# AI-Enabled Portfolio Kanban

Using AI to Decide What to Build with AI

Scrum Alliance

# Alex Sloley

Certified Scrum Alliance Trainer™
Certified Enterprise Coach™
Certified Team Coach™
Accredited Kanban Consultant

Alex specializes in product and AI transformations. He helps orgs work out how to use AI, and increasingly how to use AI to work that out. His deep specialty is portfolio kanban: the enterprise system that decides what gets funded, prioritized and built.

# Your teams are figuring out how to use AI.

# Figuring it out at the strategy layer is harder.

# Two layers
# Two problems

Both are still being worked out

## DELIVERY LAYER

How do we use AI to build the thing?
Teams are well down this road.

## GOVERNANCE LAYER

How do we automate *THIS* layer with AI?
Deciding what gets funded, prioritized and moved forward.

Far less settled.

# Investing in your strategy layer gives you the highest leverage in your investment process.

# The design decision

Scrum Alliance®

# Why retrofitting struggles

You end up shoving the old paradigm into the new one

If you want a genuinely AI-native process, build it from scratch.

Scrum Alliance®

# Use AI to figure all of this out

This is the part people miss. AI is not only there to run the portfolio once you have built it. Use AI to help you design it: to draft the canvases, shape the cadences, create your definition of value, and work out the policies either side of the commitment point.

**START HERE:** open a conversation with AI about how your portfolio should work, before you build any of it.

# Building the portfolio funnel

Every strategic input lands in one place before anyone commits to it. Ideas, requests, mandates and bets from across the organization enter one funnel instead of arriving through side channels.

The funnel is deliberately wide at the top. What matters is not how many ideas enter, but that none of them bypass the process.

# Let AI interview the idea

Someone arrives with a big idea and no structure. Handing them a blank canvas and hoping rarely works.

Instead, an AI bot interviews them. What is this? Who is it for? What would have to be true for it to succeed? What is it worth? Out of that conversation comes a minimal, usable Discovery Canvas.

The idea enters the funnel already framed, and already comparable to everything else in there.

# The Discovery Canvas

That canvas is the output of the AI interview. It captures what the idea is, who it serves, what it is worth, and what would have to be true for it to succeed. It travels with the work flowing thru the Portfolio Kanban.

The cadence is what moves it. A standing forum where options are reviewed, evidence is added, and ideas either advance toward the commitment point or are killed early and cheaply.

# Building an AI-Enabled Portfolio Kanban

**Use AI throughout to help you do all this**

### 1
**Design the real workflow**

Discovery, commitment point, delivery.

Set explicit policies.

Name the team.

DESIGN

### 2
**Definition of Value workshop**

Agree what value means here.

Written down and agreed.

DESIGN

### 3
**Definition of Measurement**

Every element gets a measure.

Classified: KPI, health, driver.

DESIGN

### 4
**Set limits and cadences**

WIP limits, rough to start.

Agree when you renegotiate.

DESIGN

### 5
**Make all the work visible**

Every initiative, one board.

Expect 30% or more extra WIP.

POPULATE

### 6
**Stabilize and collect data**

The step everyone skips.

Start collecting data that AI can analyze.

POPULATE

### 7
**AI as analyst, advisor and flow manager**

Monitors, proposes, helps manage flow.

Humans ratify.

AUGMENT

### 8
**Close the learning loop**

Did it improve flow?

Measured against step 3.

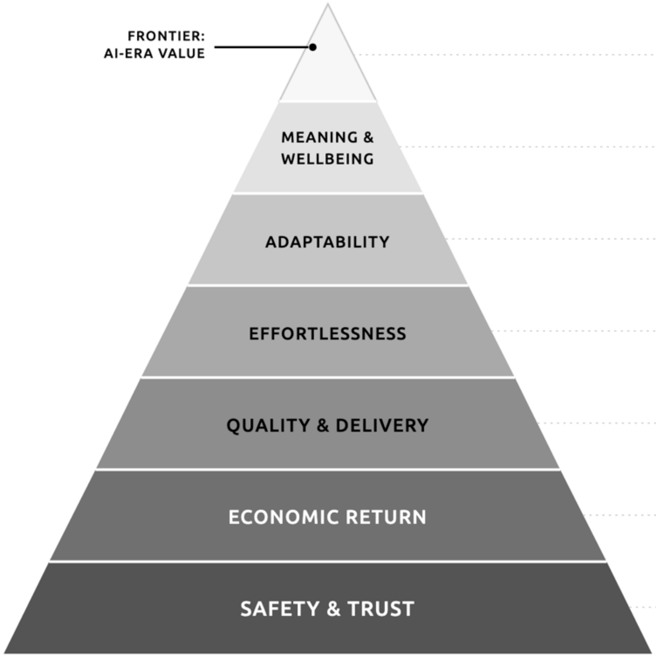
LEARN

# Step 1: design the real workflow

Discovery upstream, an explicit commitment point, delivery downstream. Then name who sits on the portfolio team. Set explicit policies for every work state that defines flow. Everything else hangs off getting this right.

A MENU OF VALUE TYPES FOR THE DEFINITION OF VALUE CONVERSATION

# The Work Value Pyramid




**FRONTIER · WHAT AI-ERA WORK CAN BE WORTH**
Data asset created · Bandwidth reclaimed through automation
New AI capability built · Decisions augmented · Responsible-AI posture

**MEANING & WELLBEING**
Improves the customer's world · Eases anxiety · Delights
Grows people · Builds belonging & trust · Motivates & gives purpose
Lifts the team · Serves society & the planet

**ADAPTABILITY & ENABLEMENT**
Fits many needs · Configurable & personalizable · Keeps choices open
Deferrable commitment · Extends reach · Creates learning
Advances strategy · Builds capability · Unblocks other work

**EFFORTLESSNESS**
Saves time · Reduces effort · Removes hassle · Simplifies
Organizes · Integrates · Connects · Informs
Easy to reach, deal with, and access

**QUALITY & DELIVERY**
Works well, on the surface and beneath it · Innovative · Scalable
Arrives on time and predictably · Short time to value

**ECONOMIC RETURN**
Earns revenue · Protects revenue · Cuts cost · Avoids cost
Affordable to buy or to subscribe

**SAFETY & TRUST**
Safe · Secure · Compliant · Ethical · Dependable
Continuity protected · Risk lowered

**A menu, not a mandate. Teams pick, adapt, or write their own elements, then prioritize:**
***that prioritized shortlist is your Definition of Value.***



Scrum Alliance®

**Step 2**

VALUE IS DISCOVERED, NOT ASSUMED

# Where Value Enters the Portfolio Kanban

The Definition of Value is a discussion framework: a prioritized list of what this organization values about work.

upstream → downstream

### IDEAS

?

Items arrive with value unknown.

That's honest, not broken.

### DISCOVERY

DoV
- 01
- 02
- 03
- 04
- 05

Which values does this item serve?

Value discovery is a column, not an assumption.

### VALUE SIZED

XL

L

M

S

XS

T-shirt size the value, by mapping the item against the Definition of Value.

The discussion IS the sizing.

### COMMITTED

L

+ measure attached

Nothing crosses the commitment point without a value size and its mapped measure.

### DELIVER & CHECK

✓

Did the delivered item move its mapped measure?

The Definition of Measurement closes the loop.



**Step 2**

TWO WORKING AGREEMENTS · EVERY VALUE MAPS TO AT LEAST ONE MEASURE

# Definition of Value · Definition of Measurement

## Definition of Value

What we value about the work in this portfolio.
Priority order matters: it settles arguments when values collide.

EXAMPLE — YOURS WILL DIFFER, THAT'S THE POINT

**01** Customer outcome improved

**02** Revenue enabled or protected

**03** Risk reduced

**04** Strategic bet advanced

**05** Carbon footprint reduced

1 : 1+

## Definition of Measurement

At least one mapped measure per value element.
A value element with no viable measure is a finding, not a failure.

THE COROLLARY — SAME NUMBERS, GROUPED PER VALUE

01 Customer effort score

01 Support contacts per account

02 Pipeline influenced ($)

03 Exposure retired ($)

03 Incidents avoided

04 Spend on strategic themes (%)

05 $CO_2e$ avoided (tonnes)

***"If you can't say how you'd measure it, you haven't finished defining it."***

# Step 4: set limits and cadences

Set these *BEFORE* you populate the board, not after.

Deliberately imperfect is fine. Gut feel is enough to start.
What matters more is agreeing the cadence on which you renegotiate them.

# Step 5: make all the work visible

Every initiative, every funding source, in one place. This is where orgs find out what they are really carrying.

30%

+

more work in progress than leaders thought they had, in my experience with enterprise portfolios

# Step 6: stabilize and collect data

The unglamorous step everyone skips.

Feed AI a chaotic board and it will give you confidently wrong answers.

# Now bring in AI

The system is built. Let it work.

# Step 7: AI as analyst, advisor and flow manager

AI monitors the board, proposes adjustments, and helps manage flow. Anomaly detection on aging work in progress, dependency risk, forecasts, reprioritization and scenario models. Every proposal is ratified by a human before anything changes.

# Step 8: close the learning loop

Did the recommendations actually improve flow?
Measured against the definitions your own people wrote in step 3.
This is how you know the AI is earning its place.

# How do you augment your process with AI?

# Where to begin on Monday

**One workflow**

Discovery, policies, team, commitment point, delivery

**One definition**

Agree what value means here

**One measure**

Decide how you will know

**One cadence**

Set WIP limits and when you renegotiate

**Then populate**

Every initiative, every funding source

**Then let AI in**

Analyst, advisor, flow manager

# Key takeaways

1 **Highest leverage**

Investing in the strategy layer gives you the most leverage, and design-first beats retrofit

2 **AI helps you build it**

Use AI to design the workflow, the canvases, the cadences and the definitions, not only to run them

3 **Frame at intake**

An AI interview turns a raw idea into a usable Discovery Canvas before it enters the funnel

4 **Then close the loop**

AI as analyst, advisor and flow manager, measured against your own definitions

# Take this away and build your own

**DOWNLOAD THE PRESENTATION**

alexsloley.com/downloads

**THEN PASTE THIS INTO YOUR AI TOOL, WITH THE PDF ATTACHED**

You are an expert in portfolio kanban and AI-enabled ways of working.
I have attached “AI-Enabled Portfolio Kanban” by Alex Sloley. Read it in full.
Then guide me through building a portfolio kanban for my own organization,
following the eight steps in that presentation, one step at a time.
At each step, interview me about my context first, then give specific advice.
Do not move to the next step until I say I am ready.
Start with step 1.

Scrum Alliance

# Questions

# Thank you

Alex Sloley

alexsloley.com

Scrum Alliance®