

SAFe® Lean Portfolio Management

Funding value streams, not projects

2 days

LIVE ONLINE

16 hrs

PDUS & SEUS

Included

EXAM + RETAKE

\$950

PER SEAT

NEW IN THIS RELEASE

Participatory Budgeting

Funding decisions made in the room by the people accountable for outcomes, rather than handed down annually.

Portfolio flow, made visible

Portfolio Kanban and WSJF sequencing turn a list of competing initiatives into a queue with a rationale.

You leave with a start

The final lesson is the Getting Started with LPM workshop, so adoption has a first step.



INSIDE THIS BROCHURE

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AT A GLANCE

Course version	6.0.2
Format	Live online
Duration	2 days · 16 hours
Credits	16 PDUs / SEUs
Exam	90 min · 45 questions
Passing score	77%
Exam attempts	First attempt included
Membership	1 year SAFe Studio
Prerequisites	None
Investment	\$950 \$1,900

Training a team?

25% off any group of five or more, plus private cohorts scheduled around your PI calendar. Email d.stevenson@agile36.com.

★★★★★ 4.9 / 5

Rated by learners on Google. Agile36 has trained professionals at Fortune 100 and Fortune 500 companies, government agencies, and universities for more than a decade.

WHAT CHANGED IN VERSION 6.0.2

Beyond project accounting

Lesson 1 confronts the problem directly: why project-based accounting fights against organizing around value.

Guardrails, not gates

Lean Budget Guardrails replace approval gates, with the LPM events that keep them honest.

Governance you can measure

Lean governance closes the course — measuring LPM performance and coordinating compliance.

01 · PROGRAM OVERVIEW

Fund the value stream, not the project

Lean Portfolio Management is where strategy meets money. Two days on connecting the portfolio to enterprise strategy, maintaining a portfolio vision and roadmap, defining and estimating epics, establishing Lean budgets and guardrails, sequencing with WSJF, and coordinating value streams.

It closes on Lean governance — measuring LPM performance, coordinating compliance, and the Getting Started workshop that turns all of it into a first move you can make when you get back.

THE AGILE36 DIFFERENCE

Strategy, lean budgets, and portfolio operations are taught with the conversations executives actually have.

Every class is live, capped for discussion, and led by a certified SAFe® Practice Consultant.

2

Days, live and instructor-led

7

Lessons in the official 6.0.2 courseware

45

Questions on the SAFe LPM certification exam

16

PDUs and SEUs toward renewal

WHAT'S INCLUDED



16 hours live

2 days of instructor-led virtual classroom — not recordings.



Exam + retake

Official exam fee with first attempt included.



16 PDUs / SEUs

Credit toward PMI and Scrum Alliance renewal requirements.



SAFe Studio

One-year membership plus SAFe Connect community access.



Digital workbook

The official 6.0.2 courseware, yours to keep and annotate.



AI prompt library

Reusable prompt patterns you can run the week after class.



Practice test

Free practice exam and preparation materials.



Free reschedule

Miss a session and join the next cohort at no extra cost.

Hands-on, not lecture. The class runs on activities, small-group discussion, role-play, and a running case study.

02 · WHY THIS CERTIFICATION, NOW

Annual budgets cannot fund quarterly learning

Most enterprises now plan delivery in Program Increments and fund it in annual projects. That mismatch is where good ARTs go to stall — waiting on approvals, defending variance, and rebuilding business cases for work the strategy already justified. Lean Portfolio Management exists to close that gap with guardrails, flow, and participatory budgeting.

WHERE THIS TRAINING LANDS

Agile36 has delivered this course into:

- ✓ Financial services and insurance
- ✓ Healthcare and life sciences
- ✓ Government and public sector
- ✓ Telecom and media
- ✓ Retail and logistics
- ✓ Higher education

“The SAFe Lean Portfolio Management course was exceptional! The portfolio strategy and investment funding modules gave me the tools I needed to optimize our portfolio. Passed the LPM exam on my first attempt!”

Victoria Chen · Portfolio Director

03 · DELIVERY MODE

- ✓ Live virtual classroom delivered remotely worldwide, over 2 days
- ✓ Taught by certified SAFe® Practice Consultants (SPCs), never contractors reading slides
- ✓ Cohorts kept small enough for real discussion and Q&A
- ✓ Open to attendees anywhere — weekday and weekend cohorts across US time zones, with private cohorts timed to your region

PREREQUISITES

- ✓ None required, though this is an advanced course.
- ✓ Aimed at people who influence portfolio strategy, funding, or governance.
- ✓ Familiarity with SAFe at programme level is recommended.

04 · WHAT YOU'LL BE ABLE TO DO

Outcomes you can point to on Monday morning

The role

- ✓ Align strategy with execution through a SAFe portfolio
- ✓ Apply lean budgets, guardrails, and investment funding

Planning and leading

- ✓ Establish portfolio flow with Kanban and epic management
- ✓ Run Agile portfolio operations and lean governance

Executing

- ✓ Design a practical plan for LPM adoption

05 · WHO SHOULD ATTEND

Portfolio Managers

Owning portfolio flow.

Executives

Setting strategy and budgets.

Epic Owners

Shepherding portfolio epics.

Enterprise Architects

Shaping enabler investment.

Finance Leads

Moving to Lean budgets.

PMO Leads

Replacing project accounting.

Business Owners

Accountable for value stream outcomes.

SPCs

Leading LPM adoption.

Certification. Exam: 90 minutes. Scaled Agile's current guideline is 77% (35/45) to pass. Your first exam attempt is included.

06 · COURSE CURRICULUM

7 lessons, 2 days

The official 6.0.2 lesson structure.

01 Introducing Lean Portfolio Management

- Why LPM?
- The Lean-Agile mindset and SAFe Principles
- The problem with project-based accounting
- Benefits of organizing around value
- SAFe portfolio structure
- Shift to LPM

02 Establishing Portfolio Strategy and Vision

- Connecting the portfolio to the enterprise strategy
- Maintaining the Portfolio Vision
- Developing the Portfolio Roadmap

03 Realizing Portfolio Vision through Epics

- Defining portfolio Epics
- Estimating Epic costs
- The SAFe Lean Startup Cycle

04 Establishing Investment Funding

- Lean Budget Guardrails
- LPM events overview
- Strategic portfolio review and portfolio sync
- Participatory Budgeting

05 Managing Portfolio Flow

- Describing the value of portfolio flow
- Establishing flow with the Portfolio Kanban
- Sequencing Epics for implementation using WSJF

06 Applying Agile Portfolio Operations

- Value Stream coordination
- Supporting ART execution and operational excellence

07 Applying Lean Governance

- Measuring LPM performance
- Coordinating compliance
- The Getting Started with Lean Portfolio Management workshop
- Additional LPM resources

08 · YOUR INSTRUCTORS

Taught by practising SPCs



Deadra Stevenson

CEO & Founder · SPC®

15+ years leading large-scale change and 30+ Lean-Agile transformations for Fortune and enterprise organizations. Pairs deep SAFe expertise with practical AI transformation guidance.



Marcus Ball

Enterprise Agile Coach · SPC®

Specializes in SAFe certification training and transformation coaching, helping teams improve flow, alignment, and the value they actually deliver.



Joe Puoci

Enterprise Trainer · SPC®

Delivers live virtual SAFe courses across the portfolio with a focus on real-world scenarios and skills learners can use the week after class.



Martina Svoboda

Enterprise Agile Coach · SPC®

Learner-centered facilitation spanning Agile transformation, organizational development, and change leadership.

ENROLL

\$950 ~~\$1,900~~ per seat, everything included

Weekday and weekend cohorts running throughout the year. Groups of five or more save 25%; private cohorts can be scheduled around your PI calendar.

agile36.com/courses/lean-portfolio-management

ABOUT AGILE36

Agile36 is a transformation and technology enablement firm helping organizations accelerate performance, modernize operations, and build the capabilities required to compete in the digital era. For more than a decade we have partnered with Fortune 100 and Fortune 500 companies, government agencies, and universities to guide large-scale change.

As a **Scaled Agile Silver Partner**, we deliver accredited SAFe® courses led by industry-recognized SPCs — hands-on, practical training that helps teams adopt new ways of working and produce measurable results.



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BASED IN

Miami, Florida · Delivered live online worldwide

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