Meetings in Lean PPM™

Implementing Lean PPM™ in your organization happens through a series of regular meetings with specific activities. Here are the meetings, participants and agendas that make Lean PPM™ work.

Meeting	Participants	Input	Output	Activities	Cadence
Proposal Coaching	• Initiator • Portfolio Coordinator	• Ideas • Demands • Opportunities	• Quality assured new initiative	• Initiator explains idea in detail • Portfolio Coordinator gives feedback and assists in developing initiative	Weekly
Pipeline Review-Committee Meeting	• Pipeline Review Committee Member • Portfolio Coordinator • Initiator (if needed)	• Quality assured new initiatives	• Ranked list of initiatives	• Committee reviews and ranks initiatives in light of current strategic goals	Every 4 to 6 weeks, minimum quarterly
Portfolio Board Meeting	• Portfolio Board Member • Portfolio Coordinator • Project Manager (if needed)	• Current portfolio status • Proposed project portfolio	• Approved project portfolio	• Portfolio Coordinator presents proposed portfolio, including the status of ongoing projects and new initiatives • Portfolio Board requests changes to priorities, timing, budget, and key resources • Portfolio Board decides on the future portfolio and the respective budgets • Portfolio Coordinator communicates decisions and ensures transparency of all changes	Every 4 to 6 weeks, minimum quarterly
Resource Conflict Resolution Meeting	• Project Managers • Resource Managers • Portfolio Coordinator (if needed)	• Resource management issues	• Resolutions to resource challenges	• Designs and discusses working solutions for resource conflicts • Escalates unresolved issues to the Execution Steering Committee	Weekly
Execution Steering Meeting	• Execution Steering Committee Members • Project Managers	• Project status report • Issues escalated by project manager • Unresolved issues from Resource Conflict Resolution meeting	• Solutions • Additional measures	• Reviews project status • Solves problems by changing scope or shifting resources within the project	Monthly
Strategy Workshop	• Strategy Manager • Portfolio Coordinator	• Company strategy	• Catalog of project prioritization criteria	• Discusses strategy • Determines project prioritization criteria and their weighting	Every 6 to 12 months