

Projects Portfolio Definition Document

[Use this template to define the purpose, staffing, governance and processes of your portfolio and the office assigned to support it. Data provided in the template are for example only.]

An organization’s projects portfolio represents its strategic intent and direction. To a large extent it is the projects portfolio that makes strategy come alive and enables an organization to reach its stated goals. This document describes <Name of organization>’s <Name of portfolio> portfolio. It serves both as the charter for its existence and as the initial planning document for its development. Questions related to this document should be directed to <Name of portfolio Director>.

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1. Portfolio Purpose	
Purpose of the Portfolio – Describe what this portfolio will do for the organization	
Business driver for this portfolio – Describe the factors that led to the creation of this portfolio	
Types of projects, programs and other portfolios that make up this portfolio	
<ul style="list-style-type: none"> • Functional areas whose projects will be included in this portfolio <ul style="list-style-type: none"> ○ Executive Initiatives ○ Finance ○ Sales & Marketing • This portfolio contains two sub-portfolios: Finance and Sales & Marketing • This portfolio is responsible for the 20% of projects that account for 80% of these divisions’ project investment, including both strategic and operational programs and projects. 	
How the portfolio will manage risk (e.g. how investment risk will be measured; degree of risk that is acceptable)	

3. Portfolio Processes

Processes (List the primary processes that the PPM Office will use for management of the portfolio)

- Facilitation of both governance process definition and execution
- Project selection and prioritization
- Project funding (e.g. ensure that project budgets are adequate for their scope; drive the use of confidence limits in all estimates)
- Project resource management

More processes are listed in the licensed template

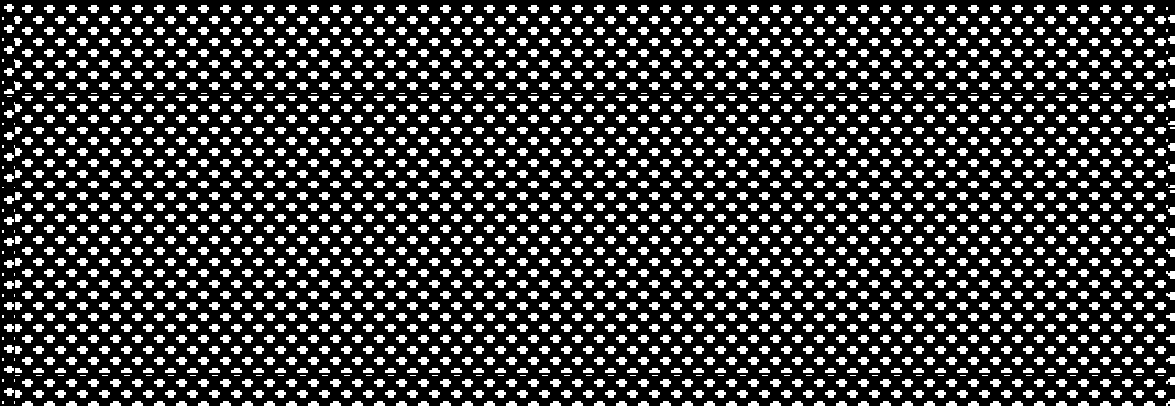
Portfolio communication. The PPM Office will communicate with:

Whom	About	On this schedule
Portfolio Review Board	Current portfolio status and plans for the near future	Quarterly

Metrics for portfolio performance (e.g. milestones, achievement of financial targets and realization of other business value. Financial measure may include aggregate return on investment, NPV etc)

- The PPM Office will use Earned Value data from the EPMO for evaluation of project and program status.

Plan for continual improvement of portfolio performance



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