Lean Portfolio Management

Duration

In Person: 2 days
LiveOnline: 3 sessions of 4.5 hours

Certification

The ICAgile Certified Professional – Lean Portfolio Management (ICP-LPM) certification is granted on the successful completion of this course. This certification is part of the ICAgile Agile Finance track.

PDUs

This course will contribute 14 PMI® professional development units (PDUs) towards your chosen certification (4 Power Skills, 5 Business Acumen and 5 Ways of Working).

How can an organisation adapt its portfolio management practices to better align with lean and agile principles, thereby enhancing flexibility, value delivery and organisational agility?

Lean Portfolio Management is about taking a holistic view of all the work being undertaken across the whole organisation, whether that be initiatives, products or business as usual, and being deliberate about where to invest to maximise overall returns aligned with organisational strategy. Our Lean Portfolio Management course is designed to equip leaders and decision-makers with the knowledge and skills necessary to transform their portfolio management practices to be lean, agile, and value-centric. This program will provide you with the tools and techniques to fund and manage the flow of initiatives and activities across the whole enterprise, maximising value delivered to customers and stakeholders.

Learning Outcomes

During this course you will learn about:

- The shift to customer-centricity within a larger context
- Communicating an adaptive strategy with transparency
- Alignment around common goals, and how they might change
- How to define, prioritise and deliver business value frequently
- Structuring in value streams
- Taking accountability for outcomes over outputs
- Optimising flow and reducing waste across the whole system
- Shortening planning and funding cycles
- Balancing capacity and demand

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Intended For

This course is aimed at:
- Portfolio Managers, Program Managers, Product Managers and Project Managers responsible for the management and/or strategy of a portfolio of work
- Executives, leaders and Agile Coaches interested in improving the delivery of value through improving the strategic planning and execution process within their organisation
- Anyone on a business agility journey working in or alongside a Project Management Office (PMO) or Value Management Office (VMO)

Prerequisites

To get the most out of this course, you will need a willingness to challenge traditional thinking and a desire to deliver outcomes for your organisation. It is recommended that participants have a foundational knowledge of Agile values, principles, and mindset through formal training like our Agile Fundamentals or Business Agility Fundamentals courses or have relevant experience working in the Agile context.

Content

Topics and exercises covered in the course include:

- Lean Portfolio Management in Context
  - Principles of Lean Portfolio Management
- Adaptive Strategy
  - Portfolio Strategy
  - Outcomes
- Value Streams
  - Identifying Value
- Funding an Adaptive Strategy
  - Adaptive Budgeting
  - Portfolio Mix
- Roadmaps
  - Prioritisation Techniques
  - Outcome Oriented Roadmaps
- Organisational Structure
  - Organisational Design
  - Product vs Project
  - PMO vs VMO
  - Structuring for Adaptability
- Flow
  - Portfolio Kanban
  - Balancing Capacity and Demand
- Governance
  - Agile Governance
  - Outcome Metrics
- Adaptive Planning
  - Portfolio Cadence

Lecturing is kept to the minimum necessary where most of the learning is achieved by applying the practices and techniques in group exercises. Our LiveOnline delivery is over three days (each four and a half hours in duration). The instructor is 100% live and interaction and learning objectives are the same as our in-person classes with the added benefit of being able to take this course from your home, your office or your home office. Since this class is delivered over half-days it allows for greater flexibility and leaves you with time each day for other work or activities.

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