Portfolio Engineer
Facilitation is Key,
Where is the Process Advisor Role?
Scott Frost
SAFe SPCT & FELLOW
Accenture | SolutionsIQ

Scott.M.Frost@Accenture.com
“GetFrosty” @LinkedIn & Twitter
+1 214-213-7845
How Many Lean Portfolio Managers In The Room?

Jump Up ... Stay Up ...

- You Operate At The Portfolio Level In Your Organization?
- You Have Direct Accountability For The Portfolio Process?
- You have sufficient personal capacity to perform your daily LPM role?
Quick View of Lean Portfolio Management
Portfolio Level within the new v5.0 Big Picture
Lean Portfolio Management Competency

- Lean Portfolio Management (LPM) is one of the Seven Core Competencies of the Lean Enterprise

- The LPM competency aligns strategy and execution by applying Lean and systems thinking approaches to strategy and investment funding, agile portfolio operations, and governance

- One SAFe portfolio can typically govern the entire solution set for a small-to-medium-size organization. Large enterprises often require multiple portfolios, usually one for each line of business, business unit, or division.

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The LPM function governs each SAFe Portfolio, providing three essential dimensions to realize its responsibilities:

- Strategy and Investment Funding
- Agile Portfolio Operations
- Lean Governance
Identified LPM Process Steward Roles

Connect Portfolio to Strategy, Maintain vision & roadmap, Communications, Administering Canvas

Facilitating Epic Triage, Metrics, Budgets, Compliance, Roadmaps/Arch Runways And Associated Change Comms

Coordinating VS, Supporting Execution, Launching New Trains, Fostering Excellence

The “Troika”
- Content Authority
- Technical Authority
- Process Advisory
Accountabilities for the LPM

- **Strategy and Investment Funding**
  - Connect the portfolio to the enterprise strategy
  - Maintain a portfolio vision and roadmap
  - Establish Lean Budgets and guardrails
  - Establish portfolio flow

- **Lean Governance**
  - Forecast and budget dynamically
  - Measure portfolio performance
  - Coordinate continuous compliance

- **Agile Portfolio Operations**
  - Coordinate value streams
  - Support program executions
  - Foster operational excellence

**Our Intent:**
*Bring Leaders Together, Break Old Biases*
People Do All The Work

The Case for Portfolio Engineer
Accountabilities – Single Person?  

- Need EPMO experience
- Background in EPMO processes, relationships
- Existing budgeting / finance skills
- ROI / Business Case skills
- OCM / Transformation
- Moving away from project management thinking

Team?  Both?

- Need advanced SPC experience
- Understanding for conversion to an LPM or APMO
- Influence portfolio team(s) which may be large enough to split into multiple teams
- Facilitator / Servant Leader
- Moving to shared-accountability with facilitation (not single owner)
“Yardmasters” coordinate activities of workers engaged in railroad traffic operations (such as the makeup or breakup of trains, yard switching, review train schedules and switching orders)

Santa Fe Yardmaster, Jimmie Frost, MY DAD.

Given the obvious wide white belt, let’s hope this was taken in the 1970’s

Yard Master - definition from cnfc.org
Portfolio Competency Wheelhouse...
What skills do we need to sharpen?

“Let’s learn to apply Lean-Agile principles...”

“What have we learned? How might we adjust next time.”

“I see a potential opportunity for how we can add more value by implementing Business Agility practices over here.”

“We will do this together and learn from each other. We are accountable to each other first, then to our work.”

“We’ve devised a new model or technique that might help. Wanna try it.”

“How will we achieve our Business Agility outcomes? How will we know?”

“I will support the LPM processes while you do your work...”

“I will answer your SAFe questions, make recommendations, or help guide those around us.”

“I will guide the organization in supporting people through the change. What do we fear? Where do we aspire to be?”

“Follow me, I know the way, and I will go with you on the journey.”
LPM Learning Journey

DECIDE TO CRAWL

JOIN a community or LACE TEAM, & INDIVIDUAL RESEARCH SELF-ASSESS READINESS AND ADJUST PERSONAL LEARNING ROADMAP

CRAWLING

ATTEND LEADING SAFe OR BECOME AN SPC

ATTEND THE LPM COURSE

CONTINUE LEARNING WITH OTHERS IN YOUR ORGANIZATION, ENGAGE WITH PORTFOLIO OR LACE TEAM AND JOIN LPM OPERATIONS OR BEGIN PLANNING LPM LAUNCH

EXPAND UPON SKILLS PRACTICE WITH REAL WORK OPPORTUNITIES DEVELOPING YOUR SKILLS WHEELHOUSE

FAST WALK

ATTEND PI PLANNING EVENTS REGULARLY AND ENGAGE WITH SOLUTION & ART “TROIKAS”

RUNNING
Questions
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