SAFe Lean Portfolio Management (LPM)

DETAILED COURSE TABLE OF CONTENTS

Duration	**3 days**
Audience	Portfolio leaders, executives, enterprise architects, finance leaders, PMO leaders, strategy and transformation professionals
Recommended background	Knowledge of Lean-Agile principles and portfolio-level decision making is recommended.
Format	Instructor-led learning, discussions, simulations and hands-on activities

Course overview

This proposed instructor-led course outline combines SAFe concepts with practical application. It can be adapted to the licensed course materials, learner profile and organizational context. Module titles and activities are a planning outline, not a reproduction of an official licensed syllabus.

Course learning outcomes

- Assess current portfolio pain points and desired outcomes.
- Draft a portfolio canvas and strategic themes.
- Create an epic hypothesis and MVP experiment.
- Run a participatory budgeting simulation.
- Map an epic through the Kanban system and identify delays.
- Design a portfolio measurement dashboard.
- Produce a 90-day LPM improvement roadmap.

Detailed module-wise syllabus

Module 1. Introducing Lean Portfolio Management

- Why traditional portfolio management struggles
- The three dimensions: strategy and investment funding, Agile portfolio operations, Lean governance
- Lean-Agile mindset and SAFe principles
- Portfolio roles, stakeholders and decision rights

Learning objective: Describe the purpose and operating model of LPM.

Suggested activity: Assess current portfolio pain points and desired outcomes.

Module 2. Establishing Portfolio Strategy and Vision

- Enterprise strategy and strategic themes
- Portfolio canvas and business model
- Portfolio vision and future state
- Portfolio SWOT and strategic gaps
- Connecting portfolio objectives to execution

Learning objective: Translate enterprise strategy into portfolio direction.

Suggested activity: Draft a portfolio canvas and strategic themes.

Module 3. Realizing Portfolio Vision through Epics

- Portfolio epics and the portfolio Kanban
- Epic hypothesis statement and MVP
- Epic owners and Lean business cases
- Evaluating epics with economic decision making
- Evidence-based go/no-go decisions

Learning objective: Define and evaluate portfolio investments incrementally.

Suggested activity: Create an epic hypothesis and MVP experiment.

Module 4. Establishing Investment Funding

- Value stream funding versus project funding
- Participatory budgeting and investment horizons
- Lean budgets and guardrails
- Capacity allocation and strategic balance
- Adjusting funding as evidence changes

Learning objective: Explain how Lean funding improves adaptability and accountability.

Suggested activity: Run a participatory budgeting simulation.

Module 5. Managing Portfolio Flow

- Visualizing demand and work in progress
- Portfolio Kanban states and policies
- Managing dependencies, queues and bottlenecks
- Flow metrics and improvement opportunities
- Portfolio sync and operational coordination

Learning objective: Improve throughput and transparency across portfolio work.

Suggested activity: Map an epic through the Kanban system and identify delays.

Module 6. Applying Lean Governance

- Governance without excessive stage gates
- Financial oversight and compliance
- Measuring portfolio performance and outcomes
- OKRs, KPIs and leading indicators
- Forecasting and reporting in a Lean portfolio

Learning objective: Build governance practices that support responsible decentralized decisions.

Suggested activity: Design a portfolio measurement dashboard.

Module 7. Building an LPM Implementation Roadmap

- Assessing LPM maturity and readiness
- Identifying stakeholders and change agents
- Sequencing adoption and quick wins
- Operating cadence and portfolio events
- Risks, resistance and continuous improvement

Learning objective: Create an actionable plan for introducing LPM.

Suggested activity: Produce a 90-day LPM improvement roadmap.

Suggested training structure

Day 1: Introducing Lean Portfolio Management; Establishing Portfolio Strategy and Vision. Include practice, knowledge checks and reflection.

Day 2: Realizing Portfolio Vision through Epics; Establishing Investment Funding; Managing Portfolio Flow. Include practice, knowledge checks and reflection.

Day 3: Applying Lean Governance; Building an LPM Implementation Roadmap. Include practice, knowledge checks and reflection.

Assessment and completion

Use short knowledge checks, applied exercises and a final reflection to validate learning. Certification registration, exam eligibility, format and current learning objectives should be confirmed against the latest Scaled Agile course and partner guidance.

Prepared as a proposed training syllabus • Verify current course version and delivery authorization before external publication.