Wrike for Project Portfolios Training Course

Professional Development Training Course Outline

Category	Project Management	**Duration**	5 Days
Base Fee	$1,500 USD	**Delivery Mode**	Online / On-site Hybrid

Course Introduction

Wrike is a leading project portfolio management platform designed to streamline workflow, enhance collaboration, and improve strategic project delivery. Wrike for Project Portfolios Training Course provides participants with comprehensive knowledge and practical skills to effectively manage multiple projects, prioritize resources, and align team efforts with organizational objectives using Wrike. Participants will learn how to configure dashboards, utilize reporting tools, and implement automation to optimize project outcomes. Emphasis is placed on leveraging Wrike's advanced features for visibility, accountability, and real-time decision-making across portfolios of complex projects.

In today's fast-paced business environment, project managers and portfolio leaders require efficient tools that drive productivity, track performance, and support agile methodologies. This course equips learners with the expertise to integrate Wrike into daily operations, manage cross-functional teams, and implement best practices for project planning, execution, and monitoring. Participants will gain hands-on experience with Wrike's collaborative tools, resource allocation capabilities, and reporting functions to enhance portfolio governance, reduce risks, and achieve measurable results across organizational initiatives.

Programme Curriculum

Wrike for Project Portfolios Training Course

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Course Objectives

1. Understand Wrike's platform capabilities for project portfolio management.
2. Implement project workflows and task hierarchies for multiple projects.
3. Configure dashboards and reporting tools for portfolio oversight.
4. Use Wrike automation features to optimize workflow and efficiency.
5. Manage resource allocation and workload across teams.
6. Track project KPIs and performance metrics in real time.
7. Integrate Wrike with other collaboration and productivity tools.
8. Apply risk management and issue tracking across projects.
9. Collaborate effectively with cross-functional teams using Wrike.
10. Customize project templates for recurring projects and processes.
11. Utilize advanced filtering, tagging, and search for efficient task management.
12. Monitor progress and generate insights for strategic decision-making.
13. Develop strategies for scaling Wrike adoption across the organization.

Organizational Benefits

- Enhanced project portfolio visibility and control
- Improved team collaboration and communication
- Streamlined project workflows and task management
- Optimized resource allocation and workload balancing
- Reduced project risks and bottlenecks
- Faster decision-making through real-time reporting
- Increased efficiency through automation features
- Standardized project management practices across teams
- Better tracking of project KPIs and organizational performance
- Higher project success rates and timely delivery

Target Audiences

- Project managers and program managers
- Portfolio managers and PMO staff
- Team leads and supervisors
- Business analysts and operations managers
- IT project coordinators and administrators
- Resource managers and planners

- Consultants supporting project management initiatives
- Trainers and educators in project portfolio management

Course Duration: 5 days

Course Modules

Module 1: Introduction to Wrike and Portfolio Management

- Overview of Wrike's platform and core features
- Key principles of project portfolio management
- Setting up workspace, teams, and projects
- Navigating project hierarchies and folders
- Configuring project settings and access permissions
- Case Study: Setting up a new portfolio in Wrike for a mid-sized organization

Module 2: Task and Workflow Management

- Creating, assigning, and tracking tasks across projects
- Building workflows and dependencies
- Setting priorities, deadlines, and milestones
- Utilizing recurring tasks and project templates
- Managing approvals and task progress
- Case Study: Streamlining cross-department workflows using Wrike

Module 3: Resource Management

- Assigning resources and managing team workloads
- Monitoring resource utilization and availability
- Using workload charts and capacity planning tools
- Balancing resource allocation across multiple projects
- Addressing over-allocations and bottlenecks
- Case Study: Optimizing team workload for concurrent projects

Module 4: Dashboards, Reporting, and Analytics

- Creating custom dashboards for portfolio oversight
- Configuring project and task reports
- Tracking key performance indicators (KPIs)
- Using real-time analytics for decision-making
- Sharing insights with stakeholders
- Case Study: Reporting project status and performance to executives

Module 5: Automation and Advanced Features

- Implementing automated workflows and task rules
- Setting triggers, notifications, and reminders
- Using templates for repetitive processes
- Automating approvals and updates
- Leveraging Wrike integrations for enhanced productivity
- Case Study: Automating approval workflows to reduce delays

Module 6: Risk and Issue Management

- Identifying risks across portfolios and projects
- Tracking issues, blockers, and mitigation plans
- Using Wrike to monitor project health and status
- Setting alerts for risk triggers and deadlines
- Communicating risks to stakeholders effectively
- Case Study: Managing high-priority issues in a complex project portfolio

Module 7: Collaboration and Communication

- Using comments, mentions, and attachments for team collaboration
- Managing cross-functional projects and approvals
- Sharing project updates with stakeholders
- Integrating Wrike with email and communication tools
- Encouraging accountability and transparency across teams
- Case Study: Coordinating a cross-functional product launch using Wrike

Module 8: Scaling Wrike Across the Organization

- Strategies for enterprise-wide adoption of Wrike
- Customizing user roles and access for multiple teams
- Implementing governance and best practices
- Training and onboarding new users
- Continuous improvement and process optimization
- Case Study: Scaling Wrike adoption across multiple business units

Training Methodology

- Instructor-led demonstrations and hands-on labs
- Real-world case studies for practical application
- Group exercises for collaborative problem-solving

- Scenario-based simulations to reinforce concepts
- Hands-on exercises with Wrike templates and dashboards
- Interactive discussions and feedback sessions

Register as a group from 3 participants for a Discount

Send us an email: info@fineskilltrainingcenter.org or call *+254769199797*

Certification

Upon successful completion of this training, participants will be issued with a globally- recognized certificate.

Tailor-Made Course

We also offer tailor-made courses based on your needs.

Key Notes

a. The participant must be conversant with English.

b. Upon completion of training the participant will be issued with an Authorized Training Certificate

c. Course duration is flexible and the contents can be modified to fit any number of days.

d. The course fee includes facilitation training materials, 2 coffee breaks, buffet lunch and A Certificate upon successful completion of Training.

e. One-year post-training support Consultation and Coaching provided after the course.
f. Payment should be done at least a week before commence of the training, to Fineskill Training Center account, as indicated in the invoice so as to enable us prepare better for you.

Upcoming Scheduled Sessions

Start Date	End Date	Location	Price
23 Nov 2026	27 Nov 2026	Online	$1,000
23 Nov 2026	27 Nov 2026	Physical	$1,500
23 Nov 2026	27 Nov 2026	Physical	$3,000
23 Nov 2026	27 Nov 2026	Physical	$3,000
23 Nov 2026	27 Nov 2026	Physical	$6,000

Start Date	End Date	Location	Price
23 Nov 2026	27 Nov 2026	Physical	$4,500
23 Nov 2026	27 Nov 2026	Physical	$6,000
23 Nov 2026	27 Nov 2026	Physical	$6,000

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