

# Management of Portfolios MoP® Foundation

Learn via: **Classroom**

Duration: **3 Day**

<https://bilginc.com/en/training/management-of-portfolios-mop-foundation-526-training/>

## **Overview**

Management of Portfolios (MoP) provides advice and examples of how to apply principles, practices, and techniques that together enable the most effective balance of organisational change and business as usual.

Delivered by fully accredited trainers and industry leading experts with extensive experience of portfolio management, the course engages with the students to ensure that theory is embedded and delegates feel confident in the practical application of MoP™.

## **Target Audience**

The MoP Foundation qualification is aimed at those involved in a range of formal and informal portfolio management roles encompassing investment decision making, project and programme delivery, and benefits realisation.

It is relevant to all those involved in the selection and delivery of business change initiatives including : Senior Responsible Owners (SROs), Members of management boards and Directors of Change, Portfolio, Programme, Project, Business Change, and Benefits Managers and Business Case writers and project appraisers.

## **Prerequisites**

### **Proof of identification**

If taking an exam, candidates are required to provide Photo ID with a valid signature e.g. driving license, passport or named work ID badges prior to sitting their exam. Failure to produce this ID will result in their exam results being withheld until proof of ID is provided. Please note that if proof is not provided within 40 days, candidate's exam results will be null and void and a re-sit would be required.

### **Reasonable Adjustments Policy**

The exam provider allows additional time for candidates who have a disability or whose native language differs to that of the examination paper. Full details and how to apply can be found here [www.qa.com/axelosexams](http://www.qa.com/axelosexams). At least two weeks' notice will be required for processing this request. Delegates failing to advise QA and provide evidence when requested, may not be allowed the additional support offered via the policy. QA Exam Administration can be contacted by email [exam.admin@qa.com](mailto:exam.admin@qa.com) or by phone +44(0)1793 696162.

### **Course material**

Learners undertaking this course will be provided with an eBook of the official course manual to support their learning, instructions on how to access the eBook will be provided with the course joining instructions.

Please note: For open book exams learners are permitted to use a second device to access the official course manual, the use of dual monitors is not permitted during the exam.

Please ensure you bring a device such as a mobile phone, tablet or laptop to be able to load your course material on to as you may need this for use in the evenings.

## **What You Will Learn**

The objective of the course is to enable a delegate to understand the MoP principles, cycles, practices, techniques, roles and documentation. This will enable them to work as an informed member of a Portfolio Office or in a range of Portfolio Management roles. Specifically they will know and understand the:

- Scope and objectives of portfolio management and how it differs from programme and project management
- Benefits from applying portfolio management
- Context within which it operates
- Principles upon which successful portfolio management is based
- Approaches to implementation, the factors to consider in maintaining progress, and how to assess the success of portfolio management
- Purposes of the portfolio management definition and delivery cycles and their component practices, and relevant techniques applicable to each practice

- Purpose and key content of the major portfolio documents
- Scope of key portfolio management roles

## **Outline**

### **Module 1 Overview**

- The definitions of portfolio and portfolio management
- The portfolio management model and the relationship between the principles, cycles, practices and relevant techniques
- The differences between portfolios and portfolio management on the one hand, and projects/project management and programmes/programme management on the other
- The local circumstances that will affect how the MoP principles and practices will be adapted and how cost effective approaches can be adopted
- The objectives and benefits of portfolio management

### **Module 2 Implement, sustain and measure**

- The three broad approaches to implementing portfolio management; when each approach to implementation is most relevant, the advantages of planned approaches to implementation
- The benefits of assessing the impact of portfolio management
- Seven steps (and their benefits) in a staged implementation of portfolio management
- The factors to consider in sustaining progress
- Approaches to assessing portfolio management maturity

### **Module 3 Strategic and organizational context**

The 6 key functions/activities that portfolio management needs to coordinate with to achieve strategic objectives

Identify how portfolio management can:

- Coordinate with Business As Usual, strategic planning, resource allocation and budgeting, project and programme management, performance management to deliver strategic objectives
- Support effective corporate governance

### **Module 4 Portfolio management principles**

The 5 principles upon which effective portfolio management is based

- Senior management commitment
- Governance alignment
- Strategy alignment
- Portfolio office
- Energised change culture

### **Module 5 Portfolio definition cycle**

The portfolio definition practices:

- Understand
- Categorize
- Prioritize
- Balance
- Plan

Understand the terms and concepts relating to the portfolio definition cycle.

The techniques of:

- Three point estimating and reference class forecasting
- Driver-based strategic contribution analysis
- Multi-criteria analysis
- Decision conferencing
- Clear line of sight

What is involved and the keys to success.

## Module 6 Portfolio delivery cycle

The portfolio delivery practices:

- Management control
- Benefits management
- Financial management
- Risk management
- Stakeholder engagement
- Organizational governance
- Resource management

The techniques of:

- Management by exception
- One version of the truth
- Staged release of funding
- Clear line of sight reporting
- Champion-challenger model

What is involved, the main elements, and keys to success.

## Module 7 Roles and documentation

- The purposes and responsibilities of the main portfolio management roles identified in MoP™
- The purposes of the main portfolio management documentation

## Examination

The MoP Foundation exam consists of:

- 50 multiple choice questions
- 40 minutes
- Closed-book
- Candidates require a minimum of 25 correct answers (50%) to pass.

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