

SAFe Lean Portfolio Management (LPM) for CFOs, Finance Team

LPM has the highest decision-making and financial accountability for a portfolio's solutions and development value streams. The people who fulfill the LPM function have various roles and titles and often reside in different parts of the organization's hierarchy. Because LPM is vital to the enterprise, executives and business owners who understand the financial, technical, and business contexts hold strategy and investment funding responsibilities. They are accountable for the overall business outcomes and addressing the challenge of defining, communicating, and aligning strategy with execution.

- **It covers Strategy & Investment Funding ensures the entire portfolio is aligned and funded to create and maintain the solutions needed to meet business targets.**
- **Portfolio Operations coordinates and supports decentralized ART execution and fosters operational excellence.**
- **Lean Governance supports oversight of spending, audit, compliance, expenditure, measurement, and reporting.**

Strategy and investment funding ensures the entire portfolio is aligned and funded to create and maintain the solutions to meet business targets.

An enterprise can only accomplish its ultimate business objectives by allocating the right investments to building the right things.

However, portfolio strategy is more than prioritization and selecting the best investments. The portfolio needs to understand its role in achieving the enterprise strategy.

Therefore, the LPM function should understand the portfolio's current state, develop a plan to evolve to a better, differentiated future state, and continuously adjust the vision and plan to address the changing business context with right financial decisions

Output of the class :

- Enhance your financial decision-making skills by applying Agility in financial decision
- Review and practice applying frameworks and tools of value-based management
- Learn about financial policies and practices used by other organizations and determine which ones best suit your organization
- Formulate processes and understand the key considerations of financial policy decisions based on modern ways of lean budgeting
- Become a strategic partner to the CEO by understanding lean and Agile economics

- Discover how to formulate, evaluate, and implement strategic choices that are grounded in financial metrics, but not limited to them with Agile practices to build in organisation capability
- Learn how to determine which metrics are most appropriate for your organization
- Make crucial choices about investment, divestitures, and the optimization of distinct product and geographic segments
- Identify new opportunities to use finance to advance the strategic goals of your organization
- Develop your leadership capabilities
- Lead, motivate, and engage people with expertise different from your own
- Oversee processes, such as capital budgeting and managing risk, in an effective manner
- Gain confidence in situations outside of your areas of expertise
- Strengthen your communication skills
- Improve how you describe your plans and performance results to stakeholders
- Become a more effective advocate for actions that create value
- Effectively communicate and collaborate with leaders and teams across different functional areas and levels by applying Agile and Lean economics
- Expand your personal and professional network
- Extend your network by living and working with accomplished executives from various backgrounds, industries, and countries around the globe
- Build relationships with a diverse group of peers who can provide wide-ranging insights into your business challenges and career decisions

Agenda

Day 1 & 2

Assessing and Managing Performance and Modern Organisations

Overview of Business Changes

Principal Financial impact and change

Evaluating Business and Modern Finance and budgeting

The Purpose of Lean Portfolio Management

The Lean-Agile mindset and SAFe® principles

Problems of project-cost accounting

Benefits of organizing around value

The Shift to Lean Portfolio Management

Corporate Investment and Financing Decisions

Calculating Present Values

Net Present Value and Other Investment Criteria

Making Investment Decisions Scientifically

Financial sustainability

Day 3 & 4 & 5

Lean Budget Guardrails
Strategic Portfolio Review and Portfolio Sync
Agile and Lean Budgeting
CAPX and OPEX in a digital world
Participatory budgeting overview
Facilitator's guide for running a participatory budgeting event
Participatory Budgeting Facilitation Templates
Participatory Budgeting Templates
Operating cycle and value drivers
Defining good stewardship of capital
Macro revenue factors, materials, and supply chains
Capacity and capital expenditure
Capital structure & Budget Realignment
Applying the COSO Framework
Capital allocation & Change Management
Mergers, acquisitions, and integration
Labor, talent, and compensation
Managing performance and compensation