**Principles of Execution Portfolio Management Templates**

**Portfolio Strategic Plan**

This document is used to define the parameters of the portfolio strategic plan and to facilitate the implementation of the Portfolio Management Office.

| **IDENTIFICATION** |
| --- |
| Portfolio Manager: | ***Enter your name*** |  | Date: | ***Today's Date*** |  |
|  |  |  |  |
| Business Owner: | ***Enter the name of the Business Owner.***  |  |  |
| Executive Sponsor: | ***Enter the name of the Project Executive Sponsor.***  |  |  |
|  |
| **Portfolio Vision and Objectives:**  |
|  |
| **Organizational Structure and Organization Area:** |
|  |
| **Measureable Goals and guidance:** |
| **Allocation of funds:** |
| **Portfolio Benefits, Performance results and value expected:** |
| **Communication required to ensure successful change and implementation:** |
| **Key assumptions, constraints, dependencies, and risks:** |
| **Resource required by type and quantity:** |
| **Portfolio Prioritization model, a high-level prioritization, decision-making framework:** |
| **Risk Tolerance:** |
|  |