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# Advanced Project Portfolio Governance and Strategy Alignment Training Course

10 – 21 May 2027
Madrid

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**Ref:** 3293_125557 **Date:** 10 – 21 May 2027 **Location:** Madrid **Fees:** 9500 GBP

Project Portfolio Governance and Strategy Alignment is a 2-week advanced training course for portfolio managers, portfolio office heads and strategy office staff who must turn executive intent into a funded, balanced set of initiatives, and it produces a Portfolio Steering Pack ready for the next investment round. Organisations now face more proposals than people, money and attention can carry, so choosing well matters more than delivering everything. Jupiter Prime Training offers this course for leaders who steer investment choices.

## Why Project Portfolio Governance and Strategy Alignment Matters Now

Three forces shape this discipline today. Executive teams revise strategy more often, so a portfolio fixed at the start of a budget year quickly drifts from intent. Specialist skills in digital, engineering and data work are scarce, so capacity rather than money often limits what can start. Boards and investors also ask sharper questions about the value each initiative returns. An organisation that governs its portfolio well stops weak work early, concentrates scarce talent on the initiatives that matter and can explain every choice. One that governs it poorly spreads effort thinly, finishes little and loses credibility with its sponsors.

## Who Gains Most from Project Portfolio Governance and Strategy Alignment

- Leaders who chair or prepare investment and steering boards and decide which proposals receive funds
- Heads of portfolio offices responsible for scoring, reporting and decision records across many initiatives
- Strategy office specialists who translate corporate objectives into measurable targets for change work
- Finance business partners who shape funding envelopes and challenge forecast returns
- Senior sponsors accountable for benefits long after individual projects close

Teams that send a strategy specialist, a portfolio office lead and a finance partner together gain most, because they can rebuild their investment criteria and board routines as one group.

## Project Portfolio Governance and Strategy Alignment Capabilities

Participants leave able to connect strategic objectives, scarce capacity and funding limits into investment choices that stand up to executive challenge.

- Design a weighted scoring model calibrated to stated objectives — investment board ranking
- Assess the balance of the portfolio across themes, risk and horizon — executive sponsors
- Calculate capacity demand against specialist supply — sequencing and start decisions
- Specify gate criteria for continue, redirect or stop — steering board chairs
- Build benefit profiles with named owners and measures — finance partners and sponsors

- Communicate portfolio health through exception-based dashboards — the board

## Key Project Portfolio Governance and Strategy Alignment Terms

- Project portfolio — the full set of projects and related initiatives an organisation funds to deliver its strategic objectives, managed as one investment.
- Strategic alignment — the degree to which each initiative contributes measurably to stated organisational objectives rather than to local preferences.
- Weighted scoring model — a set of agreed criteria with weights used to compare proposals consistently and rank them for funding.
- Portfolio balancing — adjusting the mix of initiatives across risk, horizon, theme and capacity so the whole set serves strategy.
- Stage gate — a planned decision point where evidence is reviewed and an initiative is continued, redirected or stopped.
- Benefits realisation — the work of planning, tracking and confirming the measurable improvements an initiative was funded to produce.

## Project Portfolio Governance and Strategy Alignment Day by Day

### Day 1: Strategy Signals for the Portfolio

- Strategic Objective Decomposition — Which Goals Each Project Must Serve
- Environmental Scanning Digest — Shifts That Reshape Investment Appetite
- Stakeholder Expectation Map — Whose Priorities Govern the Mix
- Portfolio Scope Statement — What Sits Inside and Outside
- Current Portfolio Inventory — Spotting Orphaned and Duplicated Initiatives

### Day 2: Portfolio Structures and Decision Rights

- Portfolio Hierarchy Design — Grouping Initiatives by Strategic Theme
- Decision Rights Matrix — Who Approves, Pauses or Stops Work
- Steering Board Terms of Reference — Quorum and Escalation Paths
- Tolerance Thresholds — When Deviations Reach Executive Attention
- Portfolio Charter — Mandate Agreed With the Executive Sponsor

### Day 3: Investment Criteria and Scoring

- Weighted Scoring Model — Translating Strategy Into Comparable Numbers
- Criteria Calibration Session — Avoiding Bias Toward Loud Sponsors
- Strategic Contribution Index — Ranking Proposals Against Objectives
- Mandatory Versus Discretionary Split — Protecting Regulatory and Safety Work
- Scoring Audit Trail — Defending Choices to Challenging Stakeholders

### Day 4: Balancing the Mix

- Risk-Return Bubble Chart — Seeing Concentration Across Themes
- Horizon Allocation — Splitting Funds Between Run, Grow and Transform
- Interdependency Network Map — Sequencing Initiatives That Rely on Each Other
- Scenario Trade-Off Comparison — Choosing Between Alternative Portfolio Mixes
- Rebalancing Triggers — When the Mix Drifts From Intent

## Day 5: Capacity and Resource Constraints

- Capacity Heatmap — Matching Demand to Scarce Specialist Skills
- Resource Levelling Across Initiatives — Resolving Peak Clashes
- Constraint-Based Sequencing — Starting Fewer Projects to Finish More
- Funding Envelope Modelling — Phasing Spend Within Annual Limits
- Supplier Capacity Review — Exposure to Shared Contractors

## Day 6: Stage Reviews and Gate Decisions

- Gate Readiness Checklist — Evidence Required Before Release of Funds
- Continue, Redirect or Stop Criteria — Ending Weak Initiatives Early
- Independent Assurance Review — Testing Optimism in Forecasts
- Change Request Impact Lens — Effect on Portfolio Balance
- Gate Outcome Record — Communicating Decisions to Delivery Teams

## Day 7: Benefits Realisation Tracking

- Benefits Dependency Network — Linking Outputs to Strategic Outcomes
- Benefit Profiles and Owners — Accountability Beyond Project Closure
- Leading and Lagging Measures — Early Warning on Value
- Benefits Erosion Analysis — Why Forecast Value Shrinks
- Post-Implementation Value Review — Feeding Lessons Into Future Scoring

## Day 8: Portfolio Performance Reporting

- Executive Portfolio Dashboard — One View of Health and Contribution
- Exception Reporting Rules — What Reaches the Board
- Aggregated Risk Profile — Correlated Threats Across Initiatives
- Narrative Commentary Standards — Turning Metrics Into Decisions
- Reporting Cadence Design — Aligning With Budget and Strategy Cycles

## Day 9: Leading Portfolio Change

- Portfolio Maturity Assessment — Choosing the Next Capability Step
- Sponsor Coaching Conversations — Building Ownership of Trade-Offs
- Saying No Constructively — Declining Proposals Without Losing Trust
- Culture of Transparent Data — Reducing Hidden Shadow Projects
- Portfolio Office Operating Model — Roles, Services and Interfaces

## Day 10: Practising the Portfolio Steering Pack

- Scoring a Live Proposal Set — Applying Calibrated Criteria
- Building a Balanced Scenario — Using Capacity and Funding Limits
- Running a Mock Gate Board — Continue, Redirect or Stop Choices
- Presenting Benefits Evidence — Defending Value to Executives
- Portfolio Steering Pack — Charter, Scenario, Dashboard and Decision Log

## Applying Project Portfolio Governance and Strategy Alignment After the Course

- Recalibrate the weighted scoring model with the executive sponsor and rescore the current proposal pipeline against it
- Run a capacity heatmap across active initiatives and propose which starts to defer at the next steering board

## Project Portfolio Governance and Strategy Alignment Questions FAQ

### What is Project Portfolio Governance and Strategy Alignment and why does it matter now?

It is the discipline of selecting, balancing and steering funded initiatives so together they deliver strategy. It matters now because strategy changes faster, specialist capacity is scarce and boards expect clear evidence of value from every investment.

### Which roles gain most from Project Portfolio Governance and Strategy Alignment?

Portfolio office heads, strategy office specialists, investment board secretaries, finance business partners and senior sponsors gain most. Each shapes how proposals are scored, funded, reviewed and judged on the benefits they return.

### How does Project Portfolio Governance and Strategy Alignment differ from a single project control course?

It looks across many initiatives at once. A project control course tracks cost and schedule on one project, while this course decides which projects should exist, in what order and with what share of scarce people and funds.

### What do you bring back from Project Portfolio Governance and Strategy Alignment?

You bring back a Portfolio Steering Pack: a portfolio charter, a calibrated scoring model, a balanced scenario within capacity and funding limits, an executive dashboard and a gate decision log ready for your next investment board.

## Project Portfolio Governance and Strategy Alignment: The Way Forward

The Portfolio Steering Pack first informs which proposals enter the next funding round and which active initiatives pause. Steering board chairs, portfolio office heads and finance partners use it to argue trade-offs openly. After its first use, revisit the scoring weights against the benefits actually achieved, since real outcomes show which criteria predicted value and which only rewarded persuasive sponsors.