

2007

Primavera 24th Annual  
**CONFERENCE**  
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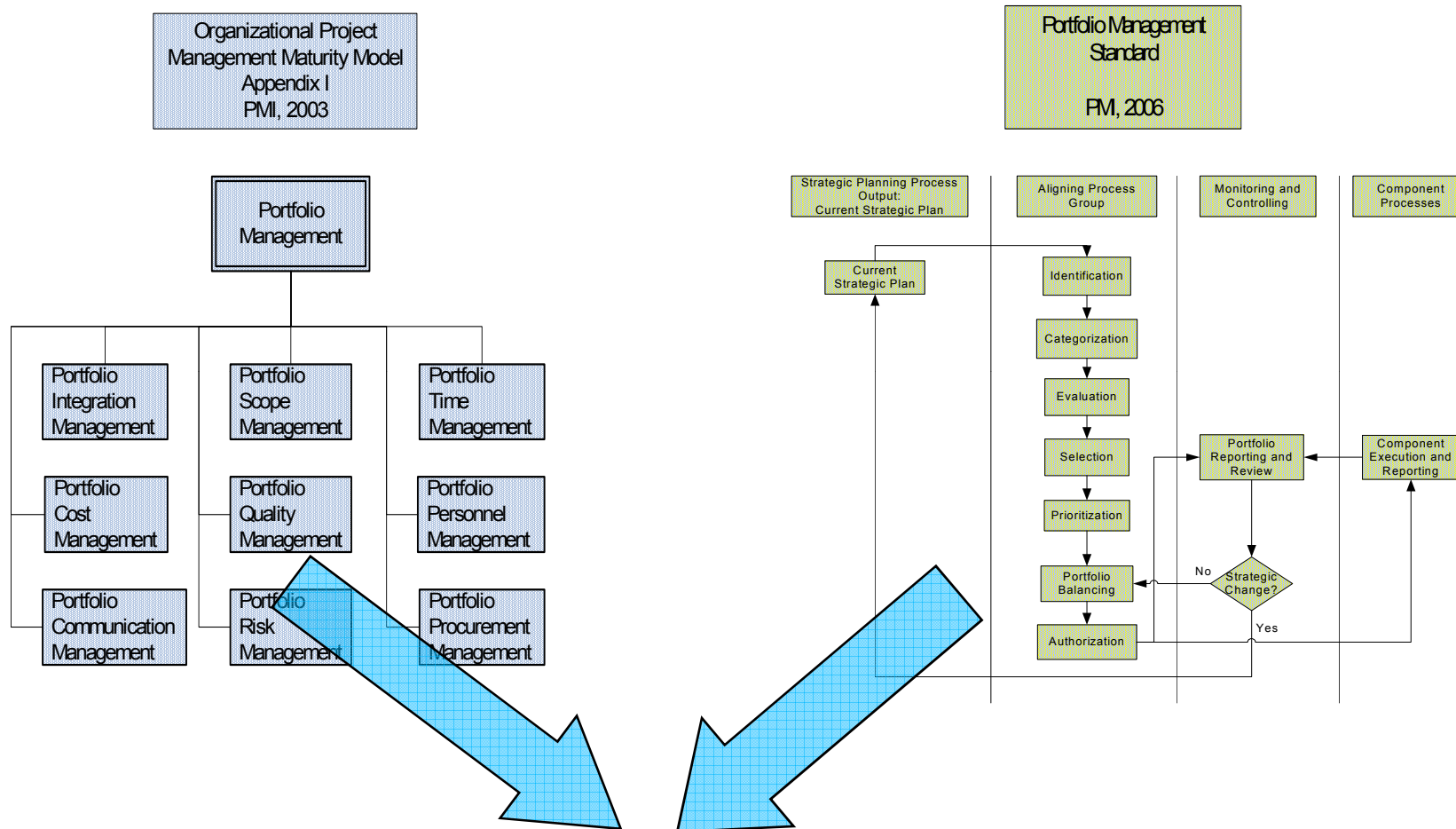


# The UPMM and Primavera Approaches to Project Portfolio Management

Stanisław Gasik



# PMI® Portfolio Management Approaches



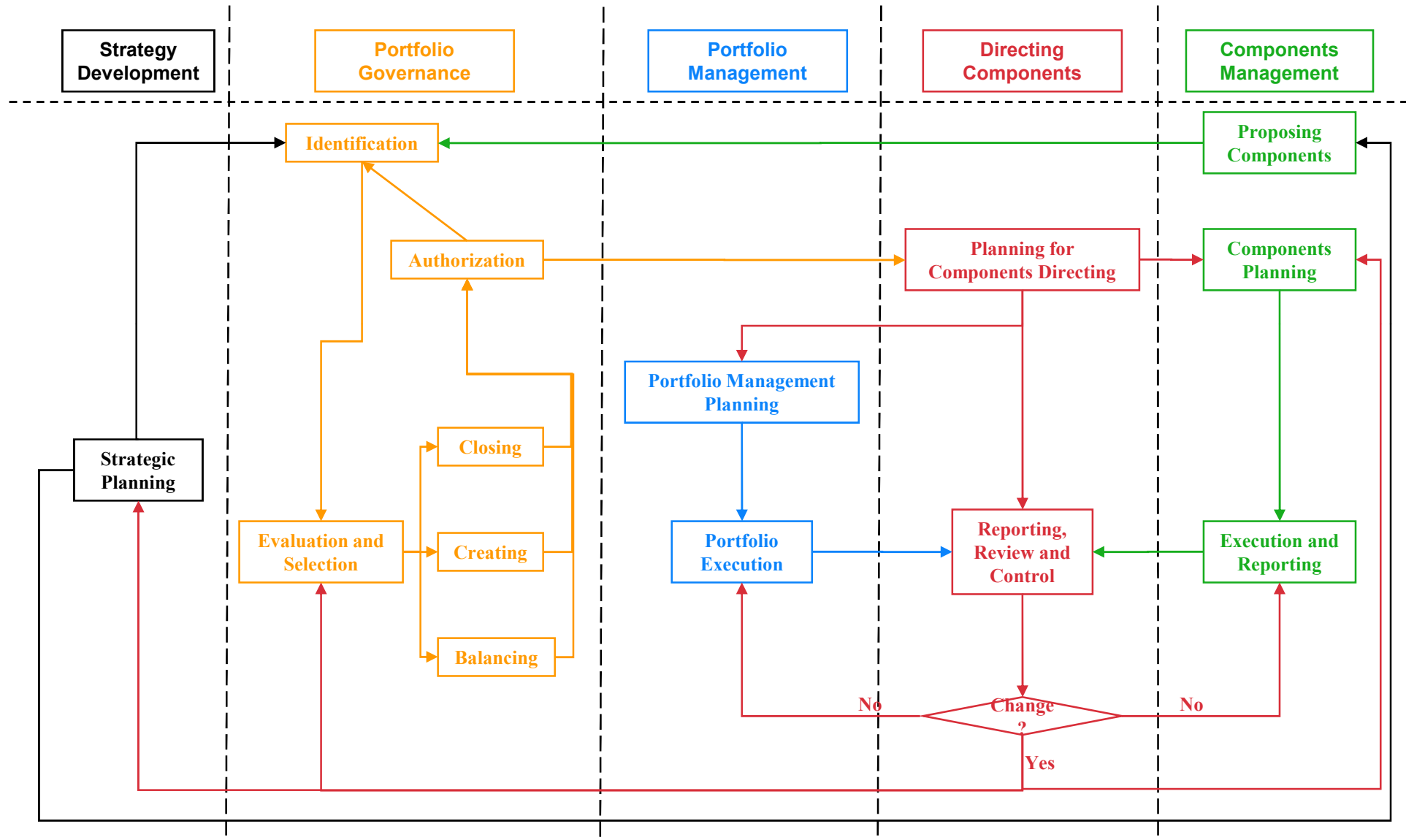
## Unified Portfolio Management Model

## Challenges of PMI® Portfolio Management Approach

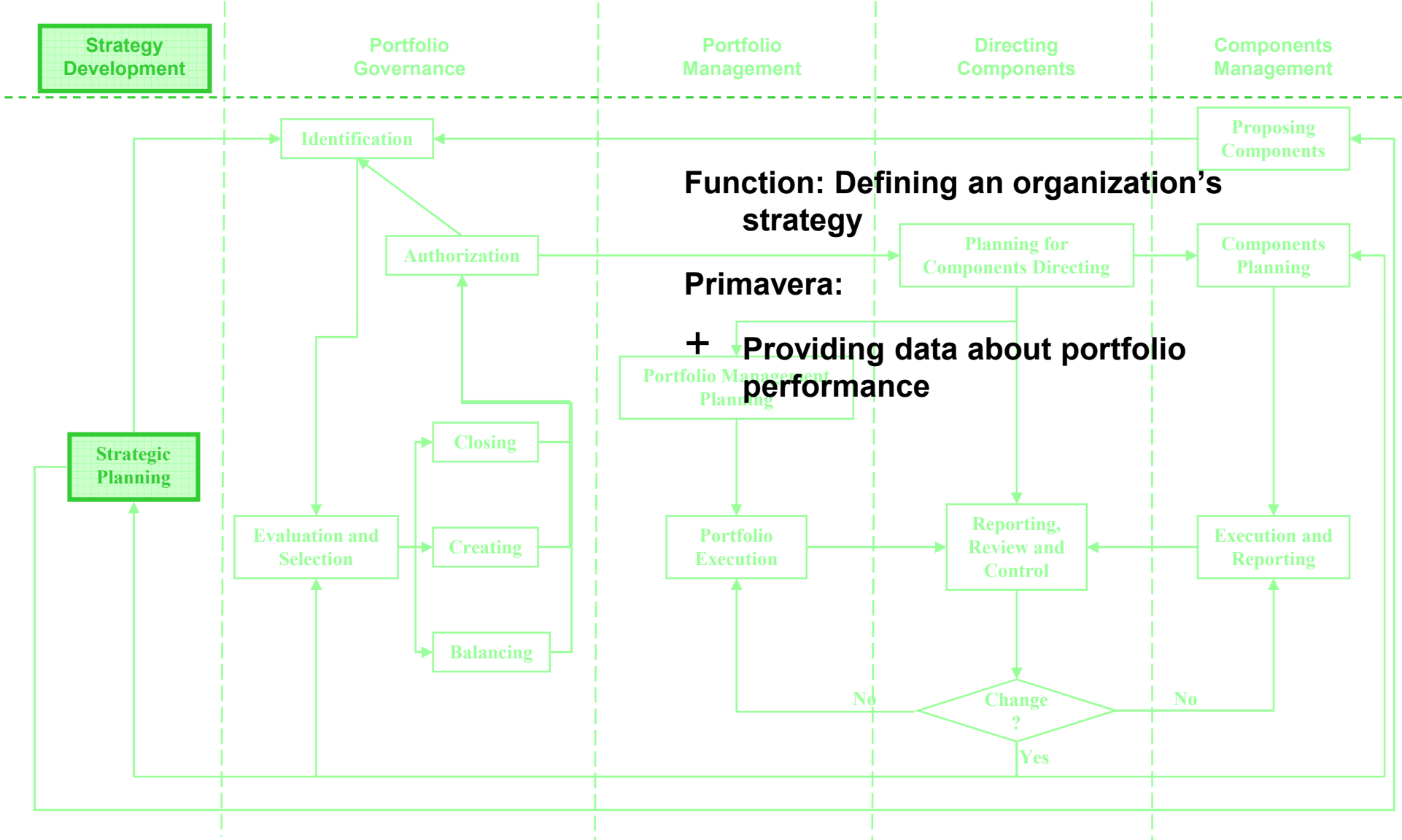
- **The same area, two different standards**
- **PMS adheres too closely to the financial portfolio model**
- **OPM3 adheres too closely to PMBoK**
- **PMS focuses on investment portfolios**

**The Unified Portfolio Management Model (UPMM) solves these challenges.**

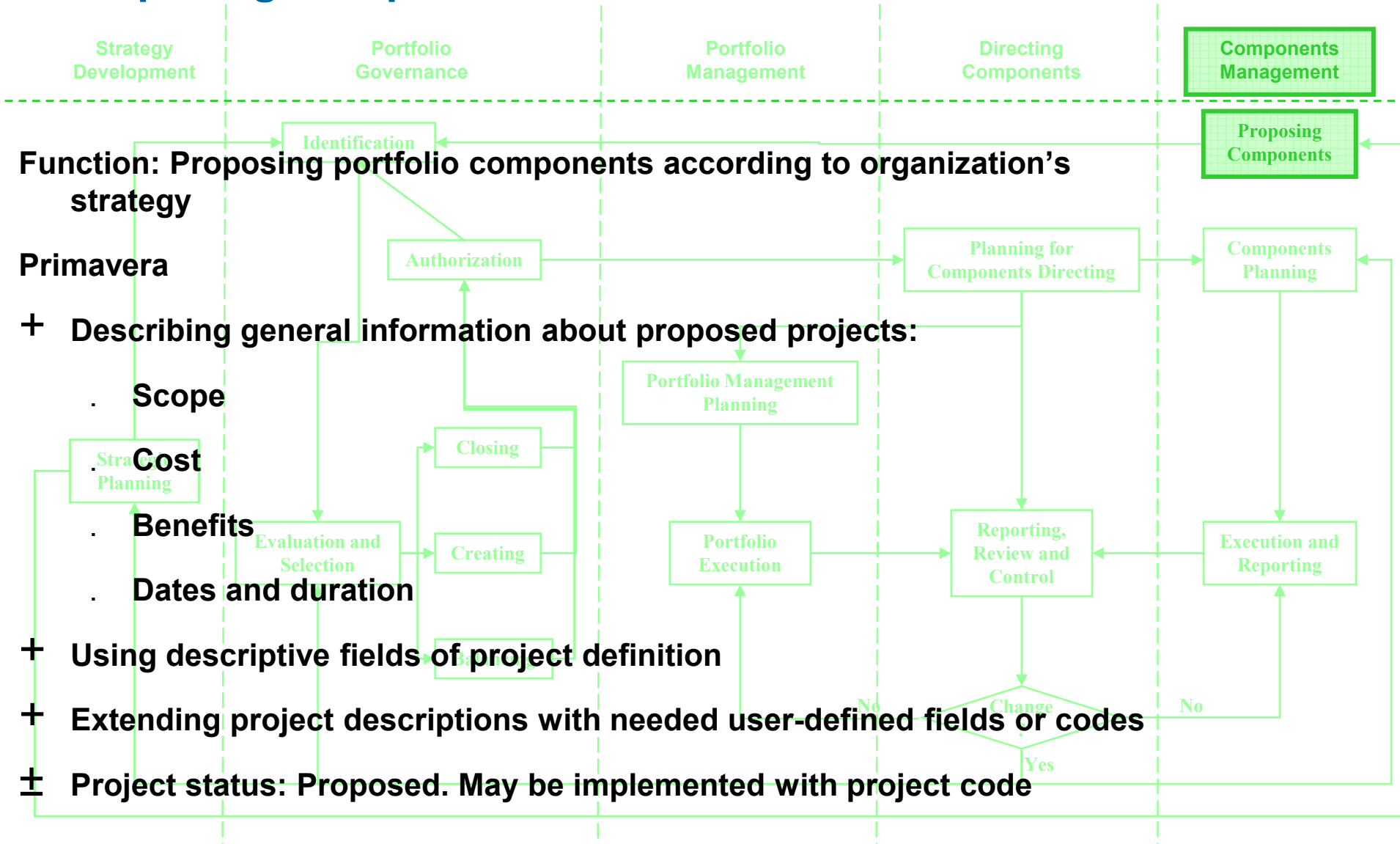
# The Unified Portfolio Management Model



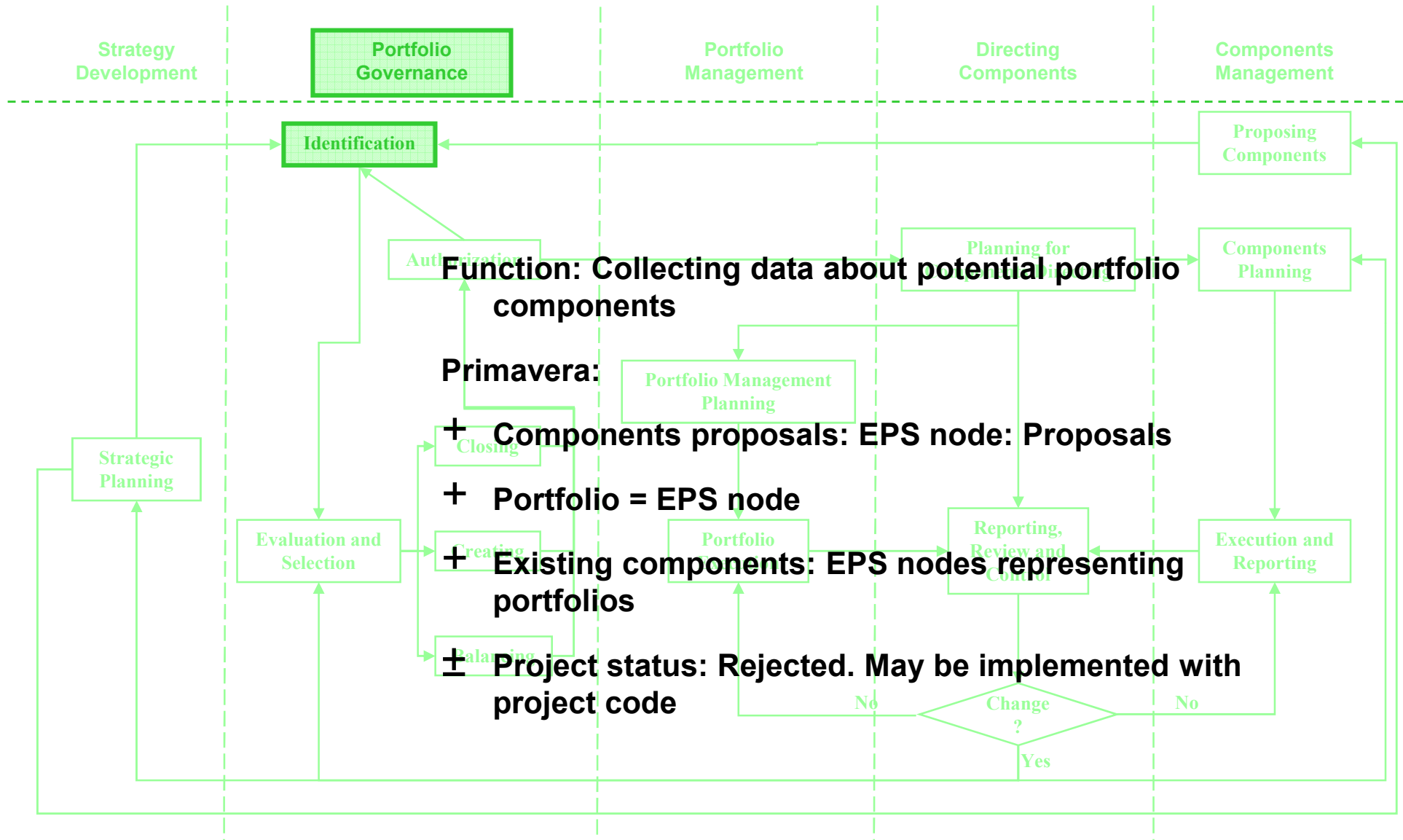
# Strategic Planning



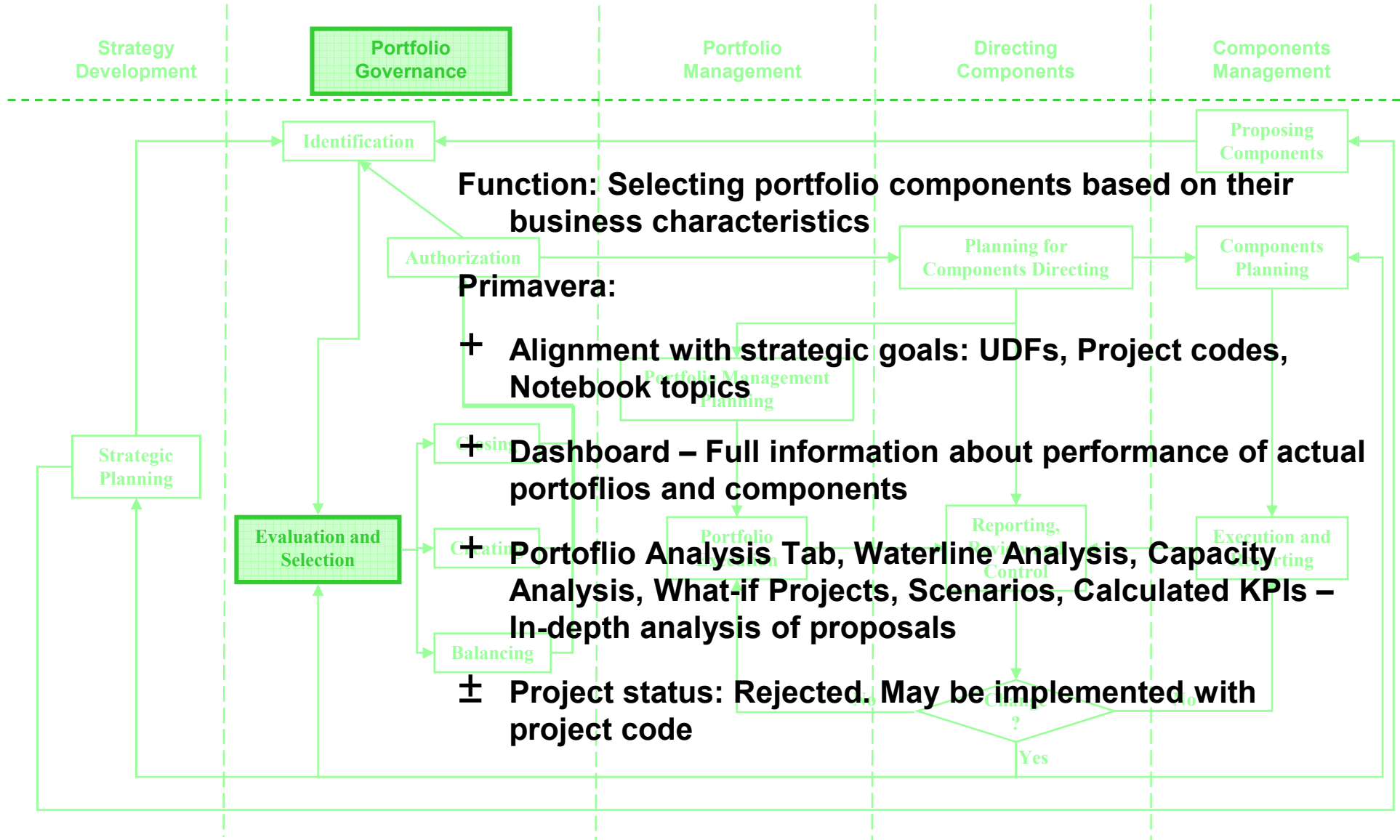
# Proposing Components



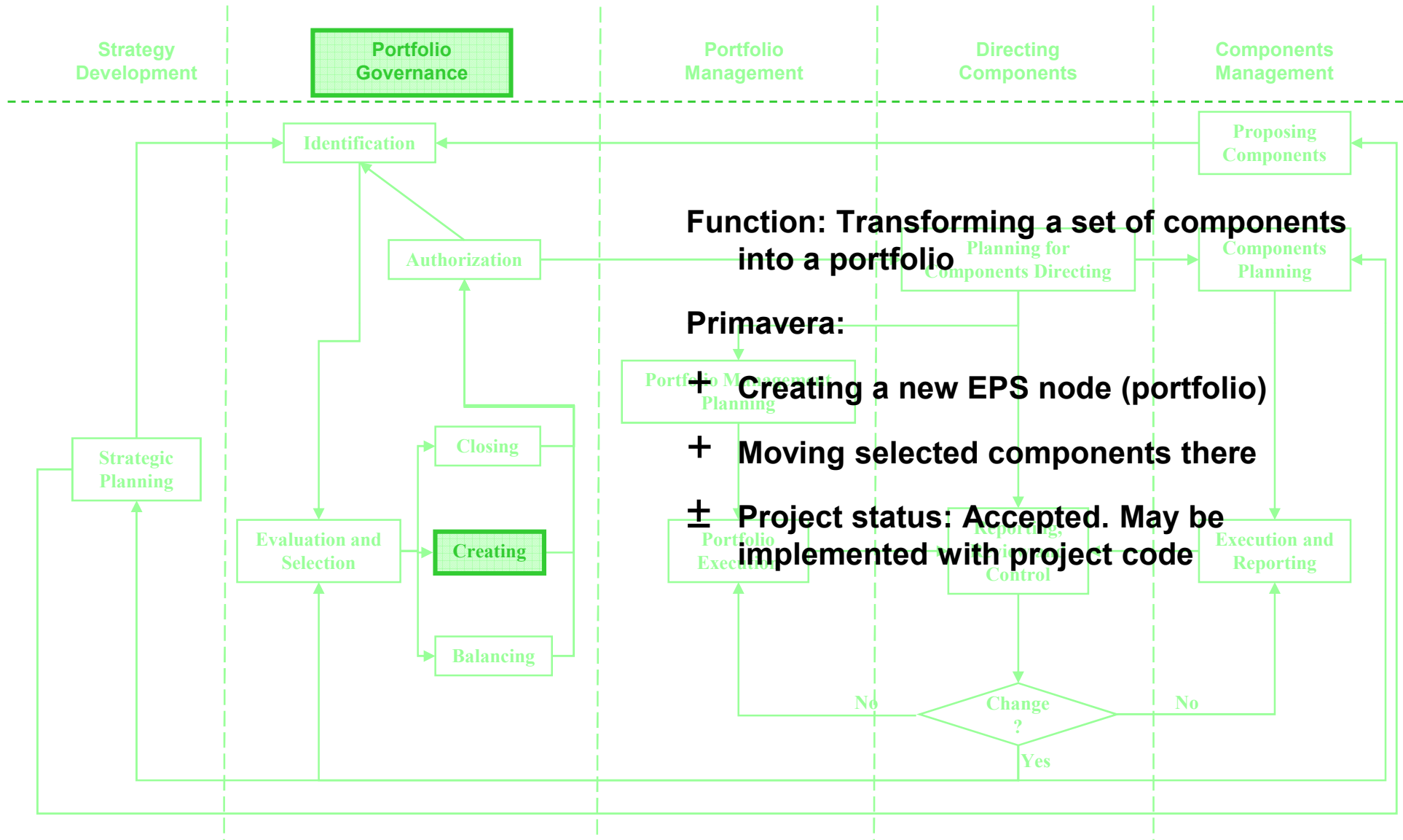
# Identification



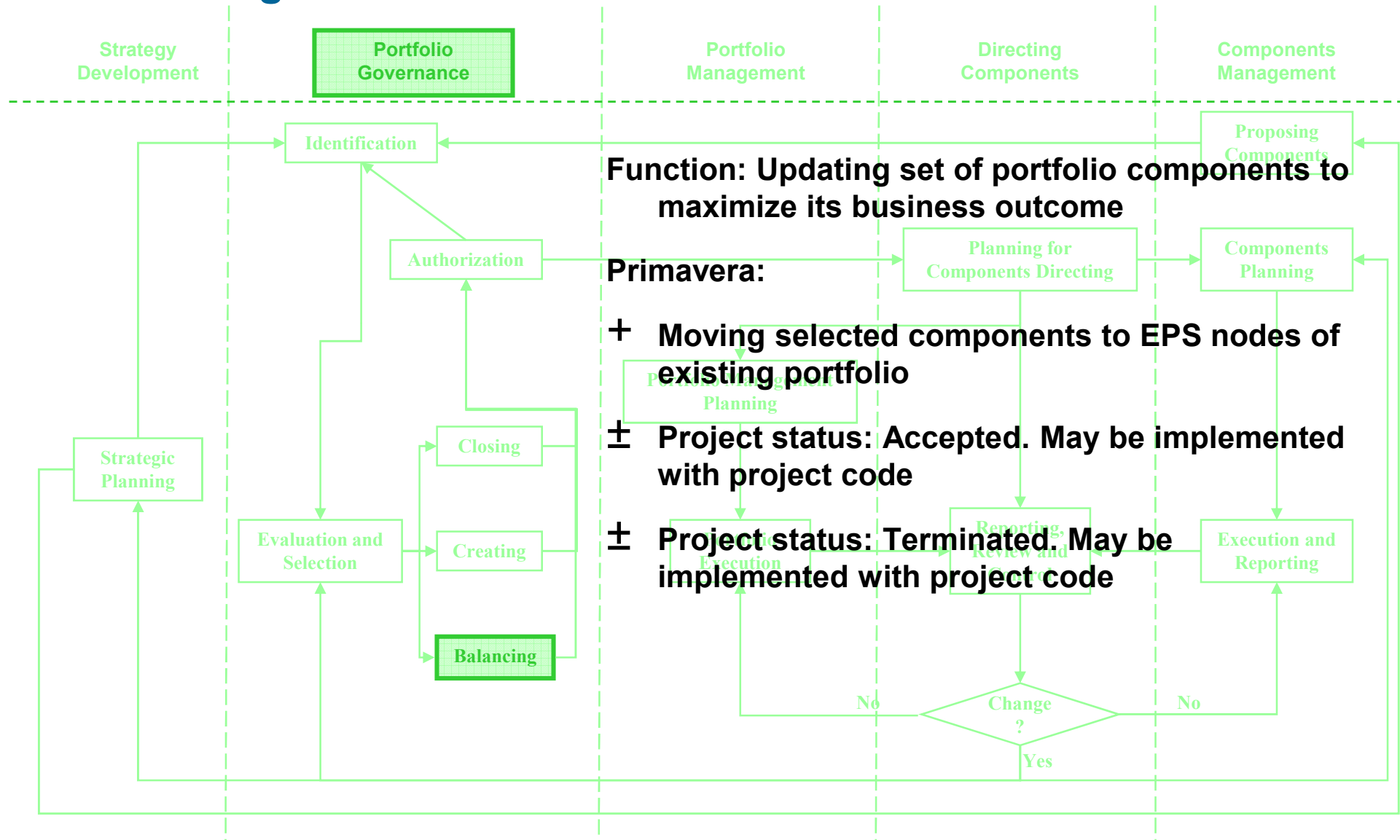
# Evaluation and Selection



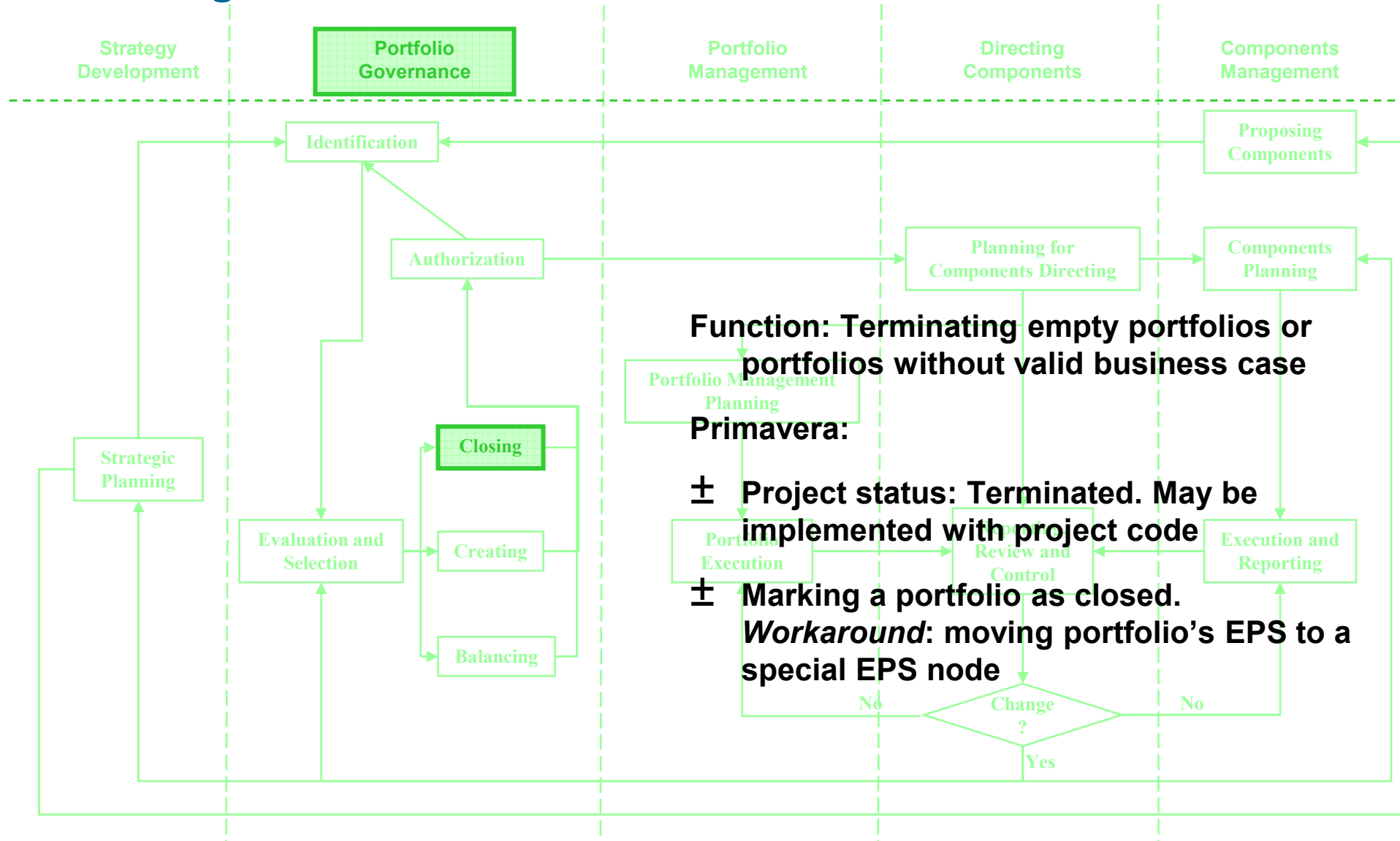
# Creating



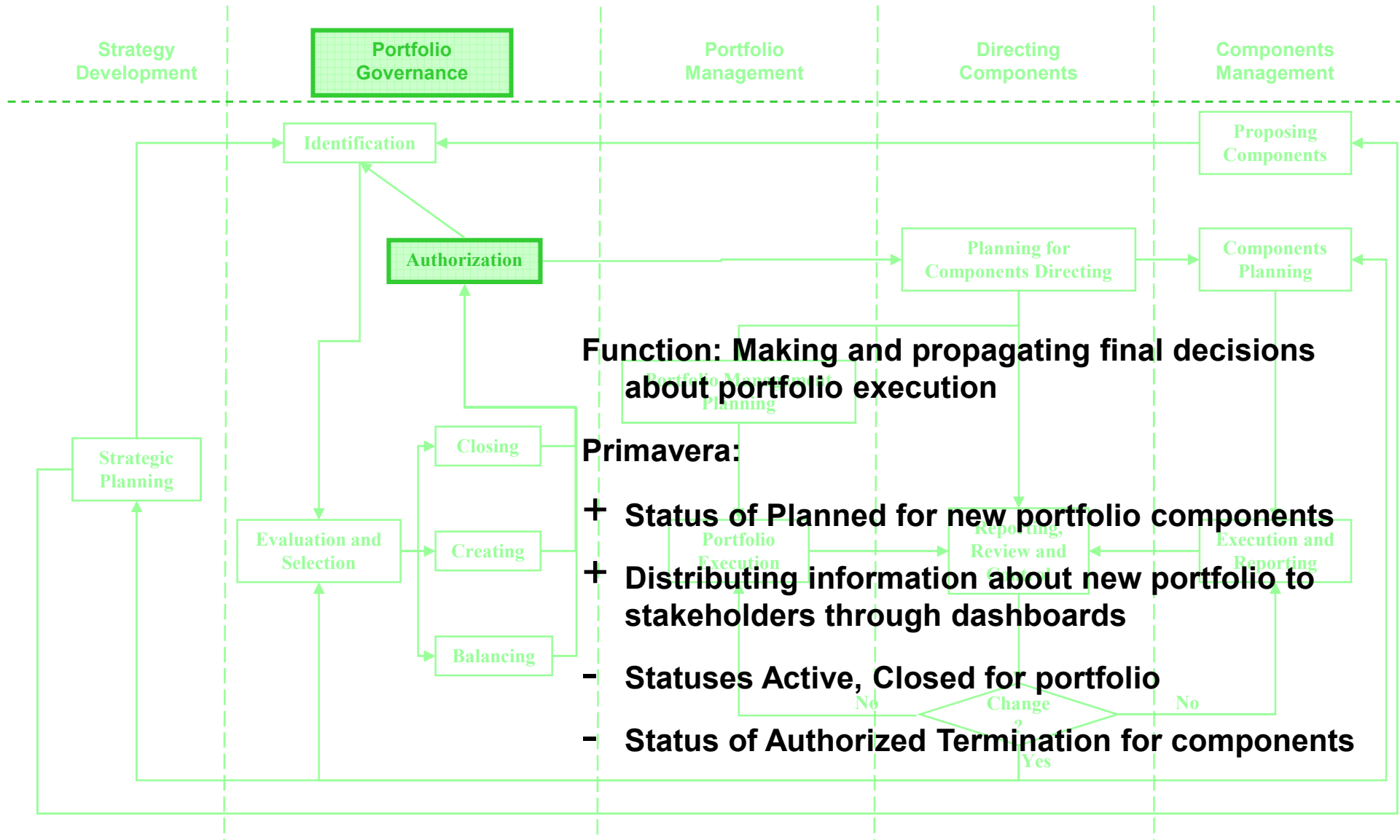
## Balancing



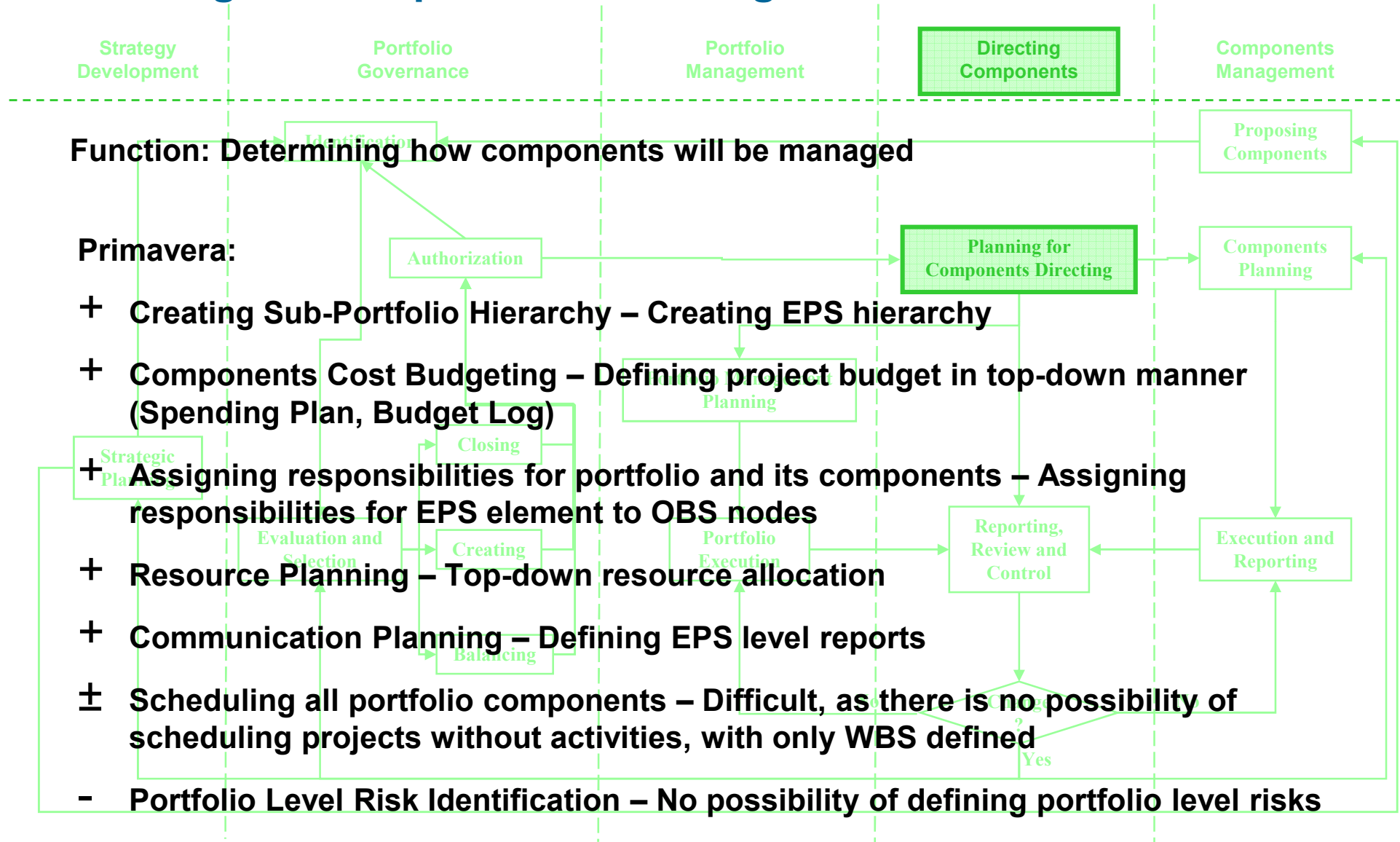
## Closing



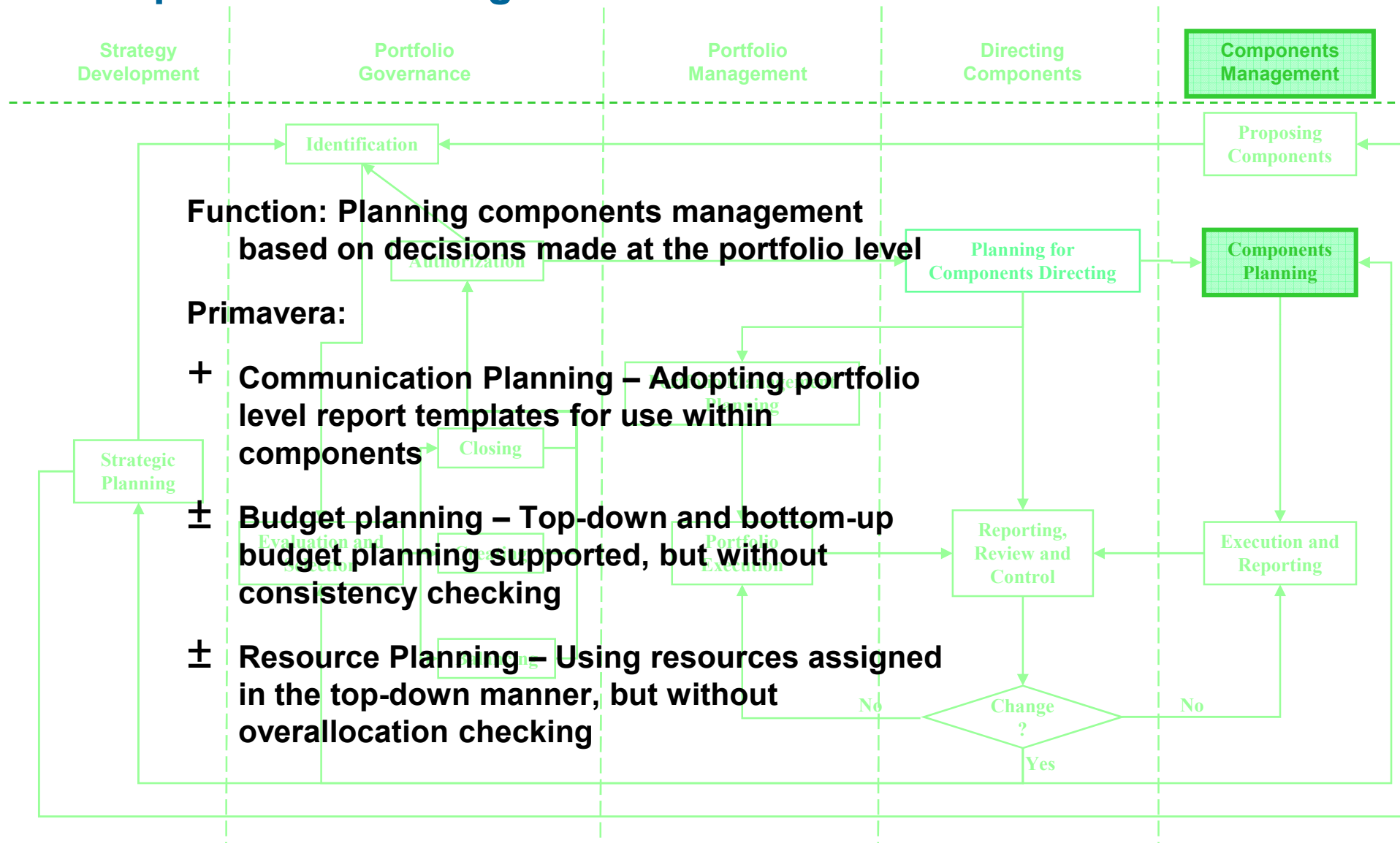
# Authorization



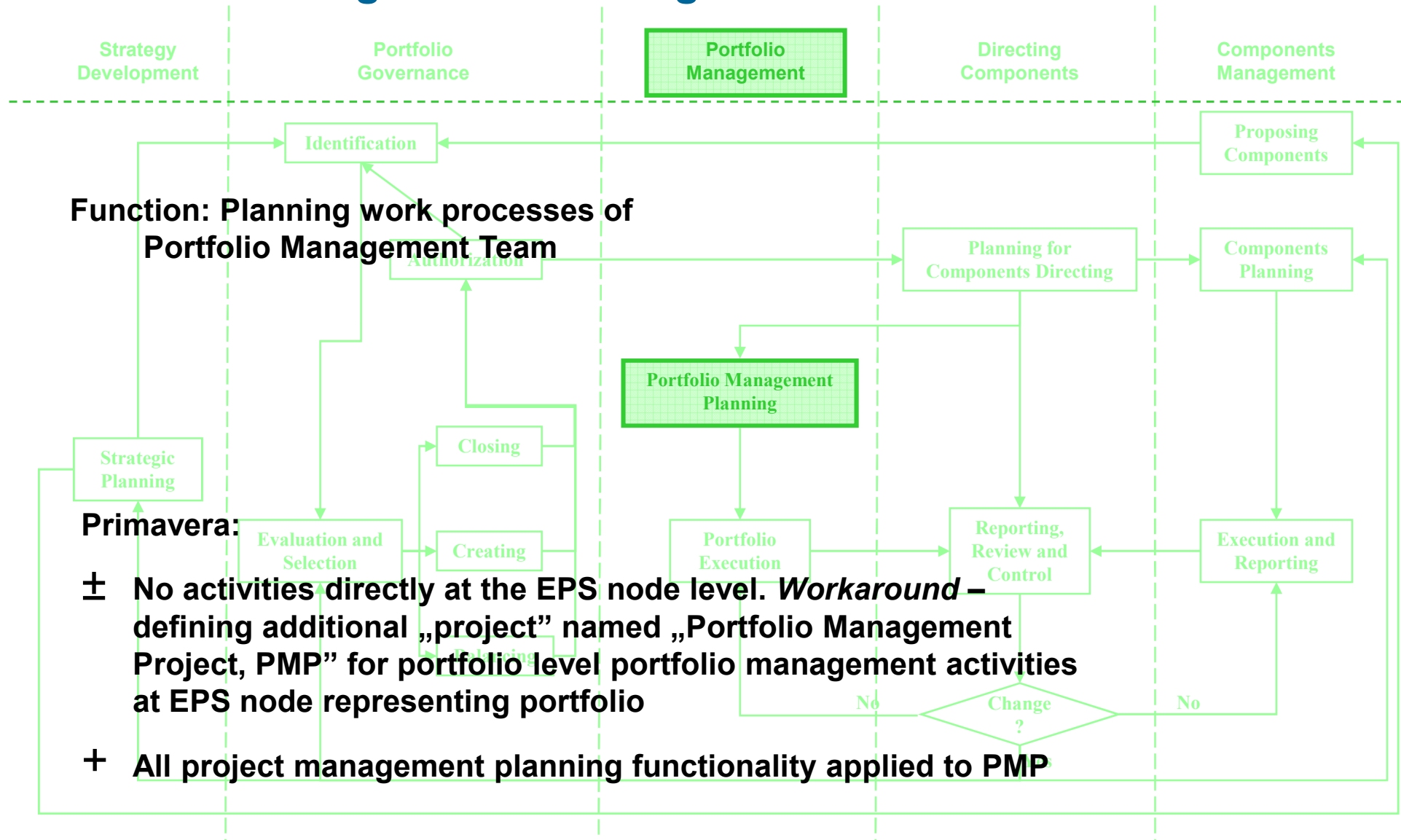
# Planning for Components Directing



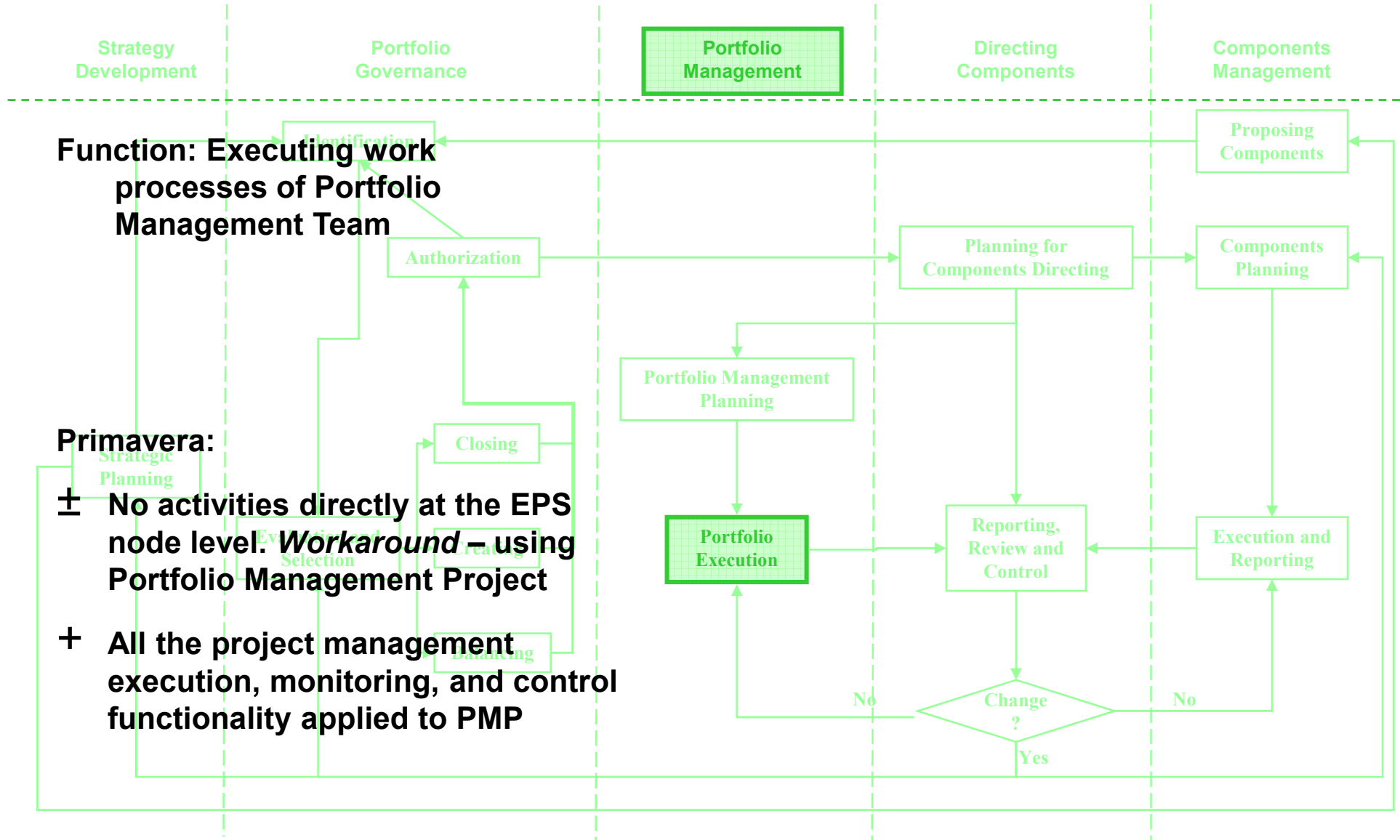
# Components Planning



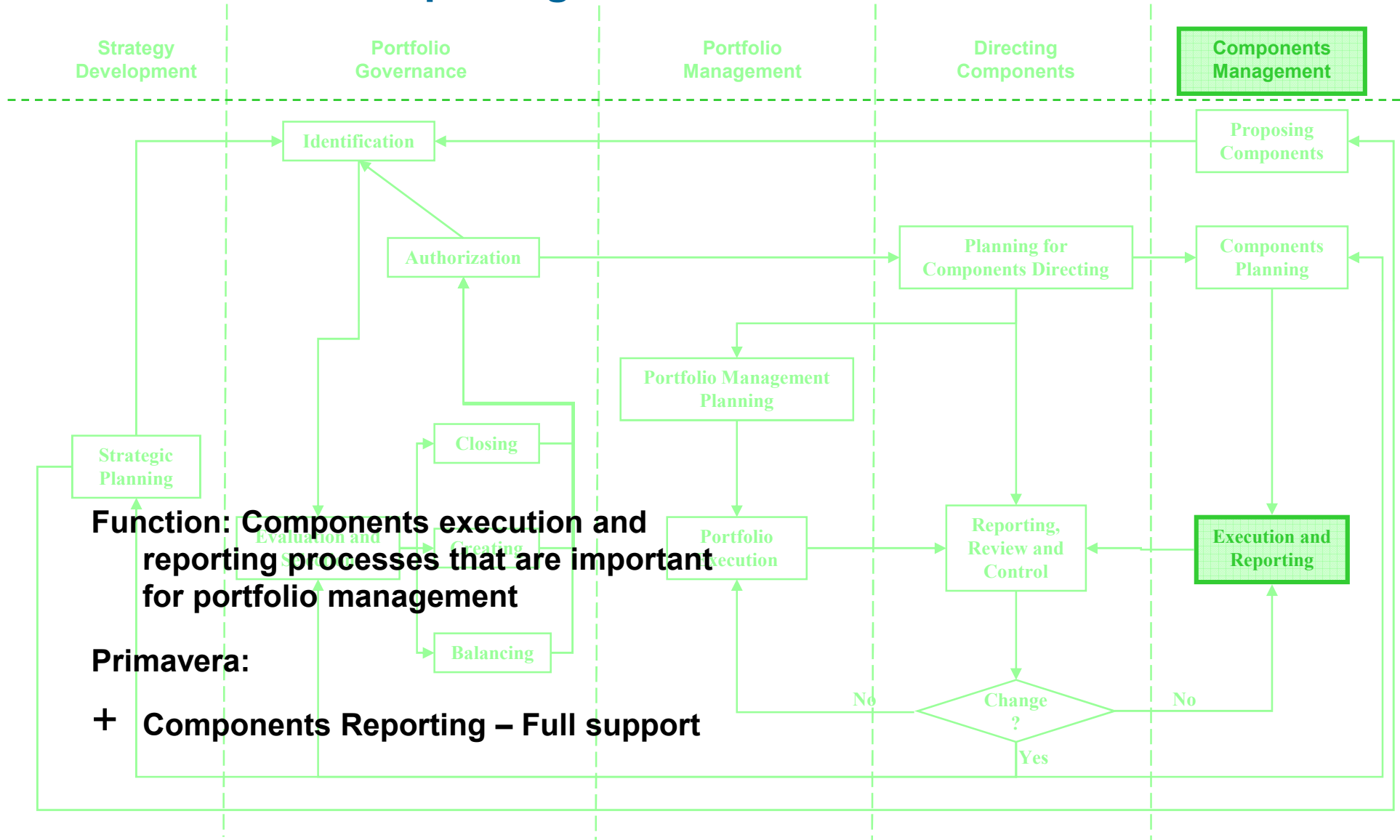
# Portfolio Management Planning



# Portfolio Execution



# Execution and Reporting

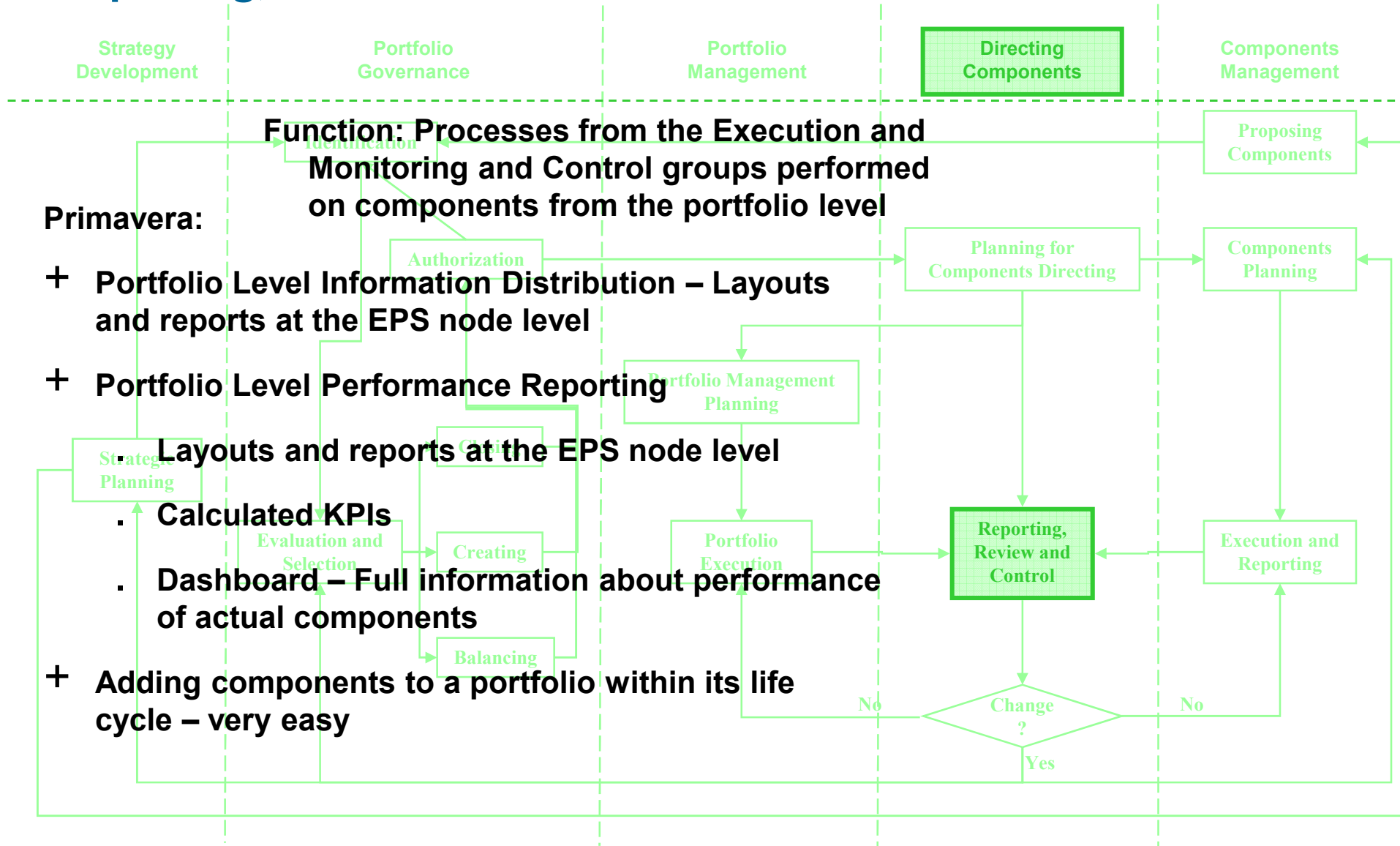


**Function: Components execution and reporting processes that are important for portfolio management**

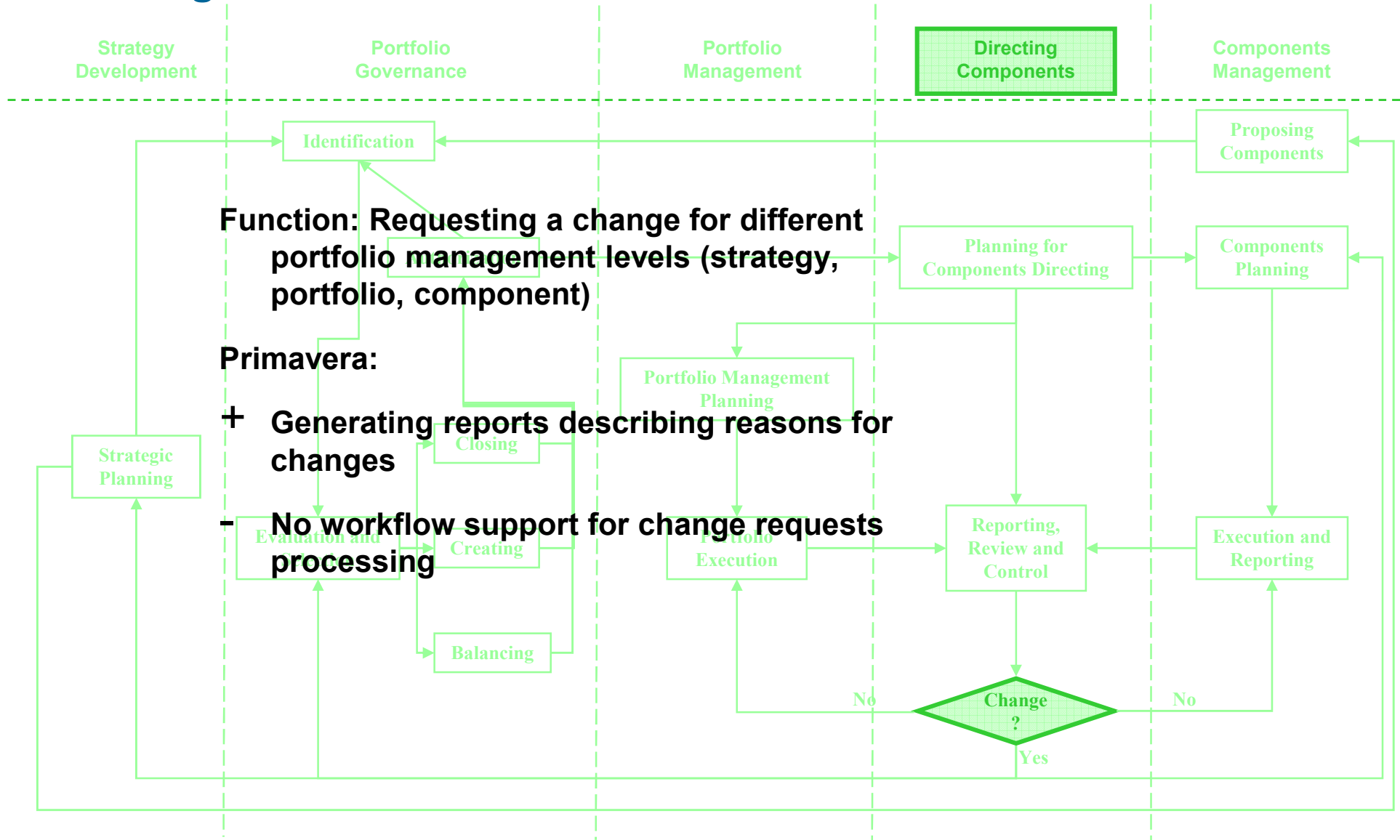
**Primavera:**

**+ Components Reporting – Full support**

# Reporting, Review and Control



# Change



## Conclusions

**Primavera tools support most of the processes needed by the Unified Portfolio Management Model.**

**Some improvements are needed in these areas:**

- **EPS codes / statuses**
- **Workflow support**
- **Portfolio Management Project processes**

**Full description of UPMM: Gasik, S. „The Unified Portfolio Management Model”, paper presented at PMI 2007 Global Congress, Atlanta, October 2007.**

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## Questions?

Presentation partially sponsored by Primavera PAR  
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