Strategic Portfolio Decisions

Sample Agenda

Core Faculty: Bruce Judd, David Matheson, Jim Matheson, Carl Spetzler

Note: We will take short breaks every 60–90 minutes.

Day 1
7:00–8:00 Registration and continental breakfast
8:00–8:30 Introduction
8:30–9:30 Portfolio simulation exercise
9:30–11:00 Portfolio management framework
11:00–12:00 Case study: product R&D
12:00–1:00 Lunch
1:00–3:00 Portfolio unit evaluation
3:00–4:15 Case exercise: project evaluation
4:15–5:00 Calibration and tracking
5:15–6:30 Reception / networking

Day 2
7:00–8:00 Continental breakfast
8:00–9:00 Case study: calibration and tracking
9:00–10:00 Portfolio decisions
10:00–12:00 Case exercise: portfolio decisions
12:00–1:00 Lunch
1:00–1:30 Case exercise: personal financial portfolios
1:30–2:15 Preparation: diagnosis, framing, and design
2:15–3:00 Case exercise: preparation
3:00–4:00 Creating more value with alternatives
4:00–5:00 Case study: large-scale portfolio

Day 3
7:00–8:00 Continental breakfast
8:00–8:30 Business portfolios
8:30–9:15 Case study: business portfolio with alternatives
9:15–10:30 Case exercise: risk correlation
10:30–11:15 Case study: resource allocation with alternatives
11:15–12:00 Implementation and summary