



Project & Portfolio Value Creation

Building capabilities and value, One block at a time

BEYOND PROJECT MANAGEMENT:

*Creating Competitive
Portfolio Management Competencies
For Profitability*

February, 2010

Florida

Pharma & Biotech, Consumer Goods, IT, and Financial Services



INTENSIVE BOOTCAMP FOR EXECUTIVES WHO SPECIALIZE IN:
PROJECT MANAGEMENT . PORTFOLIO MANAGEMENT . STRATEGIC & BUSINESS
PLANNING . PRODUCT DEVELOPMENT . BUSINESS DEVELOPMENT

LEARN HOW TO:

- ◆ *Create a multi-period strategy that integrates the organization's Mission, Vision, & Values*
- ◆ *Build a robust New Product Development & Stage Gate Review process*
- ◆ *Decompose and quantify risk at the Project, Program, and Portfolio levels*
- ◆ *Forecast Project benefits under uncertainty & generate risk-adjusted valuations*
- ◆ *Prioritize Projects, optimize Portfolios, and utilize good Portfolio analytic techniques to achieve Portfolio balance*
- ◆ *Enable effective Resource Management with simulation & optimization*
- ◆ *Determine your level of Portfolio readiness in a 5-step Capability Maturity Model*
- ◆ *Overcome organizational barriers to successfully implementing Portfolio Management*
- ◆ *Gain exposure to applications of Tree Plan, Solver, & Crystal Ball software*

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WORKSHOP LEADER

Dr. Richard Bayney is President & Founder of Project & Portfolio Value Creation (PPVC), a consulting boutique providing Training and Education in Project, Program, Portfolio, Resource, and Risk Management as well as Business, Strategic, Portfolio, and Scenario Planning services. He is a Faculty member at University of Pennsylvania lecturing to graduate and executive students in (a) Project Portfolio Management and (b) Decision Modeling. Richard is a frequent speaker in 'Portfolio & Resource Management, Risk Analysis & Risk Management, and Strategic Planning in Drug Development' and is an Advisory Board Member to Cambridge Healthtech Institute.

Dr. Bayney is a 23-year veteran of the Pharmaceutical & Biotechnology industry at Merck & Co., Bayer Corp. and AG, Bristol-Myers Squibb, and Johnson & Johnson Pharmaceutical Research & Development. In his previous position at Johnson & Johnson, Richard was Vice President, Portfolio Management & Decision Analysis. He has spent 11 years building and leading departments in Strategic Planning, Decision Analysis, and Portfolio Management, 2 years as an International Project Manager for a marketed cardiovascular drug, and 10 years in Molecular Biology research into gene expression in drug detoxification systems and in Alzheimer's Disease.

Dr. Bayney has implemented important processes and methodologies that have enabled organizations across diverse industries to realize a multitude of benefits:

1. New Product Development (NPD) & Stage Gate Review (SGR) process.
2. Project prioritization methodology from concept to commercialization.
3. Portfolio optimization methodology using budgetary and human resource constraints.
4. Sector focus and resource optimization.
5. Project, Program, Portfolio, and PMO capability maturity assessment.
6. Pipeline commercial forecasting and high risk options analysis.

Dr. Bayney obtained his M.Sc. and Ph.D. from University of London, MBA from Columbia University, and PMP from the Project Management Institute.

Bootcamps and Executive Retreats

September 25, 2009,

- ✓ **MASTERING BUILDING BLOCKS OF PROJECT PORTFOLIO MANAGEMENT**
Maximizing Value From Constrained Resources

October 23, 2009 Master PM Bootcamp

- ✓ **PORTFOLIO MANAGEMENT: BUILDING A NEW STRATEGY**
FROM THE AFTERMATH OF RECESSION
Managing The Short-Term To Preserve The Long-Term

December 4, 2009 IT PM Focus

- ✓ **IT PORTFOLIO MANAGEMENT: Aligning and managing IT investments TODAY**
To create enterprise value TOMORROW



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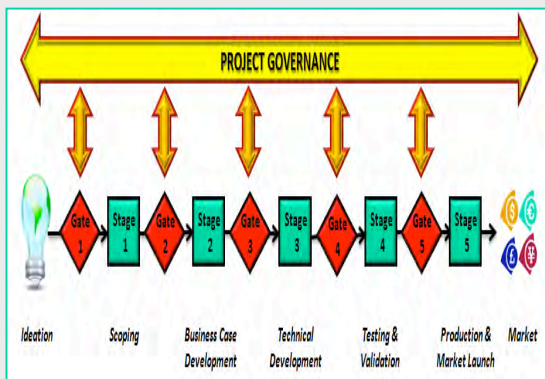
DAY 1 TOPICS

◆ Generate A Compelling Multi-Period Strategy For Your Organization



- Integrating the organization's Mission, Vision, and Values into a holistic multi-period strategy is important to ensuring its currency and longevity
- Learn how to create explicit definitions of the organization's Mission, Vision, and Values and translate them into an overarching strategy
- Training provided in segmenting and linking organization's strategic and financial objectives over short-, mid-, and long-term.

◆ Create An Efficient NPD & Stage Gate Review Process



- Creating an efficient NPD and Stage Gate Review process is seminal to disciplined Governance decision-making and timely Portfolio value creation
- Learn how to build a sequential life cycle process with review gates and appropriate decision criteria to enable Projects to progress or be terminated efficiently
- A stepwise approach to enabling the right Projects to be selected by Governance for life cycle progression and benefits realization is recommended.

◆ Quantify Risk At Project, Program, & Portfolio Levels



- Quantifying risk at every level of the organization is critical to determining how the management of Project risks impacts the tolerance of higher order risks
- Learn how to decompose and aggregate risk at the Project, Program, and Portfolio levels
- Training is provided in defining threshold levels of success in order to quantify risk using Tree Plan and Crystal Ball.



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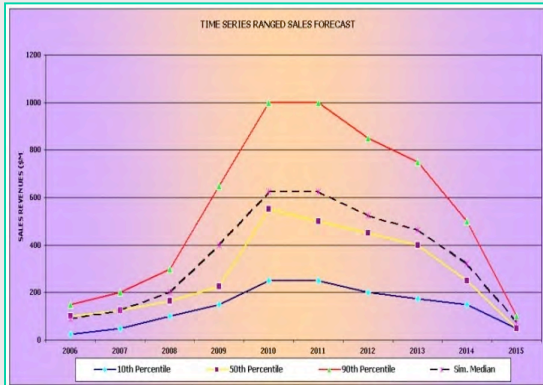


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DAY 1 TOPICS

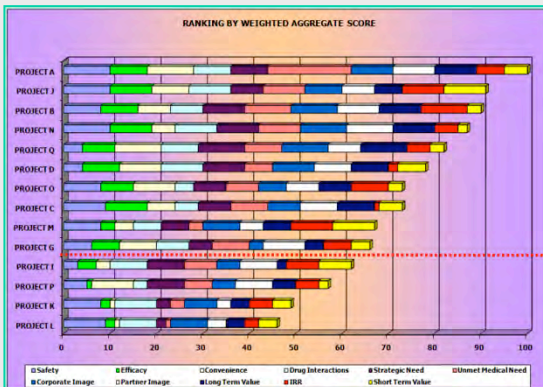
◆ Conduct Benefits Measurement Under Uncertainty



□ Measuring future benefits is seldom straightforward but good forecasting is essential to understanding the value proposition of a Project

- Learn how to create models that use time series data to generate future point estimates of sales that may involve seasonality
- Training is provided in the use of Crystal Ball to forecast range estimates of sales and a patient based model is used to demonstrate the power of simulation.

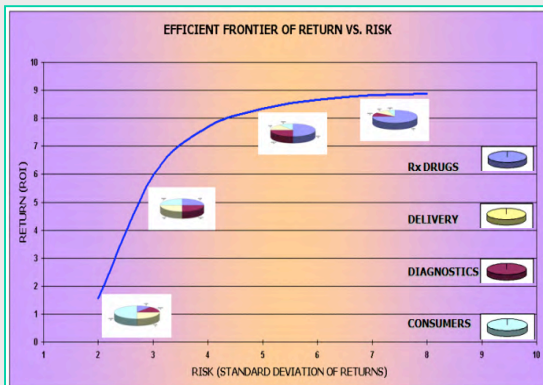
◆ Prioritize Projects Using Quantitative & Qualitative Metrics



□ Establishing Project priorities is a critical facet of successful budgetary and functional resource allocation for Portfolio Management

- Learn how to create a hierarchy of quantitative and qualitative objectives that enable Projects to be assessed for prioritization
- Training is provided in a multi-objective methodology – *MOPPSSM* – that enables rank ordering based on weighted aggregate Project scores.

◆ Maximize Portfolio Value Using Optimization Techniques



□ Maximizing financial Portfolio value depends on selecting a combination of Projects that optimally utilizes constrained \$ and FTEs

- Learn how to create models with stated objectives, constraints, and requirements for optimization using Solver and Crystal Ball
- Training is provided in how to frame and present optimization results to facilitate Portfolio decision-making.



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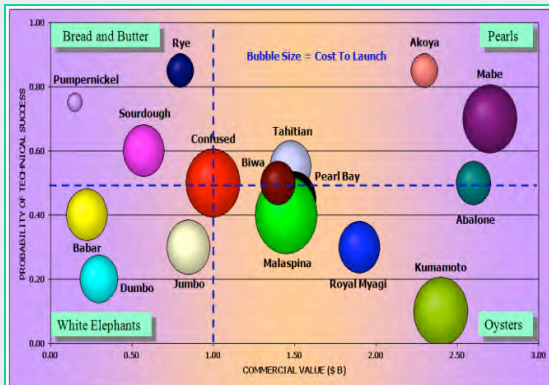


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DAY 2 TOPICS

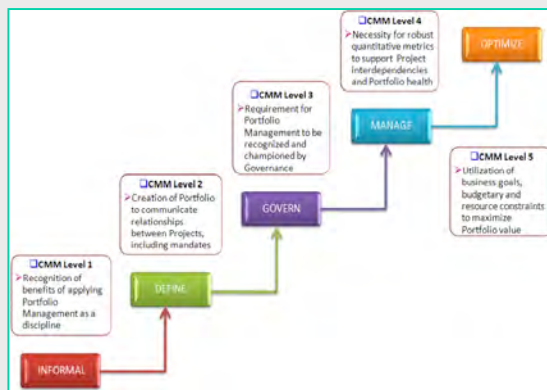
◆ Utilize Portfolio Analysis To Build A Balanced Portfolio



- Creating a Portfolio that balances risk and rewards over short-, mid-, and long-term horizons is crucial to sustaining an organization's success

- Learn how to create Portfolio strategies that are oriented toward meeting the objectives of the Strategic and Business Plans
- Training is provided in trading off between different Portfolio objectives within and across business sectors to achieve a balanced Portfolio.

◆ Assess Your Status In An R&D Portfolio Management Capability Maturity Model



- Understanding where your organization is in terms of a Capability Maturity Model will enable you to plan for what is needed to reach the next level(s)

- Learn how to assess where your organization is and what needs to be achieved to attain greater impact from R&D Portfolio Management
- A 5-step Capability Maturity Model that focuses on applications, infrastructure, people, process, and information is described.

◆ Overcome Organizational Barriers To Implementing Portfolio Management



- Creating linkages and dependencies between the major functions ensures that Corporate objectives are supported across the enterprise

- Learn how to determine who stands to gain or lose by your efforts and what pillars of co-dependence need to be created to enable co-dependence
- A roadmap that creates bridges between the major functions and ensures there is a clear determination of value gained or lost is described.



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AGENDA AT A GLANCE

Day One

7:00 AM - 8:00 AM	Registration and continental breakfast
8:00 AM - 8:15 AM	Opening Remarks
8:15 AM - 10:30 AM	Workshop session
10:30 AM - 11:00 AM	Networking break, refreshments, demos
11:00 AM - 12:00 PM	Workshop session
12:00 AM - 1:30 PM	Lunch and crossfire debate
1:30 PM - 3:00 PM	Workshop session
3:00 PM - 3:30 PM	Demonstration break
3:30 PM - 5:00 PM	Workshop session
5:00 PM	Conclusion of workshop
5:30 PM	Wine and cheese reception

Day Two

8:00 AM - 8:30 AM	Continental breakfast
8:30 AM - 10:00 AM	Workshop Session
10:00 AM - 10:30 AM	Refreshment and Demo break
10:30 AM - 12:00 PM	Workshop Session
12:00 PM - 3:00 PM	Working Lunch
3:00 PM	Conclusion of Workshop

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