

Room: Lemon Drop Martini | 9:40am

Topic Title: Portfolio Management

Initiator: Susan Lafalce

SUMMARY HIGHLIGHTS:

- Portfolio Organization: Summary of Process from company in year 3 of transformation
 - High level projects are organized to ensure technology teams are managing what's coming into them
 - High level projects are called "Portfolio Epics" - 3 or more sprints/ 3 or more Agile teams/ significant value to organization
 - Intake Process- (Sub process to portfolio)- steering members and influencers provide feedback and ask questions to determine how/if the project will move forward
 - ROM process- "rough order of magnitude" - chance for team to provide estimates before project is funded by finance
 - Relative values are assigned (Oxygen, Platinum, Gold, Silver)
 - Quarterly portfolio organization - ranks PEs in priority order
 - We also host Epic reset meetings to make sure PEs are entered into the system properly/everything is in order for the QPP
 - Product owner writes and prioritizes user stories
- Different Process from company in first year of transformation
 - Senior Executives prioritize to show top ten projects
 - Sometimes don't have enough insight into what's happening among the teams
 - Teams are split between internal and external (one portfolio manager for each)
 - Working on figuring out where product owners and portfolio managers align
- If we were to wave a magic wand, we would wish to fix:
 - TOO MANY PRIORITIES
 - Teams going around process
 - Execs prioritizing without knowing details of the projects/teams