SAFe Portfolio

What is a SAFe Portfolio?
Who participates in a SAFe Portfolio?
How does a SAFe Portfolio operate?
SAFe PORTFOLIO

• Portfolio of development value streams (products/services), **not projects/work**
• Maximize your value streams
• Focus on achieving outcomes not output
PORTFOLIO LEADERSHIP

• **Solution Portfolio Manager** – Ultimate decision authority and accountable party for the portfolio. Responsible for ensuring that the portfolio is aligned to enterprise strategy and is successfully executing to advance that strategy.

• **Enterprise Architect** – Chief business / technical architectural advisor to the Solution Portfolio Manager. Responsible for ensuring that the portfolio’s business / technology architectural direction is aligned with enterprise strategy and is successfully executing to advance that strategy. Sets the technology direction and standards across development value streams in the portfolio.

• **Agile Portfolio Management Operations Leader** – Primary process owner and facilitator of Lean Portfolio Management activities. Responsible for ensuring that effective collaboration is happening and that necessary information is available to enable high-quality decision making and execution.

**Key Ceremonies:**
- Strategic Portfolio Review
- Portfolio Sync
- PI Planning
- Inspect & Adapt

* not a SAFe role
Senior leader, accountable for achieving business outcomes for a value stream. Has strategic and fiscal authority within the value stream. Ensures LPM guardrails are adhered to, and that product key performance indicators are moving in the right direction.

- Ownership can not be delegated
- Know the products / services within your value stream
- Continually create clarity of vision and guardrails
The APMO is responsible for facilitating effective and efficient execution and delivery of the portfolio's strategic themes and KPIs.

**APMO functions include:**

- **APMO Leader** – primary process owner and facilitator of Lean Portfolio Management activities.

- **RTE / STE / SM** – support efficient, decentralized program execution using specialized skills, knowledge, and relationships with key stakeholders.

- **Analysis / Reporting** – establishes and maintains systems and reporting capabilities that ensure the smooth deployment and operation of the investment.

- **Lean–Agile Center of Excellence (LACE)** – focused on driving and coordinating relentless and continuous improvement across the portfolio.

Even with decentralization of strategy execution typically some form of agile portfolio operations is required to accomplish the goals of operation alignment and execution consistency in larger enterprises.
• Only ideas in the funnel, not epics
• Decentralize and balance portfolio based on guardrails
• Use the Kanban as the Kanban is supposed to be used
Guardrails enable decentralized decision making (making the process more responsive and adaptive), while ensuring the right investments are being made (providing appropriate governance and oversight).

**Investment by horizon** – ensures both near-term and long-term opportunities are being addressed. Don’t starve the future!

**Significant initiatives** – also known as the “portfolio epic threshold”; ensures initiatives that require portfolio level oversight are approved and managed by leadership.

**Capacity allocation** – allows for local content to be approved and managed at an appropriate level while ensuring appropriate investment in technology, infrastructure and maintenance are being made for sustainability.

**Business Owner engagement** – ensures that portfolio fiduciaries are engaged and involved in product planning and execution.
Strategic Portfolio Review
Create strategic alignment and investment guidance to inform rapid, high quality, decentralized decisions. Adapt the portfolio design to meet changing needs. Provide governance necessary to effectively respond to new and changing opportunities.

- Be prepared
- Schedule out 12 months
- Focus on decisions not status
- Have data available
- Stay focused on outcome

Portfolio Sync
Manage Portfolio intake and flow. Coordinate business case development and delivery of MVPs for Portfolio Epics. Address cross-product dependencies and escalate/remove impediments. Gather metrics & share lessons learned.

PORTFOLIO CADENCE
...be more LEAN than AGILE when managing your portfolio.