

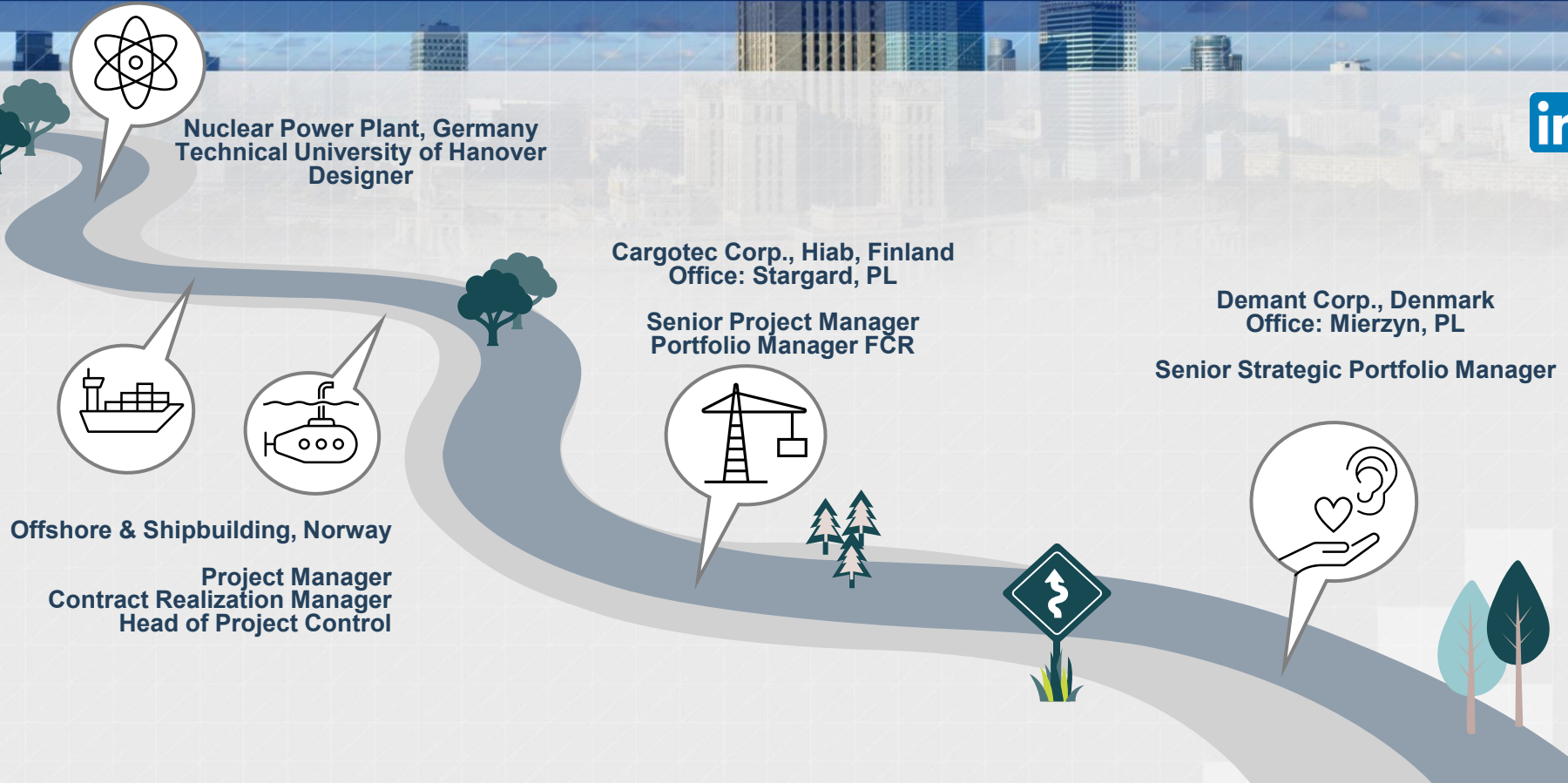


Strategic Portfolio Management

Adrianna Kozera



My way to meet up with you



Agenda



I'll focus on the content that AI chat won't provide you with;

- From Vision to Strategy
- Strategic Plan
- Challenges in global management
- From Strategic Plan to Strategic Project
- Maturity Assessment
- Toolbox – Portfolio Apps
- Global PM Community

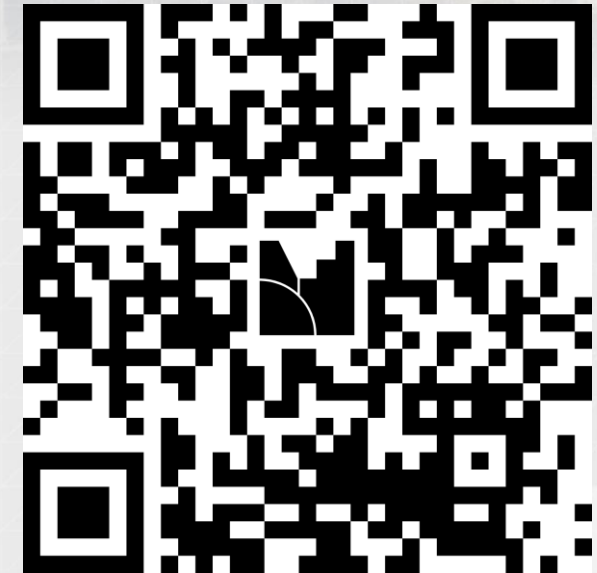
& something for the soul – Banksy

What is your experience & your expectations today?

Please log in to MENTI
using QR code or by
logging in via the
website:

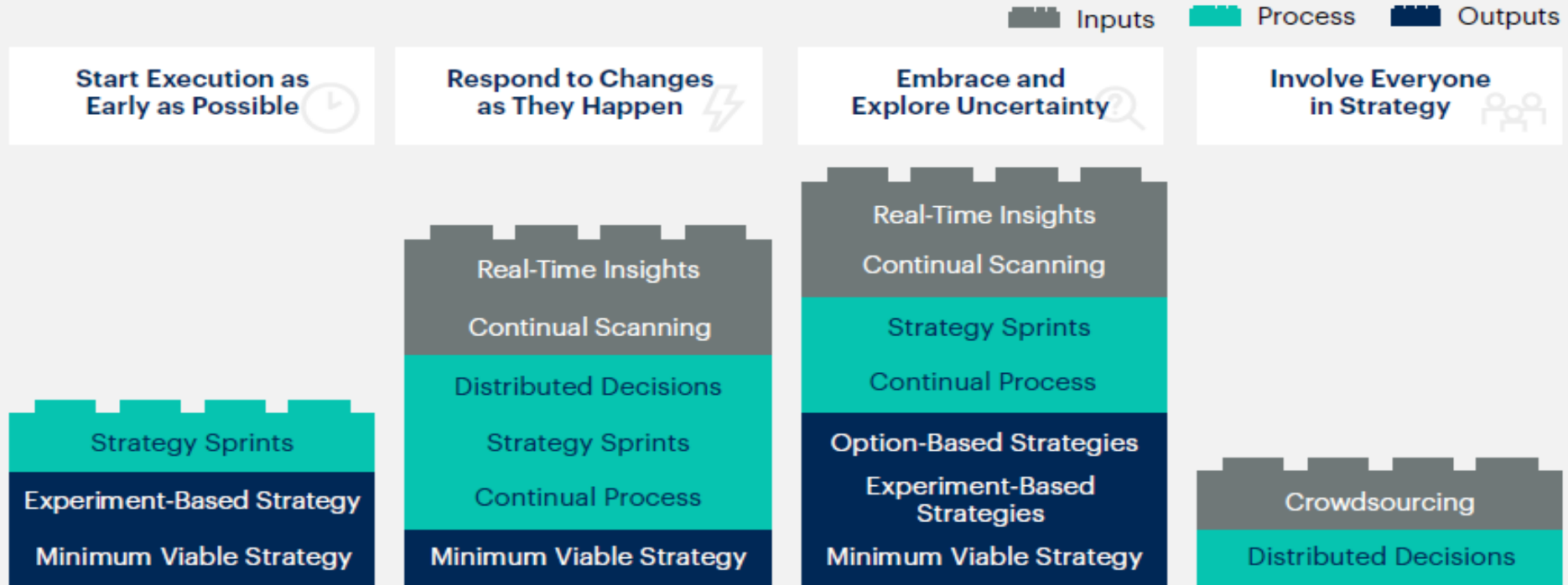
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From Vision to Strategy



One-page template to communicate your strategic plan



Vision Statement



Statement of Strategy

Current State

4 to 7 key metrics characterizing your current state

Plan

4 to 7 initiatives required to achieve the target end state

4 to 7 assumptions that must be true for the plan to succeed

Future State

4 to 7 key metrics characterizing your target state



Challenges in global management

Challenges in global management

- ❑ **Focus on designing a minimally viable strategy**

- ❑ Avoid this mistake: Striving to create a comprehensive strategic plan all at once

- ❑ **Customize planning activities to meet participants where they are**

- ❑ Avoid this mistake: Streamlining or standardizing planning efforts just to lower total cost/time

- ❑ **Sketch out initiatives to make sure the resources exist**

- ❑ Avoid this mistake: Delegating design of strategic initiatives without testing their feasibility

- ❑ **Be clear about who owns what**

- ❑ Avoid this mistake: Assigning project ownership right before execution

Challenges in global management

- ❑ **Cascade plans side to side, not just top-down**
- ❑ Avoid this mistake: Turning strategy cascades into a one-way, top-down communications activity
- ❑ **Focus performance measures on key strategic assumptions**
- ❑ Avoid this mistake: Tying initiatives to metrics that relate mostly to day-to-day performance
- ❑ **Pressure-test plans against a limited set of future scenarios**
- ❑ Avoid this mistake: Under- or overinvesting in how future scenarios might change strategic plans

Challenges in global management

Organizations **able to change plans fast** are 198% more likely to capture the full potential of opportunities created by external eves.

Source:
2022 Gartner Strategy Adaptive Planning Survey

Project portfolio management Principles



- Management Board involvement
- Alignment of activities with the company's strategy
- Alignment with the company's operating model
- Management Board support in decision-making processes
- Energetic Change Management Culture

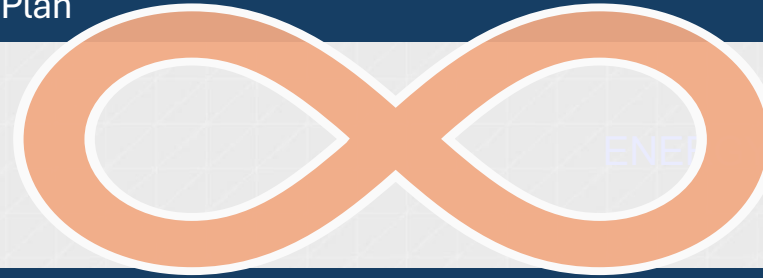
Project portfolio management

Definition & delivery cycle



CYCLE - Project Portfolio Definition:

- Define the scope of activities
- Categorize
- Prioritize
- Balance
- Plan



CYCLE – Delivery through the Project Portfolio:

- Management control
- Profit management
- Risk management
- Stakeholder and resource management
- Organizational model management



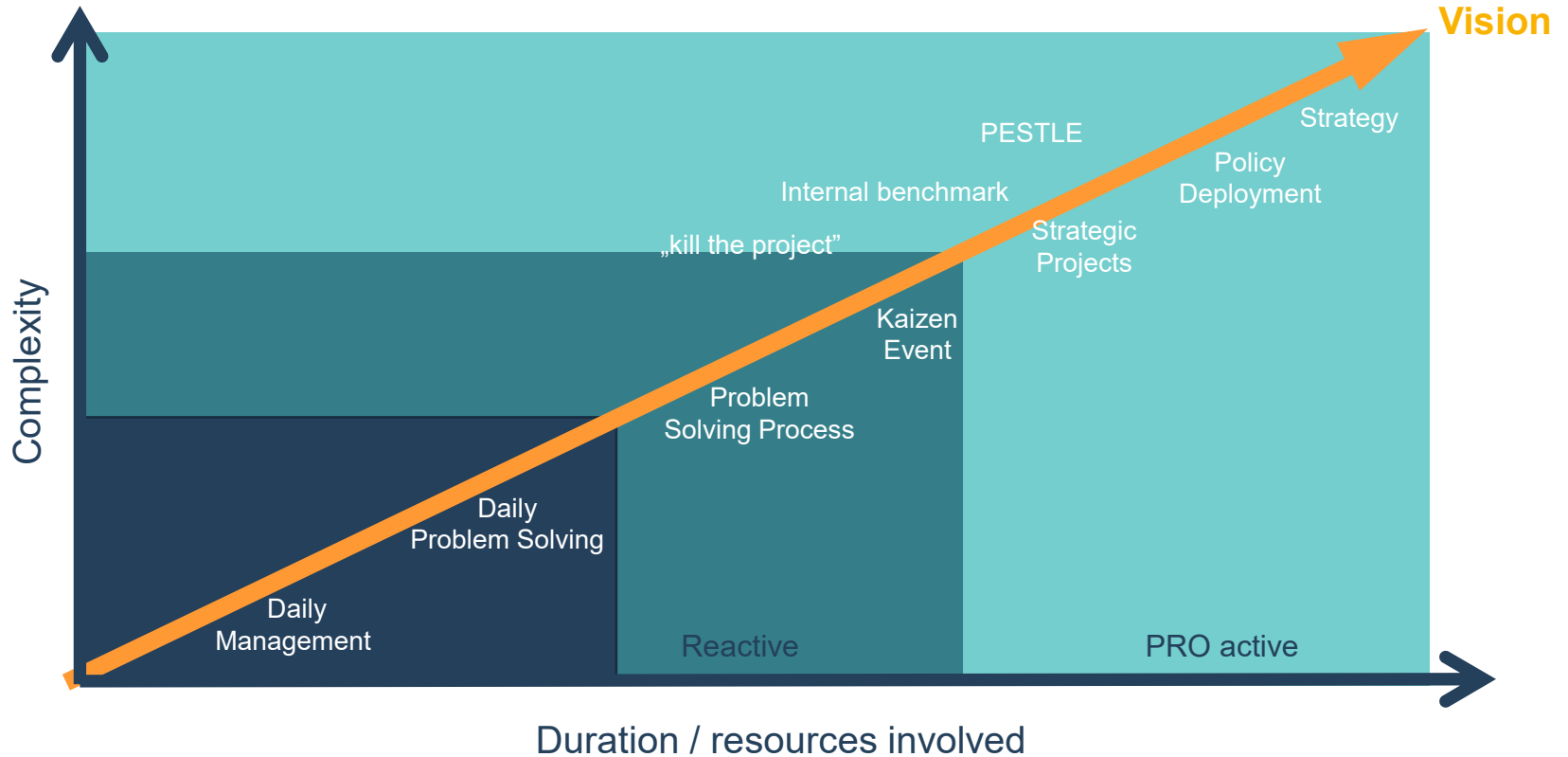
From Strategic Plan to Strategic Project

From Strategic Plan to Strategic Project Maturity Assessment

	Level 1 Aspiration	Level 2 Scoping	Level 3 Commitment	Level 4 Execution
Definition	'One sentence' describing the ambition	Strategic brief / one-pager with target, impact, what, and how describing the strategic ambition	Definition of competencies and funding needed	Ready for Project Initialization
Commitment	No organizational commitment	Dialogue with involved management stakeholders started	Commitment and ownership from management, 'OK to continue'	Full commitment from impacted organizational functions and teams
Time	Timeline unknown	Timeline proposal	Agreement on when to start up strategic execution	Ready to start and high-level timeline
Resource				
Impact	Core Value Drivers (CVDs)	Magnitude of impact identified	Supporting KPIs identified	Target for supporting KPIs defined

Different tools for different tasks

Use the smallest tool possible that will solve and eliminate the problem



„Kill the Project”





- **Time:** VUCA
- **Tool :** 5 WHY
- **Goal:** eliminate MUDA

- ✓ **1. Project Is Not Delivering Value Anymore**
- ✓ **2. Project Is Costing You A Fortune**
- ✓ **3. More Important Projects Waiting For Your Attention**
- ✓ **4. Change in Business Plan and Strategy**
- ✓ **5. Poor Management and Monitoring**








Toolbox – Portfolio Apps



PORTFOLIO

 Priority List Critical Resources Scope Risk Matrix Gate Dashboard

PROJECTS

 Project Charter Priority Assessment Reports Plan Risk Stakeholders Mapping ADKAR Archive

APPLICATIONS

 Finance App Post Project KPI Tracker Across Portfolios

Portfolio Prioritization System

- To align with strategy
- To quantify which projects add higher value
- To balance volume of the projects
- To correctly assign limited resources
- To focus our whole project delivery team on business benefits







Global PM Community

Global PM Community



Core values



Professional networking



We work together to improve our skills and actively strive to expand our knowledge and development.



No one is as strong (as good) as all of us together.



Our strength lies in diversity (different areas of activity, cultures, experiences, etc.).

Initiatives

- E-learning platform
- AI Coach built on the company's management standard
- Portfolio management applications with integrated tools for Risk, Change, Stakeholder, and Reporting Management
- Expert Pannel
- Buddy Program
- The Best Project Award
- Workshops and F2F trainings

Global PMO Platform

PM Academy →



50%

PM Essential

This plan introduces the essential terms every project manager should know — from project scope and deliverables...



67%

PM Advanced

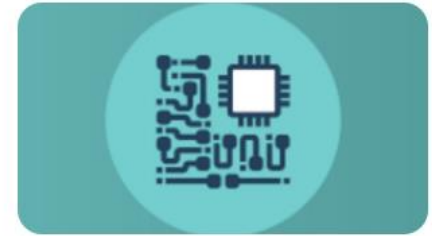
This section explores advanced project management practices for leading complex, high-stakes initiatives.



67%

PM Expert

This plan deepens your understanding of project leadership by focusing on roles, responsibilities, and effective...



100%

Portfolio & Project APPs

This plan introduces key digital tools used in project and portfolio management. Learn how to navigate, use and appl...

Learn on
your terms

Dive into video, guides, and real-life case studies made for project managers.

Connect with
fellow PM

Explore real-world insight, share your experience and learn from others.

Real talk with
real people

Join community meetups, ask questions and hear how others lead projects.



Thank you
Adrianna Kozera



LIFE

IS

BEAUTIFUL