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**Quaterly Development Planning**

**Q4-2023**

**Feature Title:**

**POX-11411 - Implementation of Gen AI in SPM Strategy Module**

**Priority:**

High

**Submitted By:**

Uppwise Development Team

**Feature Description:**

Co-Author will suggest key milestones relevant to the strategic planning process within the SPM solution.

**Feature Benefits:**

Enhances strategic planning by providing suggestions for key milestones, streamlining the planning and execution process.

**Target Users:**

Strategy planners and project managers.

**Acceptance Criteria:**

**Feature Roadmap Ahead:**

**Sub-Feature 1: Generate Comprehensive Strategy Content**

* Co-Author dynamically generates content for the Strategy Detail Page, including Executive Summary, Mission Statement, Vision, and SWOT Analysis.
* The generated content aligns seamlessly with the input provided by users.
* Users can easily view and edit the generated content within the SPM solution.

**Sub-Feature 2: Automated Strategy Milestone Suggestions**

* Co-Author suggests key milestones for the implementation of the defined strategy.
* Suggested milestones align with the overall strategy and objectives.

**Sub-Feature 3: Strategic Themes and OKRs Recommendations**

* Co-Author recommends Strategy Themes and associated Objectives and Key Results (OKRs) to support strategic planning.

**Themes: OKRs:**

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**Sub-Feature 4: Automated Strategy Key Goals and OKRs Recommendations**

* Co-Author provides recommendations for Key Goals and associated OKRs with Key Results to support strategic objectives.

**Sub-Feature 5: Automated Project and Task Suggestions**

* Co-Author offers suggestions for projects and associated tasks aligned with the defined strategy.
* Users can easily incorporate Co-Author's project and task suggestions into their project planning process.

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**Sub-Feature 6: Intuitive Drag and Drop Feature for Direct Saving**

* Users can easily save generated content into the SPM application through a simple drag and drop feature.
* Enhances user convenience by providing a direct and intuitive saving mechanism.

**Sub-Feature 7: Portfolio Association**:

* + Co-Author facilitates the association of projects with specific portfolios within the SPM solution.
  + The association mechanism ensures efficient organization and tracking of projects within the broader portfolio context.

**Sub-Feature 8: OKRs Review Cycle Association**:

* Co-Author empowers users to associate Themes, Objectives, and Key Results (OKRs) with specific review cycles for comprehensive performance management.

**Sub-Feature 9: Direct Assignment from Cards to Owners or Managers:**

* Users can directly assign owners or managers to specific objects such as milestones, themes, and OKRs from cards.
* Introduce a search functionality where users can identify and assign owners or managers by typing "@" followed by their names.

**Sub-Feature 10: Measurable Values for Value-Based Key Results:**

* Enable users to obtain measurable values specifically tailored for value-based key results within the SPM solution.

**Sub-Feature 11: Intelligent Date Retrieval for Objects:**

* Enhance user interaction by enabling them to retrieve dates for objects such as milestones, themes, OKRs, or projects through natural language commands. Users can simply state their target dates, and Co-Author will intelligently recognize and associate the dates with the specified objects. Additionally, the Co-Author may proactively suggest relevant dates based on the strategic context for improved strategy acknowledgment.

**Sub-Feature 12: Initiative Type Preference Setting:**

* Introduce a preference setting in the Co-Author configuration page, allowing users to specify their preferred initiative type (e.g., project or epic) when saving projects in the SPM application. This customization enhances user experience and ensures seamless integration with their preferred project categorization.

**Sub-Feature 13: Log Implementation:**

* Integrate a comprehensive logging system to capture and store relevant activities, events, or errors within the SPM solution.

**Sub-Feature 14: Co-Author Accessibility Configuration:**

* Implement a configuration setting within the user management system to control access to Co-Author. Users should only have access to Co-Author if they have the appropriate permissions configured in the user management settings.

**Sub-Feature 15: Dynamic Object Formatting:**

* Provide users with the ability to dynamically correct the format of various objects (e.g., milestones, themes, OKRs) by using specific keywords within Co-Author.

**Sub-Feature 16: Custom Model Training**

* Enable users to use their own custom model for content generation.

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**Additional Note:**

Co-Author plays a pivotal role in streamlining strategic planning and execution within the SPM solution. Currently focused on suggesting key milestones in the strategic planning process, this feature marks the beginning of a broader initiative. As we progress, we plan to extend Co-Author's capabilities to enhance strategic elements not only in the realm of strategy but also across projects, portfolios, and user management. This expansion aims to create a comprehensive and integrated experience, providing intelligent suggestions and automation beyond strategic planning, ensuring a holistic approach to organizational management.