

# Preparing and Allocating the Evaluation Request (API Sourcing/Portfolio)

## Learning Objectives

After completing this unit, you'll be able to:

- know where to find key information of the evaluation request

## Introduction

Once the Evaluation Request has been assigned to you in the Allocation Meeting, you can check the following information in SANITY:

- Opportunity Assessment record
- PSG Quip document
- Meeting Agenda Item (MAI) record



When an Opportunity Assessment (Evaluation Request) is assigned to you, you will receive a notification email with a link to the assessment record. You will learn more about this in the next unit.

Let's dive into each one of these topics.

## Information Found on the Opportunity Assessment record

So, you have received a notification email that an evaluation request has been assigned to you, and you have clicked on the link provided, opening the opportunity assessment record.

On the **Opportunity Assessment record (1)** you will find the following relevant information:

- **Link** to the respective **Opportunity D&D (2)**
- “**Owner**” (3), which should show your name
- “**Assessment Status**” (4) set on “**Draft**”, this needs to be changed to “Final” when the assessment is finalized by you and your team
- “**Feedback Status Due Date**” (5), the date you should provide the product strategy at the latest
- **Link** to the **PSG document (6)**.

This screenshot shows the Opportunity Assessment record for 'Assessment-102269'. The top navigation bar includes 'Opportunity Assessment' and 'Assessment-102269' (1). Below it are sections for 'Function' (Development), 'Status' (Open), 'Risks', and 'Likelihood Value' (Teno, highlighted with a yellow circle 2). The 'Opportunity Diligence' section shows 'Owner' (Jö) and 'Function' (Development, highlighted with a yellow circle 3). In the 'Overall Assessment' section, 'Assessment Status' is 'Draft' (highlighted with a yellow circle 4), 'Feedback Status Due Date' is '13.11.2020' (highlighted with a yellow circle 5), and 'Feedback Value' is 'Not Assessed'. The right sidebar displays 'Opp DD Joint Files' (All Current Assessments) and a 'Files for Parent Opportunity Detail & Diligence (1)' section containing a Quip file from 'Teno' dated '27.10.2020' (highlighted with a yellow circle 6).

## Product Strategy Gate (PSG) Document

Until the data in the Product Strategy Gate Document will be fully maintained in SANITY, the PSG Document of the Opportunity D&D will allow the team to include their data.

The PSG document, prefilled by the Portfolio Managers, will be, most of the time, added as a Quip file under the tab "Quip" on the Opportunity D&D record.

In special cases, it will be handled as an excel file outside of the system and should be uploaded afterward as a file.

As you have seen in the previous section, you can access the PSG Document directly from the Opportunity Assessment record by clicking on the link provided.

It can also be found on the Opportunity D&D on the "Spreadsheet" section (1), a link to it in the "Associated Documents" section (2) as well as in the "Files" section (3).

This screenshot shows the Opportunity Detail & Diligence record for 'Teno'. The top navigation bar includes 'Opportunity Detail & Diligence' and 'Teno'. Below it are sections for 'Record Type' (New Selection), 'Evaluation Status' (Under evaluation), 'Feedback Average' (0.0), and 'Product & Projects Links' (Product: Teno). The main area shows tabs for 'Details', 'Team', 'Feedback', 'Countries', 'Forecasts', 'Quip' (selected), and 'Selection Process'. The 'Quip' tab displays 'Associated Documents' (Sorted by last modified) with one item: 'Tenc spreadsheet' (highlighted with a yellow circle 2). The 'Forecasts' tab shows 'Forecast Details' and 'Sales' data. The 'Files' tab displays 'Files (1)' containing the same Quip file from 'Teno' dated '27.10.2020' (highlighted with a yellow circle 3). A large callout arrow points from the 'Quip' tab to the 'Files' tab.



The PSG file is visible on the Opportunity D&D and any Opportunity

Assessment record linked to the Opportunity D&D.

## Information found on the Meeting Agenda Item (MAI) record

You can access the MAI record from the related Opportunity D&D record.

On the header of the Opportunity Assessment record you can find the link to the Opp D&D, just click on it, and the record will open.

1. On the Opportunity D&D
2. Click on the tab "Selection Process"
3. You will find the Meeting Agenda Item for the allocation meeting, click on it

The screenshot shows the 'Opportunity Detail & Diligence' page for 'Teno'. At the top, there are tabs for 'Details', 'Team', 'Feedback', 'Countries', 'Forecasts', 'Quip', and 'Selection Process' (which is highlighted with a yellow circle labeled '2'). Below these tabs, a sub-header reads 'Meeting Agenda Items (1)'. A table lists one item: 'Teno' (Meeting: Allocation Oct 2020, Date: 29.10.2020, Topic: Evaluation Allocation, Final: SDC Ljubljana, Owner: Boumediene Soufi). A yellow circle labeled '3' points to the 'Teno' entry in the table. At the bottom of the table, there is a 'View All' link.

4. the MAI record for the allocation meeting opens, here you can find the following information:
  - a. Meeting
  - b. Decision Proposed
  - c. Decision Final
  - d. Strengths
  - e. Countries

The screenshot shows the 'Meeting Agenda Item' record for 'Teno'. At the top, there are fields for 'Meeting Order' (Final: SDC Ljubljana), 'Decision Tracker' (Final: SDC Ljubljana), 'Agenda Item Source Link' (Teno), 'Meeting' (Allocation Oct 2020), and 'Owner' (highlighted with a yellow circle labeled '4'). A note below states: 'Once the record is locked and changes are needed please contact "Super User" for support.' The page has tabs for 'Details', 'Deliverables', and 'Follow-Up Actions'. Under 'Details', there are sections for 'Meeting Agenda Item full name' (Teno), 'Agenda Item Source' (Opportunity D&D), 'Topic' (Evaluation Allocation), and 'Description / Summary'. The 'Details' section also contains a table with rows for 'Decision Proposed' (SDC Ljubljana), 'Decision Final' (SDC Ljubljana), 'Strengths' (200 MG + 50 MG + 25 MG), and 'Countries' (US, EU, CA, CN, MX, AU, ZA). A yellow circle labeled 'b' points to the 'Decision Proposed' row, 'c' to the 'Decision Final' row, 'd' to the 'Strengths' row, and 'e' to the 'Countries' row. To the right of the table, there are fields for 'Meeting' (Allocation Oct 2020), 'Meeting Date' (29.10.2020), and 'Agenda Item Owner' (highlighted with a yellow circle labeled 'a'). Further down, there are fields for 'Net Sales' (USD 0,00), 'Cost' (USD 0,00), and 'NPV' (USD 0,00). At the bottom, there is a 'Meeting Minutes' section.