# After Allocation Meeting

## Learning Objectives

After completing this unit, you'll be able to

- Document final allocation decision (defined evaluation function)
- Create the Opportunity Assessment record

## Introduction

After the Allocation Meeting, the SGD PMO needs to perform a series of tasks, that include:

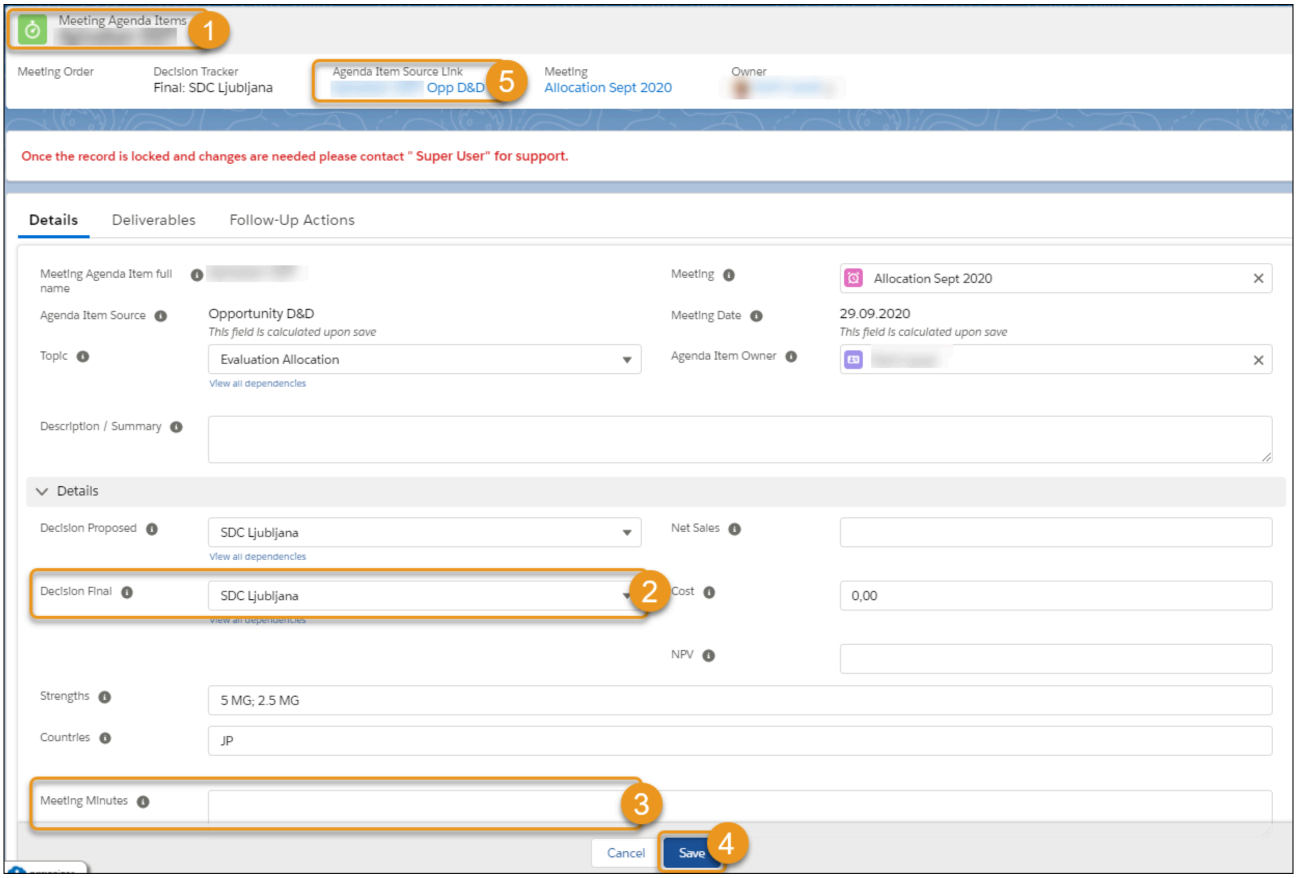
- Update the Meeting Agenda Item record
- Add team members to the Opportunity D&D
- Create assessment records and assign them to the appropriate function

Meanwhile, the Project Manager will have to provide feedback on the assessment request from the SGD PMO.

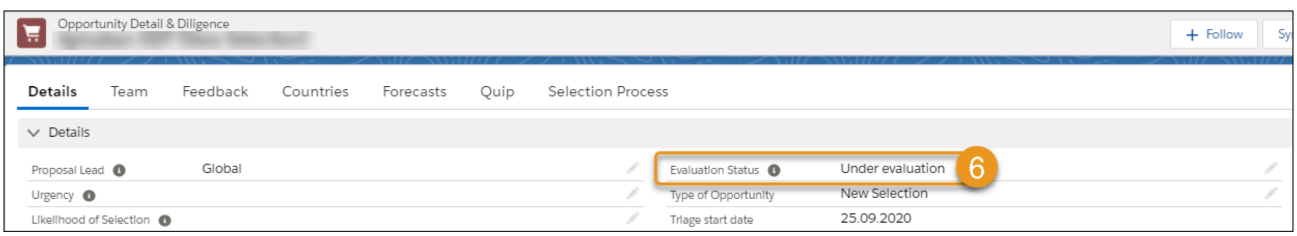
## Documenting the Final Decision (evaluation function) on MAI (SGD PMO)

The SGD PMO will record the final decision of the allocation to a team by setting the field "Decision final". To do that, follow these steps:

1. Open the **MAI record**
2. Edit the "**Decision Final**" field
3. Add the **"Meeting Minutes"** to the field
4. Click "**Save**"
5. Click on the blue link to open the linked Opportunity D&D




6. You can check that the Opportunity D&D record status has been automatically moved to "**Under Evaluation**"



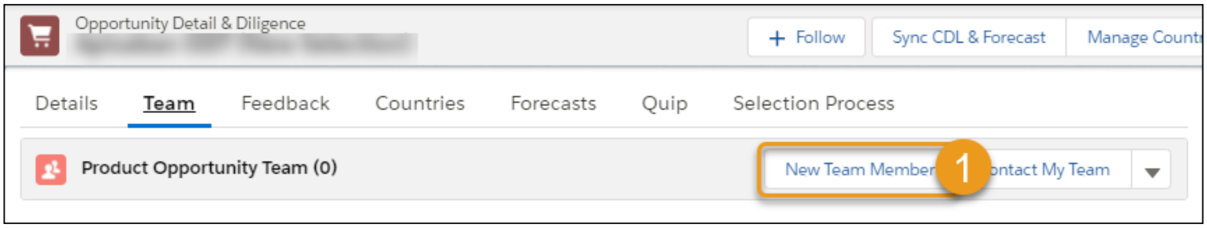

The next step is to add team members to the Opportunity D&D and assign them the assessment they should perform.

# Add Team Members (SGD PMO)

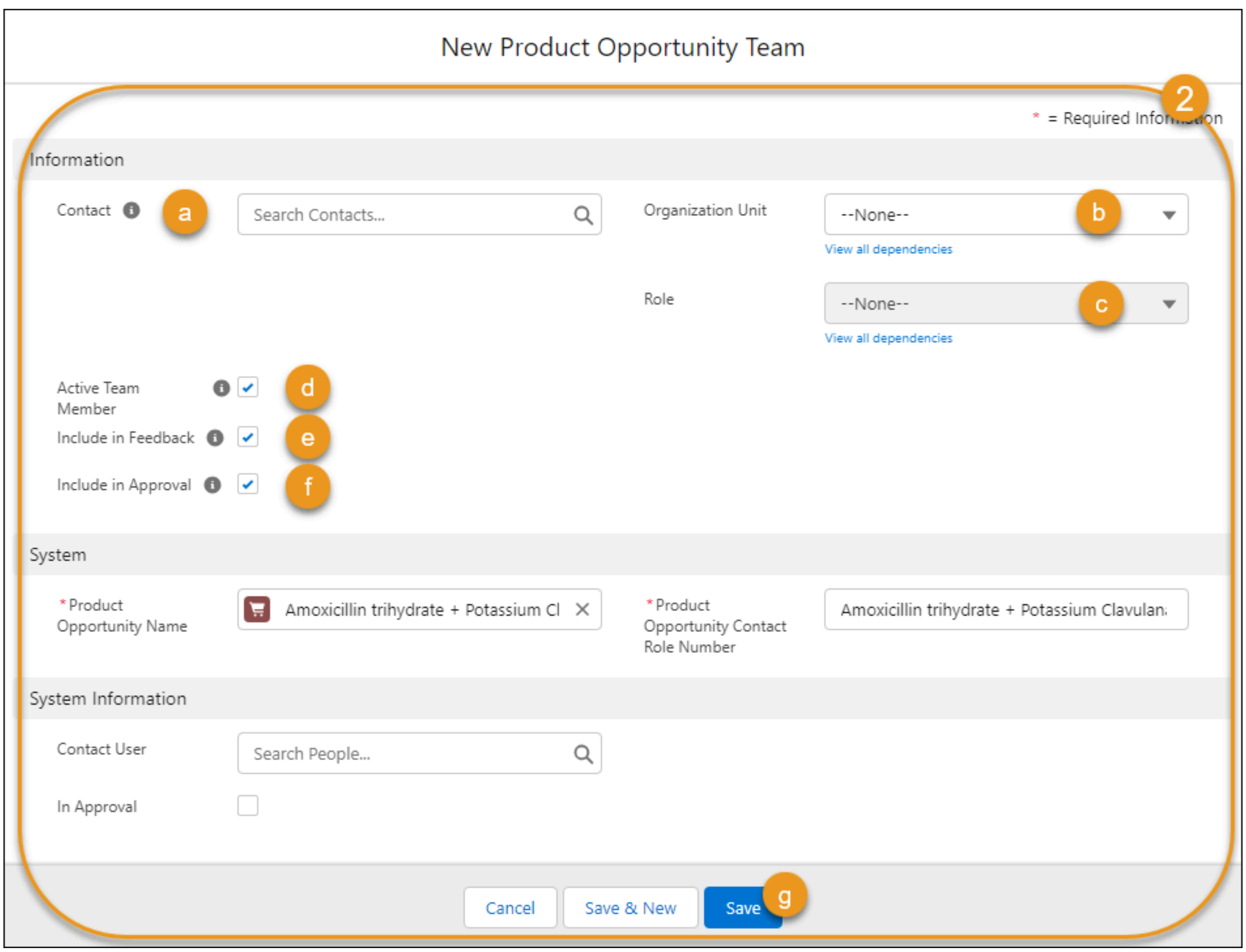
The SGD PMO will add the Project Manager responsible for the evaluation.

To add a team member, follow these steps:

1. On the **Opportunity Detail & Diligence** record, on the **"Team"** tab, **"Product Opportunity Team"** section, click on "**New Team Member**

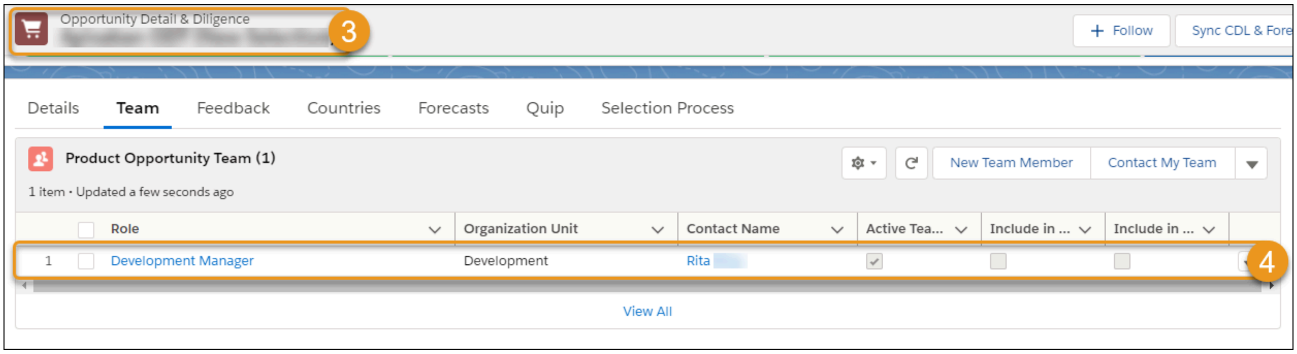



2. On the pop-up window, complete the fields:
   a. “**Contact**” - search for the name of the team member
   b. “**Organization Unit**” - pick the unit where the team member belongs (“Development”)
   c. “**Role**” - pick a role based on the chosen unit (”Development Manager”)
   d. Tick “**Active Team Member**” if the function is an active team member on the Product Opportunity
   e. Tick “**Include in Feedback**” if the function is to give feedback on the Product Opportunity (Keep **Ticked**)
   f. Tick “**Include in Approval**” if the function is to be involved in the approval process (Keep **Ticked**)
   g. Click “**Save**

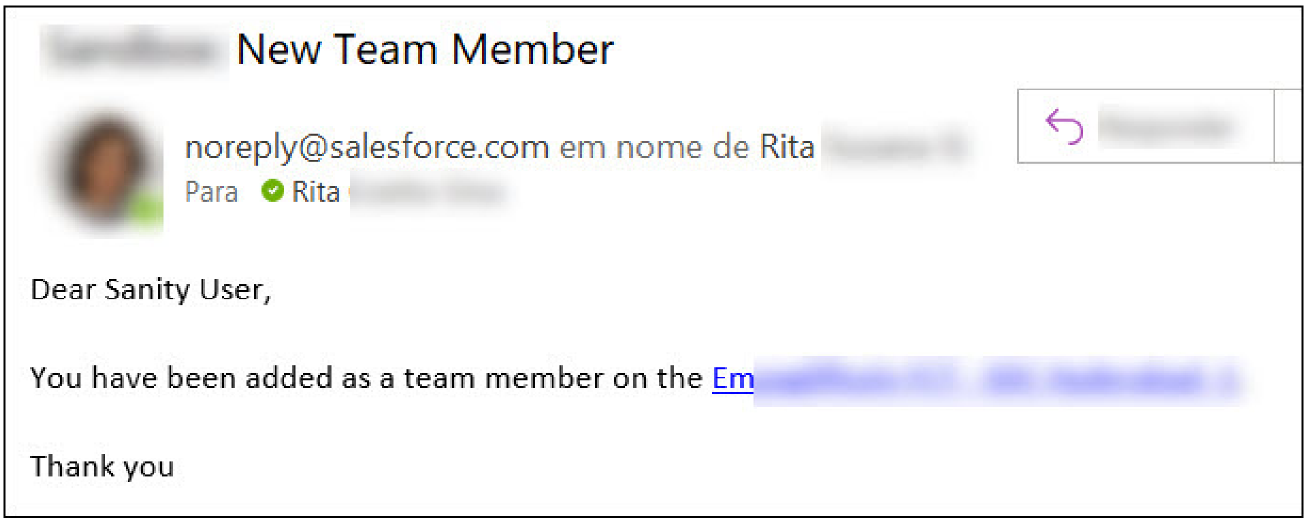



3. You are redirected back to the **“Opportunity Detail & Diligence”** record

4. On the **"Team"** tab you will find the newly created team member



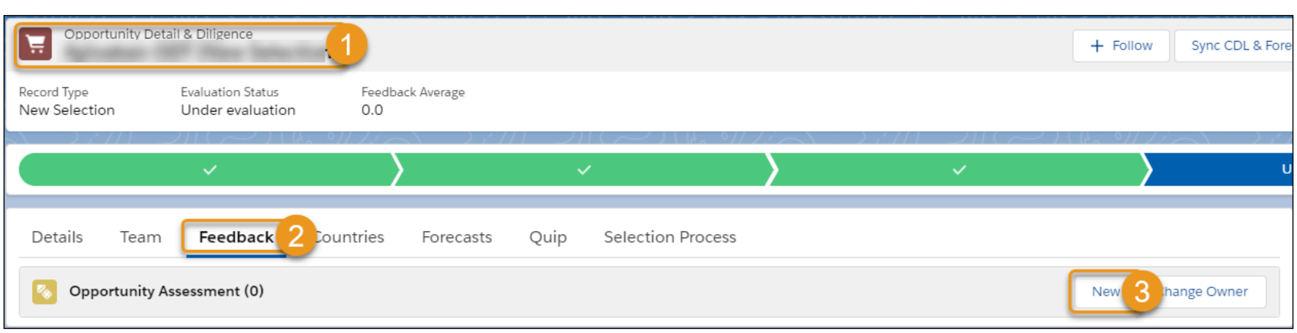

Each team member added will receive an email notification similar to the one below:



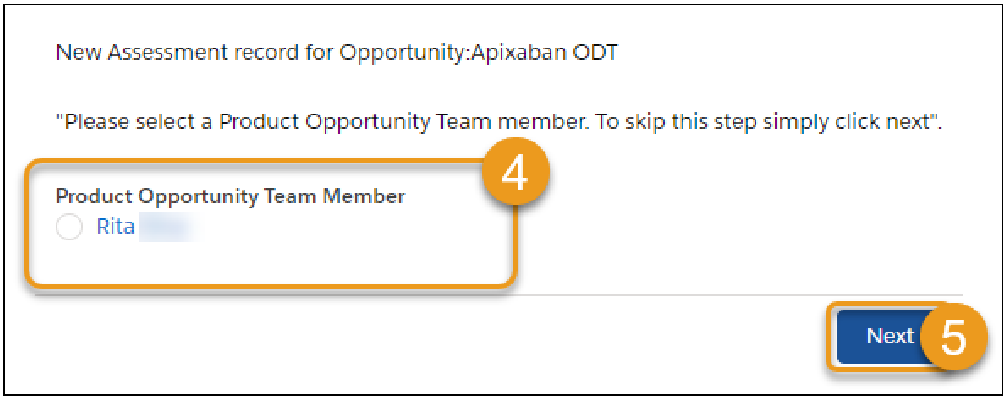

# Create the Opportunity Assessment record (SGD PMO)

First, for each function, an "Opportunity Assessment" should be created. Follow these steps to learn how:

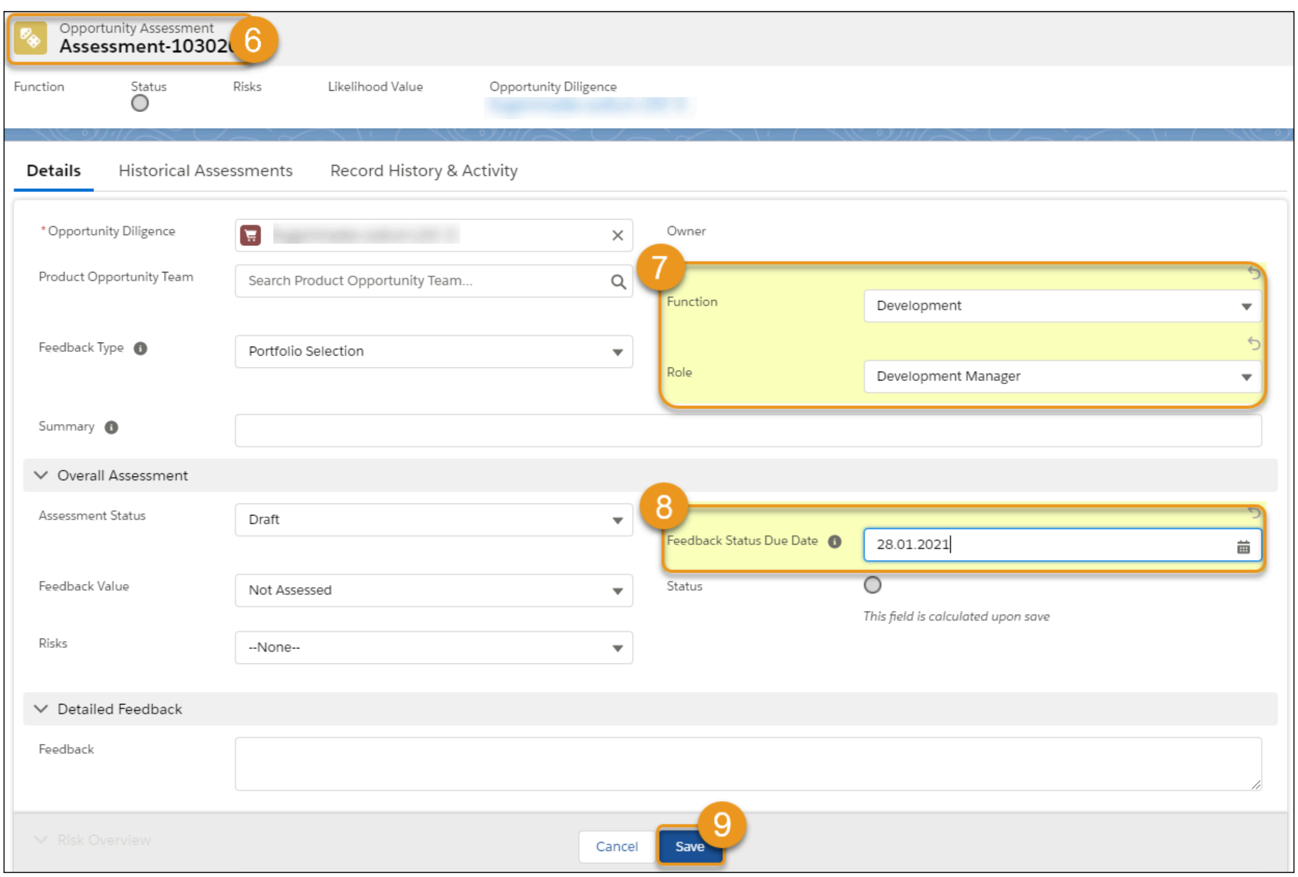
1. On the "**Opportunity D&D**" record
2. Click the "**Feedback**" tab
3. Click "**New**", under the "**Opportunity Assessment**" section



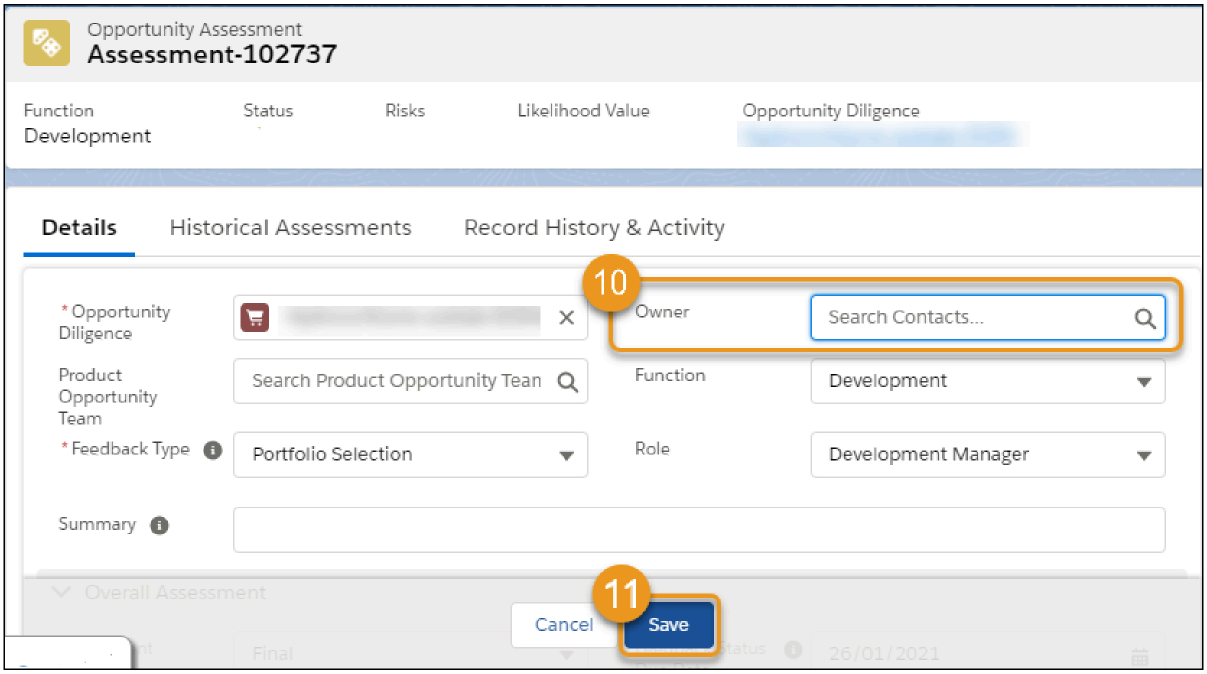
4. For now, do **NOT** select any Team Member to be able to adapt the due date, and add the person who will be assessing the Opportunity later
5. Click "**Next**"




6. The newly created Opportunity Assessment record opens up
7. Select the "**Function**" and the "**Role**" of the function for whom you are creating the Opportunity Assessment, as **"Role"** set **"Development Manager"** and as **"Function"** choose **"Development"**
8. Adapt the "**Feedback Status Due Date**" according to the specified Evaluation Due Date on the Opp D&D
9. Click "**Save**"

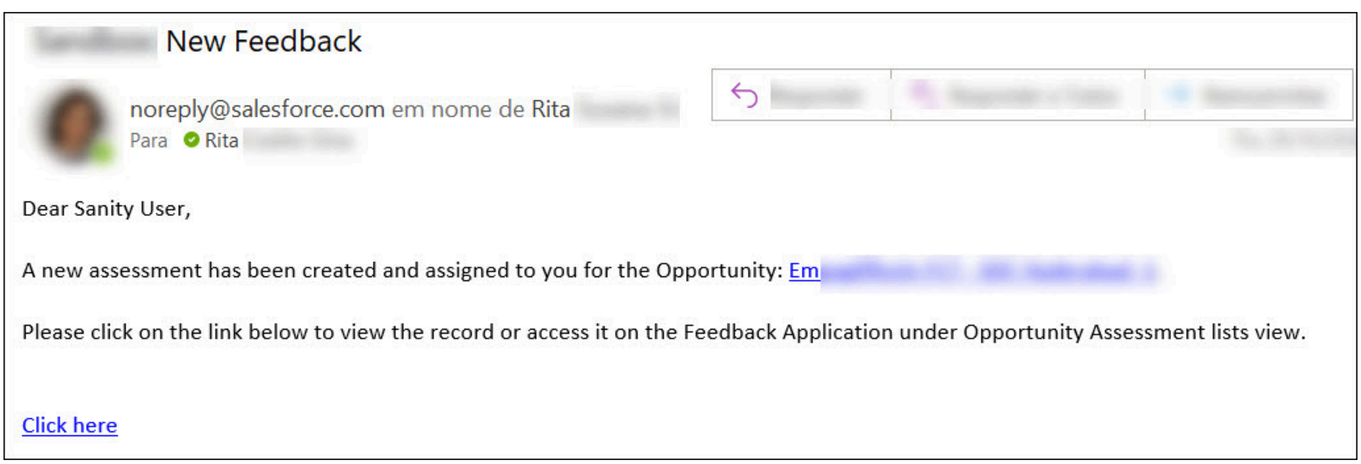


10. Only when you have all relevant information adapted, add the owner. For SGD PMO, choose as **“Owner”** the SGD PMO
11. Click “**Save**”. This will initiate a message via email to the respective person being asked to perform the assessment (the **“Owner”**, assigned in the previous step)




## Providing an Opportunity Assessment (Project Manager)

You have been asked to provide an assessment similar to the one below. What should you do next?

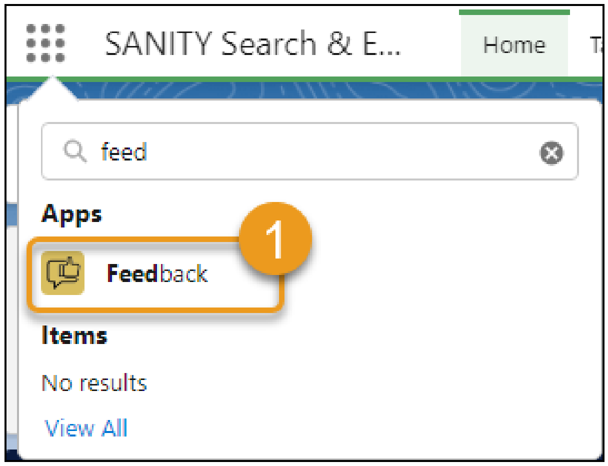



You can click on "**Click here**" on the email, and the Opportunity Assessment record will open.

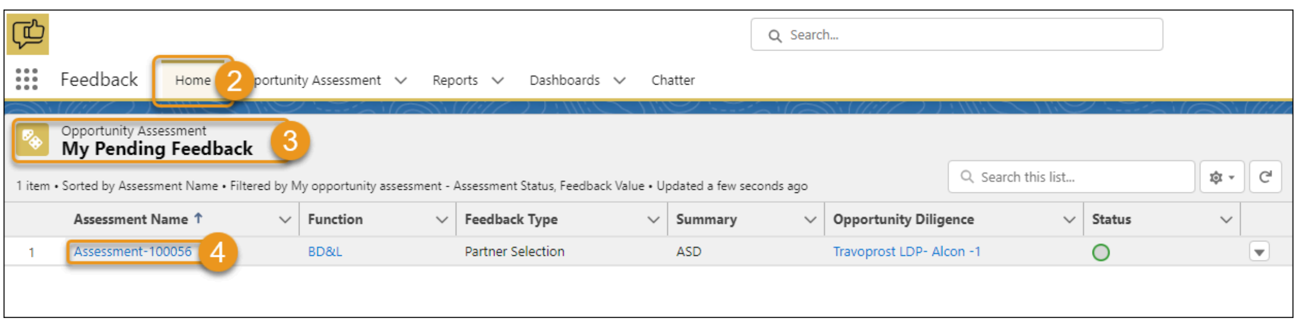
But what if you want to find it yourself on SANITY? We have created an application where you can find all your queued requests on the homepage.

You just need to follow these steps:

1. Search for the "**Feedback**" App via the App Launcher and open it




2. On the "**Home**" tab
3. You will find the related list "**My Pending Feedback**", where all Opportunity Assessment records that are waiting for your feedback are listed
4. Click the Assessment name of the record you want to provide feedback for, to open the record

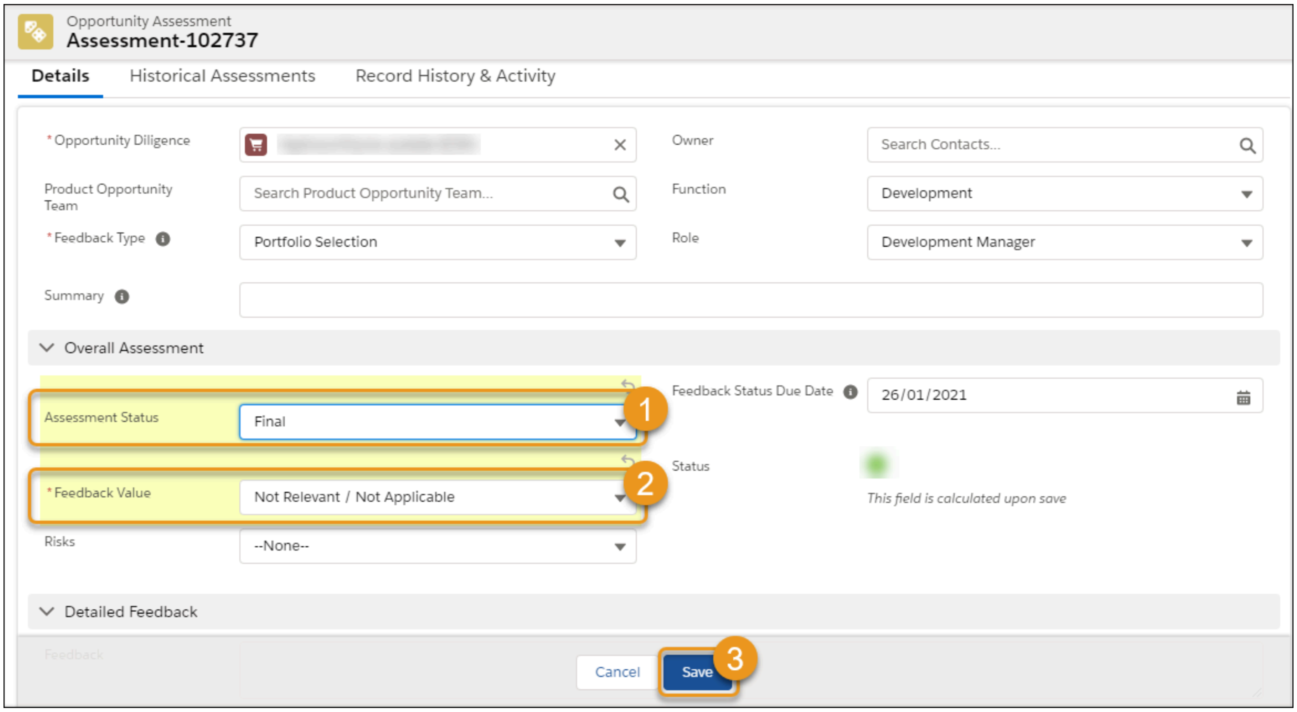



# Finalizing the Evaluation - Feedback to Portfolio Manager (Project Manager)

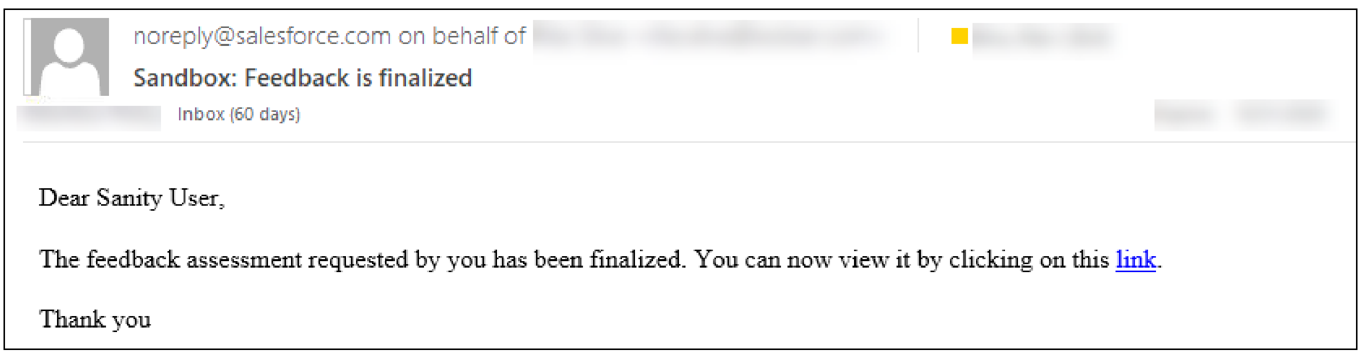
Upon finalization of the Evaluation, the Opportunity Assessment record needs to be set to final.

On the Opportunity Assessment record:

1. Set the “**Assessment Status**” to “Final”
2. Set “**Feedback Value**” to “ Not Relevant / Not Applicable”
3. Click “**Save**”




The respective Opportunity D&D owner will receive an email similar to the one below, letting them know the assessment has been finalized.

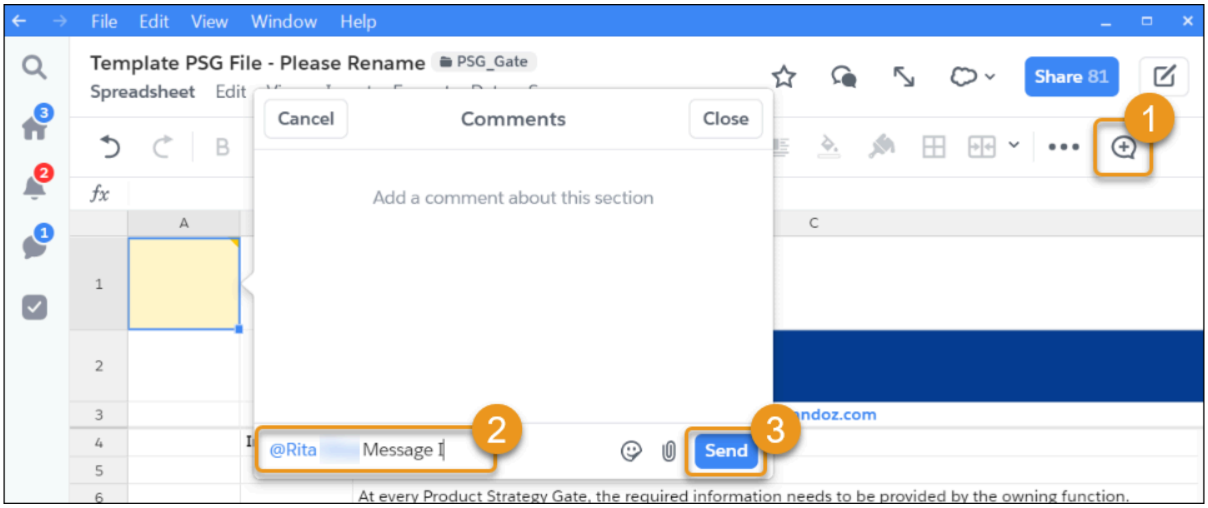



# Further Questions (Project Manager/Portfolio Manager)

For further questions related to the Product Strategy Assessment, please contact the respective Project Manager and SGD PMO via comments in the Product Strategy Document itself or via email.

To send your questions via the Product Strategy Document:

1. Click on the **"Comments"** button
2. Write your question after tagging the Project Manager who has performed the assessment
3. Click **"Send"**




## After Finalization of the Evaluation (Portfolio Manager)

Once the evaluation has been finalized by the Project Manager, the owner of the Opportunity D&D, will receive an email letting you know the assessment has been completed.

At this stage, it is important to track changes made on the related PSG Quip Document. There are several possible approaches that you can combine to accomplish that:

- Track changes
- Lock the document
- Set email notifications

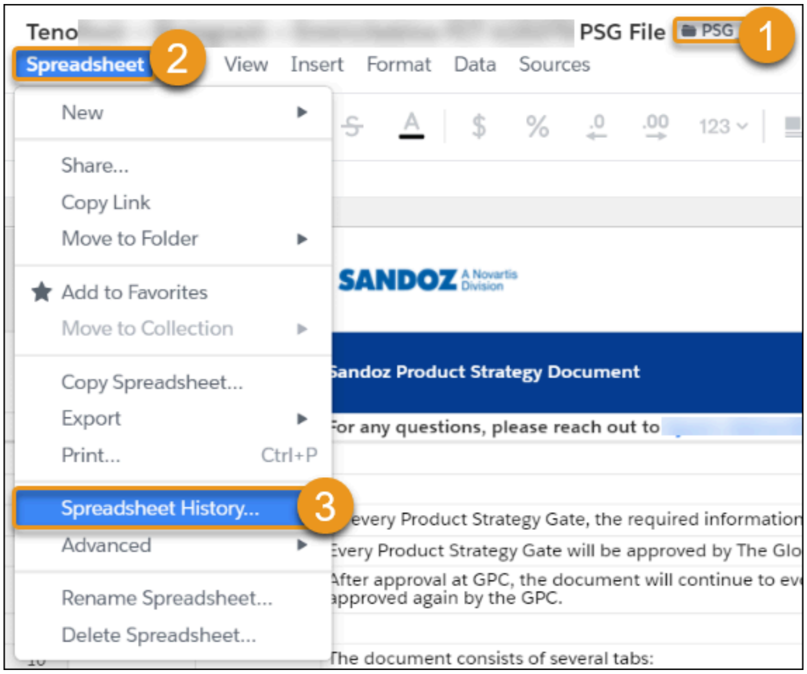
Let's look into each of these options.

**Track Changes on the PSG Document**

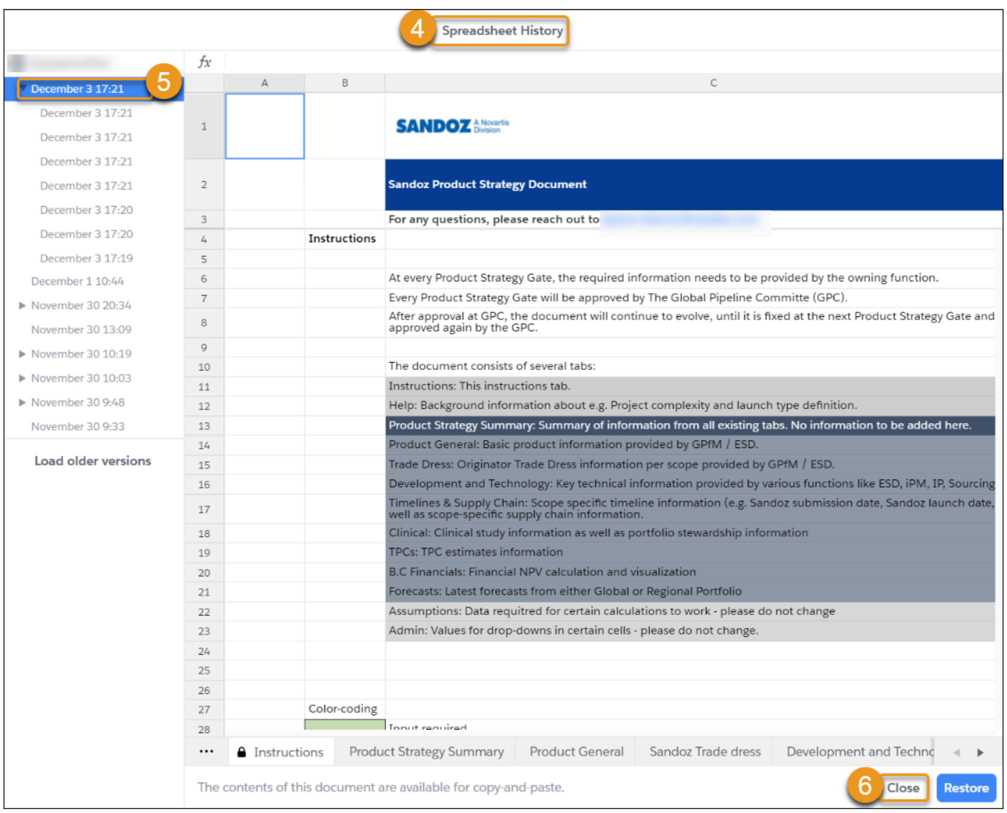
You can track the changes made to the PSG Quip document, including date/time info.

To find where changes are tracked follow these steps:

1. Open the **PSG Quip Document**
2. Click on '"**Spreadsheet**", found on the top-left of the document
3. From the drop-down menu click on "**Spreadsheet History**"




4. The **"Spreadsheet History**" window opens
5. Click on a date on the left side and find how the document looked like on that date
6. Click **"Close**" to exit

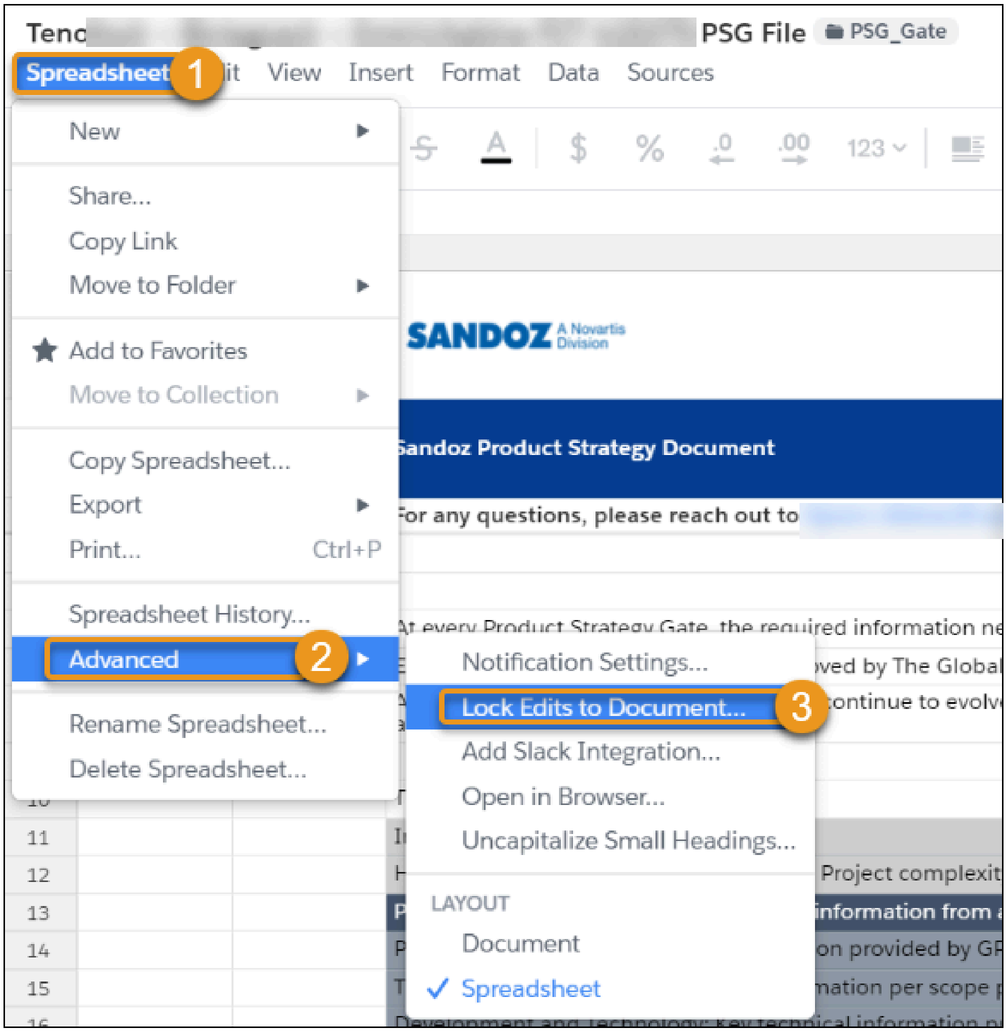



## Lock the PSG Document

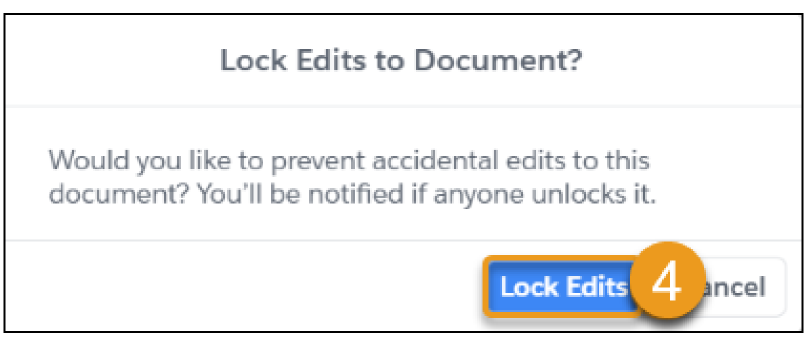
You can lock the PSG Document to prevent unintended changes to it and to get notified if someone unlocks it.

Lock the document by performing these steps:

1. Click on '"**Spreadsheet**", found on the top-left of the document
2. From the drop-down menu click on "**Advanced**"
3. Then select "**Lock Edits to Document...**"




4. On the pop-up window click on "**Lock Edits**"



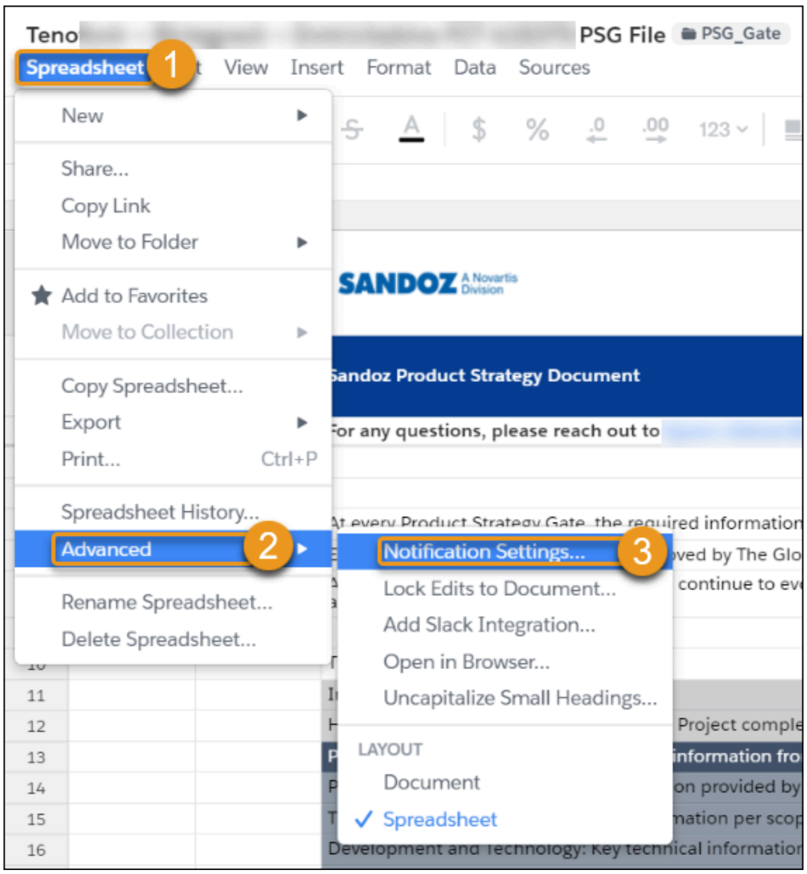

Once you have locked the document, if someone unlocks it you will be notified and can go to the document and check what changes have been made.

## Set Email Notifications

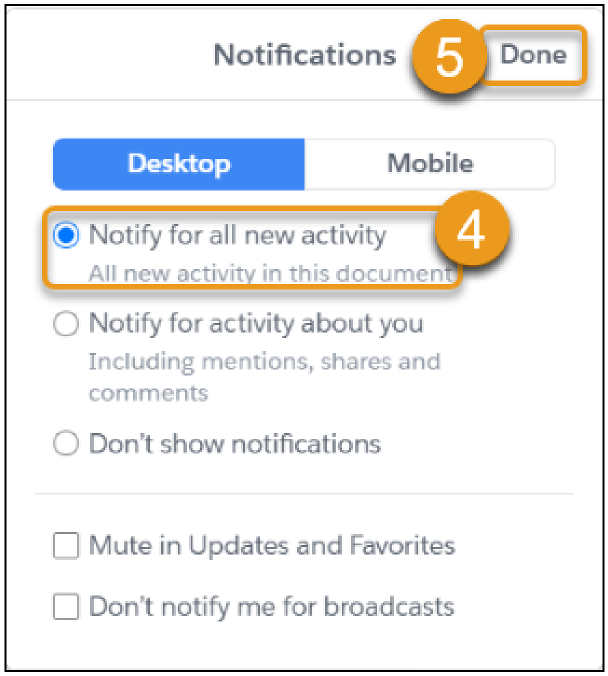
On the PSG Document, you can also set email notifications to be sent to you according to your needs.

Follow these steps to, set up the email notifications:

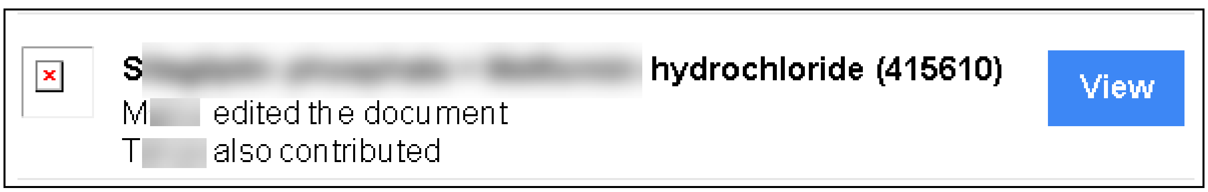
1. Click on '"**Spreadsheet**", found on the top-left of the document
2. From the drop-down menu click on "**Advanced**"
3. Then select "**Notification Settings …**"




4. On the pop-up window select "**Notify for all new activity**"
5. Click "**Done**"




You will start receiving emails with a message, similar to this one:




If you want to be aware of all the changes that are made to the PSG document you select the option **"Notify for all new activity"** as in the steps above. But you have more options, you can choose to be notified only when you are mentioned in comments and shares (**"Notify for activity about me"**), or you can choose not to be notified at all (**"Don't show notifications"**).