

# 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

Once the record is locked and changes are needed please contact "Super User" for support.

**Details** Deliverables Follow-Up Actions

Meeting Agenda Item full name: [redacted]

Agenda Item Source: Opportunity D&D  
This field is calculated upon save

Topic: Evaluation Allocation  
View all dependences

Description / Summary: [redacted]

**Details**

Decision Proposed: SDC Ljubljana  
View all dependences

Decision Final: SDC Ljubljana  
View all dependences

Net Sales: [redacted]

Cost: 0,00

NPV: [redacted]

Strengths: 5 MG; 2,5 MG

Countries: JP

Meeting Minutes: [redacted]

**Save**

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

**Opportunity Detail & Diligence**

**Details** Team Feedback Countries Forecasts Quip Selection Process

**Details**

Proposal Lead: Global	Evaluation Status: Under evaluation
Urgency: [redacted]	Type of Opportunity: New Selection
Likelihood of Selection: [redacted]	Triage start date: 25.09.2020

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:

- "**Contact**" - search for the name of the team member
- "**Organization Unit**" - pick the unit where the team member belongs ("Development")
- "**Role**" - pick a role based on the chosen unit ("Development Manager")
- Tick "**Active Team Member**" if the function is an active team member on the Product Opportunity
- Tick "**Include in Feedback**" if the function is to give feedback on the Product Opportunity (Keep **Ticked**)
- Tick "**Include in Approval**" if the function is to be involved in the approval process (Keep **Ticked**)
- Click "**Save**

New Product Opportunity Team

\* = Required Information

**Information**

Contact <small>i</small> <b>a</b>	Search Contacts... <input type="text"/>	Organization Unit	--None-- <b>b</b>
	<input type="button" value="View all dependencies"/>	Role	--None-- <b>c</b>
<small>i</small>		<small>i</small>	<small>i</small>

Active Team Member **d**

Include in Feedback **e**

Include in Approval **f**

**System**

* Product Opportunity Name <input type="text"/> Amoxicillin trihydrate + Potassium Cl <input type="button" value="X"/>	* Product Opportunity Contact Role Number <input type="text"/> Amoxicillin trihydrate + Potassium Clavulan.
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**System Information**

Contact User <input type="text"/> Search People... <input type="button" value="X"/>	In Approval <input type="checkbox"/>
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**Buttons**

- 
- 
- 

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

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

The screenshot shows the "Opportunity Detail & Diligence" page with the "Team" tab selected. At the top, there is a navigation bar with icons for Follow and Sync CDL & Fore. Below the navigation bar, the "Team" tab is highlighted. In the main content area, there is a section titled "Product Opportunity Team (1)" with a note: "1 item · Updated a few seconds ago". A table lists one team member: "1 Development Manager" under "Role", "Development" under "Organization Unit", and "Rita" under "Contact Name". There are checkboxes for "Active Team Member" and "Include in ...". A "View All" button is at the bottom right of the table.

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

The email subject is "New Team Member". The recipient is "noreply@salesforce.com em nome de Rita". The body of the email reads:

Dear Sanity User,

You have been added as a team member on the [Em](#)

Thank you

## Create the Opportunity Assessment record (SGD PMO)

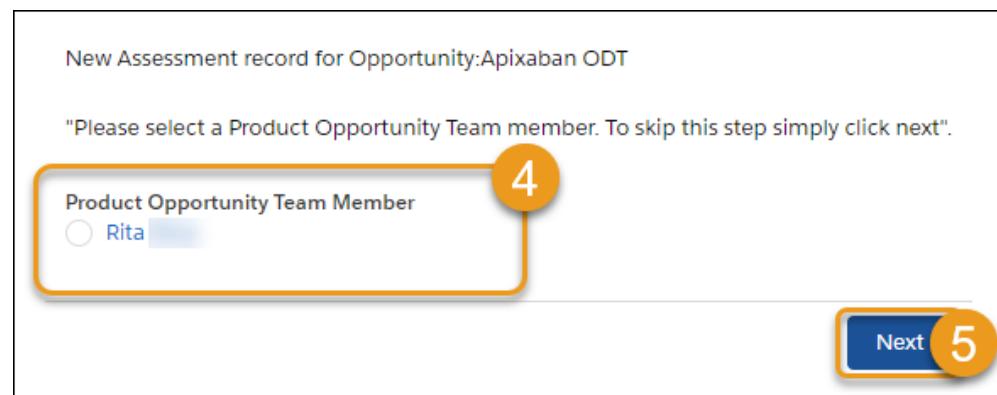
First, for each function, an “Opportunity Assessment” should be created. Follow these steps to learn how:

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

The screenshot shows the "Opportunity Detail & Diligence" page with the "Feedback" tab selected. At the top, there is a navigation bar with icons for Follow and Sync CDL & Fore. Below the navigation bar, the "Feedback" tab is highlighted. In the main content area, there is a section titled "Opportunity Assessment (0)". A green button labeled "New" is located in the top right corner of this section. A circled "1" is above the navigation bar, "2" is on the "Feedback" tab, and "3" is on the "New" button.

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**"

Opportunity Assessment  
Assessment-103026

Function Status Risks Likelihood Value Opportunity Diligence

Details Historical Assessments Record History & Activity

\* Opportunity Diligence  Owner

Product Opportunity Team  Function Development

Feedback Type  Role Development Manager

Portfolio Selection

Summary

Overall Assessment

Assessment Status Draft Feedback Status Due Date 8 28.01.2021

Feedback Value Not Assessed Status

Risks --None-- This field is calculated upon save

Detailed Feedback Feedback

Risk Overview Cancel Save 9

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)

The screenshot shows the 'Opportunity Assessment' record for 'Assessment-102737'. The 'Details' tab is selected. In the 'Owner' field, there is a placeholder 'Owner' with a magnifying glass icon. To the right of the field is a blue button labeled 'Search Contacts...' with a magnifying glass icon. Step 10 is indicated by a yellow circle with the number 10 over the 'Owner' field and its associated search bar. At the bottom right of the form, there is a blue button labeled 'Save' with a white arrow icon. Step 11 is indicated by a yellow circle with the number 11 over the 'Save' button.

## Providing an Opportunity Assessment (Project Manager)

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

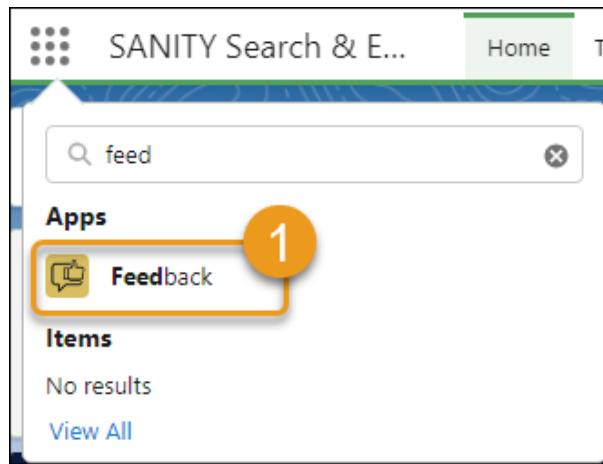
The screenshot shows an email titled 'New Feedback' from 'noreply@salesforce.com em nome de Rita'. The email body starts with 'Dear Sanity User,' followed by 'A new assessment has been created and assigned to you for the Opportunity: Em [REDACTED]'. Below this, it says 'Please click on the link below to view the record or access it on the Feedback Application under Opportunity Assessment lists view.' At the bottom, there is a blue link labeled 'Click here'.

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.

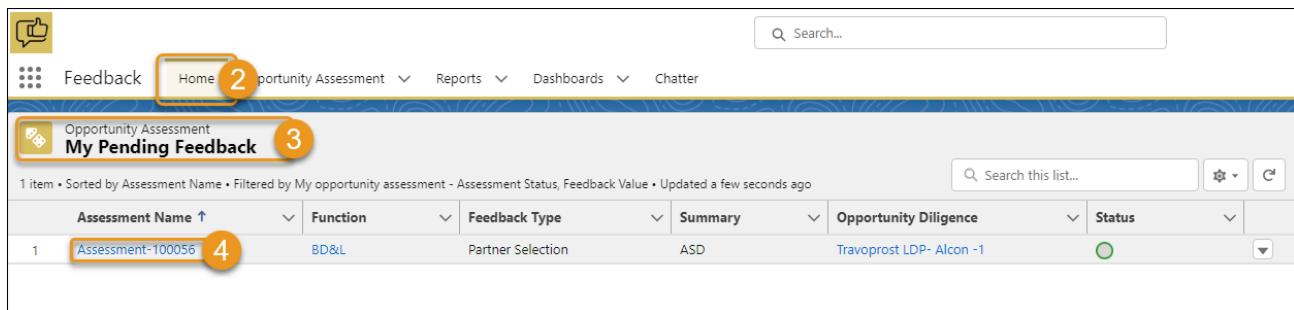
You just need to follow these steps:

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 screenshot shows the 'Opportunity Assessment' details page. At the top, there are tabs for 'Details', 'Historical Assessments', and 'Record History & Activity'. The 'Details' tab is selected.

**Product Opportunity Team:** Search Product Opportunity Team... (dropdown)

**Feedback Type:** Portfolio Selection (dropdown)

**Summary:** (text input field)

**Overall Assessment:**

- Assessment Status:** Final (highlighted with orange border, circled with number 1)
- Feedback Value:** Not Relevant / Not Applicable (highlighted with orange border, circled with number 2)
- Risks:** --None-- (dropdown)

**Feedback Status Due Date:** 26/01/2021 (calendar icon)

**Status:** (green icon)

*This field is calculated upon save*

**Detailed Feedback:**

Feedback (text input field)

Save (button circled with number 3)

Cancel (button)

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

The email is from noreply@salesforce.com on behalf of [redacted]. The subject is 'Sandbox: Feedback is finalized'. The body of the email reads:

Dear Sanity User,

The feedback assessment requested by you has been finalized. You can now view it by clicking on this [link](#).

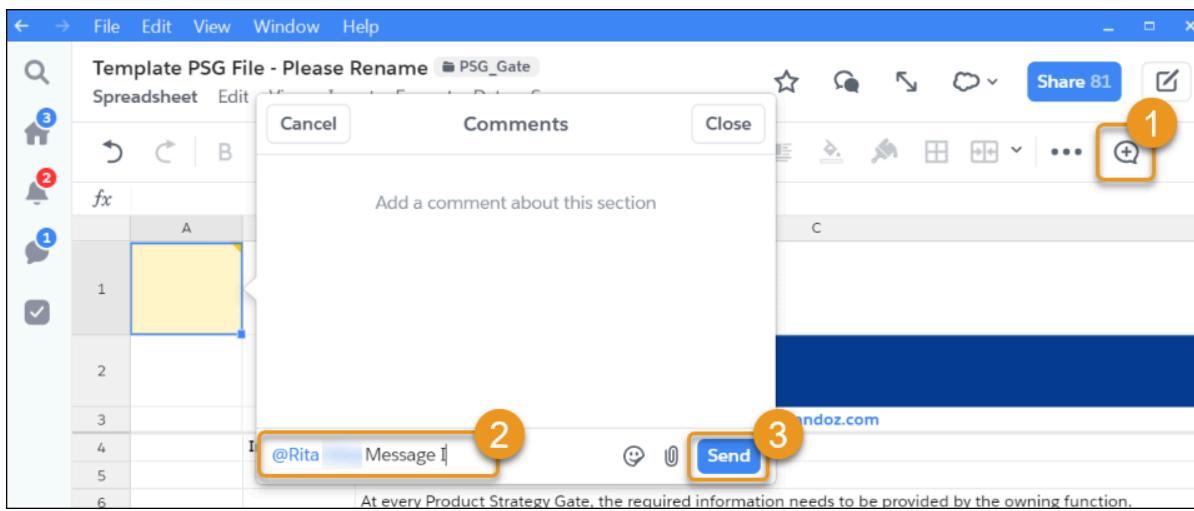
Thank you

## 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

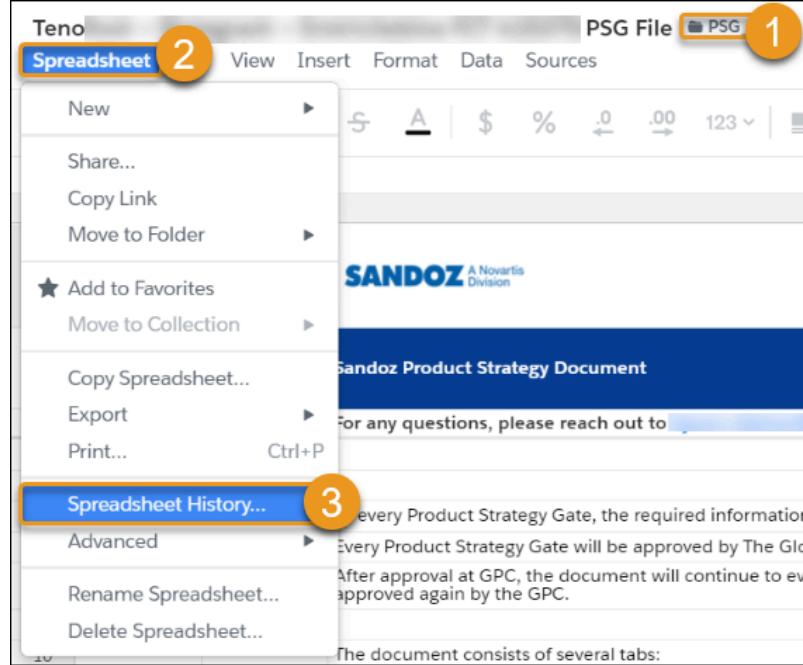
Let's look into each of these options.

### 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

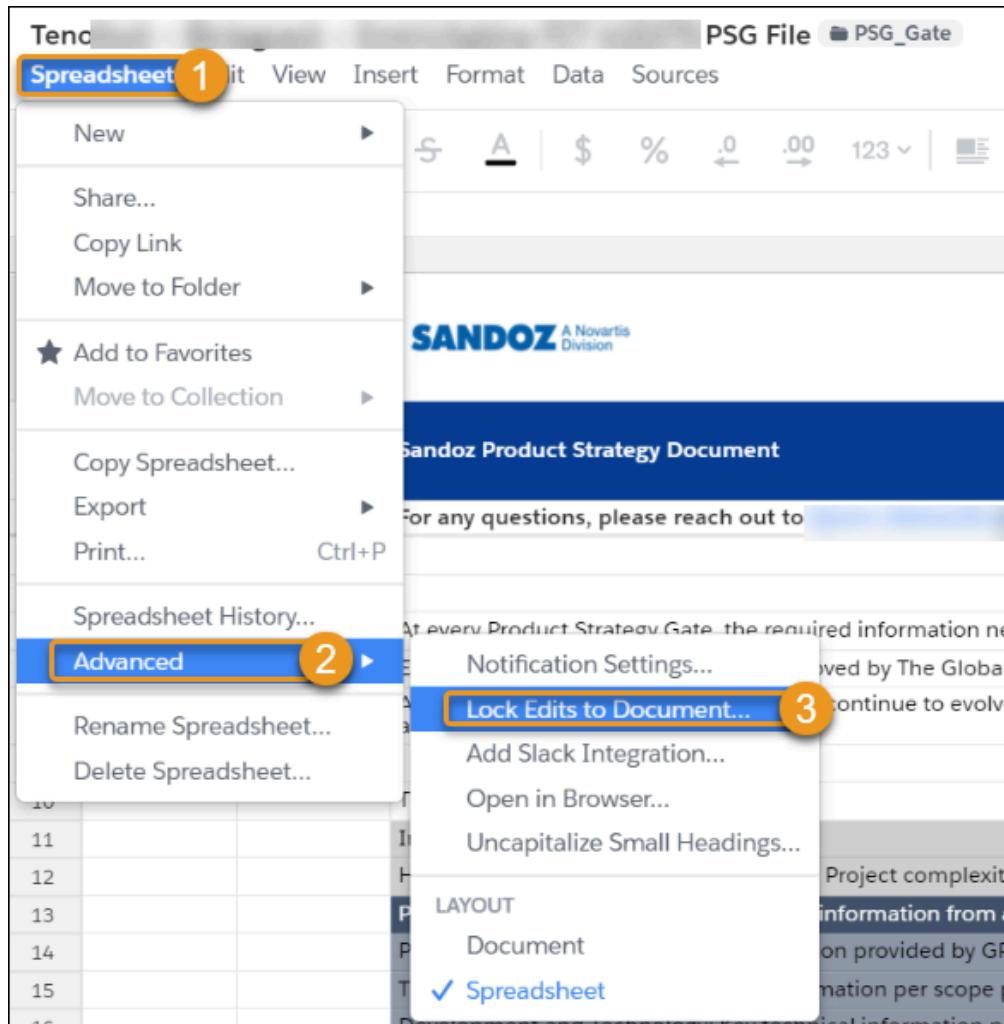
The screenshot shows a spreadsheet history interface. On the left, a vertical timeline lists dates from December 3 17:21 down to November 30 09:33. The date 'December 3 17:21' is highlighted with a yellow circle labeled '5'. The main area displays the content of the document at that specific version. The content includes the Sandoz logo, a blue header bar with 'Sandoz Product Strategy Document', and several paragraphs of text about product strategy gates and GPC approval. At the bottom, there's a note about tabs and a 'Product Strategy Summary' section. The bottom right corner has a 'Close' button with a yellow circle labeled '6'.

#### Lock the PSG Document

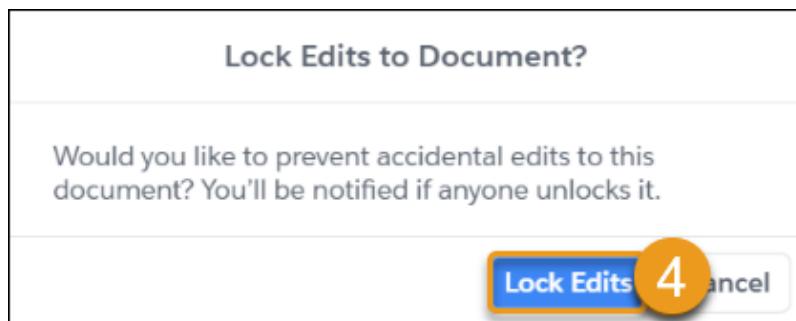
You can lock the PSG Document to prevent unintended changes to it and to get notified if someone unlocks it.

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**”



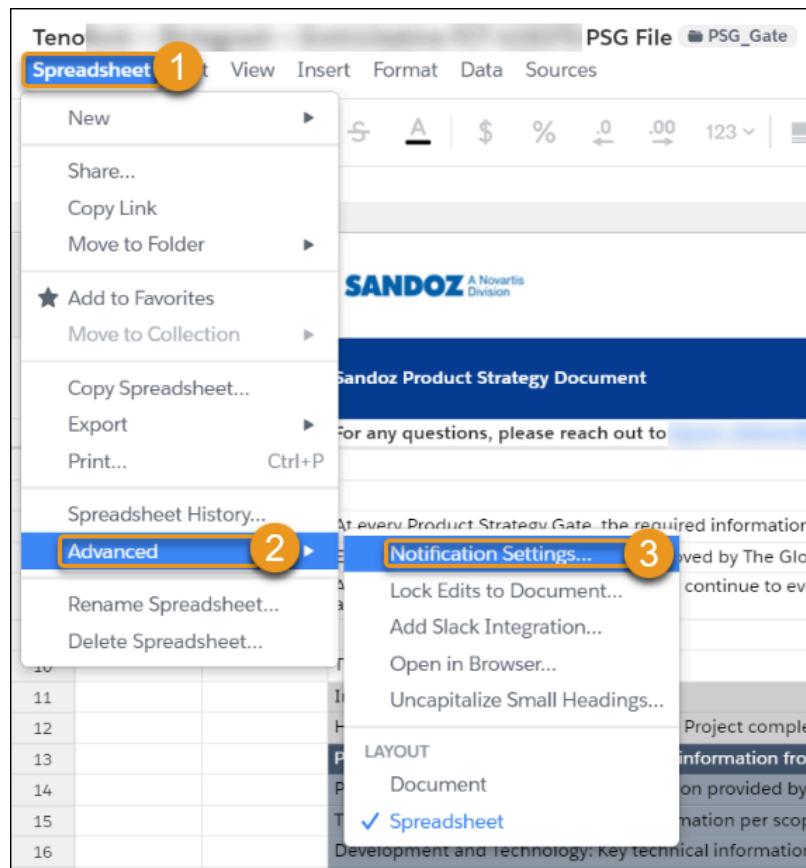
Once you have locked the document, if someone unlocks it you will be notified and can go to the document and check what changes have been made.

## Set Email Notifications

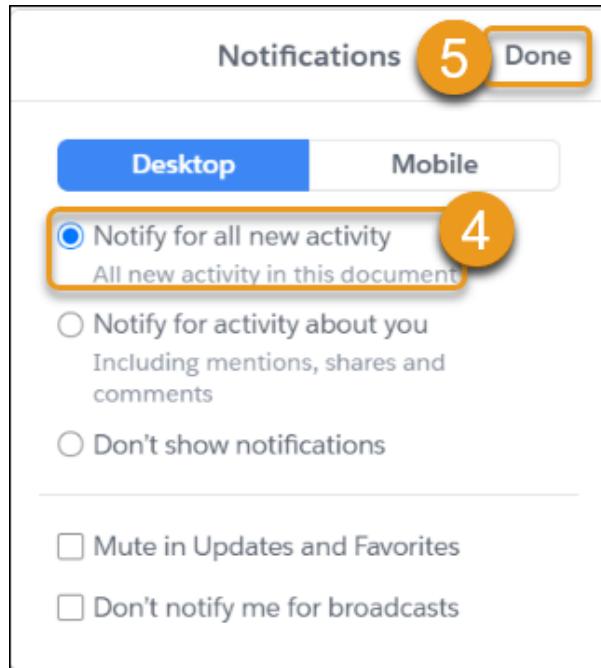
On the PSG Document, you can also set email notifications to be sent to you according to your needs.

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”**).