

COURSE OVERVIEW PM0508 Portfolio Management Professional (PMI-PfMP)

PMI Exam Preparation Training

Course Title

Portfolio Management Professional (PMI-PfMP): PMI Exam Preparation Training

Course Date/Venue

November 09-13, 2025/Boardroom 1, Elite Byblos Hotel Al Barsha, Sheikh Zayed Road, Dubai, UAE



PM0508

Course Duration/Credits

Five days/3.5 CEUs/35 PDHs

Course Description



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

This practical and highly-interactive course includes various practical sessions and exercises. Theory

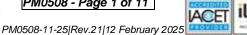


Management Professional (PfMP). It covers the relationships portfolio among management, organizational strategy, strategic business execution and organizational management; the project portfolio components and their interrelationships; the role of the portfolio manager and other roles in management; 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 key portfolio components and portfolio roadmap. 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

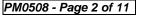
PMI Recognition of Haward Courses

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















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.



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. Sunday 00th of November 2025

| Day 1: | Sunday, 09 th of November 2025 |
|-------------|---|
| 0730 - 0800 | Registration & Coffee |
| 0800 - 0815 | Welcome & Introduction |
| 0815 - 0830 | PRE-TEST |
| 0830 - 0930 | Introduction 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 | The Portfolio Life Cycle Overview • Guiding Principles |
| 1200 - 1300 | Lunch |
| 1300 - 1400 | The Portfolio Life Cycle (cont'd) Ongoing Life Cycle (Initiation, Planning, Execution, Optimization, Monitor and Control) • Portfolio Management Information System (PMIS) |
| 1400 - 1415 | Break |
| 1415 – 1550 | The Portfolio Life Cycle (cont'd) Governance within the Portfolio Life Cycle |
| 1550 – 1600 | Recap 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 |

Dav 2: Monday, 10th of November 2025

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|-------------|---|
| 0730 - 0930 | Portfolio Strategic Management |
| | 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 | Portfolio Strategic Management (cont'd) |
| | 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 | Portfolio Governance |
| | 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 | Portfolio Governance (cont'd) |
| | Effective Portfolio Governance Design Factors • Portfolio Governance Roles |
| | (Portfolio Sponsor, Portfolio Governance Board, Portfolio Audit Organization, |
| | Other Roles) |
| 1550 – 1600 | Recap |
| | 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: Tuesday, 11th of November 2025

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| Portfolio Capacity & Capability Management |
| Overview • Guiding Principles • Capacity Management |
| Break |
| Portfolio Capacity & Capability Management (cont'd) |
| Capacity Planning • Supply and Demand Management (Supply and Demand |
| Analysis, Supply and Demand Allocations) • Supply and Demand Optimization |
| Lunch |
| Portfolio Capacity & Capability Management (cont'd) |
| Organizational Capabilities • Capability Assessment • Capability Development |
| (Developing New Capabilities, Sustaining Existing Capabilities) |
| Break |
| Portfolio Capacity & Capability Management (cont'd) |
| Performance Reporting and Analytics • Balance Capacity and Capability |
| Recap |
| 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 |
| End of Day Three |
| |

Day 4: Wednesday 12th of November 2025

| Duy T. | Wednesday 12 of November 2020 | |
|-------------|--|--|
| 0730 – 0930 | Portfolio Stakeholder Engagement | |
| | Overview • Guiding Principles • Definition and Identification of Portfolio | |
| | Stakeholders (Categorization of Stakeholders, Identifying Stakeholders) • Analysis | |
| | of Portfolio Stakeholders | |
| 0930 - 0945 | Break | |
| 0945 - 1200 | Portfolio Stakeholder Engagement (cont'd) | |
| | 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 |
|-------------|---|
| | Portfolio Value Management |
| 1300 -1330 | Overview • Guiding Principles • What is Value Management? • Components of |
| | Value Management • Negotiating Expected Value |
| 1330 - 1345 | Break |
| | Portfolio Value Management (cont'd) |
| 1345 - 1550 | Maximizing Value • Assuring Value • Realizing Value • Measuring Value • |
| | Reporting Value |
| | Recap |
| 1550 – 1600 | 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: Thursday, 13th of November 2025

| Day 5: | Inursday, 13" of November 2025 |
|-------------|---|
| 0730 - 0930 | Portfolio Risk Management |
| | Overview • Guiding Principles (Managing Portfolio Risk, Balancing Risk) |
| 0930 - 0945 | Break |
| 0945 – 1200 | Portfolio Risk Management (cont'd) |
| | Portfolio Risk Management |
| 1200 - 1300 | Lunch |
| 1300 - 1330 | Portfolio Risk Management (cont'd) |
| | Key Planning Elements (Portfolio Risk Management Framework, Risk Perception) |
| 1330 - 1345 | Break |
| | Portfolio Risk Management (cont'd) |
| 1345 - 1515 | Portfolio Risk Management Framework and Portfolio Risk Management Plan |
| | (Portfolio Risk Management Framework, Portfolio Risk Management Plan) |
| | Course Conclusion |
| 1515 - 1530 | Using this Course Overview, the Instructor(s) will Brief Participants about the |
| | Course Topics that were Covered During the Course |
| 1530 – 1545 | POST-TEST |
| 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.

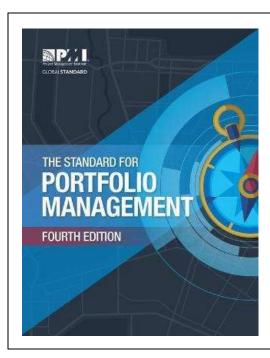






Book(s)

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



Title: The Standard for Portfolio

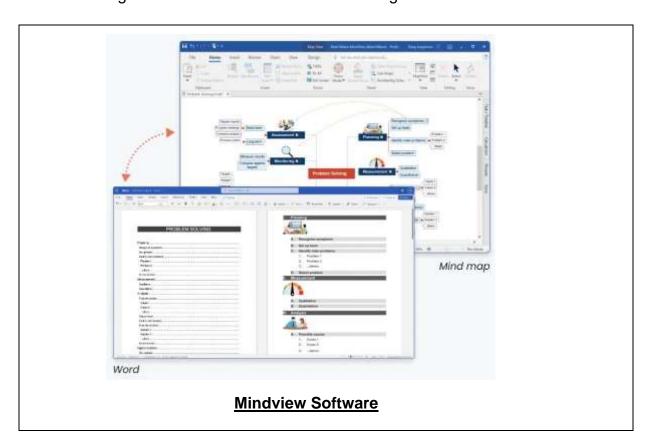
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ISBN: 978-1628251975

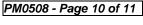
Author: **Project Management Institute** Publisher: Project Management Institute

<u>Simulator (Hands-on Practical Sessions)</u>

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".















Course Coordinator

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