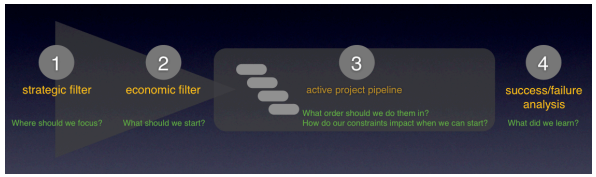
Portfolio Planning
Engagement Template

- generic portfolio modeling process flow



- assess
  - evaluate current process
  - evaluate existing prioritization models
  - set engagement goals & outcomes
    i.e. end-state for portfolio planning in your product line
  - determine what models to build
  - determine portfolio team membership
    2-3 people to structure models & learn the process
  - kick-off planning meeting
- transfer
  - conduct training class
  - provide technical support
  - document "your" portfolio process
    who, how, when
- structure
  - straw-man models
  - focus
    - 1 build Project Selection Model (2)
    - 1 build Active Project Pipeline Model (3)
    - first working session
  - 2 build Strategic Model (1)
  - 3 build Product Success/Failure Model (4)
- constraints
  - conduct product line management planning offsite (D)
    - using Model (3) develop constraints
      (risk & costs)
    - refine prioritization based on constraints -- Model (3)
- involve & refine
  - final models based on team participation
  - conduct product line management planning offsite (A)
    - refine Model (1)
    - refine Model (2) & make real selections
    - first group workshop
  - conduct product line management planning offsite (B)
    - Model (2) - make next group of selections
    - refine Model (3) - determine pipeline prioritization
  - conduct product line management planning offsite (C)
    - observe & feedback

Portfolio Planning Engagement Template.mmap - 6.21.19 - neal mitchell