



PMIAA & Portfolio Management

1 Day Workshop

Washington D.C.

June 20, 2017 ▪ 8:30 – 5:00 PM

COURSE OUTLINE

V1.0

PMIAA and Portfolio Management

○ Overview:

- PMO Advisory, Olde Stone Consulting, and ASI Government are presenting a 1-day seminar in Washington D.C. on taking a proactive strategy through Portfolio Management for individuals, federal agencies, and contractors faced with the coming compliance obligations for the Program Management Improvement Accountability Act (PMIAA).

○ Learning Objectives:

- Understand the essential aspects of Program Management Improvement Accountability Act (PMIAA) - Public Law 114-264.
- Discuss how Portfolio Management is more than a portfolio approach to the federal Capital Planning and Investment Control (CPIC) process or PortfolioStat review.
- Understand how portfolio management could link their programs/project up to the specific goals/objectives in the agencies' strategic plans and how governance through the executive review committee (ERC) would be modified and the program level approach for business cases could evolve to portfolio views.

○ Target Audience:

- This course is invaluable to all acquisition and project professionals working in US Federal Government sector, especially executives, planners, and management including CxOs, Portfolio Managers, Program and Project Managers, Marketing and Sales Executives.

○ Course Fees, Logistics, and Professional Development Credits:

- \$249 per person for the 1 day workshop
- PMI Professional Development Units: 8 PDUs
- Dates: June 20th, 2017. 8:30 AM to 5 PM
- Location: ASI Government Corporate Headquarters, 1655 North Fort Myer Drive Suite 1000 Arlington, VA 22209

○ Registration:

- To register for this class, please visit: www.pmoadvisory.com/pmiaa. Click on the button for “Sign Up Today”.

More Course Information

1. Introduction
 - PMIAA Basics
 - Why Portfolio Management
 - PMI's Portfolio Management Certification (PfMP)
2. Portfolio Management & Multi-Tier Government
 - Regulatory Environment
 - Business Environment
 - Industry Changes
 - PMIAA Impact
3. Portfolio Strategy
 - Strategy Alignment
 - Portfolio Roadmap
 - Prioritization
 - Governance
 - Defining Critical Success Factors
4. Risk Management
 - Risks Comparison across Projects, Programs and Portfolios
 - Risk and performance measurements
 - Strategic Uncertainties
5. Communication & Stakeholders
 - Comparison across Projects, Programs, and Portfolios
 - Stakeholder analysis
 - Complexity of communication and stakeholder at the portfolio level
6. Next Steps
 - Group Discussion

Read PMI's four related white papers

<https://www.pmi.org/business-solutions/white-papers>

1. *"View from Above: The Power of Portfolio Management,"* April 2013
 - Portfolio Management improves Program and Project performance
2. *"Using PMI Standards Framework to Improve U.S. Federal Government Capital Investment Outcomes,"* March 2015
 1. Move to three tier Portfolio, Program, Project structure
 - Federal Government can use Industry Standards Framework
3. *"Improving Program Management in the Federal Government,"* July 2015
 - Written in partnership with the National Academy of Public Administration (NAPA) Basis for PMIAA law signed by President Obama, Dec 2016
- *"Time to Update OMB Capital Programming Guidance,"* February 2017
 - A-11 and CPG needs updating to Industry Standards
 - Go beyond PMIAA law (signed Dec 2016)

About the Instructors: Dr. Te Wu & Mr. John Driessnack

Dr. Wu is the founder and CEO of PMO Advisory, a PMI Global R.E.P. and one of the few firms in the world specializing across the entire spectrum of project management including portfolio, program, project, risk, agile, PMO, organization change, and strategic business execution. Dr. Wu holds certifications in most of these disciplines and he is both an award winning practitioner leading major business and government initiatives, trainer and teacher, and researcher. He is one of the few people spanning across academia and the business and non-profit/government world, bridging the latest practices, thoughts and research to create more value.



Mr. John Driessnack is a nationally known expert in Systems and Portfolio/Program management in the Federal/DoD/Intel acquisition environment. He was part of the Project Management Institute (PMI) pilot program for Portfolio Management Professional (PfMP) and has written white papers published by PMI. Background includes experience as a military officer on major ACAT1D Aircraft and IT/Intel program(s), Managing Director of senior consulting groups, researcher in economics of portfolio/program controls and industry structure, and instructor along with curriculum/program development and administration experience at Defense Acquisition University, American University, and industry professional groups and companies.



About PMO Advisory & Olde Stone Consulting

PMO Advisory is one of the most specialized firms in the world focusing on project management, IT service management, and business management. In addition to offering training for all ITIL certifications, the firm also offers project management training including portfolio (PfMP), program (PgMP), project (PMP, CAPM, PRINCE2, and MSP), risk (PMI-RMP), and agile project (PMI-ACP and SCRUM) training. Our headquarter is next to Montclair, NJ with training sites in NYC (near Wall Street) and NJ (near Montclair and in Jersey City). The firm services consumers, businesses, government institutions, and universities.

Olde Stone Consulting customers have usually run into what we call "wicked problems". Every organization has these, and even the most talented, knowledgeable, and experienced leaders occasionally benefit from having subject matter experts who can help them get over the speed bumps that get in the way of achieving your goals. Olde Stone provides that expertise, and works with your staff to transfer that knowledge so that you become the experts. Key tenets of our consulting solutions include; Working with you and your staff to understand your real problem before we suggest a solution; Using real experts with specific, proven tools and methods to solve your problem; and Acting as a force multiplier by transferring knowledge and expertise to your staff. The Olde Stone advantage is we save you money, because we do it right and our goal is to fix it and move on; we are not trying to sell bodies.