

## Strategic Portfolio Management (SPM) Fundamentals

**Duration: 2 Days**    **Course Code: SNSPMF**    **Delivery Method: Virtual Learning**

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### Overview:

Strategic Portfolio Management is the process an organization uses to select, prioritize, and manage resources within its portfolio of programs, projects, and initiatives used to meet strategic goals and objectives.

In this on-demand course, you will be introduced to the Strategic Portfolio Management (SPM) applications and learn how SPM encompasses a range of business capabilities, processes, and technological support aimed at enabling organizations to implement the three key attributes that help to see superior business results from their digital and technology-related investments: portfolio alignment, value-oriented decision-making, and continuous portfolio adaptability.

Topics include:

Innovation Management  
Demand Management  
Project Management  
Resource Management  
Program Management  
Portfolio Planning Workspace

This course reflects the Vancouver release of the Now Platform®.

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### Objectives:

- Define SPM and its purpose.
  - Identify the applications within ServiceNow SPM and their purpose.
  - Change a submitted idea into a demand
  - Demonstrate how to import MS projects into ServiceNow
  - Show how to manage the project scope, schedule, and resources and communicate efficiently with project teams and stakeholders
  - Analyze project financials and resource effort
  - Plan project task resources with a clear view of capacity, allocations, and utilization
  - Analyze time related to resources
  - Track project progress and generate detailed project-level and strategic portfolio-level reports
  - Organize project artifacts and close out projects
  - Build, manage, and track programs and portfolios
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### Prerequisites:

- Welcome to ServiceNow
  - ServiceNow Administration Fundamentals
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## Content:

### Welcome to Strategic Portfolio Management

- Request participant guide and a lab instance
- Instance Help

### Introduction to SPM

- Strategic Portfolio Management overview
- Navigation overview (demo)
- SPM Architecture
- Knowledge check

### Innovation and Demand Management

- Innovation Management
- Innovation Management (demo)
- Demand initiation and creation
- Demand Management creation (demo)
- Lab 2.1 - Submit an idea and a demand
- Lab 2.1 guided demonstration of steps
- Demand assessment
- Demand assessment and approval (demo)
- Lab 2.2 - Screen a demand and create a project from a demand
- Lab 2.2 guided demonstration of steps
- Knowledge check

### Project Management

- Project initiation
- Project creation from a demand (demo)
- Project Planning
- Lab 3.1 - Create a new project and project tasks
- Lab 3.1 guided demonstration of steps
- Additional project setup options
- Lab 3.2 - Additional project creation options
- Lab 3.2 guided demonstration of steps
- Introduction to Project Workspace and Planning Console
- Project task Planning in Project Workspace (demo)
- Introduction to Project Workbench
- Lab 3.3 - Create project tasks in Planning console
- Lab 3.3 guided demonstration of steps
- Manage project activities
- Close a project
- Project Execution and closure (demo)
- Lab 3.4 - Manage project activities
- Lab 3.4 guided demonstration of steps
- Knowledge check

### Resource Management

- Resource Management overview
- Resource plans
- Lab 4.1 - Request Resources ; Confirm and Allocate Resources
- Lab 4.1 guided demonstration of steps
- Resource Workbench
- Resource costs
- Resource Management in Project Workspace
- New Resource Management (demo)
- Knowledge check

### Portfolio Management

- Project Planning Workspace (PPW) Overview
- Create a portfolio plan and prioritize (demo)
- Manage Portfolio Plans
- Manage portfolio roadmaps (demo)
- Portfolio capacity and financial planning
- Capacity Planning, the Lists module, and Portfolio Planning Diagnostics (demo)
- Lab 5.1 - Create and update a portfolio plan
- Lab 5.1 guided demonstration of steps
- Knowledge check

### Summary and Recap

- Plan, Build, Run SPM
- SPMF: PRB knowledge check

## Further Information:

For More information, or to book your course, please call us on 0800/84.009

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[www.globalknowledge.com/en-be/](http://www.globalknowledge.com/en-be/)