

# AI-Powered Portfolio Management

Professional Certificate Program

Complete Course Curriculum

Duration: 24 Weeks | Modules: 9

## Program Overview

This comprehensive 24-week program combines traditional portfolio management expertise with cutting-edge AI and automation technologies. Designed for enterprise portfolio managers, this curriculum provides battle-tested frameworks and hands-on implementation strategies proven in UK Government and Fortune 500 environments.

You'll learn to build intelligent automation systems, implement data quality frameworks, and leverage AI for predictive analytics—all while maintaining robust governance and stakeholder confidence.

# Module 1: Portfolio Management Fundamentals

Duration: 3 weeks

## Lessons

- Introduction to Enterprise Portfolio Management
- Portfolio vs. Program vs. Project Management
- Strategic Alignment and Value Delivery
- Portfolio Governance Frameworks
- Stakeholder Management at Scale

## Learning Objectives

- Understand the role of portfolio management in enterprise strategy
- Differentiate between portfolio, program, and project management
- Establish governance structures for portfolio oversight

# Module 2: AI and Automation in Portfolio Management

Duration: 4 weeks

## Lessons

- AI Fundamentals for Portfolio Managers
- Automation Opportunities in Portfolio Workflows
- Natural Language Processing for Status Reports
- Predictive Analytics for Risk Management
- Machine Learning for Resource Optimization
- Building AI-Powered Dashboards

## Learning Objectives

- Identify automation opportunities in portfolio processes
- Leverage AI for predictive risk management
- Build intelligent dashboards using modern tools

## Module 3: Data Quality and the Golden Standard

Duration: 2 weeks

### Lessons

- The Cost of Poor Data Quality
- Golden Standard Methodology Overview
- Data Validation and Cleansing Techniques
- Automated Data Quality Checks
- Building Trust in Portfolio Data

### Learning Objectives

- Implement the Golden Standard framework
- Establish automated data quality processes
- Build stakeholder confidence in portfolio metrics

## Module 4: RAID Management at Scale

Duration: 3 weeks

### Lessons

- Risks, Assumptions, Issues, Dependencies Framework
- Predictive Risk Management Techniques
- Dependency Mapping and Visualization
- Automated RAID Tracking Systems
- Cross-Portfolio Risk Aggregation
- Monte Carlo Simulation for Portfolio Planning

### Learning Objectives

- Master enterprise-scale RAID management
- Implement predictive risk models
- Build automated dependency tracking systems

# Module 5: Resource and Capacity Management

Duration: 2 weeks

## Lessons

- Resource Allocation Strategies
- Capacity Planning Across Portfolios
- Skills Matrix and Competency Mapping
- AI-Powered Resource Optimization
- Managing Resource Conflicts

## Learning Objectives

- Optimize resource allocation across portfolios
- Implement capacity planning frameworks
- Resolve resource conflicts systematically

# Module 6: Portfolio Reporting and Dashboards

Duration: 3 weeks

## Lessons

- Executive Dashboard Design Principles
- Automated Report Generation
- Real-Time Portfolio Metrics
- Building Interactive Dashboards
- Data Visualization Best Practices
- Storytelling with Portfolio Data

## Learning Objectives

- Design executive-ready dashboards
- Automate portfolio reporting workflows
- Communicate portfolio status effectively

## Module 7: Tool Selection and Integration

Duration: 2 weeks

### Lessons

- Enterprise Portfolio Management Tools Comparison
- Integration Patterns and APIs
- Building Custom Automation with Power Automate/Zapier
- Low-Code/No-Code Solutions
- Tool Migration Strategies

### Learning Objectives

- Evaluate and select appropriate PM tools
- Integrate tools into cohesive ecosystems
- Build custom automations without coding

## Module 8: Change Management and Adoption

Duration: 2 weeks

### Lessons

- Driving Portfolio Transformation
- Stakeholder Engagement Strategies
- Training and Enablement Programs
- Measuring Adoption and Success
- Overcoming Resistance to Automation

### Learning Objectives

- Lead successful portfolio transformations
- Drive adoption of new processes and tools
- Measure and communicate transformation ROI

# Module 9: Advanced Topics and Case Studies

Duration: 3 weeks

## Lessons

- Scaling Agile Across Enterprise Portfolios
- Building a Portfolio Management Center of Excellence
- Real-World Case Studies from Fortune 500 Companies
- Emerging Trends: AI, Blockchain, and Portfolio Management
- Capstone Project: Portfolio Automation Strategy

## Learning Objectives

- Apply learnings to real-world scenarios
- Develop a comprehensive automation strategy
- Prepare for portfolio leadership roles

# Program Summary

Total Duration	24 Weeks
Total Modules	9 Core Modules
Lessons	48+ Individual Lessons
Capstone Project	Portfolio Automation Strategy
Certificate	Professional Certificate in AI-Powered Portfolio Management

This program is designed for working professionals and can be completed at your own pace. Each module includes hands-on exercises, real-world templates, and practical automation examples that you can immediately apply in your organization.