

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.

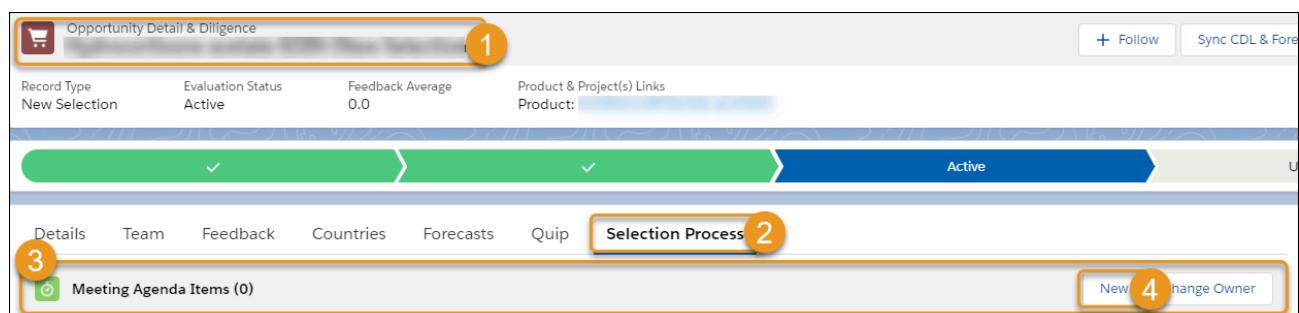
In this unit, we'll follow the process and detail the steps needed to get things started.

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 Meeting Agenda Item Update Only

5

Next 6

This screenshot shows a step in a wizard titled "Create Item". It asks the user to select the type of item to create, with two options: "Meeting Agenda Item" (which is selected) and "Update Only". A large orange circle with the number "5" is placed over the "Meeting Agenda Item" button. In the bottom right corner, there is a "Next" button with a large orange circle containing the number "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 8

This screenshot shows a step in a wizard titled "Select Meeting Type". It asks the user to choose a meeting type from three options: "Local / Regional Portfolio Meeting", "GPC", and "Allocation" (which is selected). A large orange circle with the number "7" is placed over the "Allocation" button. At the bottom, there are "Previous" and "Next" buttons, with the "Next" button highlighted by a large orange circle containing the number "8".

9. A success message is shown

10. You can click on “**Finish**”

Item Created Successfully 9

10

Finish

This screenshot shows a step in a wizard titled "Success". It displays a message "Item Created Successfully" in a blue box. In the bottom right corner, there is a "Finish" button with a large orange circle containing the number "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 software interface for managing meeting agenda items. At the top, there's a navigation bar with tabs for 'Meeting Order', 'Decision Tracker', 'Agenda Item Source Link' (which is blurred), 'Meeting', and 'Owner'. A green circular icon with a timer symbol is on the left, and a number '11' is highlighted in an orange circle at the top right of the header.

The main area has three tabs: 'Details' (which is selected and highlighted in blue), 'Deliverables', and 'Follow-Up Actions'.

Under the 'Details' tab, several fields are visible:

- 'Meeting Agenda Item full name': A text input field.
- 'Agenda Item Source': A dropdown menu set to 'Opportunity D&D'. A tooltip says 'This field is calculated upon save'.
- 'Topic': A dropdown menu set to 'Evaluation Allocation'. A tooltip says 'This field is calculated upon save'.
- 'Description / Summary': A large text area for entering a detailed description.
- 'Meeting': A dropdown menu set to 'Allocation Sept 2020'.
- 'Meeting Date': A date picker set to 'Allocation Sept 2020'. A tooltip says 'This field is calculated upon save'.
- 'Agenda Item Owner': A search bar with placeholder 'Search Contacts...' and a magnifying glass icon.
- 'Decision Proposed': A dropdown menu set to '--None--'.

At the bottom right of the form, there are two buttons: 'Cancel' and a prominent blue 'Save' button with the number '15' highlighted in an orange circle.

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.