • Other Roles in Portfolio Management (Sponsors, Portfolio Governance Body, Portfolio, Program, and/or Project Management Office, Program Managers, Project Managers)
0930 – 0945	Break
0945 – 1200	<b>The Portfolio Life Cycle</b> Overview • Guiding Principles
1200 – 1300	Lunch
1300 – 1400	<b>The Portfolio Life Cycle (cont'd)</b> Ongoing Life Cycle (Initiation, Planning, Execution, Optimization, Monitor and Control) • Portfolio Management Information System (PMIS)
1400 – 1415	Break
1415 – 1550	<b>The Portfolio Life Cycle (cont'd)</b> Governance within the Portfolio Life Cycle
1550 – 1600	<b>Recap</b> Using this Course Overview, the Instructor(s) will Brief Participants about the Topics that were Discussed Today and Advise Them of the Topics to be Discussed Tomorrow
1600	End of Day One

**Day 2: Tuesday, 12<sup>th</sup> of November 2024**

0730 - 0930	<b>Portfolio Strategic Management</b> Overview • Guiding Principles • Portfolio Strategic Objectives • Developing Portfolio Strategic Objectives (Vision and Mission Statements, Strategic Goals, Strategic Objectives, Strategic Initiatives) • Strategic Risk Appetite
0930 – 0945	Break
0945 – 1200	<b>Portfolio Strategic Management (cont'd)</b> Portfolio Charter • Portfolio Roadmap • Key Portfolio Components (Evaluating Portfolio Key Components, Selecting Portfolio Key Components) • Portfolio Optimization • Managing Strategic Alignment (Considerations When Managing Strategic Impact, The Impact of Strategic Change)





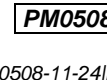
1200 – 1300	Lunch
1300 – 1400	<b>Portfolio Governance</b> Overview • What is Portfolio Governance? • Guiding Principles • The Concept of Governance (Portfolio Governance Impact on Programs and Projects, Portfolio Governance and Other Domains in Portfolio Management)
1400 – 1415	Break
1415 – 1550	<b>Portfolio Governance (cont'd)</b> Effective Portfolio Governance Design Factors • Portfolio Governance Roles (Portfolio Sponsor, Portfolio Governance Board, Portfolio Audit Organization, Other Roles)
1550 – 1600	<b>Recap</b> Using this Course Overview, the Instructor(s) will Brief Participants about the Topics that were Discussed Today and Advise Them of the Topics to be Discussed Tomorrow
1600	End of Day Two

**Day 3: Wednesday, 13<sup>th</sup> of November 2024**

0730 – 0930	<b>Portfolio Capacity &amp; Capability Management</b> Overview • Guiding Principles • Capacity Management
0930 – 0945	Break
0945 – 1200	<b>Portfolio Capacity &amp; Capability Management (cont'd)</b> Capacity Planning • Supply and Demand Management (Supply and Demand Analysis, Supply and Demand Allocations) • Supply and Demand Optimization
1200 – 1300	Lunch
1300 – 1400	<b>Portfolio Capacity &amp; Capability Management (cont'd)</b> Organizational Capabilities • Capability Assessment • Capability Development (Developing New Capabilities, Sustaining Existing Capabilities)
1400 – 1415	Break
1415 – 1550	<b>Portfolio Capacity &amp; Capability Management (cont'd)</b> Performance Reporting and Analytics • Balance Capacity and Capability
1550 – 1600	<b>Recap</b> Using this Course Overview, the Instructor(s) will Brief Participants about the Topics that were Discussed Today and Advise Them of the Topics to be Discussed Tomorrow
1600	End of Day Three

**Day 4: Thursday, 14<sup>th</sup> of November 2024**

0730 – 0930	<b>Portfolio Stakeholder Engagement</b> Overview • Guiding Principles • Definition and Identification of Portfolio Stakeholders (Categorization of Stakeholders, Identifying Stakeholders) • Analysis of Portfolio Stakeholders
0930 – 0945	Break
0945 - 1200	<b>Portfolio Stakeholder Engagement (cont'd)</b> Stakeholder Engagement Planning • Identifying Communications Management Approaches (Alignment with Governance, Communication Infrastructure, Portfolio Management Plan, Portfolio Reports, Portfolio Process Assets, Communication Governance and Interface to Components) • Manage Portfolio Communications







1200 – 1300	Lunch
1300 -1330	<b>Portfolio Value Management</b> Overview • Guiding Principles • What is Value Management? • Components of Value Management • Negotiating Expected Value
1330 – 1345	Break
1345 – 1550	<b>Portfolio Value Management (cont'd)</b> Maximizing Value • Assuring Value • Realizing Value • Measuring Value • Reporting Value
1550 – 1600	<b>Recap</b> Using this Course Overview, the Instructor(s) will Brief Participants about the Topics that were Discussed Today and Advise Them of the Topics to be Discussed Tomorrow
1600	End of Day Four

**Day 5: Friday, 15<sup>th</sup> of November 2024**

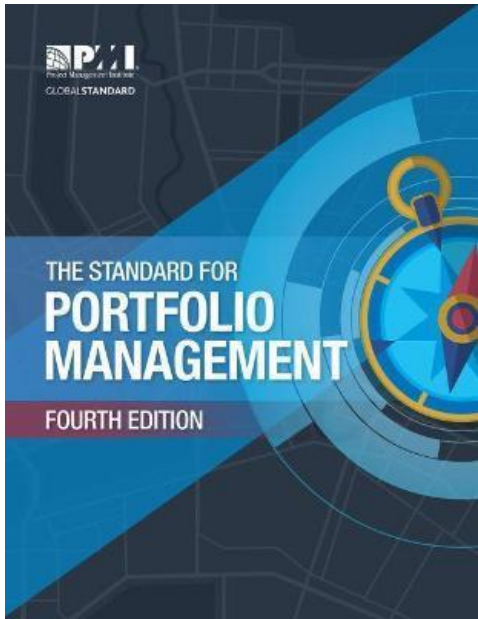
0730 – 0930	<b>Portfolio Risk Management</b> Overview • Guiding Principles (Managing Portfolio Risk, Balancing Risk)
0930 – 0945	Break
0945 – 1200	<b>Portfolio Risk Management (cont'd)</b> Portfolio Risk Management
1200 - 1300	Lunch
1300 - 1330	<b>Portfolio Risk Management (cont'd)</b> Key Planning Elements (Portfolio Risk Management Framework, Risk Perception)
1330 - 1345	Break
1345 - 1515	<b>Portfolio Risk Management (cont'd)</b> Portfolio Risk Management Framework and Portfolio Risk Management Plan (Portfolio Risk Management Framework, Portfolio Risk Management Plan)
1515 – 1530	<b>Course Conclusion</b> Using this Course Overview, the Instructor(s) will Brief Participants about the Course Topics that were Covered During the Course
1530 – 1545	<b>POST-TEST</b>
1545 – 1600	Presentation of Course Certificates
1600	End of the Course

**MOCK Exam**

Upon the completion of the course, participants have to sit for a MOCK Examination similar to the exam of the Certification Body through Haward’s Portal. Each participant will be given a username and password to log in Haward’s Portal for the MOCK Exam during the 30 days following the course completion. Each participant has only one trial for the MOCK exam within this 30-day examination window. Hence, you have to prepare yourself very well before starting your MOCK exam as this exam is a simulation to the one of the Certification Body.

**Book(s)**

As part of the course kit, the following e-books will be given to all participants:-



**Title:** The Standard for Portfolio Management

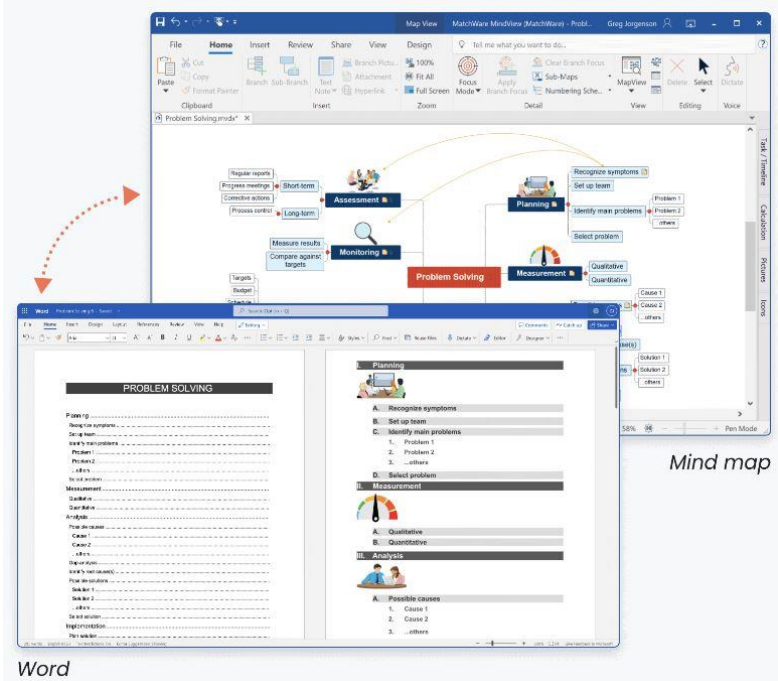
**ISBN:** 978-1628251975

**Author:** Project Management Institute

**Publisher:** Project Management Institute

**Simulator (Hands-on Practical Sessions)**

Practical sessions will be organized during the course for delegates to practice the theory learnt. Delegates will be provided with an opportunity to carryout various exercises using the “Mindview Software” and “Raidlog Simulator”.



**Mind map**

**Word**

**Mindview Software**



FREE RAID Log Template + RAID Analysis

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RAID ANALYSIS						
	RISKS	ASSUMPTIONS	ISSUES	DEPENDENCIES		
Critical	1	0	1	1	3	
High	0	0	0	1	1	
Moderate	1	1	0	0	2	
Low	0	0	1	0	1	
Negligible	0	0	0	0	0	
<b>Total</b>	<b>2</b>	<b>1</b>	<b>2</b>	<b>2</b>		

PM-TRAINING

RAID LOG					
ID	Title	Description	Type	Classification	Comments
1	Example 1		Assumption	Moderate	
2	Example 2		Risk	Critical	
3	Example 3		Risk	Moderate	
4	Example 4		Issue	Low	
5	Example 5		Dependency	High	
6	Example 6		Dependency	Critical	
7	Example 7		Issue	Critical	
8					
9					
10					
11					

**Raidlog Simulator**

**Course Coordinator**

Mari Nakintu, Tel: +971 230 91 714, Email: [mari1@haward.org](mailto:mari1@haward.org)