

Principles of Integrated Portfolio Management



In this presentation, *Principles of Integrated Portfolio Management*, noted industry expert Terry Doerscher will offer insights into the philosophies and concepts that drive the design and capabilities of Planview Enterprise®, recognized by both Gartner and Forrester as an industry-leading product for enterprise-wide portfolio management.

Planview takes a unique approach to portfolio management by leveraging the natural interdependencies that are present in all organizations to improve performance. The result is a seamless, integrated approach to business management, from opportunity to operation. This presentation will explore the discipline of portfolio management, from concept to working practice:

- The basic forces that shape today's highly charged business environments
- How these forces interact with common organizational and situational dynamics to challenge operational excellence
- How these elements require us to view projects within the broader business context as a key aspect of successful portfolio management
- How to apply portfolio management techniques to manage markets, strategies, resources and products in any organization, from internal departments to global enterprises
- A model Integrated Business Management Framework, which provides a universal map to align the network of business processes and build operational consensus across department silos
- The evolving role of the modern PMO in furthering business integration
- An overview of the Planview Enterprise product suite and how its capabilities are applied to realize integrated portfolio management and achieve high levels of operational performance

About the Presenter

Terry L. Doerscher

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Terry Doerscher has over 26 years of experience in program, project, work & resource management, process development and strategic planning.

As the Chief Process Architect for Planview, Terry's focus is on innovating world-class business management techniques aligned to the unique challenges of today's technology-centric, knowledge worker environments. Since joining Planview in 1999, Terry has worked with over a hundred Planview customers worldwide, and has become a trusted advisor in their journey towards business management excellence.

Mr. Doerscher is the primary author of *PlanView PRISMS™ Business Processes and Best Practices*, a companion product to Planview Enterprise portfolio management software. He also drives the acclaimed 'PMO 2.0' series of whitepapers, presentations, leadership forums, the *2008*

PMO 2.0 Survey and his entertaining and educational blog, the *Enterprise Navigator* - all of which are recognized as



a catalyst for redefining the role of the PMO in integrating and aligning business management functions for the enterprise.

Terry is a passionate evangelist for integrating business management processes as a proven method of improving organizational performance; he is a frequently cited industry expert and his candid and engaging presentation style makes him a sought after speaker. He is a contributing author to the book, *"The Modern PMO – Practical Insights and Case Studies"* by Mark Perry (due out in the Spring of 2009), and is currently co-authoring a book on dynamic portfolio management (due out in the Summer of 2009). His collective body of work is very influential in positioning Planview as a recognized thought leader within the industry.

Mr. Doerscher is a voracious reader and self-directed learner. He received his formal engineering education in the elite US Navy Nuclear Power Program, has been a member of PMI since 1997, is a member of the PMI PMO SIG, is ITIL v.3 Foundation certified, and is a Certified Process Design Engineer (CPDE).