

Portfolio activation for Jira Align

Build a strong foundation of portfolio management practices

Establishing the foundation of your agile portfolio practices is essential to connecting your strategy to execution and maximizing the value of your Jira Align investment. Working with an agile and Jira Align expert, you will define, design, and launch a pilot portfolio to inform better investment-based decisions. This service establishes demand intake prioritization and status roll-up capabilities for one portfolio. We'll also build the teams and practices that enable you to manage this pilot portfolio and plan for expansion to multiple portfolios across your organization.

This service is designed to:

- Establish a pilot portfolio in Jira Align based on two to four established programs
- Provide practical application experience managing a portfolio within Jira Align
- Recommend a path forward to expanding portfolio management and organizational agile capabilities

The service is right for your organization if you:

- Have established programs in Jira Align and are looking to gain higher-level oversight of these investments through portfolio alignment
- Desire to better and more consistently prioritize work to avoid technical debt and wasted resource time
- Need to make investment-based decisions on what work gets done and when
- Want to optimize the intake and distribution of portfolio work for efficiency
- Are looking to provide leadership visibility into quarterly and annual roadmaps

Overall expected outcomes

Tailored recommendations leading to:

- Improved portfolio alignment and visibility for data-driven decision-making on organizational priorities and investment
- Efficient process and teaming for the intake and prioritization of new work
- The ability to scale across multiple portfolios in the future



What to expect

Assessment, implementation, and hands-on application with Portfolios in Jira Align, including:

- Working sessions to establish the pilot portfolio team, operating cadence, purpose, and parameters to be used
- Collaborative implementation of a pilot portfolio within Jira Align
- Role-based enablement sessions with an agile expert to begin managing your pilot portfolio today



Maximize your impact

PORTFOLIO ACTIVATION

With your first programs in motion, we'll help you apply portfolio principles to connect strategy to execution.

Silver Service

PORTFOLIO EXPANSION

Expand portfolio management by introducing lean budgeting, intake with a portfolio kanban, and capacity planning to launch your first portfolio leadership team.

Gold Service

TRANSFORMATION ACCELERATION

Integrate Jira Align with your Agile transformation to ensure success within your organization.

Gold Service

Service details

Our team of agile and Jira Align Advisory Services experts Advisory Services experts will precisely carry out the following service modules.

SERVICE MODULES	ACTIVITIES	OUTCOMES
Discovery and planning	<p>Facilitate discussions to understand and document current ways of working, areas for improvement, and any tactical considerations as you enable Portfolios in Jira Align.</p> <p>To understand your portfolio strategy and operations, we will examine the following facets:</p> <ul style="list-style-type: none"> ▪ Portfolio drivers and purpose ▪ Pilot portfolio team members ▪ Cadence for portfolio management ▪ Investment strategies ▪ Organizational value and outcome targets ▪ Governance ▪ Ceremonies ▪ Strategic goals 	Organizational alignment on the documented vision, value, and strategy for the pilot portfolio.
Solution design and configuration	<p>Collaboratively design and execute one pilot portfolio based on two to four established programs within your organization's Jira Align instance.</p> <p>Through the course of developing this initial portfolio, we will cover the following themes:</p> <ul style="list-style-type: none"> ▪ Intro to Jira Align & Portfolio Simulation ▪ Portfolio to program relationships ▪ Investment themes and portfolio epics ▪ Portfolio intake mechanisms ▪ Hierarchies of people, work, and time ▪ Roles and Access ▪ Reporting 	Documented and confirmed pilot portfolio recommendations, to be implemented by your Admin and an Atlassian Jira Align expert.
Assess and launch	<p>Expert-led enablement via role-based training on administering a program and portfolio, including:</p> <ul style="list-style-type: none"> ▪ Portfolio lifecycle decision-making ▪ Portfolio management (backlog and prioritized) ▪ Value-based decision making ▪ Roadmap creation 	Portfolio team readiness to manage a portfolio in Jira Align, and expand learning across additional portfolios
Monitor and wrap up	<p>To close out the engagement, we will provide recommended next steps for scaling across your organization, including:</p> <ul style="list-style-type: none"> ▪ Opportunities and growth investments ▪ Additional programs and portfolios to implement ▪ Guidance on building Objectives and Key Results (OKRs) ▪ Analytic insights 	Portfolio team readiness to identify early gaps crucial to user adoption and create a roadmap for enhancement and expansion.

The services described in this datasheet will be deemed complete on the earlier of (i) Atlassian's delivery of the service activities listed above and (ii) twelve (12) months from the start date indicated in your order for the catalog services.

As part of a signature or elite subscription plan, this service engagement is SILVER.

Contact your Atlassian Sales Representative
[Inquire online](#) or [find a Solution Partner](#)

© 2024 Atlassian. All rights reserved.

 **ATLASSIAN** Advisory Services