Portfolio Management Fundamentals Training Course

Professional Development Training Course Outline

Category	Project Management	**Duration**	5 Days
Base Fee	$1,500 USD	**Delivery Mode**	Online / On-site Hybrid

Course Introduction

Portfolio Management Fundamentals is a comprehensive professional training program designed to build strong capabilities in strategic portfolio planning, investment governance, value optimization, and enterprise-wide decision-making. Portfolio Management Fundamentals Training Course introduces participants to modern portfolio management frameworks, performance measurement techniques, risk balancing strategies, and governance models aligned with global best practices. It emphasizes strategic alignment, benefits realization, and data-driven prioritization to help organizations maximize return on investment while managing uncertainty and complexity.

The course integrates practical tools, real-world portfolio scenarios, and structured methodologies to support effective portfolio selection, monitoring, and optimization. Participants gain hands-on exposure to portfolio analytics, resource allocation models, financial evaluation techniques, and stakeholder governance structures. By the end of the training, learners will be equipped to design, manage, and continuously improve portfolios that support organizational strategy, sustainability, and long-term value creation.

Programme Curriculum

Portfolio Management Fundamentals Training Course

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Course Objectives

1. Develop a strong foundation in portfolio management principles and frameworks
2. Understand strategic alignment between portfolios and organizational objectives
3. Apply portfolio prioritization and scoring models effectively
4. Strengthen decision-making using financial and non-financial metrics
5. Manage portfolio risk, uncertainty, and interdependencies
6. Implement value optimization and benefits realization practices
7. Enhance governance, transparency, and accountability in portfolios
8. Utilize performance measurement and portfolio dashboards
9. Optimize resource allocation across programs and projects
10. Improve stakeholder engagement and executive reporting
11. Apply portfolio lifecycle management techniques
12. Integrate portfolio management with enterprise strategy execution
13. Adopt industry best practices and maturity models in portfolio management

Organizational Impact Bulletins

- Improved strategic focus across investments
- Enhanced return on investment visibility
- Reduced duplication of initiatives
- Better alignment between strategy and execution
- Increased transparency in decision-making
- Optimized use of financial and human resources
- Stronger executive governance and oversight
- Improved risk mitigation at portfolio level
- Faster response to market and strategic changes
- Sustainable long-term value creation

Target Audiences

1. Portfolio managers and portfolio analysts
2. Program and project managers
3. PMO leaders and PMO staff
4. Strategy and planning professionals
5. Finance and investment managers
6. Senior executives and decision-makers
7. Business transformation leaders

8. Risk and governance professionals

Course Duration: 5 days

Course Modules

Module 1: Portfolio Management Foundations

- Portfolio management concepts and terminology
- Portfolio vs program and project management
- Types of portfolios and investment categories
- Portfolio lifecycle and decision stages
- Key roles and responsibilities
- Case study on establishing a corporate portfolio

Module 2: Strategic Alignment and Portfolio Design

- Translating strategy into portfolios
- Strategic themes and investment drivers
- Portfolio structuring techniques
- Alignment scoring models
- Balancing short-term and long-term investments
- Case study on strategy-driven portfolio design

Module 3: Portfolio Selection and Prioritization

- Evaluation criteria and scoring frameworks
- Financial and non-financial assessment methods
- Prioritization techniques and trade-off analysis
- Dependency and constraint management
- Decision-making workshops and tools
- Case study on investment prioritization

Module 4: Portfolio Financial Management

- Portfolio budgeting and forecasting
- Cost-benefit and value analysis
- Funding models and financial controls
- Capital allocation strategies
- Portfolio financial performance tracking
- Case study on portfolio financial optimization

Module 5: Risk and Performance Management

- Portfolio-level risk identification
- Risk aggregation and exposure analysis
- Performance indicators and KPIs
- Portfolio dashboards and reporting
- Continuous monitoring techniques
- Case study on portfolio risk balancing

Module 6: Resource and Capacity Optimization

- Resource demand and capacity planning
- Skills and competency alignment
- Resource conflict resolution
- Optimization scenarios and modeling
- Tools for capacity visualization
- Case study on enterprise resource optimization

Module 7: Portfolio Governance and Stakeholder Management

- Governance structures and decision forums
- Roles of steering committees
- Policy development and compliance
- Stakeholder communication strategies
- Escalation and decision protocols
- Case study on governance implementation

Module 8: Portfolio Maturity and Continuous Improvement

- Portfolio maturity models
- Process standardization and improvement
- Integration with PMO and strategy offices
- Change management in portfolio environments
- Measuring portfolio success and outcomes
- Case study on portfolio maturity advancement

Training Methodology

- Instructor-led interactive sessions
- Practical portfolio management exercises
- Group discussions and scenario analysis

- Real-world case study reviews
- Portfolio tools and templates application
- Knowledge assessments and feedback sessions

Register as a group from 3 participants for a Discount

Send us an email: info@fineskilltrainingcenter.org or call *+254769199797*

Certification

Upon successful completion of this training, participants will be issued with a globally- recognized certificate.

Tailor-Made Course

We also offer tailor-made courses based on your needs.

Key Notes

a. The participant must be conversant with English.

b. Upon completion of training the participant will be issued with an Authorized Training Certificate

c. Course duration is flexible and the contents can be modified to fit any number of days.

d. The course fee includes facilitation training materials, 2 coffee breaks, buffet lunch and A Certificate upon successful completion of Training.

e. One-year post-training support Consultation and Coaching provided after the course.
f. Payment should be done at least a week before commence of the training, to Fineskill Training Center account, as indicated in the invoice so as to enable us prepare better for you.

Upcoming Scheduled Sessions

Start Date	End Date	Location	Price
23 Nov 2026	27 Nov 2026	Online	$1,000
23 Nov 2026	27 Nov 2026	Physical	$1,500
23 Nov 2026	27 Nov 2026	Physical	$3,000
23 Nov 2026	27 Nov 2026	Physical	$3,000
23 Nov 2026	27 Nov 2026	Physical	$6,000

Start Date	End Date	Location	Price
23 Nov 2026	27 Nov 2026	Physical	$4,500
23 Nov 2026	27 Nov 2026	Physical	$6,000
23 Nov 2026	27 Nov 2026	Physical	$6,000

Ready to enroll or request a customized program? Book online or contact us:

Register Online Now

Email: info@fineskilltrainingcenter.com | Website: www.fineskilltrainingcenter.com