



PRINCE2[®] Portfolio Management

VERSION 1

Global Best Practice

For every organization and leader ensuring strategic investments deliver optimized value and realized benefits!

Syllabus

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Official Training Materials





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1. Introduction

The PRINCE2® Portfolio Management (Version 1) Official Book provides advice and examples of how to apply principles, practices, and techniques that help optimize an organization's investment in change alongside its Business as Usual (BAU) work. Qualifications are offered at two levels: **Foundation** and **Practitioner**.

The primary purpose of the syllabus is to provide a basis for accreditation of people involved with the selection and management of portfolios of projects and programmes. It documents the learning outcomes related to the use of PRINCE2 Portfolio Management and describes the requirements a candidate is expected to meet to demonstrate that these learning outcomes have been achieved at each qualification level.

The target audience for this document is:

- Exam Board
- Exam Panel
- PeopleCert Assessment Team
- Accredited Training Organizations.

This syllabus informs the design of the exams and provides accredited training organizations with a more detailed breakdown of what the exams will assess. Details on the exam structure and content are documented in the PRINCE2 Portfolio Management Foundation and Practitioner Design documents.

2. Foundation qualification

2.1 Purpose of the Foundation level qualification

The purpose of the Foundation level qualification is to confirm that a candidate has sufficient knowledge and understanding to work as an informed member of a portfolio office or in a range of portfolio management roles. The Foundation level qualification is also a pre-requisite for the Practitioner level qualification.

2.2 Target audience

This qualification is aimed at those involved in a range of formal and informal portfolio management roles encompassing investment decision making, project and programme delivery, and benefits realization. It is relevant to all those involved in the selection and delivery of business change initiatives including: members of Management Boards and Directors of Change; Senior Responsible Owners (SROs); portfolio, programme, project, business change and benefits managers; and business case writers and project appraisers.

2.3 High level performance definition of a successful candidate

This level aims to measure whether a candidate understands the principles, cycles, practices, techniques, roles, responsibilities, documents, and organizational context within which portfolio management operates. Specifically, to know and understand the:

- scope and objectives of portfolio management and how it differs from programme and project management
- benefits from applying portfolio management
- context within which it operates
- principles upon which successful portfolio management is based
- approaches to implementation, the factors to consider in maintaining progress, and how to assess the success of portfolio management
- purposes of the portfolio management definition and delivery cycles and their component practices, and relevant techniques applicable to each practice
- purpose and key content of the major portfolio documents
- scope of key portfolio management roles.

Only learning levels 1 (Knowledge) and 2 (Comprehension) are tested at Foundation level.

3. Practitioner level qualification

3.1 Purpose of the Practitioner level qualification

The purpose of the Practitioner level qualification is to confirm whether the candidate has achieved sufficient understanding of how to apply and tailor the PRINCE2® Portfolio Management Official Book and to analyse portfolio data, documentation and roles in relation to a scenario situation. A candidate who has successfully achieved the Practitioner level should, with suitable support, be able to advise on the implementation of appropriate practices and techniques, and apply the method to a live portfolio, but may not be sufficiently skilled to do this appropriately for all situations. Their individual expertise, the complexity of the portfolio, and the support provided will also influence the impact the Practitioner can achieve.

3.2 Target audience

This qualification is aimed at those involved in a range of formal and informal portfolio management roles encompassing investment decision making, project and programme delivery, and benefits realization. It is relevant to all those involved in the selection and delivery of business change initiatives including: members of Management Boards and Directors of Change; Senior Responsible Owners (SROs); portfolio, programme, project, business change and benefits managers; and business case writers and project appraisers.

3.3 High level performance definition of a successful candidate

Candidates should be able to apply and understand how to tailor PRINCE2 Portfolio Management effectively. Specifically, candidates should be able to demonstrate their ability to:

- define the business case to get senior management approval for portfolio management
- plan the implementation of portfolio management
- select and adapt PRINCE2 Portfolio Management principles, practices and techniques to suit different organizational environments
- evaluate examples of PRINCE2 Portfolio Management information (including documents and role descriptions)
- analyse the solutions adopted in relation to a given scenario.

The Practitioner level syllabus will test learning at levels 3 (Application) and 4 (Analysis).

4. Learning outcomes assessment model

A classification widely used when designing assessments for certification and education is the Bloom's Taxonomy of Educational Objectives. This classifies learning objectives into six ascending learning levels, each defining a higher degree of competencies and skills. (*Bloom et al, 1956, Taxonomy of Educational Objectives*).

PeopleCert have incorporated this into a Learning Outcomes Assessment Model which is used to provide a simple and systematic means for assessing and classifying the learning outcomes for PeopleCert qualifications.

This structured approach helps to ensure:

- a clear delineation in learning level content between different qualification levels
- that learning outcomes are documented consistently across different areas of the Official Book
- that exam questions and papers are consistent and are created to a similar level of difficulty.

PRINCE2 Portfolio Management learning outcomes assessment model

	1. Knowledge	2. Comprehension	3. Application	4. Analysis
Generic definition from PeopleCert Learning Outcomes Assessment Model	Know key facts, terms and concepts from the Official Book.	Understand key concepts from the Official Book.	Be able to apply key concepts relating to the syllabus area for a given scenario.	Be able to analyse and distinguish between appropriate and inappropriate use of the method/guidance for a given scenario situation.
Portfolio Management Qualification Learning Outcome Assessment Model	Know facts, including terms, principles, cycles, practices, techniques, documents, roles and responsibilities from the Official Book.	Understand the terms, principles, cycles, practices, techniques, documents, roles and responsibilities in relation to portfolio management and the organizational context within which they operate.	Be able to apply, with appropriate tailoring, the principles, practices, techniques, roles and responsibilities to suit the organizational circumstances, and in particular: (i) design and apply appropriate strategies to implement, sustain and measure portfolio management; (ii) appropriate use of portfolio definition practices and relevant techniques; (iii) appropriate use of portfolio delivery practices and relevant techniques; and (iv) appropriate use of portfolio documentation and involvement of the relevant	Be able to identify, analyse and distinguish between appropriate and inappropriate use of the guidance through appraisal of the justification, planning, design, implementation and operation of portfolio management for a given scenario.

5. Syllabus areas

The syllabus is presented by syllabus areas. This is the unit of learning which may relate to a chapter from the Official Book or several concepts commonly grouped together in a training course module.

The following syllabus areas are identified.

Syllabus area code	Syllabus area title
OV	Overview
IS	Implement, sustain, and measure
SO	Strategic and organizational context
PP	Portfolio management principles
DF	Portfolio definition cycle
DL	Portfolio delivery cycle
RD	Roles and documentation

Notes: Questions based on a syllabus area may refer to material from other sections of the PRINCE2 Portfolio Management Official Book.

6. Syllabus presentation

For each syllabus area learning outcomes for each learning level are identified. Each learning outcome is then supported by a description of the requirements that a candidate is expected to meet to demonstrate that the learning outcome has been achieved at the qualification level indicated. These are shown as syllabus topics.

All Foundation level requirements are assumed to have been met for Practitioner level and are not directly assessed again, although Foundation level knowledge and understanding will be used when demonstrating application and analysis learning outcomes for the Practitioner level.

Each of the syllabus areas is presented in a similar format as follows:

Syllabus area code DF [2]		Syllabus area : PRINCE2 Portfolio Management syllabus area [1]	Foundation	Practitioner	Primary References
Level	Topic				
Know fact, terms and concepts relating to the syllabus area. [3] Specifically to recall:					
01 [4]	01 [5]	[6]	[7]		[8]
01	02				

Key to the Syllabus Area table

- | | | |
|---|--|---|
| 1 | Syllabus Area | Unit of learning, for example chapter of the Official Book or course module. |
| 2 | Syllabus Area Code | A unique 2-character code identifying the syllabus area. |
| 3 | Learning Outcome
(topic header shown in bold) | A statement of what a candidate will be expected to know, understand or do. |
| 4 | Level | Classification of the learning outcome against the PeopleCert OTE Learning Outcomes Assessment Model. |
| 5 | Topic Reference | Number of the topic within the learning level. |
| 6 | Topic Description | Description of what is required of the candidate to demonstrate that a learning outcome has been achieved at the qualification level indicated. |
| 7 | Foundation/Practitioner | Shows at which qualification level the topic is assessed. N.B A topic is only assessed at one qualification level. |
| 8 | Primary Reference | The main reference supporting the topic. |

7.Important points

The following points about the use of the syllabus should be noted.

7.1 PRINCE2 Portfolio Management Official Book references

The PRINCE2 Portfolio Management Official Book references provided should be considered to be indicative rather than comprehensive, that is there may be other valid references within the Official Book.

In practice, at Practitioner level, questions based on a syllabus topic may require knowledge of material from other sections of the PRINCE2 Portfolio Management Official Book. This will be clear from the context of the question and the scenario.

The references provided include sections (for example 4.7) and sub-sections (for example 4.3.4). Where a specific section is referenced, for example 4.9, this refers to that section only — it does not refer to its sub-section, for example 4.9.1 to 4.9.5. However, where a range of sections is referenced, for example 4.3 – 4.4, all sub-sections of the referenced sections are meant to be included.

7.2 Syllabus exclusions

Examinations will be based on the main PRINCE2 Portfolio Management Official Book and won't include items only addressed in the accompanying 'An Executive Guide to Portfolio Management'.

The **examples** shown in the shaded boxes throughout the PRINCE2 Portfolio Management Official Book are not examined.

Syllabus area code OV		Syllabus area: Overview	Foundation	Practitioner	Primary Official Book Reference
Level	Topic				
Know facts, terms, and concepts relating to an overview of portfolio management. Specifically, to recall:					
01	01	The definitions of portfolio and portfolio management.	✓		2.3
01	02	The portfolio management model and the relationship between the principles, cycles, practices and relevant techniques.	✓		2.4
01	03	The names of the portfolio definition practices.	✓		6.1
01	04	The names of the portfolio delivery practices.	✓		7.1
Understand the terms and concepts relevant to an overview of portfolio management. Specifically, to identify:					
02	01	The scope of portfolios and portfolio management and the differences from projects/project management and programmes/programme management.	✓		2.3
02	02	The local circumstances that will affect how the PRINCE2 Portfolio Management principles and practices will be adapted and how cost effective approaches can be adopted.	✓		2.2
02	03	The objectives and benefits of portfolio management.	✓		2.2, 2.5
Be able to apply and tailor PRINCE2 Portfolio Management to a scenario. Specifically to:					
		There are no level 3 topics for this syllabus area.*			
Be able to identify, analyse, and distinguish between appropriate and inappropriate application of the syllabus area to a scenario. Specifically, to analyse:					
		There are no level 4 topics for this syllabus area.*			

* Overview topics are not specifically included at Practitioner level as they may be examined within the other relevant syllabus areas.

Syllabus area code IS		Syllabus area: Implement, sustain and measure	Foundation	Practitioner	Primary Official Book Reference
Level	Topic				
		Know facts, terms, and concepts relating to implementing, sustaining and measuring portfolio management. Specifically, to recall:			
01	01	The three broad approaches to implementing portfolio	✓		5.3
01	02	The benefits of assessing the impact of portfolio management.	✓		Appendix F
		Understand how to implement, sustain, and measure portfolio management. Specifically, to identify:			
02	01	When each approach to implementation is most relevant, the advantages of planned approaches to implementation, and the first seven steps (and their benefits) in a staged implementation of portfolio management.	✓		5.3, 2.2
02	02	The factors to consider in sustaining progress.	✓		5.4
02	03	Approaches to assessing portfolio management maturity and the impact of portfolio management including examples of performance metrics that can be employed.	✓		7.2.2.5 & Appendix F
		Be able to apply and tailor the recommended approaches taken to implementing, sustaining, and measuring portfolio management to a scenario. Specifically to:			
03	01	Identify appropriate approaches when implementing, sustaining, and measuring portfolio management for a given scenario, including: 1. Selection of an appropriate approach to implementation. 2. Coordination of portfolio management with key corporate functions. 3. Designing and evaluating approaches to portfolio governance. 4. Designing a strategy to sustain progress. 5. Building and maintaining organizational energy to support effective operation of the portfolio definition and delivery cycles. 6. Assessing progress encompassing process maturity and evidence of impact.		✓	5.3, Chapter 3 4.4, 4.6, 7.7, 5.4, 4.3 4.7, 5.5 Appendix F
		Be able to identify, analyse and distinguish between appropriate and inappropriate application of the recommended approaches to implementing, sustaining and measuring portfolio management within a scenario. Specifically to analyse:			
04	01	Whether recommended approaches to implementing, sustaining, and measuring portfolio management have been undertaken appropriately in the context of a given scenario, with reasons.		✓	5.3 Chapter 3 4.4, 4.6, 7.7 5.4, 4.3 4.7, 5.5 Appendix F

Syllabus area code SO		Syllabus area: Strategic and organizational context	Foundation	Practitioner	Primary Official Book Reference
Level	Topic				
		Know facts, terms, and concepts relating to the relationships between portfolio management and other corporate functions and activities with a role in delivering strategic objectives. Specifically, to recall:			
01	01	The 6 key functions/activities that portfolio management needs to coordinate with to achieve strategic objectives.	✓		3.1
		Understand the key aspects of the relationships between the portfolio and other corporate functions and activities with a role in delivering strategic objectives. Specifically, to identify:			
02	01	How portfolio management and business as usual (BAU) coordinate to deliver strategic objectives.	✓		3.2
02	02	How portfolio management and strategic planning coordinate to deliver strategic objectives.	✓		3.3
02	03	How portfolio management and budgeting and resource allocation coordinate to deliver strategic objectives.	✓		3.4
02	04	How portfolio management and programme and project management coordinate to deliver strategic objectives.	✓		3.5
02	05	How portfolio management and performance management coordinate to deliver strategic objectives.	✓		3.6
02	06	How portfolio management supports effective corporate governance.	✓		3.7
		Be able to apply and tailor PRINCE2 Portfolio Management to a scenario. Specifically to:			
		There are no level 3 topics for this syllabus area.*			
		Be able to identify, analyse, and distinguish between appropriate and inappropriate application of the syllabus area to a scenario. Specifically, to analyse:			
		There are no level 4 topics for this syllabus area.*			

* Strategic and organizational context topics are not specifically included at Practitioner level because they are examined with the Implement, sustain and measure syllabus area in Question 1.

Syllabus area code PP		Syllabus area: Portfolio management principles	Foundation	Practitioner	Primary Official Book Reference
Level	Topic				
		Know facts, terms, and concepts relating to the principles upon which efficient and effective approaches to portfolio management are built. Specifically, to recall:			
01	01	The names of the five principles upon which effective portfolio management is based.	✓		Figure 2.1
		Understand the principles upon which efficient and effective approaches to portfolio management are built. Specifically, to identify:			
02	01	The keys to success in relation to principle 1: senior management commitment and specifically, the ways in which: 1. Senior management engagement supports effective portfolio management. 2. Senior managers should support portfolio management.	✓		4.3
02	02	The keys to success in relation to principle 2: governance alignment, and issues to consider in an effective portfolio governance structure.	✓		4.4
02	03	The keys to success in relation to principle 3: strategy alignment, and specifically: 1. Approaches and techniques to align programmes and projects with organizational strategy. 2. Techniques that facilitate strategic alignment even where strategic measures are not clearly defined.	✓		4.5
02	04	The keys to success in relation to principle 4: portfolio office, and specifically: 1. The services it provides. 2. How it differs from a programme or project office.	✓		4.6
02	05	The keys to success in relation to principle 5: an energized change culture and specifically: 1. The elements of an energized change culture. 2. The energy states. 3. Sources of organizational energy.	✓		4.7, 5.5

Syllabus area code PP	Syllabus area: Portfolio management principles	Foundation	Practitioner	Primary Official Book Reference
	Be able to apply and tailor the portfolio management principles to a scenario. Specifically to:			
	There are no level 3 topics for this syllabus area.*			
	Be able to identify, analyse and distinguish between appropriate and inappropriate application of the portfolio management principles to a scenario. Specifically, to analyse:			
	There are no level 4 topics for this syllabus area.*			

* Portfolio management principles topics are not specifically included at Practitioner level because they are examined with the 'implement, sustain and measure' syllabus area in Question 1 (senior management commitment, governance alignment, portfolio office and energized change culture) and with the 'portfolio definition cycle (strategy alignment)' syllabus area in Question 2.

Syllabus area code DF		Syllabus area: Portfolio definition cycle	Foundation	Practitioner	Primary Official Book Reference
Level	Topic				
Know facts, terms, and concepts relating to the portfolio definition cycle. Specifically, to recall the purpose(s) of:					
01	01	The portfolio definition cycle and its key output.	✓		5.6.1
01	02	The portfolio definition practices: 1. Understand 2. Categorize 3. Prioritize 4. Balance 5. Plan	✓		6.2.1 6.3.1 6.4.1 6.5.1 6.6.1
Understand the terms and concepts relating to the portfolio definition cycle. Specifically, to identify:					
02	01	The results of a well functioning portfolio definition cycle and the implications where this is not the case.	✓		5.6.2, 5.6.3
02	02	The techniques, key features and uses, of: 1. Three point estimating and reference class forecasting. 2. Driver-based strategic contribution analysis. 3. Multi-criteria analysis. 4. Decision conferencing. 5. Clear line of sight planning.	✓		6.4.2, 7.2.2.2, Glossary 4.5 6.4.2 6.4.2, Glossary
02	03	What is involved and the keys to success in the understand practice.	✓		6.2.2
02	04	What is involved and the keys to success in the categorize practice.	✓		6.3.2
02	05	What is involved and the keys to success in the prioritize practice.	✓		6.4.2, 6.4.3
02	06	What is involved and the keys to success in the balance practice.	✓		6.5.2, 6.5.3
02	07	What is involved and the keys to success in the plan practice.	✓		6.6.2
Be able to apply and tailor the practices and techniques of the portfolio definition cycle to a scenario. Specifically to:					
03	01	Identify appropriate practices and techniques within the portfolio definition cycle when: 1. Understanding the current portfolio. 2. Splitting the portfolio into organizationally appropriate categories or segments. 3. Using appropriate approaches to prioritize the portfolio. 4. Considering what factors need to be taken into account in balancing the portfolio. 5. Completing a portfolio strategy and delivery plan.		✓	6.2 6.3 6.4, 4.5 6.5 6.6

Syllabus area code DF		Syllabus area: Portfolio definition cycle	Foundation	Practitioner	Primary Official Book Reference
		Be able to identify, analyse, and distinguish between appropriate and inappropriate application of portfolio definition practices and techniques to a scenario. Specifically, to analyse:			
04	01	Whether the approaches adopted are appropriate, with reasons, in a given scenario when: 1. Understanding the current portfolio. 2. Categorizing the portfolio. 3. Prioritizing the portfolio. 4. Balancing the portfolio. 5. Completing a portfolio strategy and delivery plan.		✓	6.2 6.3 6.4, 4.5 6.5 6.6

Syllabus area code DL		Syllabus area: Portfolio delivery cycle	Foundation	Practitioner	Primary Official Book Reference
Level	Topic				
Know facts, terms, and concepts relating to the portfolio delivery cycle. Specifically, to recall the purpose(s) of:					
01	01	The portfolio delivery cycle.	✓		5.7.1
01	02	The portfolio delivery practices: 1. Management control 2. Benefits management 3. Financial management 4. Risk management 5. Stakeholder engagement 6. Organizational governance 7. Resource management	✓		7.2.1 7.3.1 7.4.1 7.5.1 7.6.1 7.7.1 7.8.1
Understand the terms and concepts relating to the portfolio delivery cycle. Specifically, to identify:					
02	01	The results of a well-functioning portfolio delivery cycle and the implications where this is not the case.	✓		5.7.2, 5.7.3
02	02	The techniques of: 1. Management by exception 2. One version of the truth 3. Staged release of funding 4. Clear line of sight reporting 5. Champion-challenger model	✓		7.2,2.3, Glossary 7.2.2.3, Glossary 7.2.2.2, 7.4.2 7.2.2.3, Glossary 7.6.2, Glossary
02	03	What is involved, the main elements, and keys to success of the management control practice.	✓		7.2.2
02	04	What is involved, the main elements, and keys to success of the benefits management practice.	✓		7.3.2
02	05	What is involved, the main elements, and keys to success of the financial management practice.	✓		7.4.2
02	06	What is involved, the main elements, and keys to success of the risk management practice.	✓		7.5.2
02	07	What is involved, the main elements, and keys to success of the stakeholder engagement practice.	✓		7.6.2-4
02	08	What is involved, the main elements, and keys to success of the organizational governance practice.	✓		7.7.2
02	09	What is involved, the main elements, and keys to success of the resource management practice.	✓		7.8.2
02	10	The challenges and solutions to effective dependency management.	✓		7.5.3

Syllabus area code DL		Syllabus area: Portfolio delivery cycle	Foundation	Practitioner	Primary Official Book Reference
Be able to apply and tailor the practices, techniques, and responsibilities of the portfolio delivery cycle to a scenario. Specifically to:					
03	01	Identify appropriate practices and techniques within the portfolio delivery cycle encompassing: 1. Management control 2. Portfolio-level benefits management 3. Portfolio-level financial management 4. Portfolio-level risk management 5. Portfolio-level stakeholder engagement 6. Portfolio-level resource management		✓	7.2 7.3 7.4 7.5 7.6 7.8
Be able to identify, analyse, and distinguish between appropriate and inappropriate application of portfolio delivery practices and techniques to a scenario. Specifically, to analyse:					
04	01	Whether the approaches adopted are appropriate, with reasons, in a given scenario to: 1. Management control 2. Portfolio-level benefits management 3. Portfolio-level financial management 4. Portfolio-level risk management 5. Portfolio-level stakeholder engagement 6. Portfolio-level resource management		✓	7.2 7.3 7.4 7.5 7.6 7.8

Syllabus area code RD		Syllabus area: Roles and documentation	Foundation	Practitioner	Primary Official Book Reference
Level	Topic				
		Know facts, terms, and concepts relating to the main portfolio management roles and key documentation. Specifically, to recall:			
01	01	The purposes of the main portfolio management roles identified in portfolio management: 1. Portfolio Direction Group /Investment Committee 2. Portfolio Progress Group /Change Delivery Committee 3. Business change director/portfolio director 4. Portfolio manager 5. Portfolio benefits manager	✓		Appendix B
01	02	The purposes of the main portfolio management documentation: 1. Portfolio management framework 2. Portfolio benefits management framework 3. Portfolio strategy 4. Portfolio delivery plan 5. Portfolio benefits realization plan 6. Portfolio financial plan 7. Portfolio resource schedule 8. Portfolio stakeholder engagement and communication plan 9. Portfolio dashboard report	✓		Appendix E
		Understand the definitions and concepts relevant to the main portfolio management roles and key documentation. Specifically, to identify:			
02	01	The responsibilities of the main portfolio roles identified in portfolio management: 1. Portfolio Direction Group /Investment Committee 2. Portfolio Progress Group /Change Delivery Committee 3. Business change director/portfolio director 4. Portfolio manager 5. Portfolio benefits manager	✓		Appendix B

Syllabus area code RD		Syllabus area: Roles and documentation	Foundation	Practitioner	Primary Official Book Reference
02	02	The recommended contents of the main portfolio management documentation: 1. Portfolio management framework 2. Portfolio benefits management framework 3. Portfolio strategy 4. Portfolio delivery plan 5. Portfolio benefits realization plan 6. Portfolio financial plan 7. Portfolio resource schedule 8. Portfolio stakeholder engagement and communication plan 9. Portfolio dashboard report	✓		Appendix E 7.3.2 7.2.2.3
Be able to apply and tailor portfolio management to a scenario. Specifically to:					
03	01	Identify appropriate information, using typical contents, for inclusion in the relevant portfolio documentation: 1. Portfolio management framework 2. Portfolio benefits management framework 3. Portfolio strategy 4. Portfolio delivery plan 5. Portfolio benefits realization plan 6. Portfolio financial plan 7. Portfolio resource schedule 8. Portfolio stakeholder engagement and communication plan 9. Portfolio dashboard report		✓	Appendix E 7.2.2.1 7.3.2 6.6.2 7.3.2 7.4.2 7.8.2 7.6.2 7.2.2.3
03	02	Identify appropriate application of the main portfolio management roles identified in portfolio management: 1. Portfolio Direction Group/Investment Committee 2. Portfolio Progress Group/Change Delivery Committee 3. Business change director/portfolio director 4. Portfolio manager 5. Portfolio benefits manager		✓	Appendix B

Syllabus area code RD		Syllabus area: Roles and documentation	Foundation	Practitioner	Primary Official Book Reference
Be able to identify, analyse and distinguish between appropriate and inappropriate application of the syllabus area to a scenario. Specifically to analyse:					
04	01	Whether the following portfolio documentation is fit for purpose, with reasons: 1. Portfolio management framework 2. Portfolio benefits management framework 3. Portfolio strategy 4. Portfolio delivery plan 5. Portfolio benefits realization plan 6. Portfolio financial plan 7. Portfolio resource schedule 8. Portfolio stakeholder engagement and communication plan 9. Portfolio dashboard report		✓	Appendix E 7.2.2.1 7.3.2 6.6.2 7.3.2 7.4.2 7.8.2 7.6.2 7.2.2.3
04	02	Whether the specified roles have been involved appropriately, with reasons: 1. Portfolio Direction Group/Investment Committee 2. Portfolio Progress Group/Change Delivery Committee 3. Business change director/portfolio director 4. Portfolio manager 5. Portfolio benefits manager		✓	Appendix B

Notes



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