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## Actionable Portfolio Management

### How to make your business stick out

Business Driven Development (BDD) is happy to offer a training concept where we share the responsibility for business outcomes with our clients. Actionable training is part of our **Accelerating Business** service which aims for a long-term partnership.

Through our **training concept**, the participants will be involved in a learning process that creates insight and lasting knowledge. The training has been designed to include theory, practical exercise, dialogue, and reflection.

### Summary

The aim of the Actionable Portfolio Management course is to support the setting-up of Lean Portfolio Management (LPM) for your enterprise or a full-fledged business unit. LPM is significantly different from “traditional” portfolio management as it has much shorter learning cycles and incorporates entire value streams in a flow-based system.

Many organizations implement Lean-Agile ways of working on Team and Value Stream levels, whereas the top executives keep on doing business planning more or less unchanged. A so-called Portfolio implementation on a level without the ultimate authority could lead to a mismatch in the ways the business development is led.

Portfolio management is about strategic choices for your business. The choices on portfolio level are not just about how to run the business, but also where to compete. For example, you need to consider market positioning, diversification, technology disruption, investment horizons, and many other areas in the responsibility of business managers and executives who understand the enterprise's financial, technical, and business contexts.

In this course, you will learn the most critical and practical aspects of Lean Portfolio Management, and you will get the opportunity to align your strategies with Value Stream funding and Lean Governance. Unlike open classes and other off-the-shelf courses, exercises will target your environment, and you will get the time to create real content as well as set up your organization.

When innovation and speed are essential, one of the best ways is to get the right people together and provide guiding facilitation. Therefore, this course is only applicable as an in-house event where all attendees are committed. The length of the training is flexible, but you need to give full attention.

The backbone of the course is the concept of [Lean Portfolio Management created by Scaled Agile](#). The scope is 3.5 days packed with hands-on theory, creative workshops, and decision-making. A combination of a proven Lean-Agile framework and practical experience will make your business perform at a much higher level than most organizations.

The course days are further amplified by at least one preparation day, intended to make sure that the needed prerequisites are in place. The training cannot be carried out unless there is a mutual agreement that the necessary preconditions will be fulfilled.

A cost price, in combination with an optional value-based price, will ensure the training will not just be an expense for you. This pricing model means that there is a mutual incentive to achieve measurable business benefits. Without business benefits, the course fee will be market record low. However, when you can observe sustainable improvements, you potentially want to pay an additional fee, calculated as a fraction of the value increase.

## [Target Audience](#)

The setup of the training is aimed at business managers and executives who understand the enterprise's financial, technical, and business contexts and who have the ultimate responsibility for the business outcomes.

## Scope

This training is dedicated to Lean Portfolio Management. It is not an in-depth organization-building-oriented course, where you learn about setting up Agile Teams, lead the Agile transformation, and many other skills.

Instead, the scope is related to the business perspective and how to be able to stick out in an uncertain and maybe shrinking market. Your ability to experiment and continuously update your organizational abilities is the critical target.

## Pricing

The price is based on the following items:

- A fee per class and course day held by one senior Safe Program Consultant.
- A cost price for course material per attendee.
- A cost price for a certification fee per attendee. Certificates will be administered and issued by [Scaled Agile inc.](#)
- A cost price for eco-friendly travel and accommodation expenses when events are held outside the Gothenburg area.
- An optional portion of the value that you gain by attending this course and taking action.

The portion of the value will be up to your calculation. There will be no legal obligations or demands to pay anything else but the course fee + specified cost prices. However, BDD expects that any organization willing to invest in training, including work time, have a plan to make the most out of the knowledge achieved. How much the training has contributed to value creation will be of your judgment alone.

Because of the mutual interest to maximize outcomes of the training, BDD will work together with you to define appropriate measures to demonstrate actual value gained.

## Topics covered

- The concept of Lean Portfolio Management (LPM)
- Strategy and Investment Funding
- Agile Portfolio Operations
- Lean Governance
- Implementing the LPM function
- Business development practices such as the Lean Start-up, Business Model Canvas and Red & Blue Ocean shift.

## Prerequisites

To be able to take advantage of the training, Lean Portfolio Management needs involvement from the top level of the enterprise or business unit. The people ultimately responsible for profit and loss have to actively participate in the training and take part in operating the Portfolio.

Portfolio Management is not only about what products you invest in, but also your ability to deliver and how to make sure the products will generate revenues over time. Your mission should be to connect the long-term vision with the appropriate Business Architecture.

The advanced article [Applied Enterprise Workflow with the SAFe Portfolio Kanban](#) at the SAFe webpage gives more insights into the practical work and vital concepts such as Value Streams, roles, and principles. Everyone participating in this course should have attended at least one SAFe course, and you must be prepared to operate according to the description in SAFe.

For your organization as a whole, there should exist a well-communicated vision followed by a corporate strategy, including measurable objectives. You need to have an agreed view of the market and where you want to position yourself as a company. All exercises of the training will be based on your business targets, and it is no option to start the training before they are clear.

The facilities for the training should include a large room equipped with a projector, whiteboard, wall space, flipchart tripods, and flexible tables. The general guideline is at least 3 square meters per person.

## Outline of the training concept

1. You will start by filling out a [Questionnaire for Portfolio Management](#) that will give the first guideline of areas that are most vital to address.
2. A general agreement on a partnership around the specific business. You should have an idea about your key metrics, the target state of your Lean-Agile transformation, and who has the authority over the results.
3. A preparation day to assess and adjust the prerequisites: joint definition of prerequisites and who will participate in enabling a successful outcome. This day is a strategic dialogue to define the target outcomes. It is of high interest to get a picture of existing management teams, processes, and steering committees.
4. The order and assignment to perform the training: mutual agreement of the partnership and a training plan.
5. A Four-day course and workshop to expand your knowledge and create your way forward. A dedicated person must be assigned to manage and save the resulting material.
6. Follow-up, evaluation, and practical work leading to valuable results

## Course attendance

It is impractical to expect the, often called C-level, executives to participate in all the work included in LPM. Especially administrative, process, and coordination work needs to be covered by roles such as Enterprise Architect, Epic Owner, Solution Portfolio Management, and Agile Program Management Office.

Therefore the outline of the course is divided into three parts:

- Day one is intended for the overall concept, initial decisions where authority and management buy-in is needed.
- Day two and three is the practical work to make the LPM work going.
- The fourth day is a half-day for final decisions and establishment.

| Day 1  | Day 2-3   | Day 4                       |
|--|---|-----------------------------|
| Foundational principles, objectives, and alignment | Practical guides and outlining of roles, procedures, and techniques | Wrap up and decision-making |

The individuals with the highest level of decision-making and financial accountability need to participate only on days one and four. Who needs to participate in days two and three will be determined from practical prerequisites to drive the collaboration throughout the organization.

## Certification

After completing the course, the attendees will be able to become a **Certified SAFe® Portfolio Manager**. The acquired certificate will support the learning of using Design Thinking to create valuable products in the Lean Enterprise.

## Register

Please email the following information to [max.ko@agiletechdevelopment.net](mailto:max.ko@agiletechdevelopment.net)

| Particular Information | Details                                  | Remarks   |
|------------------------|--|---|
| Full Name              |  | <ul style="list-style-type: none"><li>• Full Name for registration and to be printed on the certificate</li></ul>                               |
| Contact Number         | Country Code + Area Code + Mobile Number | <ul style="list-style-type: none"><li>• Do be able to be reachable by WhatsApp/Line/Viber/Wechat</li><li>• Preferred hours of contact</li></ul> |
| Email Address          |  | <ul style="list-style-type: none"><li>• Contactable Email Address</li></ul>   |
| Preferred Date / Time  | Date / Time                              | <ul style="list-style-type: none"><li>• Do indicated your time zone you are at</li></ul>  |

Thank you for your kind interest in [Agile Tech Development's Course](#)