

Project Investment Portfolio Analysis & Planning

1-Day Skills Development Course for Analysts, Functional-area Managers, and Executives

No Best Projects, Only Best Portfolios — Unlock Your Hidden Portfolio Value

For portfolios of product development projects, R&D investments, IT assets, business transformation initiatives, marketing and channel investments, IP licensing and M&A activities, and/or other projects that consume time, people, and money, properly evaluating the “whole” offers far more value creation than the “sum of the parts”.

Analyzing and planning such portfolios as an aggregate investment results in identifying higher-value investment scenarios and drives superior operational efficiency. The period-by-period nature of project investment horizons and their associated returns requires taking a holistic view, in order to maximize portfolio performance.

Project dependencies, strategic criteria, and risk diversification further support the need for taking a portfolio perspective in allocating organizational resources. Viewing project investments in a portfolio context “unlocks” hidden value available in your managerial decision making.



Optimize Financial Performance, Strategic Alignment, and Risk Diversification

This 1-day skills development course will enable portfolio/business analysts, functional-area managers, and executives to understand the project-level business case requirements and portfolio analysis methodologies needed for effective portfolio management. We will focus on the technical modeling and analysis techniques required to identify optimal portfolio investment plans and to answer the “end-of-the-day” questions:

- How does a given plan’s business performance compare to alternatives within our budget and headcount constraints? Are we capturing the value available to us, given our opportunities?
- How well aligned is the recommended plan with our strategic and market-related criteria? Are we “spending” our resources consistent with our strategic intentions?
- What resource bottlenecks are incurred from development pipeline constraints? When and where will we need additional staff, budget, and/or time to support the plan?
- What confidence do we have in the plan being executed on-time, on-budget, and with minimal incremental resource needs? Have we appropriately diversified our various risk exposures?

Rigorous Capabilities for Objective, Transparent, Defensible Decision Making

“Although I have become a strong proponent of PROXI’s software, their training also helped challenge my own thinking about decision analysis, how to make it more objective, more analytically rich and less subjective. The PROXI training reminded me of some core financial and business principles I’d forgotten over the years. I left the training thinking, “we can do so much better, and we should do so much better.”



Jill Feeler
Strategy & Operational Planning
Memjet Technology, Inc.

“A careful look at PROXI’s methodology suggests that business decision making will never be the same. PROXI’s approach operationally brings back the science into management science. Business leaders can now make educated decisions using rigorous analytics, while adding accountability to the decision process. Most impressively, PROXI’s techniques can put a dollar value on strategic decisions, breaking new grounds in management strategy analysis.”



Steven Tadelis
Associate Dean
Chief Strategy Officer
Haas School of Business
University of California, Berkeley

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Course Curriculum & Information

Morning Session

- Project Selection vs. Project Portfolio Planning
- Projects as Real Assets of a Financial Portfolio
- Project-level Business Case & Value Creation
- Financial Metrics & Investment Decision Rules
- Organizational Resource Modeling
- Portfolio-level Metrics & Valuation

Afternoon Session

- Portfolio Performance Optimization
- Sensitivity Analysis & Efficient Frontiers
- Planned Resource Utilization
- Comparing Scenarios & Quantifying "What-ifs"
- Portfolio-level Strategy Implementation
- Project-specific Risk vs. Risk Diversification



Course Dates & Locations: **see website for details**
1-Day Course Fee (per attendee): **USD \$750***

To register, please call or email us at:
+1 (602) 910-4300
training@proxidecisions.com

*Group rates available for both public venue course offerings and on-site corporate client courses.

Course fee includes lunch, refreshments, and bound course training materials.

Class Size: We limit our training courses to 10 students, to ensure we can provide ample opportunity for student questions and discussions that are most relevant to the students' current business environments.

Refund Policy: We understand that there may be unanticipated reasons that prevent you from attending a course for which you registered. If you cancel at least 14 days in advance of the course, your payment can be applied towards registration for an alternate course within one year of the original course date. If you cancel within 14 days of the course, you may send an alternate attendee from your organization.

Course Cancellation: In the event that we need to change the dates of a course, we will contact registrants immediately. PROXI Management Decisions reserves the right to reschedule or cancel courses, due to low enrollment. In the unlikely case that a course is cancelled, we will promptly refund your course fee.

Instructor Biography



Jeff Baum has more than 20 years of new product development and technology management experience within the semiconductor, imaging & printing, medical devices, telecommunications, and enterprise software industries. Working with customers to define new product requirements, to forecast the financial performance of new product candidates, and to manage development programs through market introduction, Jeff has been building project business cases throughout his career. Jeff has lived project business case development and portfolio decision making at global companies such as Motorola, Hewlett-Packard, TRW, Agilent Technologies, Freescale Semiconductor, ACCO Brands, Alcatel-Lucent, and Fujitsu. Jeff has an MBA—Corporate Finance, an MS Electrical Engineering—Circuits & Instrumentation, and a BS Electrical Engineering—Biomedical Engineering.