

PROJECTNAME:CalculatingFamilyExpensesUsingServiceNow


Brainstorm&IdeaPrioritization


Step 1: Team Gathering, Collaboration and Problem Statement


Template

Brainstorm & idea prioritization

Use this template in your own brainstorming sessions so your team can unleash their imagination and start shaping concepts even if you're not sitting in the same room.


 **10 minutes** to prepare

 **1 hour** to collaborate

 **2-8 people** recommended

Before you collaborate

A little bit of preparation goes a long way with this session. Here's what you need to do to get going.

 **10 minutes**

A Team gathering

Define who should participate in the session and send an invite. Share relevant information or pre-work ahead.

B Set the goal

Think about the problem you'll be focusing on solving in the brainstorming session.


C Learn how to use the facilitation tools

Use the Facilitation Superpowers to run a happy and productive session.

[Open article](#)

Define your problem statement

Families often face challenges in managing their finances due to the absence of a centralized and efficient system for tracking daily expenses, setting budgets, and analyzing spending patterns. This project addresses the need for a smart, ServiceNow-based expense calculation system that simplifies expense management, ensures real-time tracking, and supports informed financial decisions for improved family budgeting and financial well-being.

 **5 minutes**

PROBLEM

How might we develop a ServiceNow-based expense management system that helps families efficiently track, categorize, and analyze their expenses to improve budgeting and overall financial well-being?

Key rules of brainstorming

To run a smooth and productive session

Stay in topic.

Encourage wild ideas.

Defer judgment.

Listen to others.

Go for volume.

If possible, be visual.

Step2:Brainstorm, IdeaListingandGrouping

2

Brainstorm

Write down any ideas that come to mind that address your problem statement.

🕒 10 minutes

TIP

You can select a sticky note and tilt the pencil, switch to sketch) icon to start drawing!

3

Group ideas

Take turns sharing your ideas while clustering similar or related notes as you go. Once all sticky notes have been grouped, give each cluster a sentence-like label. If a cluster is bigger than six sticky notes, try and see if you can break it up into smaller sub-groups.

🕒 20 minutes

TIP

Add customizable tags to sticky notes to make it easier to find, browse, organize, and categorize important ideas as they arise within your mural.

Person 1

Implement real-time expense tracking

AI-based suggestions

Person 2

Use color-coded charts for expense categories

clean, intuitive UI

Person 3

chart for present and past comparison month

expense categorization

Person 4

Budget Alert System

set financial goals

Smart Budget & Alerts System

Visual Expense Dashboard

Step 3:IdeaPrioritization

4

Prioritize

Your team should all be on the same page about what's important moving forward. Place your ideas on this grid to determine which ideas are important and which are feasible.

🕒 20 minutes

TIP

Participants can use their cursors to point at where sticky notes should go on the grid. The facilitator can confirm the spot by using the laser pointer holding the H key on the keyboard.

Importance

If each of these tasks could get done without any difficulty or cost, which would have the most positive impact?

Visual Expense Dashboard

set financial goals

expense categorization

Smart Budget & Alerts System

Implement real-time expense tracking

Use color-coded charts for expense categories

clean, intuitive UI

Feasibility

Regardless of their importance, which tasks are more feasible than others? (Cost, time, effort, complexity, etc.)