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| D:\IPMA\Website\Intranet\323 Official Graphics\IPMA_full_logo_sm.png | Executive Summary Reportfor IPMA Level A or B candidate, PORTFOLIO Management |  |

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

Purpose

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

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| **Candidate name** |  |
| **Level applied for (check one)** | [ ]  IPMA Level A | [ ]  IPMA Level B |

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| Description of employer’s organisation |
| Organisation (customer) name: |  |
| Number of employees | [ ]  < 250 | [ ]  250 – 5000 | [ ]  > 5000 |
| Main sector organisation operates in | E.g. software development, banking |
| Sector in which the portfolio operates |  |
| Role of applicant within employer’s organisation |
| An organisational chart with applicant’s position identified |  |
| Area(s) of responsibility |  |
| An overview of the portfolio management processes/procedures used  |  |

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| **Summary for all portfolios**  |
| Name of the portfolio | Start date of your involvement | Finish date of your involvement | Duration (months) |
| Portfolio #1 |  |  |  |
| Portfolio #2 |  |  |  |
| Portfolio #3 |  |  |  |

Add more lines if applicable

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| Summary of portfolio #1 (max one page) |
| Portfolio strategical alignment | Describe how the portfolio is aligned with the mission, vision and strategy of the organisation, what are the 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 the 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 competence elements

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.