Portfolio Review Meeting

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| Attendees  Executive Management (Sub) Portfolio Manager PMO / Portfolio Coordinator | General Info  Duration: 2 hour Leader: Portfolio Coordinator Cadence: Periodic/As Needed | Needed Before Meeting  Current Portfolio Status Ideas for Proposed Portfolio |



Overall Meeting Objective  
Decision on how to move forward with the project portfolio

Agenda

1. Introduction  
   Kick off the discussion with an overview of meeting objectives & the agenda.
2. Portfolio Status  
   Discuss status of projects, resources and overall health of the portfolio.
3. Portfolio Changes  
   Discuss potential changes needed to resolve any project roadblocks (resource constraints, budget constraints, lack of prioritization, timing issues etc).
4. Portfolio Decision  
   All meeting attendees come to an agreement on how to proceed with the portfolio.
5. Next Steps  
   Confirm next steps to ensure the portfolio decisions are implemented, including the communication of decisions in a standardized format to the rest of the organization.