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Project & Portfolio Management Course Syllabus

You should have received the following materials:

- Managing Complex Projects textbook by Dick Billows
- Program and Portfolio Management DVD
- Student Packet/syllabus & case studies as a PDF file

The course will utilize Microsoft Project® software for some of the assignments.

Course Overview:

Program & Portfolio Management is an advanced course designed for experienced consultants and program managers who are responsible for larger complex projects and portfolios of projects for clients or organizations. You will build on your existing skills, adding sophisticated techniques for conceiving, positioning and managing stakeholders and deliver programs and portfolio results in project dense organizations.

Course Process in each Module:

1. Complete the assigned reading for the module
2. Watch the lecture and video for the module

3. Ask your instructor any questions you have via phone or e-mail
4. Complete the assignment and send it to your instructor via e-mail
5. Schedule any online, real-time simulations with your instructor
6. Get feedback from your instructor within 24 hours.

Grading Criteria:

You must complete all assignments with a “B” grade or better to pass the course. Your instructor will ask you redo any assignment that does not meet that standard and will not grade any new assignments until all completed assignments meet the standard.

1 Critique of a Failing Program & its Manager

- 1.1. Read chapters 1 & 2 and review the software appendix in the textbook Managing Complex Projects.
- 1.2. Watch lecture #1 on project process and methodology. This is a 40 minute lecture with the first 26 minutes covering planning and the last 14 minutes covering scheduling. We will use this information here and in modules 3 and 5.
- 1.3. Case Study “Evaluating Six State Expansion Program.”
 - 1.3.1. Read the case study and review the Six State Expansion Program plan and Microsoft Project® schedule.
 - 1.3.2. Watch the video of the “Six State Expansion Program Status Meeting”
 - 1.3.3. Prepare an assessment of the program, applying the “best practices” techniques learned in the reading and lectures. Use the course template tab 1 to write your assessment and to detail your recommendations on:
 - 1.3.3.1. the program plan
 - 1.3.3.2. program schedule, resource utilization, monitoring & control
 - 1.3.3.3. Develop recommendations for saving the program
 - 1.3.3.4. Provide suggestion for improving project performance in the organization.

2 Strategic Positioning and Stakeholder Management

1. Read chapter 3 in the textbook Managing Complex Projects.

2. Watch lecture #2 on strategic positioning, decision-makers, and plotting the echelons of achievement.
3. Read the first section of “The Customers Hate Us,” case study entitled “The Business Situation.”
4. Prepare an analysis of each of the decision-makers (stakeholders), their buying pressures and buying perceptions
5. Then map their desired business achievements into the achievement echelons in your template.
6. Conceive a strategy for selling the customer service program to the Vailcrest management staff based on their performance pressures and buying perceptions.
7. Conceive two or more potential measures of program success. Describe the merits of each in this program situation and identify the MOS™ you think is best for Vailcrest. Send the template as attachments to an email to your instructor.

3 High-level Program Plan, Charter & Authority

1. Read chapter 4 in the textbook Managing Complex Projects.
2. Watch lecture #1 on building a broadbrush plan (the first 26 minutes).
3. Read the second section of the case study “The Customers Hate Us,” entitled “The Project’s Backbone.”
4. Decompose your echelons into a high-level achievement network using your course template tab #3.
5. Then recommend a program authority structure based on the high-level achievements on tab #4
6. Recommend change control authority for each level on tab #5. Then, send the template to your instructor for feedback.
7. Schedule a live project meeting with the executives (role-played by your instructor) to present your program plan including: the achievement network, program charter, required authority to deliver the project, and change control.

4 Estimating and Risk Management

1. Read chapter 5 in the Managing Complex Projects book.

2. Watch lecture # 4 on estimating and risk management.
3. Use the data in the case study “The Customers Hate Us,” entitled “Numbers and More Numbers” to develop order of magnitude (analogous), and parametric, tab #6, and PERT estimates, tab #7, in your template.
4. Read the section of the case study “The Customers Hate Us,” entitled “Risky Business.”
5. Develop a risk response plan for the customer service program detailing planned responses to the major risks facing the program, tab #8 in your template.
6. Using the above information, prepare a PowerPoint presentation for Dan Morton and the executive team that justifies your risk response plan. Use the data and your business experience. Send this to your instructor for feedback.

5 High Performance Teams

1. Read chapter 6 in the Managing Complex Projects book.
2. Watch lecture #6A and minutes 26 through 40 of lecture #1 on project scheduling (use the >> fast forward button on the player).
3. Read the section of case study “The Customers Hate Us” entitled “A High Performing Team.”
4. Complete and send your instructor the following:
 - 4.1. For each of the people in the case, assess their locus of control and their ability to think strategically (cope with cognitive complexity) on tab #9
 - 4.2. Decompose Van’s achievement into smaller sub-achievements and use your experience to make a rough duration estimate of each sub-achievement.
 - 4.3. Enter this data into a Microsoft Project® schedule using the methodology you learned in chapter 2. You can work on tabs #9 -12 in your template or directly in MS Project. Enter the HLAs and sub-achievements, create predecessors, assign resources, enter work estimates to build a full schedule for Van’s project assignment within the larger program. Send the MS Project schedule to your instructor.
5. Watch lecture #6B
 - 5.1. Based on your assessments, design appropriately sized measured achievements for each individual to create intrinsic motivation from that

individual's assignment on tab #8

- 5.2. Design an incentive reward system to allocate the bonus money available to this team. Aim at melding the group into a team and motivating high performance.

6 Trade-offs and Tracking

1. Read chapter 7 and 8 in the Managing Complex Projects book and review MS Project tracking in the software appendix.
2. Watch lecture #5 on trade-offs and tracking.
3. Using your Microsoft Project® schedule from assignment #7 and the actual status data your instructor will send you with your feedback on assignment #8, enter the status data into the Microsoft Project® schedule.
4. Identify alternative strategies for bringing this project back on schedule. Also model tradeoff options for each alternative, providing data on the impact of each trade-off on all four corners of the achievement:
 - 4.1. MOS™ trade-offs
 - 4.2. Duration reduction trade-offs
 - 4.3. Cost-reduction trade-offs
 - 4.4. Risk trade-offs
5. Create a PowerPoint presentation of your status report on the progress Van is making along with recommendations for corrective action. Use earned value analysis to develop your analysis and recommendations. Send the presentation to your instructor for feedback coaching.
6. Schedule a live simulation to answer executive's questions about your status report and plans for corrective action.

7 Portfolio Management

1. Read Chapter 9 in your Managing Complex Projects book.
2. Watch lecture # 9 on portfolio management.
3. Read the case study "Customers Love Us Now: International Expansion."
4. Assess the problems and issues in Vailcrest's international expansion program and the entire company portfolio of projects based on the stakeholder comments and the consolidated portfolio data your instructor will send you.
5. Prepare a PowerPoint presentation about your recommendations for project process changes in Vailcrest and for re-balancing the company portfolio,

including your recommendations for cancelling projects and realigning resources.

6. After you receive your feedback from your instructor, schedule a time for a live meeting to present your conclusions and process recommendations and to set priorities with the executive team.