Portfolio Review Meeting

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| AttendeesExecutive Management(Sub) Portfolio ManagerPMO / Portfolio Coordinator | General InfoDuration: 2 hourLeader: Portfolio CoordinatorCadence: Periodic/As Needed | Needed Before MeetingCurrent Portfolio StatusIdeas 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.