

# UNIVERSITY OF PLANVIEW

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TRANSLATE STRATEGY INTO RESULTS



## MANAGING STRATEGIES AND PROGRAMS IN PLANVIEW PORTFOLIOS

### OVERVIEW

Managing Strategies and Programs training for Planview Portfolios provides the skills needed to create, build, review, and manage a strategic plan.

This course provides mastery of the core activities required to create and review Strategic portfolios, drive missions and objectives into more detailed strategies, programs, projects, and outcomes, as well as manage and communicate based on strategic business objectives. This will allow you to determine if your organization is supporting the proper strategic and organizational goals and has the resources (human, financial, etc.) to execute them.

### LEARNING OBJECTIVES

At the end of this course, you will learn the following skills:

- Master the screen layout and navigation of the Strategy Portfolio View.
- Create a new strategic program and review its details.
- Designate work or programs that are dependent on one another.
- Associate work items or outcomes to strategic programs so they are visible in your portfolio.
- Use the strategic roadmap to track and update dates, milestones, and releases for strategic programs.
- Review the actual and target baseline dates for strategic programs.
- Work with the financial plans for strategic entities and associated work/outcomes.

### LEARNING LEVEL

#### Intermediate

Intended for learners who have mastered the basics and are ready to delve deeper into the subject. It explores more complex concepts, techniques, and applications, allowing participants to enhance their knowledge and practical skills.

### WHO SHOULD ENROLL

This class is ideal for experienced Project, Program and Portfolio Managers who are responsible for long-range strategic planning on behalf of their organization or business unit.

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## SUMMARY AGENDA

- Strategies (Strategic Planning) Overview
- Strategy Portfolio View
- Add Strategic Programs
- Dependencies between Strategic Programs
- Associate Work or Outcomes
- Strategic Roadmap
- Strategy Baselines
- Strategic Financial Plans
- Financial Maintenance

## FORMAT

- Two (2) half-day sessions in a virtual classroom, or one (1) full-day sessions in an onsite classroom.
- All instructor-led classes are delivered hands-on in a virtual training environment.

## PREREQUISITES

- **Beginner level Planview platform knowledge required.**
- Complete the **Introduction to Planview Portfolios: Concepts and Navigation** e-Learning course.
- Complete the **Introduction to Planview Portfolios: Managing Strategic Programs** e-Learning course.
- Fundamental understanding of Strategic Planning.

## COST

- Private on-site or virtual training is available, email [trainingrequests@planview.com](mailto:trainingrequests@planview.com) to receive a quote.

Ready to get started?  
Contact us for more information!  
[trainingrequests@planview.com](mailto:trainingrequests@planview.com)