PORTFOLIO MONDAYS · STEALABLE ONE-PAGER

One-Page Portfolio Operating Rhythm

Write down who meets, in what order, who can fund, pause, or kill, what gets prepped, and where the decision log lives.

From *What Replaces the Status Meeting Graveyard*, a Portfolio Mondays episode on Portfolio Intelligence. Watch the episode

1. Who

Name the attendees for each meeting. Keep the lists short.

Meeting	Its job	Attendees
Weekly delivery huddle 30 minutes	Blockers and dependencies across items, while they're cheap	
Monthly portfolio review	Spend capacity, check it again, fund, pause, or kill	
Quarterly strategy check	Does the portfolio still match what we said we care about?	

2. Agenda

Same order, every time. Green items live in the written pack. Exceptions get the room.

- [ ] Read the log.
- [ ] Review the exceptions.
- [ ] Check capacity.
- [ ] Decide.

3. Decision rights

If it isn't on the page, it isn't a right.

Decision	Who can make it	At which meeting
Fund		
Pause		
Kill		

4. Prep

What gets drafted before each meeting, by when, and who checks the AI draft.

Meeting	What gets drafted	By when	Who checks the AI draft
Weekly			
Monthly			
Quarterly			

5. Log

FIELDS

What we decided · Why · Who owns it · When we check it again

OWNER

WHERE IT LIVES

> Any change to funded capacity goes through the cadence, or it gets named at the next review. No change without a line in the log. Pin this page where the portfolio work lives. Review it once a quarter.

Worked example (fictional)

The fictional IT and digital portfolio, one month after the scoring pass.

Who Weekly: the portal, security, and gateway delivery leads. Monthly: sponsors and the portfolio lead. Quarterly: leadership.

Agenda Read last month's log. Exceptions: the portal refresh has a two-week vendor slip; the paused finance export hit its rescore date. The patch window is on track and stays in the pack, no airtime.

Decision rights Fund, pause, and kill sit with sponsors and the portfolio lead at the monthly review. Weekly surfaces problems; it does not spend capacity.

Prep AI drafts the “what changed” brief and the meeting pack before the monthly review. The portfolio lead checks the draft with a skeptical eye.

Log Fields as above. Owned by the portfolio lead. Lives next to the review pack.

Decision log entries from that review (twenty minutes)

What we decided	Why	Who owns it	When we check it again
Fund a short developer boost for the portal refresh	Two-week vendor slip; audit season doesn't move	Portal lead	Next monthly review
Keep the finance export paused one more cycle	Rescore date reached; scores did not change	Export owner	New rescore date, next cycle