

Creating Portfolios and Programs

 Portfolio IQ

 Portfolio/Program Manager

Instructions: Use this lab work sheet to complete a set of short and meaningful tasks at your own time and pace to complement your formal learning of **senseiIQ™** in the classroom. While the examples used herein may be different from (or not available) in your organization's senseiIQ™ instance, you can populate the system with your own data and follow the exercises. Ensure that you are already an enabled user in the **Sensei.IQ for Project** application.

Please note the Job Aid for [Creating Portfolios and Programs](#) within Learning IQ compliments the following lab sets, each of which contains two sets of data; Set A and Set B.


- | | |
|------------------------|--------------------------------|
| Lab Exercise 1. | Document Portfolio Charter |
| Lab Exercise 2. | Document Program Business Case |
| Lab Exercise 3. | Capture Key Dates |
| Lab Exercise 4. | Identifying Stakeholders |



1. Document Portfolio Charter

Set A


Portfolio

| | |
|---------------------|---|
| Name | Customer Retention Portfolio |
| Description | Customer retention for new customers is slipping. Significant changes will be required to reverse this trend. |
| Department | Select from the list  |
| Investment Category | Transform |
| Location | Sydney NSW |

Charter


| | |
|----------------------------|--|
| Justification | Cost of finding new customers is very expensive, we need to invest more money retaining short term customers and making them long term |
| Vision | Reliable customer base to drive long term sales targets |
| Scope | Customer retention for the 6-12-month range customers |
| Benefits Strategy | Continued Executive commitment to all projects |
| Resources Needed | Each project must include 3-5 resources committed at 75%. Other project resources need to be committed 20-40% |
| Stakeholder Considerations | Stakeholders are composed of the Engineering Development leaders at Director and above level |

Header

| | |
|---------|--|
| Sponsor | Select your name or another user from the list  |
| Status | Active |

Set B

Portfolio

| | |
|-------------|--|
| Name | Environmental Initiative |
| Description | Find ways to reduce the environmental footprint of our manufacturing and operations facilities using methods that will provide meaningful progress at reasonable cost. |
| Department | Select from the list  |



Investment Category Transform

Location Phoenix, AZ

Charter

Justification Global environmental change is real and we have a responsibility to help protect our planet for future generations

Vision Become a carbon-neutral organization by 2030 and demonstrate to other organizations that being environmentally friendly while making a profit

Scope All manufacturing facilities and operations centers

Benefits Strategy Make use of government grants and tax incentives to make modifications to our manufacturing and operations facilities

Resources Needed Environmental consultants, engineering, operations analysts and grant writers

Stakeholder Considerations Stakeholders include manufacturing and operations managers and financial analysts

Header




Sponsor Select your name or another user from the list 

Status Active



2. Document Program Business Case


Set A

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|---------------------|--|
| Name | Staff Retention |
| Description | Retain knowledgeable staff members to increase corporate knowledge and reduce turnover |
| Start Date | Select a date from the date picker  |
| Finish Date | Select a date from the date picker  |
| Department | Select from the list  |
| Investment Category | Grow |
| Location | New York, NY |

Business Case

| | |
|-------------------------------|---|
| Overview | Currently, employee turnover is causing a loss in corporate knowledge and decreased revenues due to having to train new staff |
| Options | Provide incentives to retain knowledgeable staff members. Increase employee morale. Provide better benefit package |
| Benefits and Disbenefits | By retaining and increasing corporate knowledge, the organization will be better able to increase productivity due to working smarter and staff will be better able to contribute new ideas |
| Justification | We currently have an average employee tenure of 2.5 years. This decreases corporate knowledge and productivity. There is also the cost of training new staff members to be able to replace lost staff members |
| Major Risks and Opportunities | By retaining staff, we are able to increase corporate knowledge and be able to provide training that enhances the skill set our current employees |

Header

| | |
|---------|--|
| Sponsor | Select your name or another user from the list  |
| Status | Active |


Set B

Program

| | |
|-------------|----------------------------------|
| Name | Employee Digital Experience |
| Description | Employees need updated equipment |



Start Date Select a date from the date picker 

Finish Date Select a date from the date picker 

Department Select from the list 

Investment Category Transform

Location Melbourne, Vic

Business Case

Overview Current employee technology does not allow for remote flexibility

Options Re-purpose existing technology or buy new, expand operations into the cloud

Benefits and Disbenefits A more mobile work opportunity will increase employee retention and attract new employees; productivity will initially need to be monitored

Justification More and more we are finding the need to have our employees work in a remote setting rather than being tied to a facility

Major Risks and Opportunities Loss of company property included intellectual and physical; lower productivity; increased productivity; increased revenue

Header


Sponsor Select your name or another user from the list 


Status Active




3. Capture Key Dates


Set A


| | |
|-------------|--|
| Name | Baseline Survey Results Completed |
| Date | Select a date from the date picker  |
| Description | Results of baseline employee survey is completed, and results compiled |
| Status | ◆ High Risk |


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|-------------|--|
| Name | Development Staff Identified |
| Date | Select a date from the date picker  |
| Description | Semi-annual financial review and reallocation of portfolio finances |
| Status | ● On Track |

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|-------------|--|
| Name | Develop Benefits Package Complete |
| Date | Select a date from the date picker  |
| Description | Development of a new benefits package has been completed |
| Status | ● On Track |

Set B

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|-------------|--|
| Name | Training Materials Completed |
| Date | Select a date from the date picker  |
| Description | Job aides regarding remove connectivity, troubleshooting, and helpdesk contact information |
| Status | ◆ High Risk |

| | |
|-------------|--|
| Name | Deploy Survey |
| Date | Select a date from the date picker  |
| Description | Deploy the survey app |
| Status | ● On Track |

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|-------------|--|
| Name | Vendor Selected |
| Date | Select a date from the date picker  |
| Description | Technology vendors for end user technology selected |



Status

● On Track



4. Identifying Stakeholders

Set A

| | |
|------------------------------------|-----------------------------|
| Name | Angelina Jollie |
| Description | Director of Human Resources |
| Role on Project | Oversees Human Resources |
| Communications Requirements | Status, Issues, Schedule |
| Communications Frequency | Bi-weekly |

| | |
|------------------------------------|---|
| Name | Gregory Peck |
| Description | Manager of Employee Training |
| Role on Project | Oversees all aspects of Employee Training |
| Communications Requirements | Oversees all aspects of Employee Training |
| Communications Frequency | Weekly |

Set B

| | |
|------------------------------------|---|
| Name | Vivien Leigh |
| Description | Budget Coordinator |
| Role on Project | Response for acquiring funding, allocating resources, and ensuring overall success of this initiative |
| Communications Requirements | Receive all status updates, escalation of all high-level risks and issues, communicate to all of IT and peers on project status |
| Communications Frequency | Formally weekly; informally as needed |

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|------------------------------------|--|
| Name | James Kirk |
| Description | Senior HR Recruiter |
| Role on Project | Responsible for managing the recruiting and hiring process to build out the services team |
| Communications requirements | Reporting from the HRIS system, status updates to the leadership, collaboration on hiring requirements |

