



Agenda

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The Agile Portfolio Manager: Advanced Lean-Agile Practices

Instructor(s): Karl Muenchow, PMP
Drew Clark

Length: 2 days

CEUs: 1.4/see below for PDU breakdown

Pework: None

Level: Advanced

Training Topic: New Ways of Working

Subtopics: Agile, Portfolio Management

Training Description:

The transition from project-centric portfolio management toward customer-centric product, service, and value streams is accelerating with every agile implementation in IT and beyond. After all, every company is a software company, and IT drives everything we touch. Balancing long-term strategy with the ever-changing demands of your customers and new organizational agile capabilities will be our focus. Welcome to the “creative economy.” Industrial-age portfolio processes are no match for the dynamics and demands of value creation in today's creative economy. As agile transforms the ways our teams deliver solutions, so too is the agile mindset transformation the way we align our investment strategies, analyze and initiate projects, plan and monitor work, and evaluate results through customer-value-focused delivery.

An agile enterprise requires agile approaches to portfolio management and portfolio managers knowledgeable in agile practices. This training is a bold step away from the status quo, focusing on advanced agile approaches to portfolio management and practices derived from the most successful agile frameworks in use, such as Scaled Agile Framework for the Enterprise (SAFe®), Disciplined Agile Delivery (DAD), Large Scale Scrum (LeSS), Scrum@Scale, and DA FLEX.

This training is based on real-world implementations and provides a playbook for traditional program and portfolio managers to align their practices to support the agile enterprise transformation that is most likely already in progress. This program bridges the gap between the traditional static roadmaps and the dynamic backlogs used by hyper-productive value stream teams.

Our focus will be on advanced agile practices in portfolio management that align with the agile values and principles through the implementation of a Lean portfolio management process aligned to strategic themes and derived value streams. You will learn how to quantify business value for ranking portfolios. Our focus will be on practices that translate the strategic and customer voices from personas and customer journeys all the way to minimum viable product (MVP) roadmaps and ultimately actionable backlogs utilizing minimum business increments (MBIs). Together, we will develop advanced practices that balance the strategic long-term objectives with the new-found agility as part of an agile enterprise transformation. Drop the 5-year roadmap for a day and join us to learn what's next. You won't find this stuff in books—not yet, anyway.


Upon completion of this training, learners will be able to:

- Demonstrate how to quantify business value and prioritize work.
- Define the weighted shortest-job-first approach to continuous delivery of value.
- Investigate how best to connect products, projects, and agile value stream teams (VSTs).

- Design their agile approach to portfolio management: From strategic themes to a portfolio Kanban to delivery, as a continuously repeatable process.
- Examine real-world case studies of agile success in portfolio management and how to apply it to your business and the role of the agile portfolio manager.
- Evaluate how DevSecOps will help their organization to optimize its value streams.

Professional development units (PDUs) are 1-hour blocks of time spent learning, teaching others, or volunteering. By attending this training, you will be able to achieve the following PDUs as learning hours to apply for PMI certification or to maintain your certification status with PMI. [View](#) how your PDUs align with the PMI Talent Triangle®.

	Technical	Leadership	Strategic	Total
CAPM® / PMP® / PgMP®	3	1	10	14.00
PMI-ACP® / Agile*	3	1	10	14.00
PMI-SP®	3	1	10	14.00
PMI-RMP®	3	1	10	14.00
PfMP®	3	1	10	14.00
PMI-PBA®	3	1	10	14.00



**Please note that the asterisked row above applies to the PMI® Agile Certification Journey and includes DASM™, DASSM™, DAC™, and DAVSC™ certifications.*