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COURSE BROCHURE

Advanced Transformation Portfolio and Benefits Realisation Training Course

18 – 29 October 2027
Milan

jupiterprime.uk

info@jupiterprime.uk

Registered in the United Kingdom and Saudi Arabia

Advanced Transformation Portfolio and Benefits Realisation Training Course

Ref: 318_10772 **Date:** 18 – 29 October 2027 **Location:** Milan **Fees:** 12400 GBP

Transformation Portfolio and Benefits Realisation is a 2-week advanced training course for transformation managers, PMO leads and IT directors who must produce a Transformation Portfolio Blueprint covering maturity baseline, target operating model, sequenced roadmap and benefits register. Organisations now run dozens of digital initiatives at once, and without portfolio discipline funding scatters and value goes unmeasured. Jupiter Prime Training delivers this course on Transformation Portfolio and Benefits Realisation.

Why Transformation Portfolio and Benefits Realisation Matters Now

Three forces shape transformation portfolios today: boards demanding evidence that digital spend returns value, cloud and automation platforms that change faster than annual planning cycles, and workforces asked to absorb several operating shifts at once. An organisation that manages its portfolio well funds the initiatives that move strategic measures and retires the rest early; one that manages it badly accumulates half-finished platforms, duplicated vendors and change fatigue. The course rests on two recognised frameworks: Control Objectives for Information and Related Technologies COBIT 2019 for enterprise IT governance, and the Information Technology Infrastructure Library ITIL 4 for digital service management.

Who Gains Most from Transformation Portfolio and Benefits Realisation

- Portfolio office heads who decide which initiatives receive funding each quarter
- Transformation directors accountable for the target operating model and its rollout
- IT directors who align architecture, platforms and vendors with the roadmap
- Benefits owners who report realised value to executive sponsors
- Change leads who plan readiness and adoption across business units

A transformation office that sends its portfolio, architecture and change leads together gains most, because the course builds one shared language for sequencing and value.

Transformation Portfolio and Benefits Realisation Capabilities

Participants move from scattered initiative lists to a governed portfolio whose every item traces to a capability gap and a measurable benefit.

- Assess digital maturity across capabilities and score the baseline — executive sponsors
- Design a target operating model with clear capability ownership — business unit heads
- Weigh initiatives on strategic fit, dependency and capacity — portfolio boards
- Build a sequenced roadmap with release waves and decision gates — investment committees
- Specify benefits with owners, baselines and leading indicators — finance partners
- Communicate readiness and adoption risks to frontline leaders — change sponsors

Key Transformation Portfolio and Benefits Realisation Terms

- Digital maturity model — a scale that rates how well an organisation's capabilities, processes and platforms support digital ways of operating.
- Target operating model — the intended future design of processes, people, technology and governance that the transformation aims to reach.
- Benefits register — a record of each expected benefit with its owner, baseline, target measure and realisation date.
- Capability map — a structured view of what the organisation must be able to do, independent of current structure or systems.
- Stage gate — a decision point where an initiative must show evidence before receiving further funding or scope.
- Value stream — the end-to-end sequence of activities that delivers an outcome to a customer or internal user.

Transformation Portfolio and Benefits Realisation Day by Day

Day 1: Forces Reshaping Transformation Portfolios

- Board Expectations of Digital Spend — Setting Portfolio Accountability Lines
- Platform and Automation Cycles — Planning Horizons Beyond Annual Budgets
- Workforce Absorption Capacity — Pacing Concurrent Operating Shifts
- Transformation Failure Patterns — Early Warning Signs to Monitor
- Portfolio Charter Drafting — Scope and Mandate of the Transformation Office

Day 2: Maturity Assessment and Baseline

- Digital Maturity Model Selection — Choosing Dimensions That Fit the Organisation
- Capability Scoring Interviews — Evidence Behind Each Maturity Rating
- Process Mining Snapshots — Locating Friction in Current Value Streams
- Technical Debt Inventory — Platforms Constraining Future Change
- Baseline Heatmap — Where the Largest Capability Gaps Sit

Day 3: Designing the Target Operating Model

- Capability Map Construction — Defining What the Organisation Must Do
- Operating Model Canvas — Linking Processes, People and Platforms
- Product-Aligned Team Structures — Ownership of Customer Journeys
- Shared Service and Platform Teams — Reuse Versus Local Control
- Decision Rights Matrix — Who Approves Change at Each Level

Day 4: Governance with COBIT 2019 and ITIL 4

- COBIT 2019 Governance Objectives — Aligning Portfolio Choices with Enterprise Goals
- COBIT 2019 Design Factors — Tailoring Governance to Context
- ITIL 4 Service Value System — Connecting Change to Service Outcomes
- Transformation Steering Committee Design — Escalation and Arbitration Routes
- Policy Exceptions Log — Controlled Deviations from Standards

Day 5: Business Case Discipline

- Strategic Fit Scoring — Ranking Initiatives Against Enterprise Objectives
- Total Cost of Ownership Modelling — Run Costs After Go-Live
- Options Appraisal — Build, Buy, Partner or Defer
- Stage Gate Criteria — Evidence Required Before Further Funding
- Kill Criteria — Stopping Initiatives That Lose Their Rationale

Day 6: Roadmap Sequencing and Dependencies

- Dependency Mapping — Revealing Hidden Links Between Initiatives
- Release Wave Planning — Grouping Change the Business Can Absorb
- Capacity Balancing — Matching Demand to Delivery Teams
- Minimum Viable Transformation Slices — Early Proof of Value
- Roadmap Scenario Testing — Effects of Delays and Budget Cuts

Day 7: Vendor Ecosystems and Platforms

- Vendor Landscape Rationalisation — Reducing Overlapping Platforms and Contracts
- Cloud Consumption Models — Commitments Versus Flexibility
- Integration Architecture Choices — Interfaces Between Core and New Platforms
- Strategic Partner Scorecards — Holding Suppliers to Transformation Outcomes
- Exit and Lock-In Assessment — Preserving Future Options

Day 8: Benefits Tracking and Value Measurement

- Benefits Dependency Network — Tracing Enablers to Business Outcomes
- Benefits Register Setup — Owners, Baselines and Target Measures
- Leading and Lagging Indicators — Signals Before Financial Results
- Portfolio Dashboards — Reporting Realised Value to Sponsors
- Post-Implementation Reviews — Lessons Feeding the Next Funding Cycle

Day 9: Change Adoption and Readiness

- Change Impact Assessment — Which Roles Shift and How Much
- Readiness Surveys — Measuring Willingness and Ability to Change
- Change Network Design — Local Champions in Each Business Unit
- Adoption Metrics — Usage, Proficiency and Sustained Behaviour
- Change Saturation Heatmap — Protecting Teams From Overload

Day 10: Practising the Transformation Portfolio Blueprint

- Baseline Heatmap Review — Confirming Gaps the Portfolio Must Close
- Sequenced Roadmap Walkthrough — Testing Waves Against Capacity
- Benefits Register Challenge — Peer Scrutiny of Owners and Measures
- Steering Committee Simulation — Defending Funding Decisions
- Transformation Portfolio Blueprint Completion — Ready for Sponsor Sign-Off

Applying Transformation Portfolio and Benefits Realisation After the Course

- Run a capability scoring round with business unit heads and publish a baseline heatmap that ranks the five largest maturity gaps.
- Rebuild the benefits register for live initiatives, assigning a named owner, baseline and leading indicator to every expected benefit.

Transformation Portfolio and Benefits Realisation Questions FAQ

What is Transformation Portfolio and Benefits Realisation and why does it matter now?

Transformation Portfolio and Benefits Realisation is the discipline of funding, sequencing and tracking a whole portfolio of digital initiatives until their promised benefits are proven. It matters now because boards expect measured returns from digital spend while platforms and workforce demands change faster than annual plans.

Which roles gain most from Transformation Portfolio and Benefits Realisation training?

Portfolio office heads, transformation directors, IT directors, benefits owners and change leads gain most. Each holds part of the decision chain from funding to adoption, and the course gives them a shared method for sequencing initiatives and proving value.

How does Transformation Portfolio and Benefits Realisation differ from a digital leadership course?

Transformation Portfolio and Benefits Realisation focuses on running the portfolio once direction is set. A leadership course shapes vision, culture and sponsorship; this course covers maturity baselines, operating model design, roadmap waves, vendor rationalisation and benefits tracking that turn that ambition into governed delivery.

What do you bring back from Transformation Portfolio and Benefits Realisation training?

You bring back a structured portfolio artefact built on your own context. It combines a maturity baseline, a target operating model sketch, a sequenced roadmap and a benefits register that your steering committee can review and adopt.

Transformation Portfolio and Benefits Realisation: The Way Forward

The Transformation Portfolio Blueprint first informs the next funding round, when the steering committee decides which initiatives continue, merge or stop. Portfolio office heads and sponsors use it to defend sequencing choices and track realised benefits. After its first use, revisit the maturity baseline and the change saturation picture, since both shift as early waves land and reshape what the organisation can absorb next.