

SAFe® Lean Portfolio Management

Aligning strategy with execution

Create a culture of innovation, flexibility, and speed where all people in the portfolio can effectively execute as one, unified team.

In this course, you will 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.

You will have the opportunity to capture the current and future state of the portfolio with the Portfolio Canvas tool and identify important business initiatives for achieving the future state. You'll be able to establish portfolio flow with the Portfolio Kanban and prioritize initiatives 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.

With SAFe® Lean Portfolio Manager (LPM) 6.0 certification



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What you'll learn

- Describe the importance of LPM
- Connect the portfolio to enterprise strategy
- Implement Lean budgeting and guardrails
- Establish portfolio flow with the Portfolio Kanban
- Support operational excellence with APMO and CoPs
- Coordinate Value Streams
- Measure the LPM performance
- Build a plan for LPM implementation



Who will benefit?

This course is designed for leaders and influencers who are responsible for the Lean Portfolio Management function
Examples include:

- Executives and leaders (CIOs, CEOs, CFOs, CTOs, and VPs)
- Enterprise architects
- Product managers and solution managers
- Business unit managers
- Program office personnel
- SPCs and enterprise Agile coaches
- Human resources
- RTEs
- Epic Owners

“The SAFe® LPM was great! This is going to be a powerful course for executives and leaders who want to weave strategy and execution together into a single way of working.”

— **Phil Gardiner**, Enterprise Lean Agile Coach, SAIC



The Lean Portfolio Management workshop was incredibly useful for our implementation of SAFe at Travelport. The format and structure of the workshop enabled us to create our LPM implementation roadmap, and depart the workshop with next steps clearly articulated and actionable. I highly recommend this workshop for any organization implementing lean portfolio management practices at scale.”

— **Hilla Knapke**, Dir. SAFe Enterprise Transformation



Prerequisites

All are welcome to attend the course, regardless of experience. However, the following recommendations will make the training more productive:

- Familiarity with Agile concepts and principles
- Attended a Leading SAFe® or SAFe® PO/PM course
- Experience working in a SAFe environment



Topics covered

- Introducing Lean Portfolio Management (LPM)
- Establishing Strategy and Investment Funding
- Applying Agile Portfolio Operations
- Applying Lean Governance
- Implementing the LPM function



What you get

Class registration includes:

- Attendee workbook
- Course certificate of completion
- Preparation and eligibility to take the SAFe® Lean Portfolio Manager (LPM) 6.0 certification exam (upon GA)
- One-year membership to SAFe Studio (upon GA)
- One certification exam attempt (upon GA)



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Course Agenda

The course covers following topics:

Introducing lean portfolio management

- Why LPM?
- The lean-agile mindset and SAFe® principles
- The problem with project-based accounting
- Benefits of organizing around value
- SAFe® portfolio structure
- Shift to LPM

Establishing portfolio strategy and vision

- Connecting the portfolio to the enterprise strategy
- Maintaining the portfolio vision
- Developing the portfolio roadmap

Realizing portfolio vision through epics

- Defining portfolio epics
- Estimating epic costs
- The SAFe® Lean Startup Cycle

Establishing investment funding

- Lean budget guardrails
- LPM events overview
- Strategic portfolio review and portfolio sync
- Participatory budgeting

Managing portfolio flow

- Establishing flow with the portfolio Kanban
- Sequencing epics for implementation using WSJF

Applying agile portfolio operations

- Value stream coordination
- Supporting program execution and operational excellence

Applying lean governance

- Measuring LPM performance
- Coordinating compliance
- TBM with SAFe®
- Agile software capitalization
- The Getting Started Workshop
- Additional LPM resources



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