TRANSLATE STRATEGY INTO RESULTS

Planview. Portfolios

INVESTMENT AND CAPACITY PLANNING IN PLANVIEW PORTFOLIOS

OVERVIEW

Investment and Capacity Planning training for Planview Portfolios provides an in-depth look at creating and managing investment and capacity planning portfolios.

This course provides the skills necessary to create Planning portfolios which aid in annual, quarterly, or monthly planning, rank investments based on user- selected criteria, compared resource capability with the requested demand to encourage informed planning decisions with capacity in mind, and provides a time-phased display of demand and/or revenue information for continued analysis of new and approved investments. This allows you to make better decisions on which program and project investments to approve based on financial and capacity targets.

LEARNING OBJECTIVES

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

- Demonstrate an understanding of portfolio data.
- Rank potential investments by priority.
- Use what-if scenarios to analyze and shift potential investments.
- Use dependencies to help make investment decisions.
- View detailed demand and target data for accepted or conditional investments from different viewpoints.
- Perform what-if scenarios to determine which potential investments to turn into strategic plans, work, and/or outcomes.
- Publish scenario analysis results back into the investment financial plans.

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, Financial and Portfolio Managers who are responsible for long-range financial and resourcing planning on behalf of their organization or business unit.

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SUMMARY AGENDA

- Planning Overview
- Investment and Capacity Planning Overview
- Planning Portfolios
- Rank View
- Analyze View
- Shift View
- Relationships between Investments
- Balance View
- What-if Scenario Analysis
- Compare Views
- Publish Scenarios

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: Investment and Capacity Plannings** e-Learning course.
- Fundamental understanding of Investment and Capacity Management planning.

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.

COST

- Private on-site or virtual training is available, email trainingrequests@planview.com to receive a quote.

Ready to get started?

Contact us for more information!

trainingrequests@planview.com