**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** | | | | | | | |
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| 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.*** | | | | |  |  |
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| **Portfolio Vision and Objectives:** | | | | | | | |
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| **Organizational Structure and Organization Area:** | | | | | | | |
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| **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:** | | | | | | | |
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