



Capital Investment Planning and Portfolio Governance Training Course

7 – 11 June 2027
Montreux



AGILE LEADERS
Training Center

Capital Investment Planning and Portfolio Governance Training Course

Ref: 413_133548 **Date:** 7 – 11 June 2027 **Location:** Montreux **Fees:** 7500 Euro

Overview

Capital Investment Planning and Portfolio Governance Training Course is a five-day advanced course for finance and capital-planning teams who leave with a Capital Planning Cycle and Portfolio Governance Pack. The course connects strategy translation, proposal intake, funding envelopes, project screening, portfolio dependencies, capacity constraints, decision calendars, approval gates, allocation records, and post-approval oversight. Agile Leaders Training Center delivers this course on capital investment planning and portfolio governance.

Who Should Attend

- Capital planning functions responsible for annual investment cycles and portfolio consolidation
- Finance functions responsible for funding envelopes, forecasts, and affordability evidence
- Strategy functions responsible for investment themes and portfolio alignment
- Project sponsorship functions responsible for proposal quality, ownership, and benefits evidence
- Controllershship functions responsible for approval records, controls, and expenditure monitoring
- Executive support functions responsible for governance calendars, challenge, and decision documentation

The course assumes participants already work with capital proposals, forecasts, or portfolio decisions and leaves out detailed project delivery, securities valuation, and introductory accounting.

Departments and Industries

The course supports capital planning and portfolio governance across asset-intensive, service, public, and nonprofit organizations.

- Finance, strategy, treasury, and financial planning departments
- Manufacturing, energy, utilities, and infrastructure organizations
- Technology, telecommunications, healthcare, and logistics organizations
- Public service, education, and nonprofit institutions
- Engineering, operations, and project sponsorship functions
- Portfolio governance and investment committee support teams

Learning Objectives

By the end of this course, participants will be able to:



- Build a governed capital planning calendar
- Apply proposal intake and readiness gates
- Analyze funding capacity and portfolio constraints
- Prioritize projects against strategic and financial criteria
- Use approval, allocation, and change records
- Evaluate portfolio delivery and post-approval evidence

Course Agenda

Day 1: Capital Planning Architecture

- Strategy-to-Investment Theme Map
- Annual Capital Planning Calendar
- Capital Demand and Funding Envelope Model
- Planning Roles and Decision-Rights Matrix
- Capital Planning Assumption Register

Day 2: Proposal Intake and Readiness

- Capital Proposal Intake Standard
- Business Case Readiness Gate
- Incremental Cash-Flow Forecast Template
- Project Dependency and Constraint Map
- Proposal Evidence Quality Checklist

Day 3: Portfolio Prioritization

- Strategic Alignment Scoring Matrix
- Financial Value and Risk Screening Grid
- Capital Rationing Allocation Model
- Portfolio Balance and Concentration Map
- Project Sequencing and Capacity Board

Day 4: Approval and Portfolio Governance

- Investment Committee Decision Calendar
- Approval Stage and Authority Map
- Capital Allocation Decision Record
- Portfolio Change and Reallocation Protocol
- Post-Approval Benefits and Expenditure Dashboard



Day 5: Capital Planning Practice

- Suggested Exercise: Funding Envelope Challenge
- Suggested Exercise: Proposal Readiness Review
- Suggested Exercise: Portfolio Prioritization Decision
- Suggested Exercise: Allocation and Reallocation Record
- Capstone Exercise: Capital Planning Cycle and Portfolio Governance Pack

Practical Exercises

The course uses suggested activities to connect investment demand with an accountable portfolio decision cycle.

- Suggested activity: translate strategy and affordability evidence into investment themes and a funding envelope.
- Suggested activity: screen proposals for readiness, dependencies, assumptions, and evidence gaps.
- Suggested activity: rank competing projects under funding and delivery-capacity constraints.
- Suggested activity: document approval, allocation, change, and post-approval oversight decisions.

FAQs

Who suits capital investment planning training, and what does it assume?

Capital investment planning training suits professionals who already prepare, consolidate, fund, challenge, govern, or approve capital proposals and portfolio evidence.

How does capital investment planning differ from project appraisal training?

Capital investment planning governs the portfolio cycle, funding capacity, intake, prioritization, sequencing, approval, and reallocation; project appraisal concentrates on the financial and risk evaluation of an individual proposal.

What belongs in a capital planning cycle?

A capital planning cycle includes strategic themes, proposal windows, readiness gates, funding envelopes, evaluation criteria, portfolio reviews, approval dates, allocation records, change controls, and post-approval monitoring.

How should a capital portfolio be prioritized?

A capital portfolio should be prioritized using strategic contribution, value, risk, mandatory needs, dependencies, timing, funding, delivery capacity, and portfolio balance, with documented challenge and decision rights.



How should capital allocations be changed after approval?

Capital allocations should change through defined triggers, updated evidence, impact analysis, authority checks, a reallocation decision record, and communication to proposal owners and portfolio oversight functions.

Conclusion

Participants leave with a Capital Planning Cycle and Portfolio Governance Pack containing a calendar, funding envelope, intake standard, readiness gate, prioritization matrix, capacity board, decision record, and oversight dashboard. The pack changes disconnected proposals into a sequenced and governed investment portfolio. It supports transparent allocation, challenge, adjustment, and accountability.