Preparing for the GPC Meeting

Learning Objectives

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

- Understand the importance of preparing the Opp D&D record
- Create and manage a Meeting Agenda Item record for the GPC Meeting

Introduction

Are you ready to bring your new product selection proposal or scope extension Opportunity for an existing Project to GPC for a decision? Here is how to start! As a Portfolio Manager, you will need to create the Meeting Agenda Item (MAI) for the selection in GPC, starting from the Opportunity D&D (Opp D&D) record.

 There are also other sources to create a Meeting Agenda Item (from Portfolio Project, Country Detail Level, BD deal, Project & Launch Management). However, for selection decisions, scope extensions, back up selections and switch selections you must always start from the Opp D&D record.

Continue reading to learn how to bring your Product to a GPC Meeting!

Prepare to create a Meeting Agenda Item

Before jumping into the creation of the Meeting Agenda Item record, there is some preparation work to be done. In the Opp D&D record, some data needs to be populated in order for the creation of the MAI to run smoothly. Let's take a look at this important data.

1. In the "**Details**" tab, make sure that **"Proposal Lead" (a)**, **"Product Class" (b)**, and **"Type of Opportunity" (c)** are correctly populated. If any of your selections relates to a launched product/ product on the market, you should include LCM as Proposal Lead in field **"a"**
2. In the "**Countries**" tab, make sure that you have all the Countries to bring to selection and add new ones if missing
3. In the "**Forecasts**" tab, make sure that you have the necessary selection forecasts and create new ones if missing

To learn more about how to create an Opp D&D record and add Countries and Forecasts to the Opp D&D, please check the myTrailhead modules "How to Create and Manage an Opportunity D&D by Portfolio (https://sanity.my.trailhead.com/content/sanity/modules/szsanitym0040nm)" and "How to Create a Forecast for Selections by Portfolio (https://sanity.my.trailhead.com/content/sanity/modules/szsanitym0067nm)".

Creation of a Meeting Agenda Item

After making sure that the preparation work is done, it's time to create the Meeting Agenda Item. Let's see how!

1. On the 'Opportunity Detail and Diligence' record, click on the "**Selection Process"** tab
2. Find the "**Meeting Agenda Items"** related list
3. Click "**New"**

4. Select "**Meeting Agenda Item**"

5. Click "**Next**"

6. Select "**GPC**" as the Meeting Type

7. Click "**Next**"
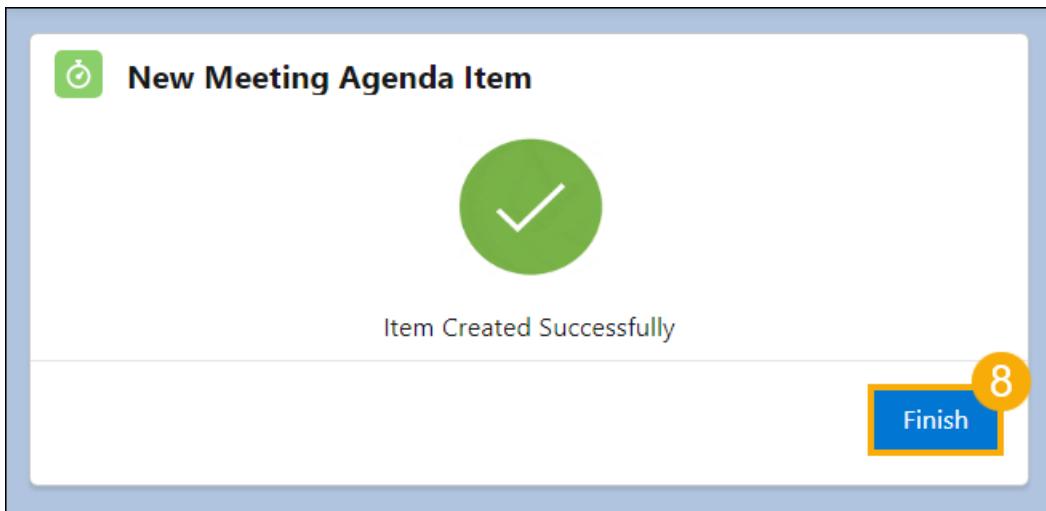
8. Click "**Finish**" on the success message to finalize the process

The freshly created Meeting Agenda Item record will open up in a new tab.

What to complete in the Meeting Agenda Item?

Before starting to complete the necessary information in the Meeting Agenda Item, there is a way to save time and automatically populate some fields. To do that, simply use the "**Update from Source**" button to retrieve the information you carefully prepared before the MAI creation. This button automatically populates on the MAI the countries you included in your selection and the selection forecast you uploaded in the Opp D&D.

But even though some of the fields in the MAI record can be automatically populated, as a Portfolio Manager you still need to maintain the rest of them. To edit this record, go to the 'Details' tab and click on the pencil icon next to any field, or click the 'Edit' button on the header. Now let's take a look at what fields need action.

1. **Meeting** - search and select the GPC meeting you would like this item to be reviewed in (if you type GPC the meeting suggestions will pop up)
2. **Topic** - to further clarify the nature of the topic. Simply select one of the options from the dropdown list
3. **Agenda Item Owner** - search and select your name
4. **Description / Summary** - use this field to give details on the topic, decision or rationale
5. **Decision Proposed** - enter the decision you are proposing during the GPC meeting. Notice that the options on this dropdown are dependent on the Topic field, which means that they change for each Topic
6. **Net Sales, Cost, and NPV** - these fields are automatically populated by the function 'Update from Source' from corresponding fields in the Opp D&D
7. **Strengths** - this field is automatically populated from the Opp D&D. You should check if these values are the correct ones to bring for selection

Woohoo, now your selection is ready for GPC! But before the meeting time comes, make sure to double check that all the included information is accurate, and it is what you want to bring for a selection decision. In the next unit, you will learn what needs to be done after the GPC Meeting.