

**Program and Portfolio Management Simulation**  
**Part II: Portfolio Management**  
**Developed by Lilo Altali, MPA, PMP, CBAP**  
**For Educational Purposes Only**

**Case Study Overview**

**Scenario:**

Congratulations on doing such great work as a Program Manager! You have been asked to take on the role of Portfolio Manager. As you know, GAT is going through transformational change. Among the program that you are managing, Danielle would like to better set up the organization for success given the new realities triggered by COVID. Danielle would like you to add the program you are managing to a portfolio. The portfolio will also include the following objectives:

- Introducing GAT services in West Africa
- Changing the online platform to be more user friendly for end-users
- Helping staff prepare for the changes and growth of GAT

Hiring a portfolio manager would ensure the realization of the organization's strategic objectives and also ensure alignment between projects and strategy. Since you already worked as a Program Manager for GAT, make sure to use all the historical information and data you have already analyzed!

**Your Role:**

You will have access to a "Documents" folder to do some factfinding and try to make meaning of the information thus far. Your supervisor is Jose Rodriguez, and any memo should be addressed to him. Other members of the leadership team might email you thought. Appendix A outlines your job description. Upon your first check-in with Jose, you agreed to a tentative schedule of deliverables, which is also found in Appendix A. Jose and the other senior leaders have compiled templates and resources that might be useful to you and placed them in the folder titled "organizational assets." For this program, it was agreed upon that Jose would serve as your Program Sponsor.

**Appendix A**  
**Job Description and Expectations**

**Job Title:** Portfolio Manager, Strategic Initiatives

**Reports to:** Jose Rodriguez, COO

**Salary:** \$120,000-150,000 USD, commensurate with experience

**Responsibilities and Duties:**

- Provide strategic planning capabilities to senior management
- Develop strategic plans
- Planning and monitoring project and program execution
- Creating and managing a budget
- Program and projects coordination and managing interdependencies
- Oversee the realization of benefits and strategic objectives
- Create the necessary portfolio documentation

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- Stakeholder communications, negotiations, and problem-solving
- Aligning or realigning deliverables with outcomes
- Provide status reports as needed
- Provide feedback to strategy formulation
- Hire, supervise, and terminate if necessary program and project managers
- Identifying and addressing problems and risks
- Other tasks might be assigned.

**Email from Jose – Follow up to first check in!**

**From:** Jose Rodriguez <j.rodriguez.gat.org>

**To:** Portfolio Manager

**Subject:** Follow Up

Me again! I am really excited to have you as a Portfolio Manager, but I must admit, I am uncertain of how to organize this role. After our discussion, I drafted the following expectations that we agreed on. We will design this role as we go!

<b>Expectations</b>
Week 1 - Review all the documents and adjust to your new role.
Week 2/3 - Complete the following deliverables, with the data you have, to the best of your ability: -Portfolio Value Streams -Lean Portfolio Canvas
Week 4/5 - Complete the following deliverables, with the data you have, to the best of your ability: -Portfolio Strategic Plan -Portfolio Roadmap -Portfolio Communication Matrix -Benefit Traceability Matrix
Ongoing: Meetings with governance team and gain approval on plans and changes.
Ongoing: Project Evaluation

\*A program would never be closed so fast after its inception in the "real world," but we will close it in this case to demonstrate the program management competencies.

If you have any questions, please don't hesitate to contact me.

Best,

Jose