



# ADVANCED PORTFOLIO MANAGEMENT

*Accelerate Growth With Higher Value Solutions*



Proficientz

## YOU WON'T HAVE TO "FIGURE IT OUT" AFTER THE TRAINING

Hands-on, how-to learning that's personalized to your products, markets and business model.

## UNIQUELY PROFICIENTZ

A **customer goal** (versus problem) approach that guarantees you're building, marketing and selling solutions with quantifiable impact on the strategic business goals of your target customers.

[LEARN MORE](#)

## B2B CERTIFICATION

Push yourself outside the boundaries of traditional product management and get certified on best practices that are uniquely valuable in B2B.



## COURSE MODULES INCLUDED

[Markets & Customer Goals](#)

[Opportunities & Priorities](#)

REQUEST ONSITE TRAINING

## COURSE OVERVIEW

### Deliver Solutions With Strategic Customer Value to Accelerate Growth

Eliminate silos and get rid of all the competing product priorities. In this two-day **hands-on, how-to workshop**, you'll learn how to align your portfolio priorities to the strategic goals and priorities of your target customers so that you're consistently delivering higher-value multi-product solutions that are more strategic to the customer organization and yours.

## DAY 1 AGENDA

**Day 1 Theme:** Understand your target customers as well as they understand themselves so that you can consistently deliver solutions with strategic and quantifiable value to all levels of the customer organization!

- Advanced **market segmentation** techniques so that product, marketing and sales operate under a common definition of "target markets."
- **Organizational personas** that paint a picture of the customer organization from the top down so that everything you do is tied directly to outcomes that are strategic to your target customers.
  - You'll love the simple one-page format.
- **What do good business and market requirements look like?** They're a representation of WHAT your target customers are doing and WHY, without any regard to your products.
  - You get to be the customer and create strategic, operational and tactical business requirements from their perspective so that you have a "can't miss" target for your portfolio and product investments.
- Create a **portfolio mission** that aligns products, marketing and sales to a common set of customer business goals and priorities.

At the end of day 1, you'll be able to answer the following questions:

1. **WHO** are our target customer (a common definition)?
2. **WHAT** are they trying to accomplish and **WHY**?
3. **WHAT's** stopping them & **WHY**?
4. **WHAT** are they doing about it?
5. **WHAT** metrics do they use to measure success?
6. **WHAT** are the biggest obstacles our core competence can eliminate?

## TOOLS & TEMPLATES

*Paint-by-Numbers Simplicity*

*Examples to Follow*

*Online Video Instruction*

*Click the Framework Activity,  
Get the Template*

ENROLL IN ONLINE TRAINING

## DAILY AGENDA (ONSITE)

*Optional Breakfast: 8:30*

*Start Class: 9:00*

*Break: 10:15*

*Lunch: 12-1:00*

*Break: 2:15*

*Break: 3:45*

*Adjourn: 5:00*

## IDEAL PARTICIPANTS

*VPs & Directors*

*Portfolio Managers*

*Product Strategy Managers*

*Product Managers*

*Market/Industry Managers*

*Development/Engineering Leads*

## CONTACT

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## DAY 2 AGENDA

### Day 2 Themes:

1. The most lucrative markets for the portfolio as a whole.
2. A portfolio strategy that maximizes near-term revenue and longer-term growth.
  - **Advanced competitive analysis** that does away with the feature comparison matrices in favor of a layered approach that covers everything from market strategy down to user scenarios.
  - **Advanced portfolio analysis** that helps you identify your most lucrative markets for the portfolio as a whole, for both the short and longer term so that product, marketing and sales priorities follow suit. What's best for each product may not be best for the customer, or your organization.
  - **Quantitative & qualitative market segment analysis** that identifies market segments with the greatest opportunities for growth, wallet share and market share for the portfolio as a whole.
  - Create a **portfolio strategy** that prioritizes market segments and **business solutions** for both short and long term.

At the end of this workshop, you'll know **HOW** to strategize objectively so that your portfolio priorities accomplish two things:

1. Make the customer organization measurably better at its business in ways that have strategic value.
2. Drive profitable growth for your organization.

# THE PROFICIENTZ DIFFERENCE



Deliver, Market & Sell Greater Strategic Value

Proficientz

## Hands-On, How-To Training



## You Won't Have to "Figure it Out" After the Training!

80% of every [instructor-led](#) and [online](#) training course consists of hands-on exercises and role-play scenarios that reflect your real-world. Hands on, how-to training for your products, your markets and your business model. You'll know exactly **what** to do and **how** to do it after the training because we'll do it together first in the classroom, real or virtual.

## Stop Looking for Customer Problems!

Ultimately, your products are going to solve customer problems but building your product management & marketing discipline on a problem-based framework is risky. You can solve legitimate customer problems that have no strategic value to the customer organization.

Proficientz has developed the only [B2B product management framework](#) that cuts to the chase. You'll learn a can't miss approach that makes the **top-down business goals of your target customers** the focal point) of your product, marketing and sales functions. All you have to do is find and eliminate the biggest obstacles standing in their way and you'll never miss the mark.



## No More Silos and Competing Priorities!

What's best for every product isn't always best for the customer. Proficientz offers the only framework that's designed specifically for managing, marketing and selling a B2B portfolio of business solutions.

Since most of your products target the same markets and customers, you'll learn how to use portfolio strategies to align all products to a common set of strategic goals and priorities of your target customers. That way, you can rest assured that your products are collectively delivering maximum market value.

