

LEAN PORTFOLIO MANAGEMENT IN PRACTICE

TRAINING COURSE OUTLINE

Thriving in the digital age with Business Agility



Overview

Lean Portfolio Management is a two-day, interactive course that teaches the practical tools and techniques necessary to implement Strategy and Investment Funding, Agile Portfolio Operations, and Lean Governance.

In this course, attendees gain the practical tools and techniques necessary to implement the Lean Portfolio Management functions of Strategy and Investment Funding, Agile Portfolio Operations, and Lean Governance. Participants also have the opportunity to capture the current and future state of their portfolio with the Portfolio Canvas tool and identify important business initiatives for achieving the portfolio vision. Participants establish portfolio flow with the Portfolio Kanban and prioritize epics for maximum economic benefit. The course also provides insights on how to establish Value Stream Budgets and Lean Budget Guardrails and measure the Lean portfolio performance.

Duration

2 – day workshop.

Learning Objectives

After attending the class, attendees should be able to:

- ❖ Describe Lean Portfolio Management (LPM)
- ❖ Connect the portfolio to enterprise strategy
- ❖ Establish the Portfolio Vision
- ❖ Implement Lean Budgeting and Guardrails
- ❖ Establish flow with the Portfolio Kanban
- ❖ Support operational excellence with an Agile Program Management
- ❖ Office (PMO) and Communities of Practice (CoPs)
- ❖ Coordinate Value Streams
- ❖ Measure LPM performance
- ❖ Build a plan for LPM implementation

Target Audience

The following individuals will benefit from this course:

- ❖ Executives and Leaders (CIOs, CEOs, CFOs, CTOs, and VPs)
- ❖ Portfolio Managers
- ❖ Enterprise Architects
- ❖ Product Managers and Solution Managers
- ❖ Business Owners
- ❖ Program Office Personnel
- ❖ Enterprise Agile Coaches
- ❖ Human Resources
- ❖ Epic Owners
- ❖ RTEs

Training contents

Module 1: Introducing Lean Portfolio Management

- ❖ Discuss the purpose of SAFe Lean Portfolio Management
- ❖ Explain the Lean-Agile Mindset and SAFe principles
- ❖ Discuss the problems of project-cost accounting
- ❖ Discuss the key benefits of organizing around value
- ❖ Define the SAFe portfolio structure
- ❖ Explain the shift to Lean Portfolio Management

Module 2: Establishing Strategy & Investment Funding

- ❖ Connect the portfolio to the Enterprise strategy
- ❖ Develop the Portfolio Vision
- ❖ Develop the Portfolio Roadmap
- ❖ Discuss how to execute the Strategic Portfolio Review

Module 3: Realizing Portfolio Vision Through Epics

- ❖ Define portfolio Epics
- ❖ Estimate Epic costs
- ❖ Achieve the portfolio Vision with the SAFe Lean Startup Cycle
- ❖ Establish Lean Budget Guardrails
- ❖ Establish Value Stream budgets

Module 4: Establishing Investment Funding

- ❖ Establish flow with the Portfolio Kanban
- ❖ Sequence Epics for implementation using WSJF

Module 5: Managing Portfolio Flow

- ❖ Describe Value Stream coordination

Module 6: Applying Agile Portfolio Operations

- ❖ Support program execution and foster operational excellence
- ❖ Measure Lean portfolio performance
- ❖ Discuss the Portfolio Sync

Module 7: Applying Lean Governance

- ❖ Explore coordinating continuous compliance
- ❖ Relate Technology Business Management to SAFe LPM
- ❖ Explain Agile development software capitalization

Prerequisites

There are no prerequisites to attend this course. However, the following recommendations will make the training more productive.

- ❖ Familiarity with Agile concepts and principles
- ❖ Attended a Leading SAFe or SAFe POPM course
- ❖ Experience working in a SAFe environment