

Christen McLemore



- Cross Country Camper
- Registered Pet Therapy Team
- I do agile stuff

Christen@RedHat.com



Can you define these?

PMO

PPMO

Projects

Programs

Portfolios

Google and Alexa say...

PMO - Project Management Office

PPMO - Project Portfolio Management Office

Projects - a temporary endeavor undertaken to create a unique product, service, or result

Programs - group of projects that are similar or related to one another

Portfolios - group of different programs and/or projects within the same organization, which may be related or unrelated to one another but has a global strategy to maximizing the ROI

PMI says...

Portfolio management ensures that
an organization can leverage its project selection and
execution success...
to achieve strategic objectives.

Our research has shown that portfolio management is a way
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So what are the necessary inputs you can derive here?

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STRATEGY!

Scaling Success!



Scale Fails



Go to www.menti.com and use the

code 6066 2416

or

open the camera app on your smartphone and point it at the QR code



Name the challenges you are experiencing with your Portfolio?

Go to www.menti.com and use the

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open the camera app on your smartphone and point it at the QR code

Results are here:

<https://www.mentimeter.com/s/28897984f4e2eee23e4cc07aa0af931a/167ef993db0f>



Name the challenges you are experiencing with your Portfolio?

Building a solid Portfolio...

....doesn't just happen on its own.

It is a collaboration of **ideas** between **business** and **technology** leaders.

Sometimes, they need help to focus, negotiate and build a Portfolio Management system that creates alignment and results.

SAMPLE Portfolio Planning Steps

PREP	1. Identify the right people 2. Interview them to discover the success and challenges 3. Communicate the Agenda
Session	4. Map the Value Stream (AS IS not TO BE) 5. Identify the Economic Decision Making model 6. Evaluate all work against Effort to Value method 7. Capture the current work in flight in Portfolio Kanban
Close	8. Consensus on attendees, cadence and agenda for Portfolio review meetings

Sample Portfolio Planning Kickoff Summary

Our objective is to work towards Agile Portfolio Management to **accelerate growth, revenue and profit** by responding to new market pressures or stakeholder needs with **remarkable transparency and speed**.

To **design a draft** of how our Portfolio will operate under **Agile Portfolio Management**.

We are working to address a few key things that have been problematic:

- **Visibility to value delivery**
- **Eliminating waste through clear Priorities**
- **Simplify the work to track status of work**
- **Real and reliable roadmaps that create customer happiness**

State of the Union - Where are we with our Strategy? What can we do to get everyone on the same page of where we are.

Limit scope to **<XYZ BU or P&L>** but the outcome to work for a more broadly applied solution.

- **Discover the Current workflow of Intake to Planning to Execution to Delivery**
- **Gain consensus on the flows**
- **Matrix of Pro/Con of each step in the process to identify perspectives**

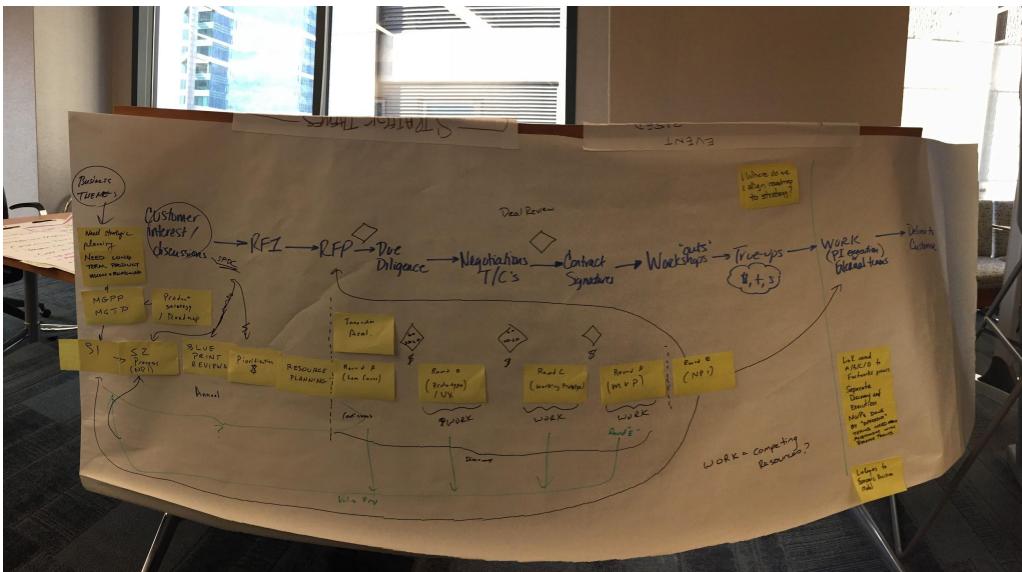
Identify Cadence of meetings to support the flow

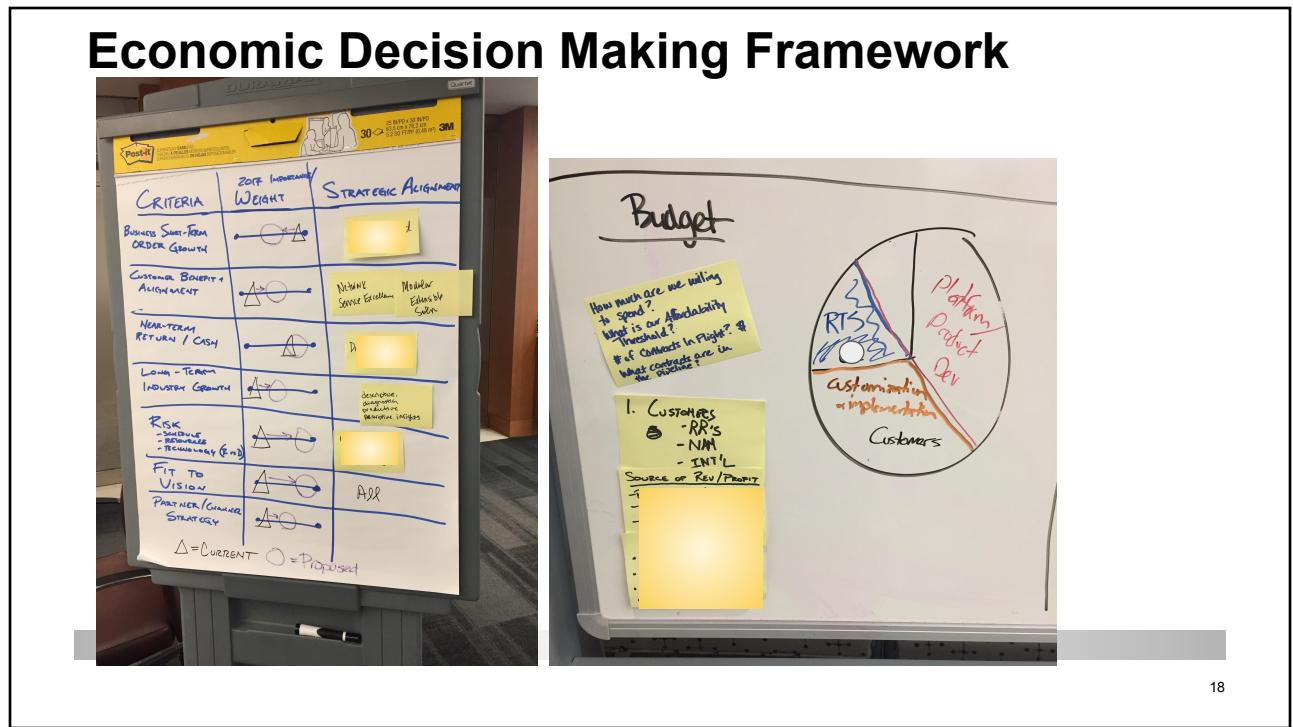
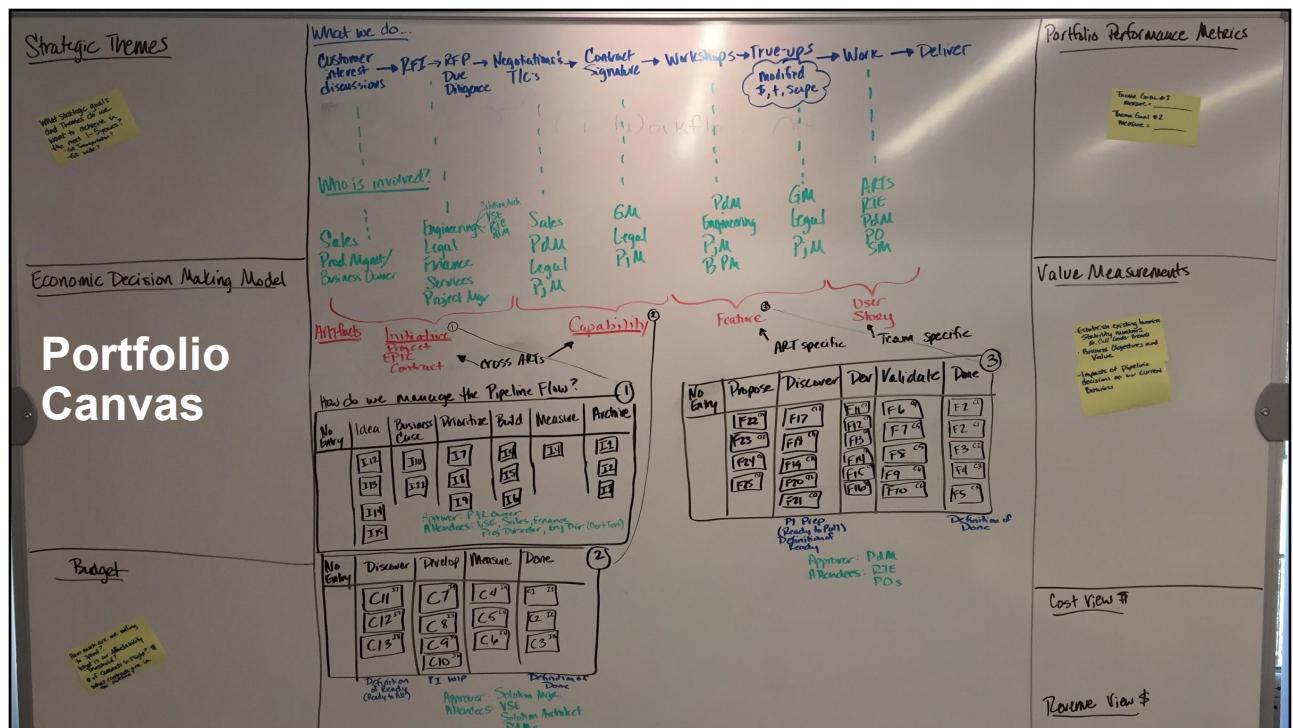
- **Business Steering**
- **Quarterly Planning prep sessions**
- **System Demos**

Recommended Attendees

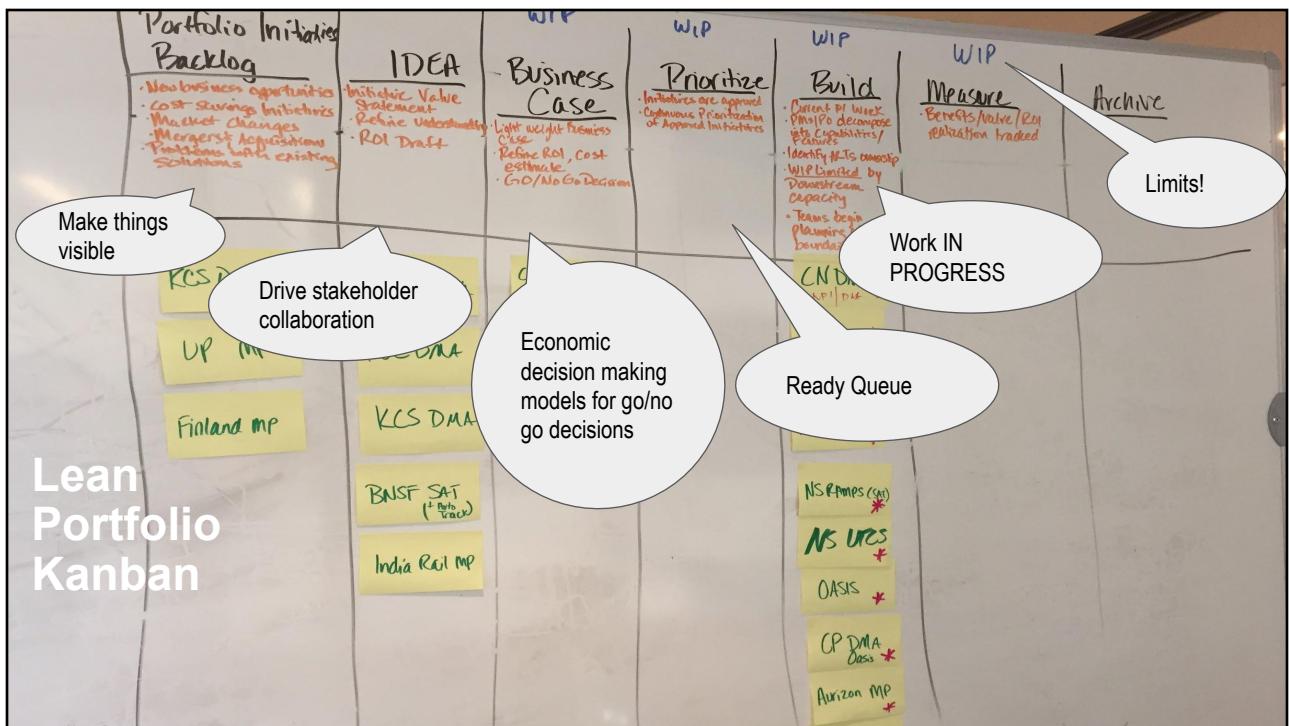
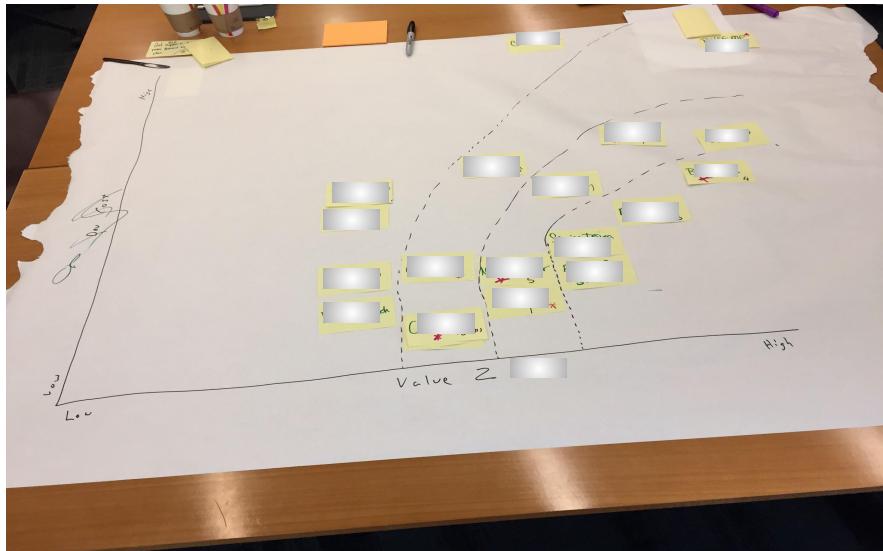
Role / Title
Chief Operating Officer
Chief Strategy & Growth Officer
Chief Technology Officer
Executive HR Leader
Executive Engineering Leader
VP – Program Management
Commercial Operations Principal
Senior Counsel – Commercial
Lead FP&A Operations Analyst
Sr. Director of Quality Assurance
Director of Operations
Principal Software Architect
Manager – Engineering Program Mgmt

Mapping the Current Process





Value to Effort Prioritization Method



Breakout Session - 15 minutes

1. What role do you play in the portfolio?
2. Discuss the challenges you are facing related to the portfolio
3. Which part of the Portfolio Planning steps could be helpful to you and why?

Remember...

Even when you fall
in the mud scaling the wall,
make sure you're not alone!

