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COURSE BROCHURE

# Advanced Portfolio Prioritisation and Risk Aggregation Training Course

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**jupiterprime.uk**

info@jupiterprime.uk

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# Advanced Portfolio Prioritisation and Risk Aggregation Training Course

**Ref:** 512_18991 **Date:** 22 March – 2 April 2027 **Location:** Vienna **Fees:** 10600 GBP

Portfolio Prioritisation and Risk Aggregation is the subject of this 2-week advanced training course for portfolio managers, PMO directors and investment committee members, who build a prioritised portfolio roadmap with a portfolio risk profile. Organisations now hold more candidate initiatives than their funds, specialists and appetite for exposure can carry at once. Jupiter Prime Training offers this course to leaders who decide which initiatives start, continue, pause or stop.

## Why Portfolio Prioritisation and Risk Aggregation Matters Now

Three groups shape portfolio choices today: boards that expect investment to follow stated strategy, finance functions that release capital in tighter tranches, and delivery units competing for the same scarce engineers, analysts and contractors. Organisations that score candidates consistently, balance demand against capacity and see combined exposure across initiatives fund fewer, stronger projects; those that approve each proposal alone overcommit people and discover correlated threats too late. The course draws on the portfolio and project context set out in ISO 21500:2021 high-level guidance and ISO 21502:2020, alongside the value delivery principles of the Project Management Body of Knowledge Guide PMBOK Guide 7th edition, with cases from energy and digital services.

## Who Gains Most from Portfolio Prioritisation and Risk Aggregation

- Leaders who maintain the portfolio inventory and recommend which initiatives enter or leave it
- Directors who set PMO selection criteria and scoring rules
- Committee members who approve funding tranches and rebalancing proposals
- Finance partners who reconcile portfolio demand with capital envelopes
- Risk owners who consolidate exposure across initiatives for executive reporting

An organisation gains most when a portfolio manager, a PMO director and an investment committee member attend together and agree one scoring model and one risk appetite statement.

## Portfolio Prioritisation and Risk Aggregation Capabilities

Participants practise turning a long list of competing proposals into a funded, sequenced and risk-weighted set of commitments.

- Design a weighted scoring model that links criteria to strategic objectives — the investment committee ranking candidates
- Calculate portfolio capacity against demand for scarce skills and funds — the PMO director sequencing start dates
- Build an aggregated portfolio risk profile from initiative-level exposures — the board reviewing combined threats
- Specify risk appetite and tolerance thresholds for the portfolio — the executive setting limits on concentration
- Weigh rebalancing options when performance or strategy shifts — the committee deciding to accelerate, pause or stop
- Communicate the prioritised roadmap and its trade-offs to sponsors — the sponsors whose initiatives move down the list

## Key Portfolio Prioritisation and Risk Aggregation Terms

- Portfolio — a collection of projects and related initiatives grouped to achieve strategic objectives and managed as one investment set
- Weighted scoring model — a method that rates candidates against agreed criteria, each multiplied by a weight reflecting its strategic importance
- Efficient frontier — the set of portfolio combinations that deliver the most benefit for each level of cost or risk
- Risk aggregation — combining exposures from individual initiatives to show total portfolio exposure, including correlations and shared causes
- Risk appetite — the amount and type of exposure an organisation is willing to accept in pursuit of its objectives
- Portfolio rebalancing — adjusting the mix, funding or timing of initiatives to restore alignment with strategy, capacity or appetite

## Portfolio Prioritisation and Risk Aggregation Day by Day

## Day 1: Portfolio Context and Strategic Intent

- ISO 21500 Portfolio Context — Positioning Portfolios Within Organisational Strategy
- Strategy Map Translation — Converting Objectives Into Portfolio Criteria
- Portfolio Inventory Baseline — Cataloguing Active and Candidate Initiatives
- Portfolio Categories and Investment Buckets — Run, Grow and Transform Splits
- PMBOK Guide Value Delivery Principles — Linking Portfolio Choices to Outcomes

## Day 2: Selection Criteria and Scoring Models

- Weighted Scoring Model Design — Choosing Criteria and Weights
- Pairwise Comparison of Criteria — Reducing Bias in Weighting
- Scoring Calibration Sessions — Making Scores Comparable Across Units
- Mandatory and Regulatory Initiatives — Ring-Fencing Non-Discretionary Work
- Scoring Sensitivity Testing — Checking Rank Stability Under Weight Changes

## Day 3: Financial and Benefit Lenses

- Net Present Value and Payback Comparison — Ranking Financial Return
- Benefit Scoring Scales — Valuing Non-Financial Outcomes Consistently
- Cost of Delay Estimation — Sequencing by Urgency of Value
- Efficient Frontier Analysis — Selecting Combinations Within Budget
- Dependency Mapping Between Initiatives — Avoiding Orphaned Benefits

## Day 4: Capacity Balancing

- Skills Demand and Supply Heatmap — Exposing Bottleneck Roles
- Capacity-Constrained Sequencing — Setting Feasible Start Dates
- Funding Envelope Phasing — Matching Spend Profiles to Capital Tranches
- Work-in-Progress Limits — Reducing Multitasking Across Initiatives
- Scenario Comparison of Portfolio Mixes — Testing Alternative Commitments

## Day 5: Initiative-Level Exposure Inputs

- Standardised Initiative Risk Ratings — Making Exposures Comparable
- Risk Category Taxonomy — Grouping Threats for Consolidation
- Opportunity Capture in Ratings — Recording Upside Alongside Threats
- Confidence Ratings for Estimates — Weighting Uncertain Submissions
- Data Quality Checks on Submissions — Rejecting Inconsistent Ratings

## Day 6: Portfolio Risk Aggregation

- Correlation and Common Cause Analysis — Finding Shared Drivers of Exposure
- Concentration Analysis by Supplier, Location and Technology — Limiting Single Points
- Aggregated Risk Heatmaps — Presenting Combined Exposure to Boards
- Simulation of Portfolio Outcomes — Estimating Combined Cost Ranges
- Portfolio-Level Contingency Pooling — Sizing Shared Reserves

## Day 7: Risk Appetite and Tolerances

- Risk Appetite Statement Drafting — Expressing Limits in Plain Terms
- Tolerance Thresholds per Category — Setting Triggers for Escalation
- Appetite Versus Profile Comparison — Spotting Breaches Early
- Key Risk Indicators for the Portfolio — Monitoring Leading Signals
- Appetite Calibration With Executives — Agreeing Acceptable Concentration

## Day 8: Rebalancing Decisions

- Portfolio Performance Dashboards — Tracking Benefits, Spend and Exposure
- Stop, Pause or Accelerate Criteria — Making Rebalancing Explicit
- Reallocation of Freed Capacity — Redirecting People After Closures
- Strategy Change Impact Assessment — Re-Scoring After Strategic Shifts
- Rebalancing Proposal Packs — Presenting Options to the Committee

## Day 9: Roadmapping and Committee Engagement

- Portfolio Roadmap Construction — Showing Sequence, Dependencies and Gates
- Trade-Off Narratives for Deprioritised Initiatives — Retaining Sponsor Support
- Investment Committee Decision Records — Documenting Rationale for Choices
- Quarterly Portfolio Review Cadence — Aligning Reviews With Funding Cycles
- Portfolio Communication to Delivery Units — Explaining Priorities and Limits

## Day 10: Practising the Prioritised Portfolio Roadmap

- Scoring Exercise on Candidate Initiatives — Applying Days 2 and 3
- Capacity Scenario Exercise — Applying Day 4 Sequencing Methods
- Aggregated Profile Exercise — Applying Days 6 and 7 Thresholds
- Committee Simulation — Defending Rebalancing Choices From Day 8
- Prioritised Portfolio Roadmap With Risk Profile — Final Peer Review

## Applying Portfolio Prioritisation and Risk Aggregation After the Course

- Re-score the current candidate list with the weighted model and a pairwise-agreed set of weights, then present rank changes to the PMO director
- Build a first aggregated portfolio risk profile from existing initiative ratings and compare it against a draft appetite statement

## Portfolio Prioritisation and Risk Aggregation Questions FAQ

### What is portfolio prioritisation and risk aggregation, and why does it matter now?

Portfolio prioritisation and risk aggregation is the discipline of ranking initiatives against strategy and capacity while viewing their combined exposure. It matters now because demand for investment outstrips funds and specialists, and correlated threats can hit many initiatives at once.

### Which roles gain most from portfolio prioritisation and risk aggregation training?

Portfolio managers, PMO directors and investment committee members gain most. You decide or recommend which initiatives receive funds and people, so consistent scoring, capacity balancing and a clear view of combined exposure shape the quality of your choices.

### How does portfolio prioritisation and risk aggregation differ from a project risk quantification course?

It differs by working across the whole portfolio rather than inside one project. A project risk quantification course models a single schedule and estimate; this course ranks many initiatives, consolidates their exposures and sets appetite limits for the set.

## What do you bring back from portfolio prioritisation and risk aggregation training?

You bring back a prioritised portfolio roadmap with a portfolio risk profile. It includes a weighted scoring model, capacity scenarios, an aggregated exposure view, a draft risk appetite statement and rebalancing criteria ready for committee use.

## Portfolio Prioritisation and Risk Aggregation: The Way Forward

The prioritised portfolio roadmap with a portfolio risk profile first informs the investment committee's choice of which initiatives receive the next funding tranche. Portfolio managers maintain it, PMO directors use it to sequence starts, and risk owners report against its thresholds. After the first rebalancing cycle, revisit whether the scoring weights still reflect strategy and whether correlated exposures were captured.