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academy

Lean Portfolio Management (SAFe® 6.0)

Duration: 2 days

Course Overview

Aligning Strategy with Execution using the Scaled Agile Framework

Aligning strategy with execution is critical to any organization's success and a key aspect of Scaled Agile Framework®. With a Lean Portfolio Management (LPM) approach, you can collaborate across silos, empower teams, and organise around value to adapt to what customers want, faster.

The Lean Portfolio Management course helps executives, project management officers (PMOs) and other key stakeholders plan dynamically and be flexible enough to adjust initiatives and budgets as the market changes. The LPM course provides the guidance and tools attendees need to work effectively in remote environments with distributed teams. You'll learn how to connect portfolio strategy and initiatives to the agility planning and execution of work, how to integrate feedback from participatory budgeting, and how to adapt to change while maintaining your funding vision and roadmap.

Who should attend?

The course is intended for executives, project management officers (PMOs) and other stakeholders involved in budgeting and prioritisation of significant work initiatives.

Prerequisites & pre-reading guidelines

There is no prerequisite course or certification. Pre-reading suggestions are issued in a welcoming email to those registered for a course.

How certification is earned

Certification is earned by attending the course and then taking an exam within 30 days of the course end date. Questions are multiple choice, single-select. There are 45 questions to be answered in 90 minutes and the passing score is 77%. If a retake is needed there is an additional fee. The full retake policy is issued if and when needed.

Course Objectives

Attendees Learn:

- How to connect the portfolio to the enterprise
- How to maintain portfolio vision and roadmap
- How to establish Lean budgets and guardrails
- How to create portfolio flow

Lean Portfolio Management answers the questions:

- How do I connect strategy to execution?
- How do I manage flow and solve perpetual overload?
- How can I fund and govern dynamically?
- How does Lean Portfolio Management fit into SAFe?

Context

This course is designed for senior leaders and anyone who will be directly involved in the organisation, budgeting, and prioritisation for lean portfolios, value streams, trains and teams.

Related courses

While not a prerequisite, attendees may consider attending the Leading SAFe course, if a broader introduction to SAFe and Lean / Agile thinking is needed.

Enquire for further information on other role specific courses.

What's included:

- Course workbook and SAFe Studio access to help you prepare to take the certification exam, claim your digital badge, and tools to get started in your SAFe role

- Remote learning via SAFe® Virtual Classrooms

- One-year membership to SAFe Studio with your first class attendance

  o Complete LPM Practice Guide to help plan and execute a successful LPM adoption

  o Platform access to e-learning modules and curated members-only content to support your SAFe transformation

  o Member discussion forms to engage in ongoing conversations on the SAFe framework or how to perform better as part of an Agile Team

  o Lean Portfolio Manager certification exam

  o Access to the optional Getting Started with LPM Workshop

Course Outline

Introducing Lean Portfolio Management

- The Purpose of SAFe® Lean Portfolio Management

- The Lean-Agile mindset and SAFe® principles

- Problems of project-cost accounting

- Benefits of organizing around value

- SAFe® portfolio structure

- The Shift to Lean Portfolio Management

Establishing Portfolio Strategy and Vision

- Connect the Portfolio to the Enterprise Strategy

- Portfolio Vision

- Portfolio Roadmap

Realizing Portfolio Vision Through Epics

- Portfolio Epics

- Epic Costs

- Innovation through the SAFe® Lean Startup Cycle

Establishing Investment Funding

- Lean Budget Guardrails

- Strategic Portfolio Review and Portfolio Sync

- Participatory Budgeting

- Value Stream budgets

Managing Portfolio Flow

- Flow with the Portfolio Kanban

- Epic implementation with WSJF

Applying Agile Portfolio operations

- Value Stream Coordination

- ART Execution and Operational Excellence

Applying Lean Governance

- Measure Lean Portfolio Performance

- Continuous Compliance

Contact

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