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1	<h2 style="color: #4F81BD;">Portfolio Management Processes</h2> <p><i>George J. Raymond, PMP nextgenray.com</i></p>			
2	ID	Name	Description	Deliverables
3	1 Defining			
4	1.1	Develop Portfolio Strategic Plan	Creating a high-level plan that outlines the strategic direction, goals, and objectives for managing the portfolio effectively.	
5	1.2	Develop Portfolio Charter	Formally documenting the purpose, objectives, and scope of the portfolio, including key stakeholders and their roles and responsibilities.	
6	1.3	Define Portfolio Roadmap	Creating a roadmap that outlines the timeline, milestones, and key deliverables for executing the portfolio initiatives effectively.	
7	1.4	Develop Portfolio Management Plan	Developing a comprehensive plan that details the approach, processes, and methodologies for managing the portfolio throughout its lifecycle.	
8	1.5	Define Portfolio	Identifying and categorizing the portfolio components, including projects, programs, and operations, based on their strategic alignment.	
9	1.6	Develop Portfolio Performance Management Plan	Establishing metrics, KPIs, and measurement criteria to evaluate and monitor the performance of the portfolio against strategic objectives.	
10	1.7	Develop Portfolio Communication Management Plan	Creating a plan that outlines the communication strategies, channels, and stakeholders for effective communication within the portfolio.	
11	1.8	Develop Portfolio Risk Management Plan	Identifying, assessing, and mitigating risks associated with the portfolio components to ensure successful delivery and achievement of objectives.	
12	2 Aligning			
13	2.1	Manage Strategic Change	Implementing changes in portfolio strategy and direction to align with evolving organizational goals, market conditions, and stakeholder needs.	
14	2.2	Optimize Portfolio	Continuously evaluating and refining the portfolio to ensure optimal allocation of resources, maximize value delivery, and achieve strategic objectives.	
15	2.3	Manage Supply and Demand	Balancing the portfolio by aligning the supply of resources (such as funding, personnel, and infrastructure) with the demand generated by portfolio components.	
16	2.4	Manage Portfolio Value	Monitoring and enhancing the value generated by portfolio components through effective prioritization, investment decisions, and performance management.	
17	2.5	Manage Portfolio Information	Ensuring the availability, accuracy, and accessibility of portfolio-related information to support informed decision-making and effective governance.	
18	2.6	Manage Portfolio Risk	Identifying, assessing, and proactively managing risks at the portfolio level to minimize threats, exploit opportunities, and safeguard portfolio success.	
19	3 Authorizing & Controlling			
20	3.1	Authorize Portfolio	Approving the establishment or continuation of the portfolio based on alignment with organizational objectives and strategic priorities.	
21	3.2	Provide Portfolio Oversight	Monitoring and governing the portfolio's performance, ensuring alignment with strategic objectives, and addressing any deviations or issues.	
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