

Project Portfolio Management: These Meetings Are Indispensable

Meeting and Participants	Input	Output	Activities	Proposed Frequency	Your Notes
Proposal Coaching <ul style="list-style-type: none"> • Initiator • Portfolio Coordinator 	<ul style="list-style-type: none"> • Ideas, demands, opportunities 	<ul style="list-style-type: none"> • Quality assured new initiative 	<ul style="list-style-type: none"> • Initiator explains his idea in detail • Portfolio Coordinator gives feedback and assists Initiator in developing initiative 	Weekly	
Pipeline Review Committee <ul style="list-style-type: none"> • Pipeline Review Committee Member • Portfolio Coordinator • Initiator (if needed) 	<ul style="list-style-type: none"> • Quality assured new initiatives 	<ul style="list-style-type: none"> • Ranked list of initiatives 	<ul style="list-style-type: none"> • Portfolio Coordinator submits new initiatives for evaluation • Committee reviews and ranks initiatives in light of current strategic goals 	At least Monthly	
Portfolio Board <ul style="list-style-type: none"> • Portfolio Board Member • Portfolio Coordinator • Project Lead (if needed) 	<ul style="list-style-type: none"> • Current portfolio status • Proposed portfolio going forward 	<ul style="list-style-type: none"> • Project Portfolio going forward 	<ul style="list-style-type: none"> • Portfolio Coordinator presents his suggested portfolio going forward, including the status of ongoing projects and new initiatives • Portfolio Board requests changes during meeting (priorities, timing, budget, key resources) • Portfolio Board decides on the future portfolio and the respective budgets • If required due to boardroom changes: Portfolio Coordinator makes effects of change requests apparent 	Monthly to Quarterly	

Meeting and Participants	Input	Output	Activities	Proposed Frequency	Your Notes
Resource Conflict Resolution <ul style="list-style-type: none"> • Project Leads • Resource Managers • Portfolio Coordinator (if needed) 	<ul style="list-style-type: none"> • Day-to-day re-source management issues 	<ul style="list-style-type: none"> • Day-to-day re-source challenges resolved 	<ul style="list-style-type: none"> • Design and discuss working solutions for resource conflicts • Unresolved issues are escalated to the Execution Steering 	Weekly	
Execution Steering <ul style="list-style-type: none"> • Execution Steering Members • Project Lead 	<ul style="list-style-type: none"> • Project status report • Issues escalated by project lead • Unresolved issues from Tactical Resource Conflict Resolution meeting 	<ul style="list-style-type: none"> • Solved problems • Further measures 	<ul style="list-style-type: none"> • Review project status • Solve problems by changing scope or shifting resources within the project 	Monthly	
Strategy Workshop <ul style="list-style-type: none"> • Strategy Manager • Portfolio Coordinator 	<ul style="list-style-type: none"> • Company strategy 	<ul style="list-style-type: none"> • Catalogue of project prioritization criteria 	<ul style="list-style-type: none"> • Discuss strategy • Derive project prioritization criteria • Determine weighting of project prioritization criteria 	Every 6-12 Months	