

Portfolio Assignment - Plan

Assignment

Title:

Project leader/team names:

Management Sponsor/guide name:

Date started:

Date completed:

Introduction and background

(Describe the background/history and reason that this portfolio assignment is important for the company/business unit/team. How would this project add value/extra value? Who else worked on this before? Are there known stakeholders who should be involved/informed along the way?)

Portfolio Assignment Goals

(what exactly should this project team accomplish? Are there limits to what they should focus on or not focus on? Are there specific learning goals associated with this assignment which would benefit those working on this portfolio assignment?)

Strategies/approach planned

(Are there known strategies or preferred approaches that have already been agreed with the sponsor/management? Does this assignment fit in with any other existing strategies?) What status update and communication should those working on this assignment adhere to? i.e. how often should the Sponsor be updated and consulted?)

Potential Cost/Resource impact

(What kind of cost impact do we expect this assignment will have? Does anyone get assigned to this on a full-time basis? External resources used? Do we need to buy any tools or equipment for this assignment to be completed successfully?)

Desired/Planned outcome

(Is the desired outcome known? What would be the best realistic outcome this assignment could have?)

Post Project Evaluation:

What was the final result/outcome/recommendation?

What did you learn from this assignment?

(Looking at the outcome achieved the process you planned and actually followed, etc.)

How can the outcome/learning from this portfolio exercise be used to improve processes/understanding etc.?

(Are there any other areas where the outcome of this assignment may be applied?)

Sponsor/Guide comments

(Helpful comments from the sponsor on how the assignment was conducted and the outcome?)