

Technical Evaluation Request

Learning Objectives

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

- Create a Meeting Agenda Item for Allocation
- Identify the fields that need to be filled in the Meeting Agenda Item

Introduction

To request an evaluation from Product Development for a specific Opportunity, a Meeting Agenda Item needs to be created for Allocation and specific fields need to be filled.

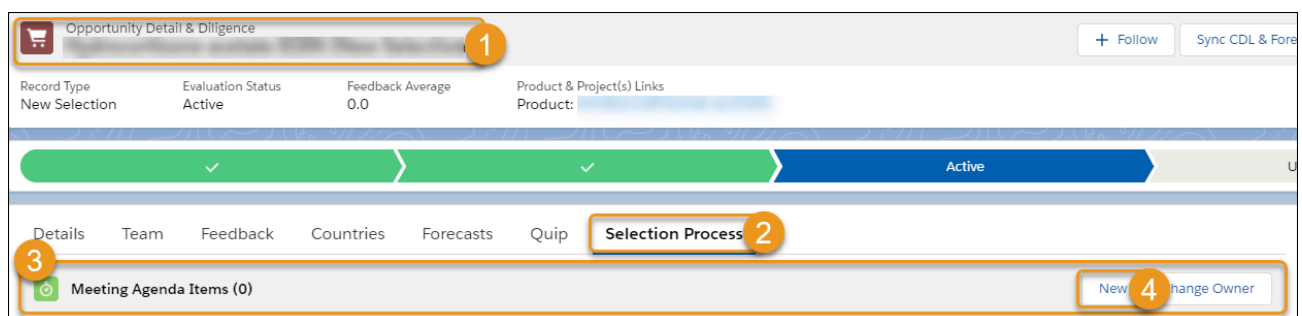
In this unit, we'll follow the process and detail the steps needed to get things started.

Create a Meeting Agenda Item for Allocation (Portfolio Manager)

Once the Opportunity D&D record is created, you need to get feedback from the development function by creating an Allocation Meeting Agenda Item and specifying the planned month.

Here is how you can create a Meeting Agenda Item for Allocation:

1. On the **"Opportunity Detail and Diligence"** record
2. Click on the **"Selection Process"** tab
3. Find the **"Meeting Agenda Items"** section
4. Click **"New"**



5. Select **"Meeting Agenda Item"**

6. Click **"Next"**

Please select the type of item to create * ☐ Update Only

☒ Meeting Agenda Item 5

Next 6

7. Select **"Allocation"** as the meeting type

8. Click **"Next"**

Please select the meeting type: ☐ Local / Regional Portfolio Meeting

☐ GPC

☒ Allocation 7

Previous Next

Previous Next 8

9. A success message is shown

10. You can click on **"Finish"**

Item Created Successfully 9

Finish 10

11. You will be redirected to the newly created record

12. You can see that the **"Topic"** field has been auto-populated as **"Evaluation Allocation"**

13. On the **"Meeting"** field, click on the pencil icon and select **"Allocation"** for the month and year you desire the evaluation to start, considering the standard evaluation time of at least 4 weeks until your defined evaluation due date on the Opp D&D

14. Add a description to the field **"Description/Summary"** with some background of the Product or specific aspects to be considered in the evaluation
15. Click **"Save"** to save the change

The screenshot shows a web application interface for 'Meeting Agenda Items'. At the top, there is a header bar with a green circular icon and the text 'Meeting Agenda Items' (callout 11). Below this is a navigation bar with tabs: 'Meeting Order', 'Decision Tracker', 'Agenda Item Source Link', 'Meeting', and 'Owner'. The main content area has three tabs: 'Details' (selected), 'Deliverables', and 'Follow-Up Actions'. Under the 'Details' tab, there are several input fields: 'Meeting Agenda Item full name' (callout 11), 'Agenda Item Source' (set to 'Opportunity D&D', with a note 'This field is calculated upon save'), 'Topic' (set to 'Evaluation Allocation', with a note 'View all dependencies' and callout 12), 'Meeting' (set to 'Allocation Sept 2020', with callout 13), 'Meeting Date' (with a note 'This field is calculated upon save'), and 'Agenda Item Owner' (with a search bar 'Search Contacts...' and callout 14). At the bottom, there is a 'Description / Summary' text area (callout 14) and a 'Details' section with a 'Decision Proposed' dropdown (set to '--None--') and a 'Save' button (callout 15).

Carefully check on the Opp D&D that the correct strength(s), countries in scope, and the 'Evaluation Due Date' are entered.

Now everything is ready for the SGD PMO to get the relevant project managers to be nominated in the Allocation Meeting.