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| D:\IPMA\Website\Intranet\323 Official Graphics\IPMA_full_logo_sm.png | Executive Summary Report  for IPMA Level A or B candidate, PORTFOLIO Management | CAPM LOGO novi |



***Please consider the environment before printing this document***

Version control

| Version and date of CVMB approval | Date | Valid until |
| --- | --- | --- |
| Version 1.0 | 11.10.2016 | N/A |

Configuration control

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| --- | --- | --- | --- |
| Date | Version | Section | Change |
| 29.04.2016 | 0.1 | All | * Initial draft |
| 29.05.2016 | 0.2 | All | * Comments incorporated from the team members |
| 30.05.2016 | 0.3 | File name | * File name changes according to the Document Design Guidelines |
| 29.06.2016 | 0.4 | All | * Comments from Dalibor and Jorunn incorporated * Colour scheme of the tables changed |
| 02.08.2016 | 0.5 | All | * CVMB comments incorporated |
| 11.10.2016 | 0.9 | All | * Proposed Version by Project Team |
| 11.10.2016 | 1.0 | All | * Endorsed by CVMB for CB use and modification |

Purpose

The purpose of this document is to provide directions how to prepare executive summary report for IPMA level A or B candidate working in portfolio management.

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| --- | --- | --- |
| **Candidate Name** |  | **Insert link to your CV** |
| **Level Applied for (check one)** | IPMA Level A | IPMA Level B |

|  |  |  |  |
| --- | --- | --- | --- |
| Description of employer’s organisation | | | |
| Organisation (Customer) name: |  | | |
| Number of employees | < 250 | 250 – 5000 | > 5000 |
| Main line of organisation’s industry | E.g. software development, banking | | |
| Main line of your portfolio industry |  | | |
| Role of applicant within employer’s organisation | | | |
| An organisation chart with applicant position identified |  | | |
| Area of responsibility |  | | |
| An overview of the Portfolio Management processes / procedures used |  | | |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Summary for all portfolios** | | | | |
| Name of the Portfolio | Start date of your involvement in Portfolio | Finish date of your involvement in Portfolio | Duration, months | Score of complexity |
| Portfolio #1 |  |  |  |  |
| Portfolio #2 |  |  |  |  |
| Portfolio #3 |  |  |  |  |

Add more lines if applicable

|  |  |
| --- | --- |
| Summary of the portfolio #1  (max one page) | |
| Portfolio strategical alignment | Describe how the portfolio is aligned with the mission, vision and strategy of organisation, what are objectives and planned benefits of the portfolio |
| Your workload (% of total) |  |
| Total budget |  |
| Resources available | Describe available resources (People, Equipment, Materials, Infrastructure, Tools and other assets) |
| Stakeholders | Relationship with internal and external stakeholders |
| Description of portfolio management | Describe the organisation of the portfolio and its component projects and programmes  Describe the methods, tools, techniques and documents used for portfolio management |
| Description of portfolio management challenges | Describe how you have managed portfolio and how you met the complexity criteria. You can use the STAR approach (Situation, Task, Action, Result) in order to structure the report.   * Situation/challenge * Effort to deal with it * Outcome * Reference to CEs * You can include the links to the information in complexity criteria form |

Please copy and fill in relevant parts of this report according to your needs to cover your experience.