



Strategic Portfolio Management: Maximizing Value, Minimizing Risk

1 – 5 February 2027
Madrid (Spain)



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Ref: 121225_1023490 **Date:** 1 – 5 February 2027 **Location:** Madrid (Spain) **Fees:** 6200 Euro

Introduction:

Strategic Portfolio Management is essential for organizations seeking to align investments with business goals while minimizing risk. This Strategic Portfolio Management: Maximizing Value, Minimizing Risk course equips professionals with practical tools and frameworks to evaluate, prioritize, and optimize project and investment portfolios. Participants will learn to balance risk and return, improve resource allocation, and drive organizational value.

The Strategic Portfolio Management: Maximizing Value, Minimizing Risk program focuses on decision-making strategies, performance measurement, and portfolio management governance. Real-world case studies will demonstrate best practices and lessons learned. Participants will confidently apply strategic portfolio management to maximize organizational outcomes.

Targeted Groups:

This Strategic Portfolio Management: Maximizing Value, Minimizing Risk training targets professionals seeking specialized knowledge and skills:

- Portfolio managers and project managers.
- Senior executives overseeing multiple initiatives.
- Financial analysts are involved in investment planning.
- Risk management and compliance officers.
- Consultants advising on portfolio strategies.
- Business strategists aim to enhance decision-making.

Course Objectives:

Participants will achieve the following objectives by completing the Strategic Portfolio Management: Maximizing Value, Minimizing Risk course:

- Understand portfolio management principles.
- Align projects with strategic goals.
- Evaluate risk and return effectively.
- Prioritize investments to maximize value.
- Allocate resources efficiently.
- Monitor and measure portfolio performance.
- Implement governance and decision frameworks.
- Apply analytical tools to optimize portfolios.
- Use case studies to enhance practical understanding.
- Develop strategies for sustainable growth.

Targeted Competencies:

Participants will gain the following competencies during the Strategic Portfolio Management: Maximizing Value, Minimizing Risk program:

- Strategic decision-making in portfolio allocation.
- Risk assessment and mitigation techniques.
- Financial evaluation of projects and investments.
- Resource prioritization and optimization.
- Performance monitoring and reporting.
- Governance and compliance in portfolio management.
- Analytical thinking for complex decisions.
- Practical application of portfolio management tools.
- Integration of business strategy with portfolio objectives.

Studying Scenarios:

In this Strategic Portfolio Management: Maximizing Value, Minimizing Risk training, participants will develop their skills through the analysis of the following scenarios:

- Balancing high-risk, high-reward projects.
- Resource conflicts across competing initiatives.
- Portfolio adjustments due to market changes.
- Performance evaluation of ongoing projects.
- Strategic investment prioritization under constraints.
- Risk mitigation in multi-project environments.
- Governance decisions for project alignment.

Course Content:

Unit 1: Fundamentals of Strategic Portfolio Management:

- Introduction to portfolio management concepts.
- Importance of aligning projects with business strategy.
- Portfolio lifecycle and governance structure.
- Key performance indicators and metrics.
- Risk and return analysis principles.
- Decision-making frameworks for portfolio selection.
- Overview of investment evaluation methods.

Unit 2: Portfolio Analysis and Prioritization:

- Techniques for project assessment and ranking.
- Risk-adjusted return analysis.
- Resource allocation strategies.
- Scenario planning and forecasting.
- Use of portfolio management software tools.
- Analyzing interdependencies between projects.
- Case studies on prioritization challenges.

Unit 3: Risk Management in Portfolios:

- Identifying and assessing portfolio risks.
- Mitigation strategies for operational and financial risks.
- Balancing risk and reward across projects.
- Stress testing and sensitivity analysis.
- Monitoring risk exposure over time.
- Implementing risk governance frameworks.

Unit 4: Performance Measurement and Optimization:

- Tracking portfolio performance metrics.
- Evaluating project outcomes against objectives.
- Benchmarking and reporting techniques.
- Optimizing resource use and portfolio value.
- Continuous improvement strategies.
- Learning from past portfolio decisions.

Unit 5: Strategic Decision-Making and Governance:

- Integrating portfolio decisions with organizational strategy.
- Governance structures for effective oversight.
- Executive decision-making frameworks.
- Aligning stakeholder interests with portfolio goals.
- Ethical and compliance considerations in portfolio management.
- Advanced techniques for portfolio optimization.

Final Insights & Key Takeaways:

Strategic Portfolio Management enables organizations to maximize value while minimizing risk. Applying these principles ensures effective decision-making, optimized investments, and sustainable business growth.