Idea Management Tool

Vision

System1 is building out a multifaceted set of content site properties. The high-level business model remains the same: acquire traffic to our monetized content sites and optimize to drive up margin. System1 is already successful at this model and so it is time to scale our efforts.

To do this, System1 requires CMS and tooling to efficiently scale content production and traffic acquisition. Teams will work cross-functionally, leveraging resources to meet needs as efficiently as possible. Our vision is to build an idea management tool to fully support this objective.

Definitions

- **Pitch** - an idea for a content item, not ready to be written

What	Who	Where	Definition
Pitch - New	All	Pitches Board	Pitch has been added to list and not been touched
Pitch - Rejected	All	Pitches Board	Pitch is deemed not good
Pitch - Parked	All	Pitches Board	Pitch seems like a good idea, team isn't ready to act on it
Pitch - Approved	Admin	Pitches Board	Pitch has been approved and will carry over to the next Board

Screens

1. Dashboard
2. Goal Board
3. Team Board
4. Draft Board
5. Pitch Board
6. Parking Board
7. Weekly Publishing Calendar Board
8. Setting page

Users

1. Super Admin x1

2. Admins x4-5
3. Contributors x10-20

Notes

Key Features
-Homepage to show how we are tracking to current week content needs
-User Permissions (for Admins to use)
-Pitch Board (with approval process)
-Export to CSV
With these features, it should be able to take you all the way from ideation to actual "I am ready to go write a quiz"
Of course, still need to rely on where the idea comes from (The part before this .. perhaps another project for AdBeats Integration) … and the part after this … actually writing the content and publishing, and viewing results/data/the feedback loop
But this can help scale the # of freelancers under management and have a better way to process manage. Other thoughts are:
-where should this data be stored? Should it be downloadable into a CSV? This way, we can always look back at specific dates of what happened?

High Level Workflow

1. The Super Admin should manage the goal board of the tool and add details such as:
   a. How many content pieces will we need for this calendar week?
   b. How many in each vertical?
   c. There should be a way to look weeks ahead and schedule ahead
2. Super admin/Admins should also have control to contributors/other admins and create permissions and delete users:
   a. Level of access
   b. Types of controls
3. Contributors can "pitch" a drafted idea to the pitch board and it will be labeled as "New"
4. Admin will look at a pitch and assign a status: "Approved", "Parked", "Rejected"
   a. 2 approvals
   b. The conversation then should be taken offline, and one of the Admins will need to change their status so that the Pitch can either be moved to "Approved", "Parked", "Rejected" and it should be in agreement.
5. For pitches that are approved, it should move to weekly publishing calendar
6. For pitches parked, it should move to the parking board
7. Super admin will review the weekly publishing calendar, either approve the whole list, or add parked pitches into the publishing calendar in order to satisfy quantity requirement
8. Weekly publishing calendar can be exported into CSV file

Detailed Workflow

Login page
1. User open the site, firstly shown a login page with simple username/password portal (same screen)
2. User logs in as admin or Contributor, shown different homepage

As content contributor
1. **Dashboard page**: it has overall project progress, current week goal, verticals in work, for each vertical, show number of draft, number of pitches submitted, number of pitches approved/parked/rejected. Logout button available on corner of homepage. Contributors can also view past or future week goals. **Extra**: Contributor will receive notification as a piece of content moves through the various stages (approved, rejected, parked)

2. **Draft board page:** Contributor works on the draft, a draft can be created, edited, or deleted. Once the contributor determines a draft is ready, he/she clicks on "pitch it" button to publish the draft to global pitch board. This pitched draft is then removed from this contributor's draft board, and he/she can not edit / delete that pitch. **Extra**: And a notification about this new pitch will be sent to admin.

Draft ID	Title	Vertical	Creator ID	Time created	Last time modified	Details	log	Button to publish it
						• Description • URL • Buy-side network	1.contributor X changed it 2.Admin Y approved it	

3. **Global pitch board page:** New pitch is marked as "new". Once the pitch is approved by two admins, the status changes to "approved". If one admin rejected, status changes to "parked". If both admin rejected, status changes to "rejected". Have two checkboxes indicating the two approvals. Approved pitch will be moved to weekly publishing calendar page. Parked pitch will be moved to parking board page. Contributor can view the details of all the pitches in the global pitch board.

Pitch ID	Title	Vertical	Creator ID	Time created	Last time modified	Details	Status	log	Admin Reviews	
						• Descripti on • URL • Buy-side network	1.New 2.Approv ed 3.Rejecte d 4.Parked	1.contributor X changed it 2.Admin Y approved it	1	0

4. **Setting page:** the contributor can change his/her own profile

As a super admin
1. **Dashboard page:** The dashboard page of Super admin will have overall project progress, goal verticals, number of pitch needed by each vertical, progress of each vertical (pitch approved / needed). Super admin can view past or future week's goal. Super admin does not edit goal in dashboard page, it must be done in goals board page. Logout button available on corner of homepage. Proposed UI

change to existing UI: in the right section of super admin dashboard, change the title section to be individual performance section, meaning that there is a list of contributors. Super admin can click on a contributor and on the right lower section of the UI there will generate histogram curve for the performance of this contributor. **Extra**: Super admin will receive notification as a new pitch needs to be reviewed / when weekly deadline approves, weekly publishing calendar needs to be reviewed.

2. **Global Pitch board page:** New pitch is marked as "new". Once the pitch is approved by two admins, the status changes to "approved". If one admin rejected, status changes to "parked". If both admin rejected, status changes to "rejected". Have two checkboxes indicating the two approvals. Approved pitch will be moved to weekly publishing calendar page. Parked pitch will be moved to parking board page. Rejected pitches are removed permanently. Super admin can view and edit the details of all the pitches in the global pitch board.

Pitch ID	Title	Vertical	Creator ID	Time created	Last time modified	Details	Status	log	Admin Reviews	
						● Description ● URL ● Buy-side network	1.New 2.Approved 3.Rejected 4.Parked	1.contributor X changed it 2.Admin Y approved it	1	0

3. **Weekly Publishing Calendar page:** All approved pitches will be moved to the weekly publishing calendar page, **which is only accessible by the super admin**. In where the super admin will be able to review the whole board, make any necessary final edits, and approve the whole list to be published to meet weekly targets.
    ○ If there is not enough pitches in the publishing calendar for that week, the super admin can **pull some parked pitches into the publishing calendar in order** to meet the targets (actual operation is in parking board).
    ○ Super admin can edit pitch in the publishing calendar.
    ○ The page will offer an "Export to CSV" functionality, which will download the whole publishing list into a CSV file.

Pitch ID	Title	Vertical	Creator ID	Time created	Last time modified	Details	Status	log
						● Description ● URL ● Buy-side network	approved	1.contributor X changed it 2.Admin Y approved it

4. **Parking board page:**
    ○ Pitches that were marked as "parked" from the approval step will be moved into parking board page. This page is only accessible by super admin.
    ○ This list serves as a reservoir for weekly publishing calendar in case that there is no enough pitches to be published.
    ○ If there is not enough pitches in the publishing calendar for that week, the super admin can pull some parked pitches into the publishing calendar in order to meet the targets. Super admin can edit pitch in the parking board.

Pitch	Title	Vertical	Creator	Time	Last time	Details	Status	log

ID			ID	created	modified			
						● Description ● URL ● Buy-side network	parked	1.contributor X changed it 2.Admin Y approved it

5. **Team board page:** Shows the organization information. The details of each team member including admins and contributors. Super admin can create new account for contributors and admins, or delete an existing user.

Member name	Type	Number of pitch submitted	Number of pitch approved	Total weekly number of pitch needed	Success rate (approved pitch / draft ratio)	Details
Adam	Contributor	5	10	30	30%	Name, gender,, email, phone number, address, county, state, country
Jack	admin	-	-	-	-	

6. **Goals board page:** Super admin can make goals for current week and future weeks, set the verticals and number of pitch each vertical needs for the current week or future weeks. Super admin can also check previous goals from past weeks. Each contributor will get the same amount of quota of pitches they need to submit for the week, meaning the quota of each vertical is evenly distributed among contributors. Every contributor will work on all the verticals.

Goal ID	Vertical ID	Issue Date	Due Date	Pitch Needed	Pitch Completed
1	Education	10-1-18	10-7-18	30	10
2	Finance	10-1-18	10-7-18	20	7
...	...	...	...	...	...

7. **Setting page:** the super admin can change his/her own profile

As an admin
1. **Dashboard page:** The dashboard page of admin will have overall project progress, goal verticals, number of pitch needed by each vertical, progress of each vertical (pitch approved / needed). Admin can also view past or future week's goal. Admin can only view goals but not altering goals. Logout button available on corner of homepage. **Extra**: admin will receive notification as a new pitch needs to be reviewed.

2. **Global Pitch board page:** New pitch is marked as "new". Once the pitch is approved by two admins, the status changes to "approved". If one admin rejected, status changes to "parked". If both admin rejected, status changes to "rejected". Have two checkboxes indicating the two approvals. Approved pitch will be moved to weekly publishing calendar page. Parked pitch will be moved to parking board page. Super admin can view and edit the details of all the pitches in the global pitch board. Admin can edit a pitch in the global pitch board

Pitch ID	Title	Vertical	Creator ID	Time created	Last time modified	Details	Status	log	Admin Reviews	
						● Description ● URL ● Buy-side network	1.New 2.Approved 3.Rejected 4.Parked	1.contributor X changed it 2.Admin Y approved it	1	0

3. **Team board page:** Shows the organization information. The details of each team member including admins and contributors. Super admin can create a new user, assign the type to it, or delete an existing user.

Member name	Type	Number of pitch submitted	Number of pitch approved	Total weekly number of pitch needed	Success rate (approved pitch / draft ratio)	Details
Adam	Contributor	5	10	30	30%	Name, gender,, email, phone number, address, county, state, country
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