

ADVANCED PORTFOLIO MANAGEMENT

Create Solutions With Differentiating Value!



Proficientz

UNIQUELY PROFICIENTZ

1. *Personalized Training*
2. *Outcomes vs. Problems*
3. *B2B/B2B2C Specialization*

1. PERSONALIZED TRAINING

Hands-on, how-to learning that's personalized to your products, your markets and your business model. You'll know exactly what good looks like for you!

2. OUTCOMES vs. PROBLEMS

You'll never miss the target for strategic value when everything is centered on **customer outcomes**. It's a simple shortcut that brings the customer's biggest problems to you.

3. B2B/B2B2C SPECIALISTS

Focus on creating successful customers. Successful products will be the result! Learn how to deliver **multi-product solutions** that have more quantifiable customer value than any single product can deliver on its own.

INSTRUCTOR-LED TRAINING

ON-DEMAND TRAINING

LESSON PLAN

The Whole Portfolio Has More Value Than The Sum of The Products!

Eliminate silos and get rid of 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 multi-product solutions with quantifiable strategic value to the customer organization...and yours.

SESSION 1 4 hours (Zoom Meeting)

Introduction to B2B Portfolio Management

Lesson 1: Advanced Market Segmentation, Sizing & Opportunity Analysis

Lesson 2: Portfolio SWOT Analysis by Market Segment

Lesson 3: Uncovering Strategic Customer Requirements

SESSION 2 4 hours (Zoom Meeting)

Lesson 3: *Continued*

Lesson 4: Portfolio Competitive Analysis

SESSION 3 4 hours (Zoom Meeting)

Lesson 5: Quantifying & Prioritizing Market Segment Opportunities

Lesson 6: Creating a Customer-Facing Portfolio Vision

Lesson 7: Creating a Portfolio Strategy & Roadmap

SESSION 4 4 hours (Zoom Meeting)

Lesson 8: Positioning the Strategic Value of Your Portfolio

Lesson 9: Structuring an Outcome-Based/Customer-Facing Product Org

A Framework for Building, Marketing, Selling & Delivering Strategic Customer Value



Deliver Solutions That Make Customers Measurably Better at Mission-Critical Business Processes

That's what makes the Proficientz Framework unique. It's the only framework that makes the top-down business priorities of your target customers the focal point of product management, product marketing, sales and customer success teams. It's a can't-miss approach for consistently delivering a portfolio of solutions with strategic customer value.

Continuity From a Single Framework Accelerates Your Maturity!

1. **Basic** – Build, market, sell and deliver **products** that make users quantifiably better at their job.
2. **Intermediate** – Build, market, sell and deliver **multi-product solutions** that make customer departments quantifiably better at their business function.
3. **Advanced** – Build, market, sell and deliver a **portfolio** of vertical market business solutions that give the customer organization a competitive edge in its industry.

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