

# Name of Portfolio | Program Management Vision

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# Name of Portfolio | Program Management Tools & Routines

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1

## Standardized Templates

Ensuring consistent information access and rapid comprehension across all portfolios

2

## Grow GMV Portfolio Check-In

Hosting an Informal bi-weekly round-table with initiative owners to drive alignment without adding complexity

3

## “Portfolio Pulse” status email

Delivering bi-weekly status updates to sponsors & L7 roadmap owners

4

## Project Support & Guidance

Providing targeted assistance to drive alignment, decision-making, and deliverable accountability

5

## Enhanced Clarity & Visibility

Proactively identifying and escalating critical issues for DCR consideration

who

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Name

Name

Name & Name

when

Bi-weekly

As needed and in preparation for Meeting A

what

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# Name of Portfolio | Templates



- **Key Milestone Roadmap** | 30,000 ft view of full portfolio | High level view of full portfolio progress over time
- **Executive Summary** | Key details of current status | Medium level view of point-in-time status
- **Initiative Summary** | Serves as project charter | Detailed view of program objective(s)



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## Key Milestone Roadmap | Quickly shows total portfolio progress over time



HeatherWMpls

### Responsible:

Initial completion: PM  
Updates: PM

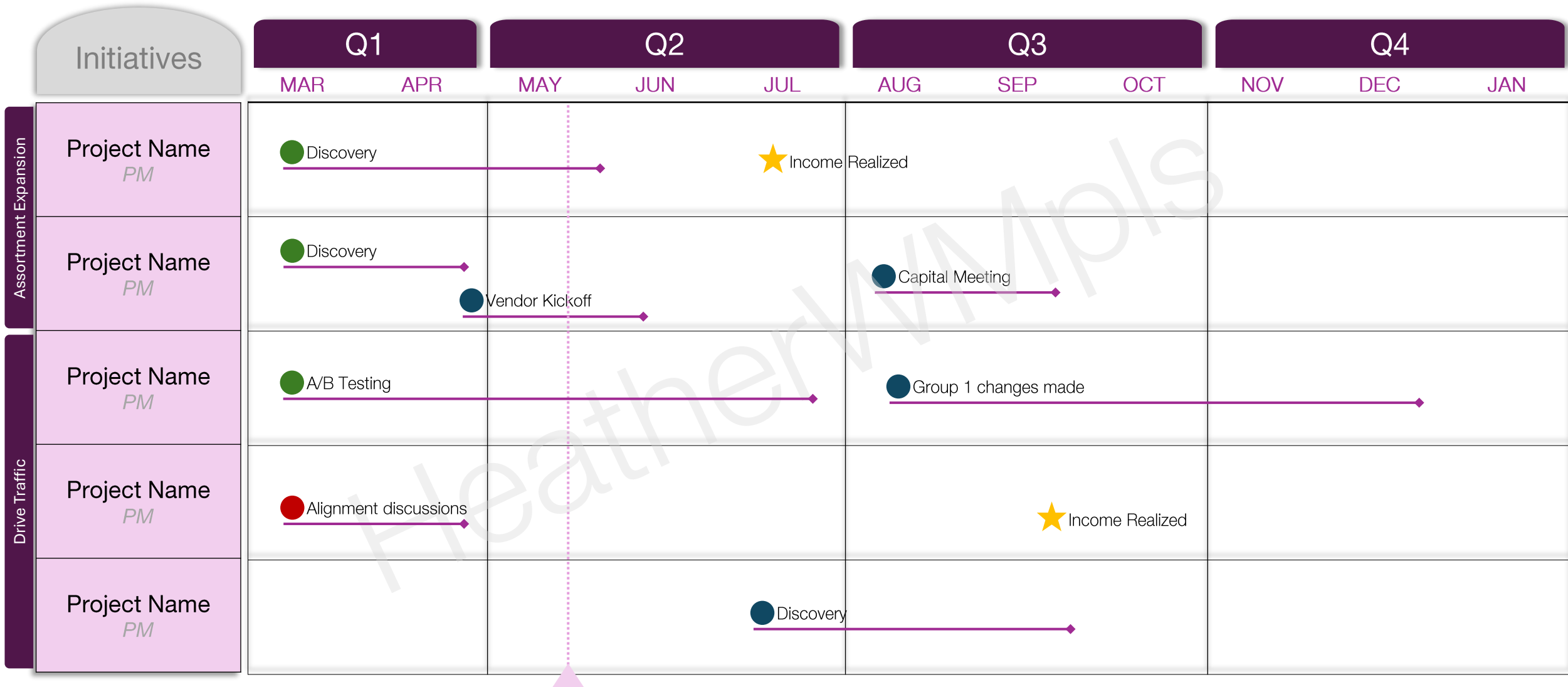
Used in Newsletter

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- At Risk

Future Task
- Complete

On Schedule
- Key Milestone / KPI



**Executive Summary** | Showcases detail on current project status, actions being taken, or where roadblock removal is needed

HeatherWMpls



**Responsible:**

Initial completion: PM  
Updates: PM

Used in Newsletter

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## Name of Portfolio: Executive Summary

Project Name	Project Name	Project Name
<div>Top update headline here</div> <div>Add further context here about status and rationale, making sure to highlight any key wins or escalations needed</div>	<div>Top update headline here</div> <div>Add further context here about status and rationale, making sure to highlight any key wins or escalations needed</div>	<div>Top update headline here</div> <div>Add further context here about status and rationale, making sure to highlight any key wins or escalations needed</div>
<div>Current Milestone Tracking</div> <div><ul style="list-style-type: none"><li>Milestone 1 – <i>In Progress</i></li><li>Milestone 2 – <i>In Progress</i></li><li>Milestone 3 – <i>Blocked</i></li></ul></div> <div>What's been done</div> <div><ul style="list-style-type: none"><li>Accomplishment 1</li><li>Accomplishment 2</li></ul></div> <div>Help or Decisions needed</div> <div><ul style="list-style-type: none"><li>Information</li></ul></div>	<div>Current Milestone Tracking</div> <div><ul style="list-style-type: none"><li>Milestone 1 – <i>In Progress</i></li><li>Milestone 2 – <i>In Progress</i></li><li>Milestone 3 – <i>Blocked</i></li></ul></div> <div>What's been done</div> <div><ul style="list-style-type: none"><li>Accomplishment 1</li><li>Accomplishment 2</li></ul></div> <div>Help or Decisions needed</div> <div><ul style="list-style-type: none"><li>Information</li></ul></div>	<div>Current Milestone Tracking</div> <div><ul style="list-style-type: none"><li>Milestone 1 – <i>In Progress</i></li><li>Milestone 2 – <i>In Progress</i></li><li>Milestone 3 – <i>Blocked</i></li></ul></div> <div>What's been done</div> <div><ul style="list-style-type: none"><li>Accomplishment 1</li><li>Accomplishment 2</li></ul></div> <div>Help or Decisions needed</div> <div><ul style="list-style-type: none"><li>Information</li></ul></div>
KPI tracking	KPI tracking	KPI tracking

**Initiative Summary** | Provide detail on scope and goals of projects, utilize for socializing or deep dive DCR topics

**Responsible:**

Initial completion: IO  
Updates: PM

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# Name of Portfolio: Initiative Summary

## Project Name

### Project Description

Insert text here

### Project Goals/KPIs

- Insert text here
- Insert text here

### Roles & Responsibilities

R

Insert name(s) here

A

Chris Troutman

C

Insert name(s)/team(s) here

I

Insert name(s)/team(s) here

### Risks & Assumptions

Insert text here  
Insert text here

## Key Tasks & Milestones



### Milestone Name

Additional context if needed

### Milestone Name

Additional context if needed

### Milestone Name

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