Lean Portfolio Management Planning Workshop

This 2-day facilitated portfolio planning workshop allows for leaders from both the portfolio and product levels to come together and plan out the Demand and Capacity for the next quarter. The room will be setup as a Portfolio Visibility Room or Enterprise Visibility Room (EVR) based on the level of planning desired.

Who will benefit?

Attendees typically include:

- Senior portfolio executives and leaders from business and technology who wish to gain hands-on experience defining clear and measurable business outcomes for the next year or quarter.

Learning Objectives

- Learn about common challenges when identifying and measuring value delivered from our work
- Learn the different levels of outcomes (portfolio, product/program, team)
- Portfolio success metrics | Flow, Value, Quality + Pirate Metrics (AARRR)
- OKR overview
- Writing 3-year Strategic Intent and 1-year themes
- Writing quarterly business outcomes
- Leading vs impact key results
- The OKR cycle
- Practice writing quarterly outcomes using OKRs
- Common pitfalls with writing OKRs
- Visibility & the outcome/OKR alignment dashboard
- Checking in with your OKRs and updating key results
- Defining business value buckets for ranking epics against each other
- Change Mgmt. and top tips for making this stick

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