PORTFOLIO MONDAYS · STEALABLE ONE-PAGER

90-Day Starter Checklist

Install intake, prioritization, and cadence in ninety days, so a project shop starts acting like a portfolio PMO.

From *Project Shop to Portfolio PMO: The First 90-Day Map*, a Portfolio Mondays episode on Portfolio Intelligence. Watch the episode

The starter checklist

Tick each one when it is real, not when it is planned.

	Item	Notes
☐	**1. Baseline the book of work so invisible demand stops running the show.**	
☐	**2. Draft intake rules before you accept another hallway yes.**	
☐	**3. Run one scored prioritization pass on a limited set, and make a real fund, pause, or kill call.**	
☐	**4. Pilot one portfolio review that is not a status dump.**	
☐	**5. Calendar the cadence and keep a decision log.**	
☐	**6. Let AI draft the templates and scenario packs. You own every tradeoff.**	

The 90-day map

Steal the milestones. Adapt the language. Don't paste someone else's org into it.

DAYS 1–30

Baseline the system

- ☐ One view of the book of work: initiatives that consume real capacity, named, owned, roughly sized.
- ☐ Draft intake rules: who can submit, minimum info, and what "accepted into the queue" means versus "approved to start."
- ☐ Pick a scoring model stub: the four lenses you will actually score.
- ☐ Name who owns the portfolio review. One accountable human.

AI drafts: inventory templates, first-pass intake criteria, demand themes from a messy backlog. **You decide:** what counts as in the portfolio, who holds the intake gate, what done means for month one.

DAYS 31–60

Force the first tradeoffs

- ☐ Run a scored prioritization pass on a limited set you can finish.
- ☐ Stand up a lightweight capacity view. People-weeks or team-slots by month.
- ☐ Pilot one portfolio review: mix, capacity, decisions. Time-boxed. End with written decisions.

AI drafts: scenario packs, scoring sheet drafts, cross-item risk and dependency summaries. **You decide:** what funds, pauses, or is killed, and which capacity assumptions you defend out loud.

DAYS 61–90

Make it stick

- ☐ Harden cadence. Calendar it. Keep a decision log.
- ☐ Tighten intake so a yes visibly costs capacity.
- ☐ Publish a one-page portfolio operating rhythm.

AI drafts: cadence checklists, "what changed since last review" briefs, decision log cleanup. **You decide:** the operating model you keep, what you refuse to automate, next quarter's rules.

> Ninety days won't finish the rebuild. It gives you a spine: visible demand, a scoring pass you've actually run, and a cadence that reviews the portfolio instead of replaying project status.

Worked example (fictional)

A fictional mid-size delivery organization: solid project managers, a backlog that never shrinks, and leadership asking for “more portfolio thinking.” No special tools. A shared list and a standing review.

	Item	Notes
☐	**1. Baseline**	Single list of named, owned, roughly sized initiatives. Found shadow work and two “small” asks that were not small.
☐	**2. Intake rules**	Rules drafted. Accepted into the queue does not mean approved to start.
☐	**3. Scored pass**	Scored a limited slice. One fund, one pause, one kill, all written down.
☐	**4. Review pilot**	Time-boxed to mix, capacity, and decisions. Ended with written decisions, one of them “defer.”
☐	**5. Cadence and log**	Monthly review on the calendar. Decision log started.
☐	**6. AI drafts, you decide**	AI drafted the inventory template and intake criteria. The review owner edited and signed off.

> If month three still feels messy, that's normal. The win is that tradeoffs are visible and somebody owns the gate.