

TOOL 7

The Portfolio and Roadmap View



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Balance the work, sequence the commitment, and make the resource line visible.

ORGANIZATION OR TEAM	PLAN OR VERSION	LAST UPDATED

KEEP THE QUESTIONS SEPARATE. Portfolio Role shows how the work contributes. Flight Status shows where it stands in the commitment sequence.

1 DEFINE THE FLIGHT KEY Keep the date ranges and commitment conditions explicit

IN FLIGHT	ON THE RUNWAY	IN THE HANGAR	GROUNDING OUTSIDE THE CURRENT ROADMAP
Approved, resourced, owned, and underway.	Approved and sequenced next, with a credible resource path.	Worth preserving, but still needs preparation before activation.	Not currently committed. Reconsider only when a defined condition changes.
IN FLIGHT DATE RANGE 	ON THE RUNWAY DATE RANGE 	IN THE HANGAR DATE RANGE 	

2 MAP THE PORTFOLIO Balance Foundational, Growth, and Transformational work

IN EACH CELL, RECORD: initiative | owner | Money intent tag G Growth S Savings I Investment

PORTFOLIO ROLE	IN FLIGHT	ON THE RUNWAY	IN THE HANGAR
FOUNDATIONAL Keeps the organization sound			
GROWTH Expands the current model			
TRANSFORMATIONAL Builds future capability			

GROUNDING INITIATIVE	WHY IT IS OUTSIDE THE CURRENT COMMITMENT	RECONSIDER WHEN / REVIEW DATE

PORTFOLIO CHECK

☐ The balance is intentional
 ☐ Every In Flight item is resourced
 ☐ Hangar readiness is defined

When something new enters, something else must move.